



Use common business tools and technology

D1.HGE.CL7.12

D1.HGA.CL6.12

D2.TCC.CL1.13

Trainee Manual



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Trainee Manual



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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a 'toolbox' which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The 'toolbox' consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of 'Recognition of Prior Learning' (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service

- Front Office
- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria'. An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title*: statement about what is to be done in the workplace
- *Unit Number*: unique number identifying the particular competency
- *Nominal hours*: number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Use common business tools and technology

This unit deals with the skills and knowledge required to perform in a range of settings within the hotel and travel industries workplace context.

Unit Code:

D1.HGE.CL7.12
D1.HGA.CL6.12
D2.TCC.CL1.13

Nominal Hours:

25 hours

Element 1: Access and use common business tools

Performance Criteria

- 1.1 Identify and access business tools required to achieve work outcomes in accordance enterprise policy and procedures
- 1.2 Use business tools efficiently and effectively and in accordance with enterprise policy and procedures
- 1.3 Obtain and maintain business tools required to support workplace activities
- 1.4 Store business tools in accordance with enterprise procedures and to reduce theft and fraudulent activity

Element 2: Select and use common business technology

Performance Criteria

- 2.1 Select appropriate business technology and/or software applications to achieve the requirements of work task
- 2.2 Use technology in a way which promotes a safe work environment

Element 3: Maintain technology

Performance Criteria

- 3.1 Identify and replace used technology consumables in accordance with manufacturer's instructions and organizational requirements
- 3.2 Carry out and/or arrange routine maintenance to ensure that equipment is maintained in accordance with manufacturer's instructions and enterprise requirements
- 3.3 Identify equipment faults and take appropriate action in accordance with manufacturer's instructions or by seeking specialized assistance

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

		Work Projects	Written Questions	Oral Questions
Element 1: Access and use common business tools				
1.1	Identify and access business tools required to achieve work outcomes in accordance enterprise policy and procedures	Case study 1 – 3	1	1
1.2	Use business tools efficiently and effectively and in accordance with enterprise policy and procedures		3, 15	2
1.3	Obtain and maintain business tools required to support workplace activities		4, 14	3
1.4	Store business tools in accordance with enterprise procedures and to reduce theft and fraudulent activity		5, 9, 10, 15	4
Element 2: Select and use common business technology				
2.1	Select appropriate business technology and/or software applications to achieve the requirements of work task	Questions 2.1 – 2.6	13	5
2.2	Use technology in a way which promotes a safe work environment		12	6
Element 3: Maintain technology				
3.1	Identify and replace used technology consumables in accordance with manufacturer's instructions and organizational requirements	Case study 4 & Questions: 3.1 – 3.6	2	7
3.2	Carry out and/or arrange routine maintenance to ensure that equipment is maintained in accordance with manufacturer's instructions and enterprise requirements		6, 7, 11	8
3.3	Identify equipment faults and take appropriate action in accordance with manufacturer's instructions or by seeking specialized assistance		8, 12	9

Glossary

Term	Explanation
Business tool	Any asset that helps or assists the business
Business tool register	A list of assets that are considered as being a business tool
Identification criteria	Criteria that is to be used to classify an item as a business tool
Serial number	Number attached to a tool during the manufacturing process
Asset number	In-house created number to identify a tool
Barcode	Method of recording a number or code on to an asset
Radio Frequency Identification Tags	Electronic tags that can be attached so as to locate the asset within a reasonable distance
Storage location	The place where a business tool is to be stored when not in use
Usage	Allowed non-business usage
Software	Business tool that controls the activities of the computer
Wiki	A web site that allows access from wide range of users
Social Networking	Website that provide information on social activities of its members
Landline telephone	A standard telephone that requires a physical connection to the telephone network
Roster	Document detailing future access rights to a tool
Damage	Harm inflicted upon a tool that is not a result or accepted business usage
Storage Requirements	Details any special storage conditions required by a business tool
Security Tool	A process or procedure to control access to a business tool
Swipe Card Access	A method of controlling access by using swipe cards

Term	Explanation
Password	A set of characters and letters to verify that access is allowed
Police Check	An application to the police to disclose any previous criminal activities
Security camera	Camera positioned so as to record access to a business tool or tools
Employment contract	A contract that stipulates special terms and conditions over and above a standard employment contract
Audit	A process to check and monitor current procedures and assess their performance
Stocktake	Process to determine and verify the existence of a business tool
Legal Implications	The possible legal consequences of supplying information to those not authorised to have same
Training	The development of skills and knowledge so as to better able to use a business tool
Maintenance	The process of preparing a tool for later use
Repairs	The process of making an unusable tool usable
In-House	Using people and resources that are within the confines of the business
Outsourced	Using people and resources that are not within the confines of the business
Consumables	Resources that are consumed in the normal operation of the business tool. Without consumables the tool will not perform.
Common Skills	The minimum set of skills that are required to efficiently use a business tool
Local Expert	Someone who has a higher level of skills or knowledge than the minimum set
Fault Reporting	Procedure to notify relevant people that a tool has a fault and is not fully operational.
Documentation	Documents that support the operation or care of a business tool

Element 1:

Access and use common business tools

1.1 Identify and access business tools required to achieve work outcomes in accordance enterprise policy and procedures

What is a Business Tool?

A business tool can be considered as any asset that helps or assists the organisation to achieve its stated aims or objectives. There are various types of tools that may be used in a business varying in size, complexity, danger, and importance to the business operation. There are the large, heavy tools such as stoves, refrigerators, cars or freezers. This unit aims to consider the items that are portable and valuable, and by their very nature present unique management challenges to the business.

There are various considerations that relate to the management of these items that are not applicable when considering their other cousins. For example it is very easy to misplace a mobile telephone, but very difficult to misplace a freezer. The cost of using a mobile phone can vary significantly; the cost to the business of the mobile can be reasonable or exorbitant depending on use. It is also a challenge to misuse a freezer. However, there have been several cases where the misuse of a telephone has had significant implications for employees and for the business.

Modern managers must to be able to manage these tools to ensure that they are available when required, are in a usable and operating condition and that the user is sufficiently trained to use the device efficiently. A mobile phone must have a sufficiently charged battery, a mobile service, and a user who is sufficiently trained or experienced to be able to use the tool in an efficient and productive manner.

To continue the example of the mobile telephone, it is possible to imagine a situation where an employee is given a phone with a flat battery. A charger is eventually found and the battery charged. When the phone is switched on it asks for a security code, which is unknown, but also later located. When this is entered it is discovered that the bill has not been paid and there is no service. This is a simple example of the care and management that is necessary to ensure that the tool does meet the needs of the business and that the tool enhances the performance of the business.



Examples of Common Business Tools

Each of these items represents an investment by the business and can be considered important to the business. As they are portable they can be misplaced, require usage monitoring, training, and maintenance:

- Digital Cameras – still, moving, and in mobile telephones
- Mobile Telephones
- Pagers
- Scanners
- Photocopiers
- Notebooks
- Batteries
- Dictation machines
- Order taking handhelds
- Laser pens
- Mice
- Keyboards
- Brochures
- Information
- Knowledge
- Facsimile
- Manuals
- Landline telephones
- Software
- Wiki
- Email
- The business web site.



Defining a Business Tool

Each business will need to develop criteria so as to identify which tools are to be monitored and therefore controlled to ensure that time and effort is devoted to managing the proper and important tools.

Obviously a mobile phone supplied to a salesperson will need to be monitored and controlled to ensure that all costs are consistent with business activity. However, the mobile of the business owner is probably immune from such controls. A mobile phone may be on a contract and have a purchase price of zero, while a stapler to fix paper together may cost a few hundred dollars.

There are several criteria that may be used to identify and classify a business tool, and most businesses will use a combination of these criteria to establish the classification of an individual tool. Once identified, the tools need to be considered as a group and it is logical to provide a name for the list that recognises the importance of the group. Possible names could be:

- *Portable and Attractive Tool:*
 - This states that the item is portable and probably does not have a fixed location. It also states they are attractive, meaning they could be a target for theft or excessive use
- *Significant Small Items:*
 - This is very similar as the items are small so they can be easily lost and they are significant to the business
- *Significant Small Tools.*



Regardless of the group name that is identified, it is important to note that the tools:

- Represent an investment to the business
- Require control as their use or loss can represent a significant cost to the business
- Will generally require training to prevent damage to the user or the business
- Are attractive in terms of cost and can be attractive to a potential thief
- Are often portable so they are susceptible to damage and loss as a direct result of their portability and the exact location of a tool at any time may not be known.



One criteria may be the asset value; another could be the usage cost. Mobile telephones can be very inexpensive to buy – or are even sometimes free – but the cost of calls or internet charges can be frightening.



Another can be the portability of the asset. Mobile phones and portable computers are small and easily mislaid or concealed. A computer monitor can also be very expensive but it is not very portable or easily removed as they are often secured in place or fixed to the computer which makes quick removal a challenge. Therefore, monitors may be excluded from the tool list because they do not present a risk.



Another can be the training necessary to use the tool efficiently and safely. Although most tools require some training, the tools in this group often have a wide range of functions and capabilities so that some level of training is mandatory. In some cases some level of training is required to be able to commence item usage.

Finding the Tool: The Register

As these items are portable there needs to be a register of the tools that are owned and available within the business. The register will need sufficient information to ensure the tools are locatable and identifiable thereby ensuring the correct tool is identified. Each business will have different requirements, but there are a general set of guidelines that will identify the data that most businesses should collect. The actual selection of data to collect can vary because the size of the business allows greater resources to be used in the process, the nature of the item, and the nature of the items in the business. For example, if a business has 20 mobile phones and they are all different models that are easily identifiable then it may not need additional data. Motor cars, if deemed to fall within the classification, have many inbuilt unique data that allows accurate positive identification. This includes registration and identification, make and model and colour. Pagers are often branded and all other identification is hidden and requires the removal of a cover (which is not always easy) to distinguish one model from another.

Storing the Details

There are various methods to record these details. The simplest is the paper approach where all the details are recorded in a book – an asset register. This can be stored under the control of an officer of the business.

Spreadsheets are excellent tools to record the required details. These can be easily constructed to suit the individual needs of the business and changed to suit changing needs. They can be password protected or secured using other methods to ensure the quality of the data allowing many people to view the document and only a few to edit.



Electronic document files can be as simple as word processing files that require a little more effort to construct, but once done, are excellent tools.

The electronic formation can be constructed on a multi-access approach where employees can easily locate and view the file to find the required information, but they cannot alter or edit the document. The ease of access makes the electronic format much more attractive than the book approach which can only be accessed by one person at a time.

There are purpose designed database software packages that store and manage the details for each asset. These are flexible packages that can be configured to suit the needs of the business.

What is the tool?

Each tool needs to be described and identified, and this is especially important where there are multiples of the same tools. For example, there may be several mobile telephones in a business that are exactly the same model. As it is important to distinguish one phone from the other, a business will require other criteria to distinguish the models.

Description

Because every asset must be described in a register to ensure that the asset can be identified, it therefore follows that each business must create a set of guidelines as to what constitutes a good asset description. There are many criteria that can be considered in the description. Rules can be established for the various types of assets, but the description could include one or more of the following:

- Brand or manufacturer
- Model or name
- Purchase date
- Supplier
- Warranty Expiry date
- Purchase price
- Department
- Physical location
- Serial number
- Asset number
- Colour
- Warranty responsibility
- Other non-attached items that form the tools such as:
 - Cables
 - Power supply
 - Lens
 - Memory cards
 - Mice.



Serial Numbers

Most tools have a serial number that is attached to the device as part of the manufacturing process. These are generally globally unique so that no two serial numbers should be the same and they will identify each item. As they were created by the manufacturer they are cheap and require very little effort. Unfortunately, they convey a great deal of information to the manufacturer about production runs, and assembly teams, and quality approval teams. Much of the information is unknown outside organisation and so they provide very little usable information as to the asset or tool. A serial number does not identify the tool without context or other information. It is impossible to extract any detail about the tool from SN: XCV45125442012.

Asset Number

Some businesses will attach their own asset or serial number. This has the advantage that the number can be created for each asset that has identification within the number. For example the asset number of CAM-FUJ-ROMSER-2001-005 identifies the asset as a camera, brand Fuji, that was purchased in 2001 and is number 5 of that type.

Although this can be very useful, especially in a large business, the process requires a great deal of effort to establish and maintain. The business needs to establish the rules that identify the asset and each of the tools needs to be so identified before it can be used. There is also the question of how the asset number will be attached to the tool. While a computer can have a tag attached to the rear of the computer with the relevant number, the same approach cannot be used for a mobile telephone.

In some cases stickers can be attached to the inside of the assets, and in others the number can be etched on the chassis or body of the device.

Barcodes

The asset number can be encoded into a barcode that can be easily scanned to maintain records. These have the advantage of certainty and the elimination of data entry error. The business needs the equipment to be able to create these codes and attach them to the tool.



There are software programs that will create and print barcodes on standard printers that can be found in most businesses. There are also barcode printing companies that will produce rolls of individual barcode labels that can be affixed to the tool where appropriate. Although these are randomly created, it is simply matter of attaching the barcode to the item and recording the tool and the associated barcode. Again there are specialist asset control programs, but many businesses use Excel as a list and database management tool.

Radio Frequency Identification Tags (RFID)

These are electronic tags that can be attached to items that will communicate with electronic scanning systems that will allow individual items to be identified while in groups. While barcodes require individual item scanning, items with RFID tags can all be put in a bag and passed through a scanner and each will be identified at a reasonable distance. In a reasonable size business it may be possible to locate the exact physical location of every tool that has an RFID tag attached.

Storage location

Where will the tool be stored? There are many places that can be used to store an item: a desk drawer, cupboard, storage locker, or cabinet. The location needs to be identifiable so there can be certainty as to the tool's correct storage location. Cabinets can be numbered or identified where there is a possibility of confusion because they are similar in appearance. Shelves and boxes can also be identified with labelling systems to indicate a unique storage location to ensure the tools are stored in the correct location and the correct location can be found.



Identification numbering can be used that provides some indication as to the location of the storage item. As an example, a classroom may have a number C113. This indicates the room is in building C on the first floor and it can be found between 112 and 114. Just as was proposed with asset numbers, storage location numbers, or codes, should be constructed using a template or coding standards that allow the consistent formation of the number or code and encourages the quick and certain location of the storage position and the quick and certain return of the asset to the correct location.

1.2 Use business tools efficiently and effectively and in accordance with enterprise policy and procedures

Introduction

Many modern business tools have wide applications in a business where they can assist the business in meeting its objectives. Many business tools also present a possible non-business use that should be considered when allowing access. The simplest example is a telephone. Business calls to suppliers and customers are obviously part of the job of many people. Just as obviously a telephone call to a relative in another country is not. The number, cost, and nature of the personal access has been a challenge for businesses for many years, but as the range of tools with this issue has increased so has the range of challenges.



Traditionally, employees have not been allowed to customise the place where they work as there can be a conflict of interested and the possibility of fraud with free drinks or food. Modern business tools provide new opportunities for an employee to waste or misuse business resources. There are a wide range of tools to limit such practices but they need to be carefully planned, implemented, and communicated to ensure the objectives of the business are not comprised:

- Telephones can have call-barring where certain numbers are not available, for example international or mobile numbers. In some systems these restrictions can be applied on a telephone by telephone basis. This means that executives can make international calls while others cannot
- If this is not necessary, overriding codes can be made to managers that allow them to make any call from any telephone. A manager can call overseas from a telephone that has the service banned by first entering the number
- Agreements can be created that allow for personal access up to a set level. Employees may be required to identify personal calls made on a business mobile and if they exceed a predetermined amount the employee must make restitution. This can be a set by time or dollar cost. For example, if the personal cost is more than 10% of the total bill or \$10 the employee will pay the amount over the maximum amount. In other cases employees are required to pay for all calls after close of business as any calls made at such a time must be personal.

Is the employee allowed to use the tool for personal use? As previously stated, traditionally, employees have not been allowed to frequent an establishment where they work. The same restriction can be applied to business tools so they cannot be used for non-business purposes. Employees are not allowed to borrow a camera to take a few photographs at home.

Internet presents a wide range of opportunities to misuse and abuse resources. Precious business time can be squandered while surfing the internet on unrelated business activities.

Email also presents similar challenges as web surfing. Email can be where an employee accesses personal accounts using the business internet. While some time is reasonable, how much time is reasonable?

There is also a consideration of sending and receiving personal email over the business system. There is a time issue of staff using business resources for private use, but there is also a security aspect. By publishing the business address there is greater opportunity to receive emails from a contaminated source and infect the system with a virus.

Non-essential downloads can consume precious bandwidth and slow internet access for legitimate access.

Downloads may involve objectionable material that can offend other employees and in some cases be cause for dismissal. The possible consequences of such action need to be fully explained and communicated.

Off premise access to computer resources will present security considerations and greater opportunity to misuse company resources.

Allowing users to connect memory sticks and other equipment provides an opportunity to infect the computer system with unwanted software that may present a risk to the business. Malware in the form of viruses and spyware can be easily spread from a memory stick. The denial of such access will remove the possibility but such restrictions may place unreasonable challenges on an employee to do their job.

Pictures taken and left on mobile telephones have had significant impacts on the careers of some employees. Restrictions and consequences need to be communicated to all employees.



The Business Web Site

This business tool is unique and must be considered as a separate entity. Whereas the other tools have common challenges and issues regarding use, access, and cost, the website of the business can do unprecedented damage to a business and requires special care and control to ensure the objectives of the business are achieved.

Consider two scenarios. An employee has a company mobile phone and becomes disgruntled with the business. He can make excessive calls and run up a high bill. This is unpleasant but not business threatening. The second case has the same upset employee but in this scenario he has uncontrolled access to the business website. He could write anything on the site and publish very embarrassing or dangerous information to millions of internet users. The consequences of the second case are more significant than the first.

Assuming that the motives of an employee are genuine and honourable, the normal process of updating a web page can present opportunities to cause harm to the business. It is possible for incorrect or inaccurate information to be published by people believing it to be correct. This may be as simple as wrong names, telephone numbers, email addresses or even incorrect spelling. It may be as damaging as wrong prices, stock items, stock details, sale information, or plain misleading information.



A well-managed site will often have an approval process that will hide any changes to a site until they have been vetted and approved by another person. There may be a group of authors that have the permission to make changes to the site, and these people become the first step in the approval process. They can check that language, style, and content is consistent with the existing material on the site. But any changes made by an author does not become visible or published on the site until the edits have been approved by another party, often called an approver.

Software

Software is also a unique item. Where software is distributed on portable media it will be installed on the various computers and then stored and it may never be needed again. But should it be required the hardware – the disk or similar – must be accessible as well as the associated passwords or install keys. These are often on the disk case or packing, but they may be sent via email. Replacement keys are obtainable, but it is obviously quicker, easier, and cheaper to have the key with the disk. It is not unknown for a company to have useful software that has been made by a manufacturer that has ceased operation so support in the form of additional keys is not available.

When the software is sent electronically the key may not be physically attached to the software. The relevant details need to be recorded to ensure that purchased software is available for use in the business. As the software has been sent electronically, via email or download, the software will need to store in manner that is consistent with the long term life of the software. It has been known for storage media to become obsolete which makes the content of the media inaccessible. The early format floppy disks of 360KB and 1.2 MB, the later hard shell 1.44 MB disks cannot be used in modern computers because the disk drives that read the disks are no longer available. Storing data on CDs may be unsuitable for long term storage for the same reason.

Software is often useful in the home and this increases the attractiveness of software and makes it more susceptible to theft. It is unlikely to be a high volume access item so that any theft may not be detected for some time after the event, and then only after an audit or stock take. Added to this is that, should the software be required, it will often be because there has been some incident that requires reinstalling the software so there will often be a time issue and pressure on accessing the software. Therefore storing software requires special considerations to ensure it is there and it can be used.

Wiki

'Wiki' is Hawaiian for fast and wiki sites allow users to update the site with little restriction on access. Businesses can create their own wiki sites to store information that may be required by the internal business users. It is especially suited for large business to be able to publish internal public information, this is information that is freely available to anyone in the business. If it becomes known outside the business there should not be any negative consequences, but the business does not intend to publish the material.



Consider an internal telephone list. Traditionally these were printed and distributed and each person would have a copy near their telephone. With each staff change, a person leaves, arrives or moves there would be a reprint of the list and another distribution. Email made printing redundant as the new documents could be sent as an attachment.

However, a wiki can store all the numbers and users can access the wiki should the need arrive. Make one change and all in the establishment can receive up to date information immediately.

Areas of a wiki can have restricted access so passwords for various items can be stored with limited access so that only those with authority to access the information can do so.

Obviously a wiki will have a management overhead as access will need to be maintained and controlled and replacement passwords supplied. For a 3 person business a wiki would be a significant waste of resources whereas for a 300 person business it is almost a necessity.

A wiki can store text, pictures, video and sound, it can store plain facts (e.g. telephone lists) as well as training material, training records, manuals, and forms for whatever purpose. Wikis are available straight out of the box, and operated with little or no web development expertise.

It is important to establish guidelines as to what is appropriate. Management in one business may encourage personal, family friendly material to be published as a method of bonding and creating a family entity, while the same material is seen as inappropriate in another. Pictures and stories about the private lives of the employees may be allowed or it may be deemed to be unacceptable. It is important that guidelines are established and reviewed to ensure that they are relevant to the business.

There will need to be some control over what is published, or monitoring as to who publishes the item. All users must be aware of the consequences if offensive or inappropriate material is published.

Social Networking

Sites such as Facebook® and MySpace® can be assets for the business but they can also be liabilities. There have been several cases where people have been fired because of what they wrote on Facebook and the impact the comments would have on the business. Staff need to be aware of the consequences of publishing material on the social sites.



http://www.google.com.au/#sclient=psy-ab&hl=en&source=hp&q=fired+because+of+facebook&pbx=1&oq=fired+facebook&aq=1c&aqi=g1g-c1g2&aql=&gs_sm=e&gs_upl=0I0I1I452I0I0I0I0I0I0I0I0I0I0&bav=on.2,or.r_gc.r_pw.,cf.osb&fp=e03f64200b695afe&biw=1156&bih=817

Consider:

http://www.google.com.au/#sclient=psy-ab&hl=en&source=hp&q=fired%20because%20of%20youtube&pbx=1&oq=&aq=&aqi=&aql=&gs_sm=&gs_upl=&bav=on.2,or.r_gc.r_pw.,cf.osb&fp=e03f64200b695afe&biw=1156&bih=817&pf=p&pdI=500

Landline Telephones

Landline telephones can be restricted to local calls if necessary and they usually have unlimited access. Some businesses may not approve personal calls, but in most the cost and number of local calls make it inefficient to monitor.

What is important for some businesses is the training element. If the business is small and there is only one phone, or only one phone on a number then training may be unnecessary. However, as the phone system becomes more complicated and the functionality increases so does the need for training in “telephone techniques”.



Training companies offer a wide range of courses that train people to answer the telephone and collect relevant details in a manner that presents a positive image for the business. There should be a standard corporate greeting and the ability to perform, again, a standard set of tasks. Depending on the telephone system, these could include transfer calls, how to put a person on hold, to recover from hold, use of the speaker system and other.

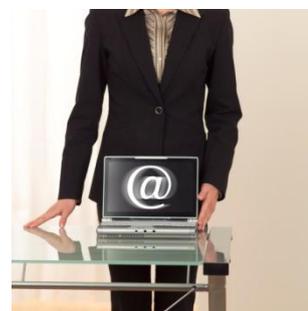
Large businesses are able to develop specialists: specialists to take reservations, and other areas. Small businesses often require cross-skilling where anyone in the business will need to be able to take a reservation. The process is the same; identify the skill set and ensure that all can perform the required tasks for the business.

Email

This is very similar to the landline requirements. It may be possible to assume that most can use an email system, but different programs present different challenges.

There is also the consideration of email etiquette and how a sent email will reflect on a business. Modern businesses will often have a standard email template with a standard signature block and users may need to be trained on how to change the template for an individual user. Training programs may include:

- Colour schemes and which to avoid
- Standard greeting “Dear” rather than “Hi”
- Capitals – “HELLO” indicates shouting and a recipient may find such a message offensive
- Inappropriate attachments that recipients may find offensive and the possible consequences
- Inappropriate use as defined by the corporate email policy
- Use of group or bulk emails and when they are appropriate
- Private email use through the system
- Spam filters
- Attachment size – what is the maximum allowed size?



1.3 Obtain and maintain business tools required to support workplace activities

Introduction

As each tool is to be monitored and controlled it is logical that the use of the tool must be also be monitored for various reasons. It is important to know who has the tool so that it can be located should the need arrive. If the tool is to be used for a set period there needs be a process that should be followed to get the tool back.



Therefore the business needs a procedure to allocate the tool to a user and record the date or time that it is expected back, just as for a book in a library. There will be a person or people that have the authority to release the asset and maintain the business records. The business will need documentation to record the movement of the tool, the allocation and return. There will also be some form of documentation to the user so they know when the asset is to be returned. The document could be a piece of paper with the relevant details or it could be an email.

There is also the return process. For some tools there will be procedures that need to be followed when the tool is returned. In some cases a record of usage will determine maintenance requirements. For example maintenance for a motor car is determined by the distance driven or by a pre-determined time period: six months for example. Photocopiers will need a service after a pre-determined number of copies have been done. Printers also have similar requirements.

Batteries may need to be checked for charge and if they are rechargeable they may need to be recharged. Camera memory cards may need to be erased in preparation for next use. Portable computers may also need to be recharged ready for next use. There should be an inspection for damage and normal wear and tear and the impact on the future life of the tool.

For some tools a return check list is necessary to ensure that the tool will be ready for the next user.

Rosters

Some tools will require a roster to allow users to plan for access and to allow planning for events when the tool is being used by another. There are various tools available from simple to complicated system-wide computer systems.

The simplest is a diary that can be paper or electronic. Users can book use of the tool. This requires access to the diary and people will need to physically access the book. The diary can be controlled by a person so that users can call or email the controller to make a booking.

For larger systems and tools that are in heavy demand an electronic booking system that can be accessed as part of the internal computer system is an advantage. Microsoft® Outlook® has the ability to allow assets or tools to be booked as standard functionality. At a lower level Excel can have multi-user spread sheets where the same file can be accessed by many people at the same time so the availability of a tool can be checked and the appropriate action can be taken.

Again, much depends on the size of the organisation and the level of control desired by management. In large organisations a booking system will be standard for a wide range of resources and applying to business tools and will add very little additional cost. In small businesses it can be managed with an exercise book tied to the cabinet where the tool is stored.



A dispute system may need to be established should there be conflicts or clashes on use of the tool. It is usually a case of first come first to apply then first use, but there may be circumstances where a later use of a tool is more important for the business than the currently booked event. Assume that a camera is to be used on Friday night, but there is a rumour that a celebrity is going to have dinner in the restaurant and photographs of him or her would be useful for the promotion of the business. A decision will need to be made to either buy another camera, use a mobile phone and suffer the quality loss or divert the camera from its original use and use it to photograph the celebrity.

Damage

The business will need to establish rules and responsibilities for tools that are damaged as a result of negligent behaviour by the user. Assume that a user borrows a digital camera and places it on the roof of the car while she loads other items into the car. She forgets about the camera and drives off with the camera still on top of the car. It falls off and is damaged beyond repair when it hits the road. Who is responsible for the damage and the loss of the camera? Some businesses will have insurance and others will be willing to accept the damage as it is not a common event and may not occur at all. Others will have a statement stating that the responsible party will be expected to pay a percentage of the cost as an encouragement to take responsibility for their actions and to utilise a higher level of care and responsibility when dealing with the business tool.



There will also be a need for a reporting process to ensure that the appropriate action is taken to ensure the tool is available when next required. This may be having the tool repaired if possible or the initiation of the replacement process.

Who Has the Tool?

In much the same fashion as a library, there needs to be a record of who has the tool and who has used the tool. The business will need to know who has the tool so management can be certain of its location and the current person responsible. But a usage history is also useful to determine if the tool is a worthwhile asset. A tool that is not used may need to be replaced or simply deleted as there is no longer a need to support ownership of the tool.

1.4 Store business tools in accordance with enterprise procedures and to reduce theft and fraudulent activity

The storage requirements for each tool must be considered. There is the physical space that will be needed for the tool and any other items. There is the security trade-off: the more secure the item the less accessible and the more difficult it is to be accessed, the less secure the more accessible. Management will need to determine the level of security required and the resources that are to be devoted to the security.

Does the tool have any special storage requirements? Will it be affected by excessive heat, cold, moisture, or humidity? Some portable storage media will be sensitive to excessive heat and may be permanently damaged.

Security tools

The simplest tool is a document that controls the use and access to the tool. The cheapest is a book that records all the relevant information and has to be signed on access and use of the tool. Other methods of security include a selection of the following.

Swipe Card Access

Access to the tools can be controlled by the use of swipe cards. Systems can record each person that accesses the storage area and also the users that take the tools from the storage location. This has a higher cost than the paper approach but provides greater flexibility and, of course, does not rely on a person to check the item in or out.



Password

Computer systems can have password protection to restrict access. When considering access to knowledge or information users can have a security access attached to their log-in profile. Systems can record all information or knowledge that each user accesses.

The disadvantage of this system is that users will forget their password and some protocol needs to be established to enable users to reset their passwords when they forget them. To increase security, passwords can be set to expire at regular time intervals and force the user to create a new password. For example users must reset their password every 45 days and cannot reuse a password within 365 days. This reduces the possibility of passwords becoming public knowledge.

There can also be requirements as to the construction of a password. Possible rules include the length, how many characters, the composition, how many numbers or how many capital letters are required. Most passwords are case sensitive so an "A" does not equal an "a". The usual minimum is 6 characters, and as the number increases so does the security as does the possibility that a user will forget their password after a holiday or even over the weekend.

Any system will need to have a method to reset the password. In most cases the password cannot be read by anyone in the system so that a process will be required to reset passwords if they have been forgotten.

Security Cameras

As well as recording access, security cameras can record handling and use of the tool in the area. It may be that many people will need to access the area where the tool is kept. A security camera can record who actually uses or even touches the tool and how they use it. The presence of the camera also acts as a motivator to staff to ensure that they treat the business tool in an appropriate manner as they know they will be recorded and can be held responsible for their actions.



Cameras can control access to the area or monitor the particular storage area. If a camera is kept in a drawer, management can install a camera that records every person that opens the particular drawer.

Police Checks

Individuals may apply or authorise others to perform a police check which will disclose any charges that have been made against a person. It is now standard practice for teachers, security officers, crowd controllers, and others to prove they do not have a criminal history and are of a suitable character for the position.

Employment Contracts

Every employee is employed on a contract that sets out the terms and conditions of their employment including such terms as holidays, wages, hours of work etc. It is possible to include other terms and conditions in a separate contract of employment. This contract can include aspects that are not involved in a traditional employment contract but are relevant to a modern business. These terms could include:

Privacy

Terms in this section determine the nature of the information that an employee can publish about the business and the guests of the business. A modern operation may consider details about the behaviour and characteristics of guests. This is especially important if celebrities stay at the establishment.

This section may also inhibit the ability of the employee to publish operational or other details about the business. This could include profitability, recipes, management practices, and other details. It may also include how long these details are subject to control.

Internet

If Internet access is normally a part of the employee's duties it may be relevant to state the allowable internet use that is allowed by an employee. This could include the amount of time that is spent on private use such as personal email, accessing non-business related sites, the type or material that is allowed to be viewed on the computer, and an agreement that the employee will not attempt to break any controls that are present. The most common approach is to allow a "reasonable time" without actually stating a specific time. But some businesses have blocked all non-essential sites from access from computers within the business.

Lockable Access

Locks can be used to prevent access and to enhance the possibility of the tool being available for later use. Rooms can be locked and keys made available to a limited number of people to control access. Cabinets and drawers can also be locked for the same reason. Laptop computers can be locked with cables to desks to inhibit theft and misuse.

Locks can be of the traditional type with a metal key and door or padlock. For greater control a swipe card system can limit access and record who has access. It becomes a higher level of difficulty to gain undetected access. Higher levels involve fingerprint identification such as is common with laptops. Higher levels of control can be achieved with retina scans, facial recognition, voice prints, or a combination of these methods.

Each of these controls has benefits and costs. Management will need to consider the level of control that is required and determine the level of resources that will be required to install and maintain the system to a level to provide the required security level. It is silly to implement a system of swipe card access and never check on who is actually accessing the tools.

Audits

An audit can mean many things. In this context an audit is the assessment of the processes that are in place on how the business tools are monitored, controlled and used. Is the current process workable? How can it be improved? Is the process recording all the required information or have people become lazy or taken short-cuts that preclude the collection of the required information?



Are the training manuals and requirements still relevant? Have the requirements been changed to suit the new models?

Are the current business tools relevant to the business operation? The audit process can be the start of a sequence of events that may result in retaining, replacing, or disposing of the asset. A tool that has not been accessed for an unreasonable period may be a sign that the tool is no longer valuable to the business. A camera may only be used twice a year to capture photographs to be used to update the website. If the camera has remained stagnant and inactive for two years this may be a sign the camera is no longer necessary as mobile phones are being used. It may also be a sign the website has not been updated and this may be another area for investigation.



The audit should also confirm that all relevant documentation for each business tool is present and located in the correct location. As well as the individual tool, and the associated support items, manuals are an important factor in the efficient use of the tool. Being able to find the documentation, should the need arrive, is important.

Usually this is a two person (or more) process to ensure that the audit report is accurate and mistakes or false data has not been entered to hide deficiencies in the system. If both sign they both agree to the details and this complicates or reduces the possibility of fraud or innocent mistakes occurring.

The audit process should be a standard management process and not seen as an exception. Although it is impossible to dictate time periods for this process for every business, it would be highly unlikely that the time between audits is longer than one year.

Stocktakes

A periodical stocktake can be performed on consumable resources to ensure there are sufficient resources to meet the operational needs. A brochure that shows the possible dishes for functions is useless if they are not available because the supply has been distributed and not reordered. Batteries are another item that are often in short supply, making the associated tool useless.



A regular stocktake of the identified items should ensure that there are sufficient levels of the resource available and also ensure that over-ordering does not occur where there are several thousand brochures on hand when the brochure is changed and the current stock becomes worthless.

A stock list of consumable items is important when there is a change of business tool. It has been known for people to order toner cartridges for a photocopier that is to be or has been replaced. In some cases the item can be returned, which involves time and effort in fixing a problem that could have been easily avoided had there been sufficient planning and communication within the business.

Different items may have a different stocktake period. Batteries, sim cards, memory sticks and similar that are easily misplaced, damaged in normal use, or consumed may need to be checked every two weeks. Brochures, information pages, toner cartridges and other similar consumables may be checked once a month while a complete stock take of all items is done once a year. There are no concrete rules that can be applied. It is a matter of management determining a process that meets the needs of the operation and that does not consume an unreasonable level of resources.

Forms are normally compiled in alphabetical order and can be by section. Rather than the traditional paper approach, tablet PCs may be used. The stock list could have the number on hand so that all that is required is a tick to verify that the asset associated equipment and documentation is present. Where there is a high degree of security required a stocktake is performed in pairs to ensure that there are no mistakes in the data entered or counting and both sign the stocktake sheet. If only one person counts and records there is an opportunity to lie and falsify the details. Again, much depends on the size of the business because if the owner is doing the stocktake there is no need for a second person to check the data.

Information

Information is an important business tool in a modern organization. Like the other tools it needs protection from unauthorized use and access. It needs maintenance as information that is old or outdated may be useless and even dangerous. Assume that a recipe that did not have peanuts is changed to have this ingredient. A waiter is asked if there are peanuts and, as this same question has been asked before, the confident answer is "No". Unfortunately the dish has changed and a person with allergies consumes the dish and dies. Perhaps this is a little over dramatic but certainly not an impossible situation. Other scenarios could include:

- Buying goods from the wrong supplier and paying too much because prices have not been updated
- Buying the wrong goods e.g. Roma instead of Cherry tomatoes because the order requirements have changed but these have not been recorded in the system

- Sending accounts to the wrong address because the client's details have not been updated
- And, of course, there are many others.

Information has a shelf-life aspect or age characteristic. It may be easy to see that a mobile telephone is old and has limited functionality, but it is virtually impossible to determine, without other details, that a piece of information is old. A person can look at a price list of fruit and vegetables and determine which are incorrect because they were at the market last week and know the prices. It is impossible to look at the price on a screen and visually identify it as old without that additional insight. Systems can include metadata to meet this need. Metadata is data about the data. In the case of an ingredient price the metadata could be the last date and time the data was updated, or who did the updating. This provides some assurance on the quality of the data. A price that had not been updated for a year should be treated with suspicion, while a price that was updated yesterday can be relied upon with some confidence.

Just as with other tools there is an access issue. Privacy laws and commercial considerations mandate that people that are able to view certain information must be controlled or limited. In most cases privacy laws allow only people with a valid reason for accessing the information to be allowed to do so. Managers may have a legitimate business reason to view the personal details of a staff member, but it is most unlikely that a colleague will be able to provide an acceptable justification. Thinking that a co-worker is attractive and wanting to invite them on a date is not a sound reason to access their personal details.

It therefore follows that access to an organization's information must have the same access limitations and restrictions as other business tools and many of the control techniques can be equally applied to information access. Locked rooms can hold paper or computer information, passwords can restrict access to the computer, the program, or the file on the computer. Security cameras can survey the area to monitor access. Information can be signed in and out and responsibility attached to its use.

A further challenge is that information can be duplicated, which is impossible with all of the other tools. When considering access to information, it is not only access to the information but there must also be restrictions on printing, copying, and email access. There have been situations where staff have printed customer lists or emailed confidential information to competitors.

It becomes even more interesting because access to information is often time sensitive and delays can hinder the operation of the business. Assume that a form requires the company number. This is public information generally and does not require any restriction. If the user cannot get the information the form cannot be processed and this may produce delays. With most business tools restrictions relate to a class of tools – all cameras are controlled. When considering information there are various categories with varying restrictions. If the business is large enough and the number of users sufficient an internal website, and intranet is an excellent tool to control access. In the case of a small business with a limited number of users a password protected computer system in a locked room may be a suitable tool. As there is a limited number of users the people that do access the company information can know it all because they have a valid reason to do so.

Legal Implications

Where information is disclosed various privacy acts and controls can impose penalties for the business and the individual for acts that breach the act. Computer programs have had to be changed to hide information about guests staying in a hotel as it was deemed that not all employees needed to see the guest's telephone number.

Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Read the following case studies and answer the questions below them:

Case Study 1

Sally was told that she had to visit a client to discuss a function that was not possible over the telephone or using communication software such as Skype. As the client was in the country she would be provided with accommodation, a business car and a mobile phone to use while she was away. As there was a shortage of telephones she would borrow the sales manager's phone as he was having an operation and was not allowed access to a phone.



She was given the items without any training, instruction, or opportunity to test the equipment. She discovered later that the batteries were dead and as she did not have a charger for the phone so she had to buy a new set of batteries using her own money.

On the second day, while waiting for her client, Sally played with the phone looking for games. What she discovered were photographs of men and women in pictures that were clearly not of a business nature. She was very shocked and decided to sue the business for sexual harassment.

Work task: Write a one page report to your manager detailing what procedures you would recommended introducing as a result of the above situation.

Case Study 2

Ron manages a small restaurant with one computer on which were the accounts of the business, payroll, and all business correspondence. It failed and had to be replaced. As Ron had all the necessary software it was simply a matter of installing the software and then copying the data on to the system. Ron was not sure where the software was located. He had a box of disks, but these had been collected and retained for all the computers over the last ten years. Finally, the correct collection was identified but all the serial numbers and registration details were in emails on his computer, the computer that would not start.

Ron decided to go to a friend's place and look at the email there and get all the details. This took a few hours and he finally returned and started the install. Unfortunately, there were several programs that were controlled by web access and the passwords had been stored in the computer. He had to email them and get a response. Luckily he now had access to email as he had to spend a long time going back over details to get account numbers and log in name to prove that he could have the passwords. Finally, after three days, he had a fully operational computer.

Work task: In the following case study, make a list of the issues that show poor procedures in the management of business tools.

Summary

Access and use common business tools

- Tools are an asset to the business that must be managed and controlled
- A business tool register records the details of all tools
- Each tool must have a unique identifier to positively identify one tool from another
- Tools can be considered as physical and non-tangible such as information
- Training is required to use the tool efficiently
- Support items should be considered as part of the tool
- Records must be maintained as to the location and usage history of the tool
- Tools must be stored in a secure location
- Access must be controlled.

Element 2: Select and use common business technology

2.1 Select appropriate business technology and/or software applications to achieve the requirements of work task

Which Business Tool?

Before a business tool can be selected it is important to be clear and certain of the purpose of the tool. What are the objectives or outcomes that will result from using the tool? What do we want the tool to do?

For example, there is a significant difference in a camera that is designed to capture still images and one that is designed to capture moving images. There may be cases where a pager is a better solution than a phone.



What features or characteristics will be required? A laptop computer does not need a power supply but most desktop computers do.

You need to create a complete picture of all that is required from the tool in as much detail as possible. Then it is a matter of matching the requirements of the tool with the tools available. There will be situations where there are none of the required tools in the register and management will have to decide if a purchase is warranted or, especially in the case of a one off situation, a hire arrangement will be satisfactory.

Consider the consumables that will be required. If the use is to be off site there may not be the same availability of resources as in the business. This may apply whenever a tool is used. A SIM card for a camera needs enough space to be able to store the images that are to be taken.

Buy or Hire

If the tool is not in-house then some assessment will need to be made as to future demand. If this is a once-off situation then a once-off hire arrangement may solve the immediate problem without committing the business to a significant capital outlay. Remember, it is not only the purchase price that must be considered, but the tool must be stored and maintained should a future use develop. In some cases, although hire costs may seem high, the lack of responsibility and care because the tool is hired can compensate the business for the extra cost.

If it is deemed that a purchase is required, the usage requirements can act as a set of specifications that will assist in determining the correct model. Estimated future use will also act as a guide as to the robustness of the tool and how much should be spent on the tool.

2.2 Use technology in a way which promotes a safe work environment

Training

In all cases the efficient use of any tool requires some training before the tool can be used efficiently and safely. The efficiency refers to the ability to achieve the desired results or outcomes within an acceptable time frame and a reasonable effort. Assume that a user wants to take a photograph from a digital phone and further assume they have no training. The results could be anything and the time involved could be significant as they fumble and take pictures of fingers that cover the lens.



Safety needs to be considered for the person and the equipment. A camera flash close to the eyes can injure and possibly blind. There is also a consideration of damage to the equipment. More than one phone has fallen from a top pocket into a sink or other body of water; plugging parts of a computer in while the computer is operating has been proven to be damaging to a computer.

All these dictate that, before a person is allowed to use a business tool, they must undergo some level of training, and perhaps a refresher level of training for those using the same tool later to remind them of the first set of skills.

There can be no definitive program for every tool in a business, but it is inconceivable that a tool does not require some training. When the tool is acquired a skill set and a training manual or form should be developed, and this will probably be unique to each tool. As the user does the training this should be recorded before they are allowed to use the tool. Possible skill sets could be:

- Facsimile:
 - Page up or down
 - Add 0 to the beginning of the number
 - How to enter the telephone number
 - How to send from a list of contacts
 - How to send the fax
 - How to unjam the fax
 - Ability to print the journal record (if this is required)
 - Charge codes if applicable
- Digital Camera:
 - Insert batteries
 - Insert and remove memory card
 - Transfer images to a computer.

Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Answer the following questions:

- 2.1. Explain the short and long term differences in hiring versus buying a tool.
 - 2.2. What factors should be considered when selecting a business tool?
 - 2.3. Why do consumables need to be considered when selecting a tool?
 - 2.4. Why is training an important consideration when considering a business tool?
 - 2.5. Describe the safety considerations concerning a mobile telephone.
 - 2.6. Devise a list of 'must have' skills for a mobile telephone.
 - (a) For short term use.
 - (b) For long term use.
-

Summary

Select and use common business technology

- Software and information must be considered as tools
- Access must be controlled
- Technology has safety implications and therefore requires training
- Training should include minor problem fixing as well as use.

Element 3: Maintain technology

3.1 Identify and replace used technology consumables in accordance with manufacturer's instructions and organizational requirements

The Business Register

A consumable is any item that is consumed by the business tool in use, and without the consumable the tool becomes useless. A photocopier requires power, paper, and toner to produce a copy. Without these items copies cannot be made and the efficiency of the business suffers. It is therefore very important to ensure that there is a sufficient supply of all consumables, they are available, and users have sufficient skills to be able to install them.

The business register will record all details of the asset, including the consumables with a description and part number if applicable. It is not enough to list the model of the tool, but also the part number as this will ensure the correct item is supplied.

Not all consumables are user replaceable. In some photocopiers the toner is replaced by technicians, while in others the user is expected to replace them. In most cases there are consumables that will need replacing to ensure the tool is fully functional.



Management Decisions

As consumables represent a cost, the similar decisions relate to the consumables that relate to the tool itself.

Who has Access Rights?

Who has the right to dispense the consumable? As these items are assets and represent a cost, they must be controlled to ensure that the item is used in the asset. In some cases the cost will need to be allocated to a department. In other cases the use will need to be recorded to ensure that reordering takes place when necessary.

What to Order?

In some cases there will be the manufacturer's brand and there will be aftermarket or alternatives. Management will need to make a decision as to which type of product the company is going to use. There are usually cost advantages associated with using the aftermarket, but they may void warranty and there may be performance issues. Regardless of which choice management decides, the decision needs to be recorded.

Supplier

The supplier of consumables should be identified, either in the register or in the stock list. With some business items there are many suppliers and the quality may not be significantly different. In the case of business tools there may only be one supplier so that it is important to identify the supplier to they can be easily found. This is especially true if an aftermarket supplier has been chosen and the contact details are unknown or unclear. It is also important to know the supplier should there be any issue with the performance of the part and there is a warranty issue.

Training

There is also the issue of training. In some cases a local expert will install the item to ensure that it is installed and installed correctly. Installing paper in a photocopier may be obvious, while the removal of the back of a mobile phone to replace the battery may be a little more challenging. As well as the physical process, there may be operational considerations, such as turning off the phone before removing the battery.



The process and procedure for replacement for each of the consumables for each of the tools needs to be documented and stored in an accessible location. In some cases this documentation will be written in-house to explain what and how to make the changes. In other cases it may be a hint list that is used in conjunction with the instructions on the tool.

Documentation

Any documentation that was provided with the tool and any notices or documents that were created in-house to support the tool need to be stored in a known and accessible location.

Ordering

In any order process there is a lag time between the order being made and the order arriving. As consumables are a stock item, the quantity to be ordered must consider the lag time, the normal consumption that will occur over this time, and the reliability of supply. There is also the question of who is allowed to order in the business.

These are standard business decisions relating to the purchase of any item for the business, and the process of ensuring there is an adequate supply of consumables should follow the same process.

3.2 Carry out and/or arrange routine maintenance to ensure that equipment is maintained in accordance with manufacturer's instructions and enterprise requirements

Maintenance

Most business tools require some type of maintenance, ranging from the simple in-house operation to complete machine services that requires technicians. Maintenance is the process of preparing a tool for operation and ensuring that it is in a suitable operating condition to minimise the possible of future failure. In most cases there is a set of stated procedures for each tool that needs to be performed on a regular basis. It is impossible to identify all the possible procedures that all tools may require, but it is important to be able to identify the various common events that will be done by employees and the procedure to be followed when outside assistance is required.

In-House Maintenance

The most common type of maintenance required for all business tools relates to the supply of consumables. These are the items or materials that the tool consumes during its normal operation. Cars consume petrol, copies consume paper and toner, facsimile machines consume paper and toner, and there are many others. Often these items involve an order process so a procedure needs to be established where a person is allowed to order the consumables and a source of supply has been established.



Although the detail for each tool will be different, the process involved is the same and once established for one tool can be followed for a range of tools. To demonstrate the process, we will apply it to a photocopier as it will cover the wide range of considerations.

Repairs

The repair process returns a faulty tool into an operational condition. Something is broken on the tool and the repair process makes the machine functional again. Unlike maintenance repairs are not predictable and cannot be planned. There may also be an element of time pressure as the tool is not available and it may be needed. Repairs could be considered as simple as replacing the batteries in a camera, to the complete replacement of the tool because the required repairs are not economically feasible.

Who Does the Repairs

If a machine does require repair there will need to be a record maintained of the relevant service authority. This can be in the tool register or alternately a list of authorised repairers can be kept. Contact names, numbers and people can be recorded. A database in Excel can be kept that will allow the relevant people to be contacted and arrangements made.

Repairs v Maintenance

In most cases repairs imply some immediacy where action needs to be taken promptly to ensure the tool is in working order. For example, a broken tail light on a motor car may make the car unroadworthy. Likewise it is foolhardy to drive a car without a serviceable spare tyre. This elevates the urgency of the repair and also increases the importance of reporting the issue to ensure that prompt action is taken.

In other cases a repair may not be immediate and the tools are still serviceable, although not as efficient before the damage. A mobile phone may have a cracked screen that makes the image hard to read but is still usable.

Maintenance and repairs without a time pressure component can be arranged to suit the needs of the business and match with the time available for service repair times. Users may be willing to suffer some inconvenience in return for use of the tool.

Establish an Expert

Usually this means allocating the responsibility of the machine to a single person who has authority to spend the company's money on service calls and other items. They will often be versed in a wider range of activities on the tools than others.

Consumables and Service

When considering the copier the expert will be able to:

- Order paper, toner and other consumables
- Decide if a service call is required and to make the service call
- Provide advice on the less used functionality
- Decide on what is a required common user skill and what is not.

Common Skills

For example the expert may be able to change the toner or call a technician to do so if appropriate, but the minimum set of skills for each user will be:

- Fill the paper bins from the storage area (and paper access may require the expert)
- Remove common paper jams
- Perform standard copying as relevant to the machine.

These skills would form part of the training program that all users would need to attend before they are allowed to use the copier.

Some paper jams are more complicated and it is obviously in the best interests of the business to be able to fix them without the inconvenience and possible cost of waiting for a service call and a copier remains unavailable until the service call.



Local Expert Maintenance

In some machines refilling the staple holder requires a higher level of skill than refilling paper and this is the responsibility of the expert.

Documentation may disclose a set of known fixes for the less common problems. The always reliable power off and power on (power recycle) can fix a wide selection of problems on all electronic equipment, but it is not something that should be applied by ten individual users that suddenly discover the machine is not working.

Cleaning?

As well as these functions which are on demand, there can be regular maintenance functions that can be performed by in-house staff with a little training. Copiers need the platen cleaned. This is a plastic or glass area that can get dusty or dirty from fingerprints and dirty hands. A spray with a common glass clear is all that is required, but this should be done on a regular basis to maintain a high quality of copying.

Some machines have similar internal cleaning procedures which are simple and straightforward, but have to be regularly performed.

A failure to do these procedures will not lead to machine failure, but there can be a noticeable impact on quality, which increases as the time between cleaning increases.

Action to be taken when a service call is required

Notification that a service call has been made is always useful to ensure staff that action has been taken and avoids a phone call from each user that wants to use the machine.



Advance Warning

Advance warning that the machine will not be available when routine maintenance is required is useful to allow users to plan for lack of access and minimise disruptions to the business. Advice as to when the machine will be available is also useful.

3.3 Identify equipment faults and take appropriate action in accordance with manufacturer's instructions or by seeking specialized assistance

Fault Reporting

Details of the fault are helpful for technicians to arrive at a solution faster. In this case details mean issue detail. Complaints such as “machine not working” or “cannot copy” do not provide any helpful information. It is always the case that detail is helpful e.g. “machine jams only when duplexing on A4” directs the technician’s attention to a particular area. Documentation may be necessary that encourages detail or the expert collects the details.

Some manufactures have a standard form that is designed to ensure the correct and most complete data is collected to enable the problem to be solved as soon as possible. This could include details such as:

- Person's name
- Contact details
- Email address
- Sequence of events
- Asset name
- Model
- Finance officer
- Problem description
- Service contract number
- Serial number of machine
- Urgency of the problem
- Access hours.



Fault Recording for the Business

It may be useful to maintain a record of fault types to use when deciding on the future of a machine. Repeating faults may indicate that a tool is being used beyond its specifications and that a more robust model is required.

Fault repeating may also indicate that the repair process has fixed the symptom – paper jamming – but not the cause, which is a faulty pickup roller in the paper bin. Some companies do not maintain records of faults but only action taken and they may not investigate for a deeper problem.

Consumables

Consumables are the items or resources that are consumed in the normal usage of the tool. Photocopiers will consume paper and toner and once depleted they will not operate with them being replaced. Mobile phones use the power from batteries, and these can be recharged. However, eventually the ability to store power will diminish and the batteries will be useless.

Where are the consumables stored? Toner cartridges will need to be accessible and readily available when the cartridge needs to be replaced. In most cases this will require a secure area where access is controlled. Paper can consume a large space, depending on the amount of paper used and the number of machines.

There is also the recording process to ensure that items consumed are reordered. Once a toner cartridge is removed and installed in the copier, a procedure is required to replace the item in the storage area.

Just as in any order process, it is also important to have a detailed description of the item to be ordered, and the description should relate to the item and not the use. Batteries size AAA is a much more useful description than batteries for Nokia 343.

There is often the question of using items from the original manufacturer, HP cartridges in a HP printer or buying the cheaper generic brands. Management will need to identify which suppliers are to be used and also which of the products.

What to order?

In some cases there are different sizes of the same item. A copier cartridge can print 4,000 copies or the large capacity with the same physical size can be 10,000 at a higher price. Policies need to establish which size is the standard order.

Order histories may indicate that items with large capacity or larger orders to get volume discount is justified.

Who can order?

Will these items be ordered through the same process as is used for all other items or on a needs basis? In large departments there may be an order department that orders items. Consumables may be ordered through a different process because the need is high and they may be used in only one area. This is a management decision that determines the process.



Documentation

Where is tool specific documentation stored? Some tools have user documentation e.g. how to make a copy and technical documentation on how to fix a paper jam. These may be stored in different locations or they may be electronic so the business can make copies and keep a full set in both locations. It is important that any technical documentation is accessible to assist in problem solving.

Documentation storage may be overlooked as using the documentation is an exception and only occurs when there is an issue with the tool. If all goes well the documentation may never be read past the install process. However, when it is required it is often required in a hurry and needs to be made available and a process to ensure it is returned, just as the tool must also be returned.

External Support

What are the contact details? Telephone numbers, machine details, account numbers, will be required. The machine details can include model number and may even include the serial number. These may be easily discovered from the machine, but may be hidden on the back or in areas that need a touch and a fair amount of flexibility to discover. It is useful to record these in an accessible location when and if a service call is to be made. In some cases businesses will have support contracts with numbers and this will assist in lodging a service call in an efficient and prompt manner.

In large organisations additional information may include the physical location of the copier as it may be in a different building or possibly a different suburb. Where service calls are lodged from a central location to the servicing authority, the technician will need to know where the copier is located so they can call on the location where the copier is and not go to the central address. Again, in large organisations, they may need a guide to take them to the copier's location so an appointment with the technician is necessary to ensure there will be someone available to take the technician to the copier and guide them back to the street.

Who is responsible or authorised to contact the external support organisation? If there is a charge for the service there will need to be an approval process to allow the call. It is also silly to have several people from within the business calling about the same problem on the same tool.

Passwords



Some tools have passwords that deny access to the tool or some function within the tool. The copier may have passwords for each department and another password that restricts access to the management of the copier, and the setup.

Some tools require passwords to be changed on a regular basis and users must be created to devise new passwords without duplicating an earlier version. It is obviously important that the management passwords are recorded and secured. The password is designed to control access so if the password becomes public knowledge it is useless as a password and quickly becomes a passport.

Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.



Case Study 4:

The Stand Hotel has 100 rooms, two restaurants, a function centre, and 3 bars. The current departments, each of which has a manager, are room service, housekeeping, front office, catering, and functions. Each manager has a mobile phone and a pager that operates in the hotel. There are approximately 100 staff on the books with 25 people employed at any one time, unless there is a function when the number of staff will increase.

All managers have a computer on their desk with full unrestricted internet access. In the break rooms there are also computers with full internet access where employees can check their email or play a few games. Each has a personal assistant (PA) to manage appointments, do typing, and generally assist the manager. Each of the Personal Assistants have a foot controlled transcription machine to control playback from their manager's dictation machine. There are two different models but the foot controlled transcription machines work with all foot pedal machines. As well as the desktop computers, three of the managers have laptop computers that they are allowed to take home so they can access their email and appointments. The other managers have refused the option as they either have their own computers or do not perform company business at home.

Each person has a business email address that is accessible from home and it is into these accounts that rosters and important notices and other information is sent. It is deemed that once the email has been sent that it will be read by employees and there is time allocated in each shift to allow the reading of emails. People that are not rostered on are required to read their emails remotely. The business has tried other methods but this has proven the most reliable. There is a proposal to change to SMS notification but there have been issues with telephone numbers, with people changing their number and not getting their message. Many staff have set up a system where the emails sent to their business address are automatically sent to their private address and they never actually check their business address.

There are four photocopiers that are also uncontrolled, so any staff can copy an item for any number. It was rumoured that one person made several copies of the music that his son was to play at a competition. Because the usage has been acceptable management believes that any unnecessary copying is minimal and not worth the effort to remove as any security procedures would not prove cost effective and introduce unwanted and unnecessary impediments into the operation of the business.

The function centre has a digital still camera, a digital movie camera, and a film still camera that are used to record important events that can be used in the promotion of the establishment. They are used by the other departments and administration, but remain the responsibility of the functions department. They are stored in a stationery room which has a lock, but is never locked because the exact location of the key is unknown.

The front office and administration have faxes that are available for all departments, there were previously more, but email has replaced faxes to a large degree and the number of operating machines has been reduced to the remaining two.

The business is experimenting with the development of a wiki to enhance the sharing of common information with all in the business. The responsibility for its use and development has been shared with the PA of the CEO and the sole member of the IT department. Only 50 of the rooms have internet access and, as there are only 20 computers in the building, there is not a great deal to be done. The Property Management Software that manages the bookings and the general management of the hotel is run on a server in a server centre where all management, service, and care is administered by computer experts. They have one server which has Microsoft Office, Adobe Print Premium, software for the Dictaphones and transcription machines, as well as various other software programs. They are all stored in a shoebox in the bottom of a desk drawer, under a couple of books that were purchased to assist initial training but have not been used for some time as “everybody knows office” and there is no need for training.



Answer the following questions:

- 3.1. Identify all items that could be identified as business tools.
- 3.2. Construct a register form that will cover all tools identified in question 1.
- 3.3. Fill in all details with the information from the case.
- 3.4. Identify the items that should have a training plan.
- 3.5. Pick three of the tools listed in question one and identify any key issues that should be considered about the use of the tool and that should be explained to the user.
- 3.6. List any procedures or steps that management should introduce in the future to improve the operation and management of business tools.

Summary

Maintain technology

- All tools require maintenance
- Some will require repairs
- Most tools have a consumable element and insufficient consumables will affect the use of the tool
- Maintenance will render the tool unavailable and this must be planned
- Consumables must be purchased in accordance with business procedures
- Consumables need to be monitored to ensure there is a sufficient supply
- Training may be required to replace consumables
- Documentation and access to relevant documentation can be very important.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organized. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognize and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

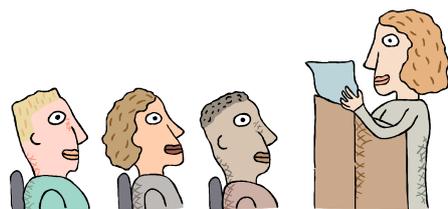
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	<i>Humankind</i>
Barman/maid	<i>Bar attendant</i>
Host/hostess	<i>Host</i>
Waiter/waitress	<i>Waiter or waiting staff</i>

Recommended reading

Campbell, J., ed *Asset Management Excellence: Optimizing Equipment Life-Cycle Decisions*, Second Edition CRC Press; 2 edition (November 19, 2010)

Nyman, D. *Maintenance Planning, Coordination & Scheduling Industrial Press, Inc.*; 2 edition (June 15, 2010)

Deadman, C. *Strategic Asset Management Non Basic Stock Line*; First Edition (April 5, 2010)

Hastings, N., *Physical Asset Management Springer*, 2nd Printing. edition (October 14, 2009)

http://en.wikipedia.org/wiki/Asset_management

<http://www.amcouncil.com.au/>

<http://www.mpe.com.au/>

<http://www.lient.com/free-asset-management-software.htm>

http://www.rhas.com.au/content_common/pg-asset-register.seo

Trainee evaluation sheet

Use common business tools and technology

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of the competency seemed relevant to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency was at the right level for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I got enough help from my trainer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of activities was sufficient.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency allowed me to use my own initiative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My training was well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer had time to answer my questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood how I was going to be assessed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was given enough time to practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer feedback was useful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enough equipment was available and it worked well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activities were too hard for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:



William
Angliss
Institute

Specialist centre
for foods, tourism
& hospitality



**Australian
AID** 