

Business Services Training

Unit of Competency

BSBADM504B Plan or review administration systems

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to plan or review the requirements of effective administration systems and procedures for implementing, monitoring and reviewing the system

Employability Skills

This unit contains employability skills.

Pre-requisite Units

Nil

Application of the Unit

This unit applies to individuals employed in a range of work environments who are required to plan or review administrative systems. They may work as senior administrative staff or may have been delegated responsibility for planning or reviewing administrative systems.

**SUITABLE
FOR
BSBADM504**

Plan or review administration systems

This book supports BSBADM504B, Plan or review administration systems in the Business Services Training Package.

© Copyright , Haylee & Brian Walmsley 2009, 2010

This edition published 2010

Editor: Sandra Griffith & Lloyd Jones

ISBN: 1-921657-04-9

Disclaimer

All rights reserved. No part of this publication may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, scanning, recording, or any information storage and retrieval system, without permission in writing from the publisher, Software Publications Pty Ltd. No patent liability is assumed with respect to the use of the information contained herein. While every precaution has been taken in the preparation of this book, the publisher and the authors assume no responsibility for errors or omissions. Neither is any liability assumed for damages resulting from the use of the information contained herein. These learning materials have been prepared for use as part of a structured vocational education and training course and should only be used within that context. The information contained herein was correct at the time of preparation. Legislation and case law is subject to change and readers need to inform themselves of the current law at the time of reading.

Published by Software Publications Pty Ltd

Head office – Sydney
Unit 10, 171 Gibbes Street
Chatswood NSW 2067
Phone: (02) 9882 1000
Fax (02) 9882 1800

Australia Toll Free Numbers

Phone: 1 800 146 542
Fax: 1 800 146 539

Web address

www.softwarepublications.com.au

Published and printed in Australia

1.2 Obtain quotations from suppliers/developers

‘Obtain quotations from suppliers/developers of system in accordance with organisational policy and procedures’

Introduction

As per the range statement for the course, suppliers/developers may include:

- Administration system consultants
- Computer/software suppliers
- Efficiency consultants
- Equipment suppliers
- Information technology technicians
- Information technology trainers
- Internal staff/clients
- Office equipment suppliers

At times during the planning and review processes it may be necessary to seek the services and/or products of suppliers and developers of systems. It may be that you need a second opinion, do not have the required expertise or it is simply more cost efficient to use external suppliers, especially if it is technology-based. Generally, there are technical or equipment requirements within a system, whether it is simply a filing cabinet or the purchase of new computers and software.

You may consider the option of outsourcing where some of the processes in the system will be completed by an external supplier. Generally, outsourcing is used for activities such as customer interaction activities, administration tasks, information technology, finance and human resources. By outsourcing, you have instant access to expertise and up-to-date technology. It can result in cost savings for the organisation, however on the downside it can result in loss of control and take away the ‘personal’ touch.

Be organised and document specific details of what you require from a potential supplier and the outcomes you need to achieve. Determine clear roles, responsibilities and how their performance will be managed. What criteria must they meet? How will you evaluate the quotations? Confirm how much has been allowed for in the budget and if there are any budgetary constraints. A clear statement will provide you with the information you will need when identifying and communicating with potential suppliers.

Identify organisational policy and procedures

Identify and make yourself familiar with the requirements you will need to abide by. Are there organisational policy and procedures you are required to follow when using internal and external suppliers and obtaining quotations? Does the organisation have a preferred supplier list? Are quotation templates available? Always act in accordance with organisational and budgetary requirements. Where policies and procedures do not address the specific requirement, consider organisational culture and precedents established elsewhere in the organisation or with related functions.

Templates can save time and provide guidance in what information is required and needs to be communicated. However, errors can happen, especially when you are using a previously completed template, such as forgetting to change the date or name. When using templates make sure you are focused, paying attention to detail and avoid rushing. If practical, have another staff member check them before sending. Errors will not portray a good image of the organisation and will affect reputation.



Task 19 – Activity: Identifying organisational policy and procedures

Spend some time identifying and becoming familiar with organisational policy and procedures relating to sourcing external suppliers and developers. Consider culture and talk to other staff members to gain a better understanding. Where available, review documentation on previous projects.



Task 20 – Group activity: Creating a list of ways to source potential suppliers

As a group, draw up a detailed list of ways to source potential suppliers. You will need to draw on your personal experience and opinions to complete this task.

Identify potential suppliers

It is now time to identify potential suppliers. Make sure you follow organisational policy and procedures at all times. Be aware of and consider any relationships that staff may have with potential suppliers.

Examples of policy may include:

- All hardware and software quotations must be writing. Fax and email transmissions are acceptable.
- All new potential suppliers must complete an application form and be approved by management before they can be considered as a preferred supplier.
- All quotations are to be received by registered post.
- All quotations over \$1,000.00 are to be in writing. Verbal quotations are acceptable under this threshold.
- Preferred suppliers that meet the acceptance criteria must be used in preference to a new supplier. Where two quotes are equal, a local supplier should be selected in preference to a supplier from outside the region.
- You are required to obtain three written quotations for all external services from reputable suppliers.

Determine the number of quotations you need and how they will be received. Quotations can be received verbally or written and can include fax or email transmissions. In some instances, dollar value thresholds may determine what you are required to do.

Based on your requirements and information available, compile a list of potential suppliers and rank them in order of preference. Sources could include organisational supplier lists, professional directories, Yellow Pages directory, referrals, internet search and networking. Where possible, you should consider the level of quality you want, reputation and licences held by the supplier when deciding on their suitability.

Request for quotation (RFQ)

When obtaining quotations, a request for quotation (RFQ) form will provide a consistent way to manage external supplier quotations. You can develop a form or customise an organisational template that will meet your needs. To be fair, all potential suppliers need to receive the same information, be given the same length of time to respond and be issued the request for quotation on the same day.

Be specific. The more detail you provide about your requirements, the more potential suppliers will be able to quote the job specifically and accurately to meet those requirements. Equally important, it will make the selection process easier.

Generally, an RFQ will include the following information:

- A clear description of the products or services you require, including outcomes you desire.
- Any technical specifications, conditions and interface requirements.
- Closing date for receiving quotations and accepted method (verbal or written).
- Contact details of requesting person.
- Delivery or performance address, if applicable.

- Evaluation criteria that will be used for selection.
- Quantity (units or hours, where applicable).
- Required delivery time of products or services.
- Special conditions, e.g. flexibility, financial (GST inclusive prices, freight to be separate, payment terms and discounts available), meeting regulatory requirements or references required for work done of a similar nature.
- Specific request for information about potential supplier (expertise, track record, financial position, experience in industry etc).

Where you are seeking verbal quotations, it is important to be prepared before speaking to potential suppliers, especially if there are specifications and conditions. Have all necessary documentation in front of you, this will ensure that potential supplier responses are based on the same information and selection criteria. Allow the same length of time for suppliers to respond. Document details of all conversations including information you have supplied and any questions they may have asked.

With furniture and office equipment, you may be able to request quotations over the internet or by visiting the store directly. Make sure you compare the same product and model number or at least models with the same functionality in terms of your requirements.

Tendering

It may be a requirement of the organisation that tendering be a consideration when seeking the services of external suppliers. Before rushing into tendering, make sure you assess whether using the tender process is going to be the most efficient, economical and appropriate way to select a supplier.

A request for tender (RFT) document will contain similar information to a request for quotation document. It is necessary to provide sufficient and clear details/guidelines of what is required relating to goods and services needed and the outcomes you would like to achieve. Usually, you will request required information, as with the request for quotation, about the bidders themselves such as expertise, track record, financial position etc.

Treat all bidders equally throughout the tendering process and clearly describe the process bidders must abide by. Respect deadlines and conditions set. Tenders are usually only accepted in writing. Whilst it is important to have fairness and equity in the tendering and quotation process and to follow protocol, at the same time you do not want to exclude a potential supplier because they have made a minor error in their application.



Task 21 – Research activity: Tendering

Spend some time researching tendering documentation and process. Check out tender notices in the newspaper and on the internet. If your organisation uses the tendering process, check out previous tender documentation. Talk to staff members to gather a different perspective.



Task 22 – Research activity: Alpha and beta testing of software and hardware

Have you heard of alpha testing and beta testing?

It is commonly used in the testing of software and hardware. In brief, prior to new or revised software and hardware being released for sale to the public, it is tested internally (alpha test) and/or tested externally by a selected group of users who are given early access (beta test) with the intention of ironing out all the bugs, issues and problems and making sure it will meet user needs in a practical manner before it is released to the public.

It is an interesting topic and you may want to Google both of them to find out more and gain an understanding of how software and hardware are developed. Think about the advantages and disadvantages and whether or not you would consider participating in beta testing.



Task 23 – Review questions: Identifying potential suppliers and RFQ

This will form a part of your system plan. For this exercise, and to demonstrate your understanding, document your approach, methodology and outcomes. Remember to keep your record of communication updated.

Where applicable, consult and seek input from staff and key stakeholders.

1	Determine if external supplier's and developer's services or products are required in the development/modification of your system.
2	Make a list of potential suppliers for each need. Include how and why you selected them.
3	Develop a request for quotation (RFQ) form.
4	Send out requests to potential suppliers (if applicable).



Task 24 – Research activity: Alternative to no external supplier required

This is an alternative to the above exercise, where your system plan does not require the use of external suppliers and developers. Choose one of the following examples:

- Replacing accounting software.
- Replacing telephone system.
- Upgrading your personal internet plan.

For this exercise, document your approach and methodology.

1	Name the relevant parties you would consult with – internally and externally.
2	Make a list of potential suppliers. Include how and why you selected them.
3	Develop an RFQ for your choice.



Task 25 – Resource folder: Using external suppliers and developers

For future reference, create tools that will assist you when seeking the services or products of external suppliers and developers. This may be in the form of checklists, guidelines, procedures or a combination. Include examples of such things as tender notices and request for quotation / tender forms. The intention is a general overview and for your personal benefit. Keep it simple.

Note: Your resource folder will be part of course assessment.

BSB BUSINESS SERVICES TRAINING PACKAGE SUPPLEMENT

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.

BSBADM504 Plan and implement administrative systems

Application

This unit describes the skills and knowledge required to plan for or review the requirements of effective administrative systems and procedures for implementing, monitoring and reviewing the system.

It applies to individuals employed in a range of work environments in senior administrative roles.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – General Administration

Elements and Performance Criteria

This workbook is structured according to the Performance Criteria for the Unit of Competence. Each major heading represents a performance criterion. All content under that heading relate to that competency.

Element <i>Elements describe the essential outcomes.</i>	Performance criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
1 Plan for the new or modified administrative system	1.1 Identify requirements of, or modifications to, the administrative system through consultation with system users and other stakeholders in accordance with organisational and budgetary requirements	Tasks 1 – 18 Assessment Activity Part 1
	1.2 Obtain quotations from suppliers/developers for the identified requirements or modifications to be made to the system in accordance with organisational policy and procedures	Task 19 – 25 Assessment Activity Part 1
	1.3 Select supplier or developer in accordance with organisational policy and procedures	Task 26 – 29 Assessment Activity Part 1
2 Implement new or modified administrative system	2.1 Identify and develop implementation strategies in consultation with staff	Task 30 – 34 Assessment Activity Part 2
	2.2 Encourage staff to participate in all stages of the implementation process	Task 35 – 39 Assessment Activity Part 2
	2.3 Implement system in accordance with organisational and legislative requirements	Task 40 – 42 Assessment Activity Part 2
	2.4 Define and communicate procedures for using the system to staff	Task 43 – 47 Assessment Activity Part 2
	2.5 Provide training and support for staff on the use of the new or modified system	Task 48 – 53 Assessment Activity Part 2
	2.6 Deal with contingencies to ensure minimal impact on users	Task 54 – 58 Assessment Activity Part 2

Element <i>Elements describe the essential outcomes.</i>	Performance criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
3 Monitor administrative system	3.1 Monitor system for usage, security and output in accordance with organisational requirements	Task 59 – 63 Assessment Activity Part 3
	3.2 Modify system to meet changing needs in accordance with organisational requirements	Task 64 – 66 Assessment Activity Part 3
	3.3 Clearly identify further modifications and notify users	Task 67 – 69 Assessment Activity Part 3
	3.4 Monitor staff training needs and train new staff on administrative system	Task 70- - 73 Assessment Activity Part 3

Foundation Skills

Skill	Performance Criteria	Description	Workbook page reference
Learning	2.5, 3.4	<ul style="list-style-type: none"> Actively reinforces own knowledge and skills by training or mentoring others 	50–51, 68–72, 96–98
Reading	1.2, 1.3, 3.1	<ul style="list-style-type: none"> Extracts, analyses and evaluates information from complex texts, including organisational policies and procedures 	18–21, 34, 42, 85, 97
Writing	1.1, 2.1, 2.4, 3.2, 3.3	<ul style="list-style-type: none"> Gathers and utilises information and ideas from a range of sources to create texts to meet organisational requirements 	20, 35–36, 51, 61–62, 63–66, 72, 78
		<ul style="list-style-type: none"> Creates instructional texts using grammatical structures and vocabulary appropriate to audience and context 	65–66, 70
Oral communication	1.1, 2.1, 2.2, 2.4, 2.5, 3.4	<ul style="list-style-type: none"> Participates in verbal exchanges using appropriate style, tone and vocabulary for audience, context and purpose 	26–28, 56–58, 94, 96–97
		<ul style="list-style-type: none"> Uses listening and questioning techniques to elicit key information and confirm understanding 	26–28, 58, 84, 96
		<ul style="list-style-type: none"> Presents complex information adjusting presentation style and vocabulary to suit the audience 	66, 71
Numeracy	1.1, 1.2	<ul style="list-style-type: none"> Recognises and interprets numerical information related to budgets 	23, 35–36, 41, 43
Navigate the world of work	1.1-1.3, 2.3, 2.4, 3.1	<ul style="list-style-type: none"> Develops systems to meet organisational and legislative requirements 	Throughout workbook

Skill	Performance Criteria	Description	Workbook page reference
Interact with others	1.1, 1.2, 2.1, 2.2, 2.4	<ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role 	24, 26, 35–36, 56–58, 66
		<ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes, providing guidance to others , where necessary 	26–28, 53, 57–58, 68–71
Get the work done	1.1-1.3, 2.1, 2.3, 2.4, 2.6, 3.2, 3.3	<ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints 	15–25, 47–50, 69–70, 75–77
		<ul style="list-style-type: none"> Monitors progress of plans and changes them to meet new demands or priorities 	25, 73, 78–78, 82–91
		<ul style="list-style-type: none"> Systematically gathers and analyses all relevant information and evaluates options to make informed decisions 	23–24, 33–42, 89–91
		<ul style="list-style-type: none"> Anticipates potential problems and implements contingency plans as soon as warning signs are recognised 	75–78
		<ul style="list-style-type: none"> Uses and investigates new digital technologies and applications to manage and manipulate data 	23, 40–41, 89
		<ul style="list-style-type: none"> Demonstrates awareness of the importance of data security in a digital environment 	85

Assessment Requirements v1.0

Performance evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none"> work with relevant personnel and stakeholders to identify administrative system improvements 	Assessment Activity Part 1 Assessment Activity Part 3
<ul style="list-style-type: none"> document necessary requirements or modifications 	Task 65 – Review questions: Modify system to meet changing needs Task 68 – Review questions: Further modifications Assessment Activity Part 1 Assessment Activity Part 3
<ul style="list-style-type: none"> provide training and support for staff to use the new or modified system 	Task 52 – Review questions: Training and support requirements for your system Task 71 – Review questions: Monitoring staff training needs Assessment Activity Part 1 Assessment Activity Part 2 Assessment Activity Part 3
<ul style="list-style-type: none"> monitor the new system and identify future improvements and staff training needs. 	Task 59 – Group activity: Discussion of monitoring Task 61 – Review questions: Develop a monitoring plan Task 70 – Group activity: Discussion of staff training needs Task 71 – Review questions: Monitoring staff training needs Assessment Activity Part 2 Assessment Activity Part 3

Knowledge evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> summarise relevant legislative and organisational policies and procedures for reviewing administrative systems 	Task 9 – Group activity: General discussion of regulatory requirements Task 11 – Activity: Organisation regulatory requirements Task 12 – Research activity: Regulatory requirements Task 44 – Group activity: Organisational procedures Task 50 – Activity: Organisational training Task 55 – Activity: Contingency plan Assessment Activity Part 1