Ethiopian TVET-System

Clerical Work Support

Level-II

Based on August 2012G.C. Occupational Standard

Module Title: Processing and Maintain Workplace Information

TTLM Code: EIS CWS2TTLM 0219v1

This module includes the following Learning Guides

> **LG05:Collect information**
>
> > **LG Code: EIS CWS2 M02 LO1-LG-05**
>
> **LG06: Process workplace information**
>
> > **LG Code: EIS CWS2 M02 LO2-LG-06**
>
> **LG07: Maintain information systems**
>
> > **LG Code: EIS CWS2 M02 LO3-LG-07**

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Instruction Sheet 1	**LG05:Collect information**

This learning guide is developed to provide you the necessary information regarding the

following content coverage and topics:

- Collecting *information* in a timely manner and ensure that it is relevant to organisational needs
- Using *business equipment/technology* available in the work area to effectively obtain information
- Applying *organizational requirements* relating to security and confidentiality in handling information

This guide will also assist you to attain the learning outcome stated in the cover page.

Specifically, upon completion of this Learning Guide, you will be able to:

- Collect *information* in a timely manner and ensure that it is relevant to organisational needs
- Use *business equipment/technology* available in the work area to effectively obtain information
- Apply *organizational requirements* relating to security and confidentiality in handling information

Learning Instructions:

1. Read the specific objectives of this Learning Guide.

2. Follow the instructions described

3. Read the information written in the "Information Sheet". Try to understand what are being discussed. Ask you teacher for assistance if you have hard time understanding them.

4. Accomplish the "Self-checks" .

5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-check).

6. Submit your accomplished Self-check. This will form part of your training portfolio.

Information sheet-1	Collect information

1.1 Collecting relevant *information*

Workplaces rely on large amounts of information from many different sources to operate effectively. Most of that information is recorded either manually (on paper) or electronically (on computer). Work schedules, product catalogues, orders and receipts, and memos are all examples of written information, or records, found in most workplaces.

Workplaces rely on the exchange of information to carry out their daily business. Dealing effectively with information and records is a necessary and important task for all employees. Common types of workplace information include messages, correspondence, computer files, sales records, product information, forms, computer databases, accounts records, personnel records, minutes of meetings, library collection, promotional material and printed products. Information sources may include colleagues, computer networks, individual computers,, electronic storage, and paper filing systems, newspapers, magazines and journals.

You need to know where information is stored and how it is organized so you can collect and pass it on promptly to the relevant people. When collecting information, you need to understand what you have to collect, who the information is for and when the information is needed. The information must be relevant, current and appropriate.

Types of Information

Includes correspondence such as faxes, memos, letters and emails, databases of customer records or catalogues, computer files containing copies of letters and other documents, client records, sales records, forms, financial documents such as orders, invoices and statements, personnel records with personal details of employees, salaries, and superannuation, Minutes of meetings, reports and policies and procedures.

Information must be
• Accurate: Information is true and verifiable.
• Current: Information is applicable to the present time and/or needs of the business.
• Relevant: Information applies to the interests of the individuals who use it for the decisions
  they are facing.
• Specific**:** Information must contain concrete facts or answer specific questions.
• Understandable: People using the information must be able to understand it.
• Comprehensive: The information should include all the important categories within its scope of coverage.
• Comparable**:** The information presented should be of uniform collection, analysis, content, and format so that a user of the information can compare and contrast the various files.

Methods for collecting information include:

• Observation and listening
• file records

• Individual research
• Statistics and reports from other organizations
• producing reports from data collected in the business
• translating data from diaries and note-books
• Professional data collection agency

• Interviews with colleagues/customers
• questioning

1.2: Using *business equipment/technology*

Obtaining information efficiently means: knowing where to find correct, up-to-date information collecting it according to the organization's policies and procedures   forwarding it to the correct people. Responding within a given time line, which is sometimes specified or you may just know what it is. Each time you are about to start collecting information, you should think about how you could complete the task in the most efficient way possible.

Store confidential information safely

Perhaps the most important aspect of a protection management programmed is to securely store trade secrets in places where access is allowed under authorization, such as archives, safes or other appropriate locked room's only personnel needing to know it should have access to the information.
Electronically stored information should be technologically protected. At least two security measures should be executed: Use of passwords to access the system, and regular change of passwords;

Employee awareness

To avoid your business strategy being disrupted, employees should be aware of the company's security policy and their duty with regard to confidentiality, as well as the consequences of a breach of such duty

1.3: Applying *organizational requirements* relating to security and confidentiality

Handling information confidentially

Confidential means that only certain people have permission to know about particular things. For example medical records are normally only seen by health professionals and patients themselves. In your day-to-day work as a team leader you will handle different types of information, which will be on paper, electronic and spoken. Some of this may be confidential.

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Confidential information may refer to personal information (e.g Journals,pictures), professional information (e.g. information supplied in the course of professional duties) and information in the context of business, commerce or trade (i.e. trade secrets).

Broadly speaking, trade secrets are any confidential business information which provides an enterprise with an economic benefit that translates into competitive advantage, and this directly derives from the fact that the secret is generally unknown to competitors due to the efforts of its owner to keep it secret.

This session has helped you to identify the differences between confidential and non-confidential information at work. You should be clearer now about your role in maintaining and ensuring confidentiality. In particular, by making sure that you keep to the law that regulates the use of information at work.

Generally speaking, information will be confidential if it is about:
➢ another employee,
➢ a client or customer, or
➢ it is sensitive information about the organization.

Sensitive information on the organization may include information about its finances, new projects, reorganizations and mergers. Any in-formation that would give a competitor an advantage can be considered confidential.

Confidentiality policy is a way of making clear to employees their responsibility for not disclosing this information to unauthorized people, or looking at information they are them-selves not authorized to see. If employees don't keep to the organization's confidentiality policy it can result in instant dismissal or even prison. The costs to a company can also be enormous (in monetary terms and reputation) if information which should be confidential is disclosed improperly.

You will be more efficient in the way you handle information if you plan how to meet your deadlines, record and priorities your tasks, keep track of information and monitor your progress.

Most organizations have at least some files that are not appropriate for general circulation. These may include personnel files, performance appraisal documents and sensitive material such as the business's strategic plans. For example, files containing personal information about employees should not be available to everyone. The only people who need to view these files are managers, human resources staff and the employee the file is kept for. All files, confidential or not, are the property of the organization. Employees must be careful not to release information to the public, competitors or anyone else outside the workplace.

In some organizations, file security is extremely important. These include: organizations that keep sensitive information about their customers such as insurance companies,

legal firms and government departments organizations developing new products where information revealed to competitors may disadvantage the organization organizations that do politically sensitive work.

Files that are confidential, or have restricted access, are generally kept separate from the main filing system. Sometimes they are tagged to indicate their security rating (for example, general, personal, restricted, confidential, secret and top secret).

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Electronic files are more difficult to store separately, especially with a networked computer system, so other measures are used such as password protection.

Methods used to keep confidential or restricted files secure include:

➢ keeping hard-copy files locked
➢ requiring signed authorization from a manager for access to files
➢ using passwords to access restricted computer files
➢ storing confidential computer files on a CD or other storage device rather than on the hard drive (the CD can then be stored in a locked cupboard)
➢ Using encryption, a method in which the computer file is coded and requires a decoding key to open and translate the file.

If you require access to confidential or restricted files, you will need help to make sure you completely understand the policies and procedures for accessing such files. It is particularly important that the movement of these files is accurately recorded to ensure they are not accidentally released into the wrong hands or lost

● To organize information, you need to ask a few questions:

○ Who will use this information?

○ How will the information be used?

○ Are there any organizational and presentational requirements associated with it?

● When you prepare information remember the following guidelines:

○ Report should contain a table of contents, chapter numbers, headers & footers,

○ Spreadsheets are an appropriate way to represent financial information

Formatting information contents.

○ Graphic such as charts, diagrams, pictures are useful aids for interpreting written material.

○ Database organizes information about customers & suppliers information in a logical, consistent format.

○ Formatting information cont.

○ Incorporating graphics and pictures

○ Clip art

○ Photographs

○ Illustrations

○ Web graphics

○ Symbols

Commonly used software

- Word processing

- Spreadsheet

- Presentation

Self-Check -1	Collecting information

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Discusses detail the type of technology and it's significant.

_____

2. Discusses guidelines and procedures for processing information in a given

company————————————————————————————————————
_____

3. How to Updating, modifying information in your organization
_____
_____

4. Describe detail collate and dispatching information in your office

_____

Note: Satisfactory rating - 3 and 5 points   Unsatisfactory - below 3 and 5 points

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____

Rating: _____

Name: _____   Date: _____

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Instruction Sheet	**LG06:Process workplace information**

Learning Instructions:

7. Read the specific objectives of this Learning Guide.

8. Follow the instructions described

9. Read the information written in the "Information Sheet". Try to understand what are being discussed. Ask you teacher for assistance if you have hard time understanding them.

10. Accomplish the "Self-checks" .

11. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-check).

12. Submit your accomplished Self-check. This will form part of your training portfolio.

Information Sheet-2	Process workplace information

2.1:Using equipment/technology process information

In order to function efficiently, an organization must have access to all of its information. This information needs to be collected or created, carefully stored and easily retrieved. The overall objective of any records management system is to provide the right information, at the right time, to the right person(s) at an affordable cost Business Equipment/Technology can assist in the Effective Collection of Information Effectively using today's technology and various business equipment helps to collect and store information quickly and securely. For example

Telephone	Allows for instant verbal communication of facts, figures or information. Telephones allow people to be contacted in and out of the office, at any time of the working day. Replies can be immediate, which is essential if you have a tight deadline.
Answering machine	Receives and records information when the office is unattended
Fax machine	Transmits written information, including signed documentation, instantly, and this information can be received out of normal business hour
Computer	Creates and stores information in various software packages, as well as giving access to email for transmission of this information worldwide at an affordable cost
Printer	The medium through which computer records can be processed into hard copies A printer takes electronic information and turns it into paper-based information
Photocopier	Information can be duplicated for storage, or for circulation among several

	people
Filing systems	Can be manual, computerized or electronic and provides for the safe and secure storage of information, as well as its easy retrieval

2.2 Processing information according to defined timeframes, guidelines and procedure

Organizing Your Information

Now that you've recorded the information you've found on the Web, you need to decide how you will organize this information. How well your final paper makes it point depends on how well you express your argument and how you organize the information you use to support it.

- *Review your notes*. This will remind you of the information you have to work with.
- *Think about different ways you can organize the information*. These will often depend on your topic. What is your perspective or point of view on your topic? If you were writing about the giant squid, you might want to compare and contrast the giant squid with the common squid. You could then organize your paper around comparing and contrasting the two types of squid.
- *Use graphic organizers*. . There are many different kinds of organizers you can use to help you decide how to organize your information—charts, Venn diagrams, word webs, and concept maps to name a few. Ask your teacher to provide you with some examples of graphic organizers. Remember that the kind of graphic organizer you use will depend on the topic of your research. For example, you might use a Venn diagram to help you compare and contrast the information you researched about giant and common squids.

Using an Outline

An outline is like a blueprint. Once you get all the information down in your outline, you can better organize your argument. You can also try to create two outlines that organize the information differently. Then you can compare the two and decide which organization works better

To create an outline, follow these steps:

1. Write your thesis statement at the top of the page.
2. List all the main ideas that support your thesis statement. Use Roman numerals to identify each main idea.
3. Under each main idea, list two or three supporting ideas or details. Use capital letters to identify each supporting detail.

4. Use full and complete sentences when writing your outline. This will help you to clarify your thoughts and express your ideas coherently.

5. Use the worksheet to help you record and organize Web informatio

Accuracy

Remember that almost anyone can publish information on the Web. Ask yourself this question as you read through the information:

- Is the information you find factual, detailed, and up to date? Check the Web site for the date when the information was updated. If the information is old or there is no date, be careful of using the information unless you can verify it with another source. Also, look out for spelling and other errors. They may reflect the overall accuracy of the information.

Organizing Information Worksheet

Read the information on this page and on the other links and learn about gorillas. Review the Web site again and take notes to record the information you find. Use your notebook or note cards to record the information. Use a sheet of paper to create an outline for the information you have found on the web site. Use the topics of each link as main ideas for your outline. Be sure to include three or four supporting details for each main idea.

2.3. Updating, modifying and filing information

Incomplete portion

Information is updated, modified and filed in accordance with organisational requirements.During gathering information relating to the extent of local resource and their providers, renewing and updating information at the office level is important for making right decisions. Accordingly, right decisions are depending of quality of reviewing information.

I. Renewing: is making something valid for a further period of time, emphasizing something by saying or stating it again.

II. Updating: means add/give something recent information about to something.

In short, renewing and updating information is the process of reviewing or checking the collected information that is during the interpretation and analysis step. This indicates the value of support, supervision and monitoring to own work by any responsible body. This can be also done at individual level given there are guiding objectives in the initial phase.

2.4. Collating and dispatching information

Gathering information is the process collection of data for dealing with the individual's or the organization's/communities', etc. current situation. More data means more and better ways of dealing with the current situation. More data broadens the minds of those who will use the data to solve current organizational problems. New and additional ideas come more easily if there are lots of facts to be used as bases.

Gathering additional information means an event and activities that collects different data, facts, figures, and information through employing different methods which intended to the organization's/communities' intended objectives.

2.4.1. Methods of gathering additional information

It's difficult to build a solution if someone doesn't know the requirements (in spite of the fact that many teams still try to do it today). The "elicitation" step is where the requirements are first gathered from the client. Many techniques are available for gathering requirements. Each has value in certain circumstances, and in many cases, it needs multiple techniques to gain a complete picture from a diverse set of clients and stakeholders. Here are below the types of method that used during gathering information;

 ➢ *Interviews* – collecting information verbally from informants, using a question and answer format. Interviews can be conducted in different ways, such as in person or over the phone. Interviews can be fairly unstructured, allowing you to be flexible in deciding what questions to ask or how to best ask the question, or can be tightly scripted, requiring you to ask questions the same way across respondents.

 ➢ *Surveys or questionnaires* – collecting information from respondents without direct contact. Paper versions of a survey may be handed out or mailed. You might also ask people to complete surveys electronically via email or internet.

 ➢ *Focus groups* – conducting group interviews with a small group of participants or other informants at the same time.

 ➢ *Observation* – recording what actually happens during a situation or event.

2.4.2 Sources of additional data/information gathering

There are two main types of sources in the field of information gathering, namely:

I. Existing sources: existing sources are those sources of information that can be found in the printed, in video, in audio and other materials that are available to the public or upon request to proper bureaucracy.

II. **Natural sources:** natural sources are first hand sources such as those who have tried products, services and methods, and expressing their experience and opinions to the information collector.

2.4.3. Purpose of gathering additional information

Researchers undertake information gathering in order to:

➢ Know the extent of resources that vested from inside and outside of the given community
➢ Create awareness on how to mobilize such resources timely
➢ Use resources to identify community connections, meet community needs, & other activities
➢ Recognize and value the resources within communities

Self-Check -2	Written Test

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Write at list five equipments using to process information

_____

2. How do you organize information that you use

_____

3. What is the difference between renewing information and updating information?

_____

4. Define collection information

_____

5. Write the methods used to gather information

_____

Score = _____

Rating: _____

Note: **Satisfactory rating - 3 and 5 points** **Unsatisfactory - below 3 and 5 points**

Instruction Sheet	LG07:Maintaining information system

1. Read the specific objectives of this Learning Guide.

2. Follow the instructions described

3. Read the information written in the "Information Sheet". Try to understand what are being discussed. Ask you teacher for assistance if you have hard time understanding them.

4. Accomplish the "Self-checks" .

5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-check).

6. Submit your accomplished Self-check. This will form part of your training portfolio.

Information Sheet-3	Maintaining information system

3.1   Maintaining information and filing systems

Records management is important because it supports an organization

➢ To make decisions based on evidence;
➢   meet operational, legal and regulatory requirements;
➢   be open and accountable;
➢ enhance operational efficiency and effectiveness; and
➢   Maintain organization or collective memory.

Records management policy of the Government

The Government's records management policy requires the implementation in each bureau and department of a comprehensive records management programmed that will

➢   make and keep full and accurate records as long as they are required;
➢ minimize the costs of managing government records;
➢   provide quality services to users;
➢   provide necessary security for government information;
➢   facilitate public access to records and information that encourages better understanding of government policies and operations; and
➢   identify, preserve and provide access to archives that have continuing or permanent value for research, educational, cultural and other related purposes

Records retention and disposal schedules are established and reviewed having regard to the values of the records, as follows

Administrative value: Records with administrative value are those needed to determine the policy and procedures necessary to carry out the activities of an organization. For example, policy documents, procedure directives, rules and regulations;

Operational value: Records with operational value are those documenting the activities and transactions of an organization. For example, routine correspondence and technical data;

 *Legal value***:** Records with legal value are those required to define the rights and obligations of an organization, its staff and individuals and organizations with which it deals. For example, agreements, certificates and   contracts. If necessary, legal advice should be sought as to the legal value of individual records;

 Fiscal value: Records of fiscal value are those relating to the financial transactions of an organization and especially those required for audit purpose. For example, contracts, guarantees, bonds and documents related to settlement of claims and loans; and

 Archival value: Records with archival value are those which should be preserved permanently.

Information in the form of documents can be categorized as records and no records. Records are official documents valuable enough to be retained and stored in a format for future use. No records are of temporary use and eventually disposed of.

3.2 Identifying, removing and/or relocating inactive or dead files

Accordingly, "records" can be defined as any recorded information or data in any physical format or media created or received by an organization during its course of official business and kept as evidence of polices, decisions, procedures, functions, activities and transactions.

Files Management: Applying records management principles and techniques to filing practices in order to organize and maintain records properly, retrieve them rapidly, ensure their completeness, and facilitate appropriate disposition.

Records management is important because it supports an organization

- ➢ To make decisions based on evidence;
- ➢   meet operational, legal and regulatory requirements;
- ➢   be open and accountable;
- ➢ enhance operational efficiency and effectiveness; and
- ➢   Maintain organization or collective memory.

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Fiscal value**: Records of fiscal value are those relating to the financial transactions of an organization and especially those required for audit purpose. For example, contracts, guarantees, bonds and documents related to settlement of claims and loans; and

Archival value: Records with archival value are those which should be preserved permanently.

Information in the form of documents can be categorized as records and no records. Records are official documents valuable enough to be retained and stored in a format for future use. No records are of temporary use and eventually disposed of

3.3. Establishing and assembling new files

Documents are stored within files in Chronological or Date Order, with the most recent date on top. This means that when the file is opened, the most recent correspondence is in front of the reader, and the earliest correspondence is at the bottom of the file
.
All filing systems are divided into sections to help storage and retrieval of individual files. These sections are labelled with guides, which help you to find the correct location of a file. A filing system may have one guide or many guides to subdivide each section.
Alphabetic drawers are gene Documents are stored within files in Chronological or Date order, with the most recent date on top. This means that when the file is opened, the most recent correspondence is in front of the reader, and the earliest correspondence is at the bottom of the file.

All filing systems are divided into sections to help storage and retrieval of individual files. These sections are labelled with guides, which help you to find the correct location of a file. A filing system may have one guide or many guides to subdivide each section.

Alphabetic drawers are generally set up with:
Primary guides – major drawer dividers • Special guides – used to subdivide major sections • Individual folders – one for each client • Miscellaneous folders – folders are placed at the back of each primary section (eg A, B or C) for odd letters and papers on individual clients until there are sufficient papers for a specific client to warrant the opening of an individual file. rally set up with:
• Primary guides – major drawer dividers • Special guides – used to subdivide major sections • Individual folders – one for each client • Miscellaneous folders – folders are placed at the back of each primary section (eg A, B or C) for odd letters and papers on individual clients until there are sufficient papers for a specific client to warrant the opening of an individual file.

3.4. Updating reference and index systems

A business will need information, surveys and data more than once. This means that it is important to review how data is maintained and updated as re-collecting information is wasteful of time and resources. Based on the fact that a successful workplace is an efficient workplace, you must review whether the maintenance and updating process is easy or time consuming. Ask the following questions:

• Does the information need regular updating or is it a one-off snapshot?
• Who is responsible for updating the information?
• How could information updates be improved in the future?
• Was information stored / filed appropriately and easy to locate/retrieve?

If your review finds that information was difficult to locate and access, then you know storage could be a problem. Ask the following questions:

• On what system was the information stored?
• Was the storage tool appropriate for the type of information?
• Who needed to access this information?
• How was the information backed up?
• Have advances in technology provided a cheaper backup medium than is currently being used?

IDENTIFYING FUTURE INFORMATION NEEDS

One of the most important facts about collecting appropriate information is to remember that the information needs of the business will change with time. This can be due to many different reasons including changes in technology, new directions for the business, a change of customers or increased competition e.g.

• A business once relied on personal contact with its customers but now distributes feedback forms through the post.
• A bookshop now sells books over the Internet and keeps records of all customers' credit details.
• Due to increased competition, an organization needs more regular information from customers about their needs.
Clearly all of the situations above require different types of information to be collected and updated than that which was used in the past.

 Identifying what information will be required should be determined by an information needs analysis so that the workplace can pro actively plan for the future. A needs analysis asks several questions:

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. • How is current data obtained and used and should the source base be widened for the future?———
_____

_____

2. What information might be available in the next three to five years?
_____

_____

3. How quickly might information be needed in the future and what would be the best way of ensuring needs are met on time?————————————————————————————————————
_____

4. How can the organization ensure information it receives and provides is of consistently high quality?———
_____

_____

Note: **Satisfactory rating - 3 and 5 points**　　　　**Unsatisfactory - below 3 and 5 points**

You can ask you teacher for the copy of the correct answers.

Score = _____

Rating: _____

Name: _____　　　　Date: _____

Operation sheet 2	Process and Maintain Workplace Information

The techniques for identifying key information about **Collecting information, Processing, workplace information and maintaining information systems** providers are;

Instructions: Given necessary templates, tools and materials you are required to perform the following tasks within 8-12 hours.

Task 1: Identify key information about collecting information

Task 2: List information as part of directory/community asset map

Task 3: Renew and update gathering information in regular base

Step 4- Implement the collection of information

Step 5- Send the completed documents to supervisor/ concerned body

Step 6- List out orderly all resource providers

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