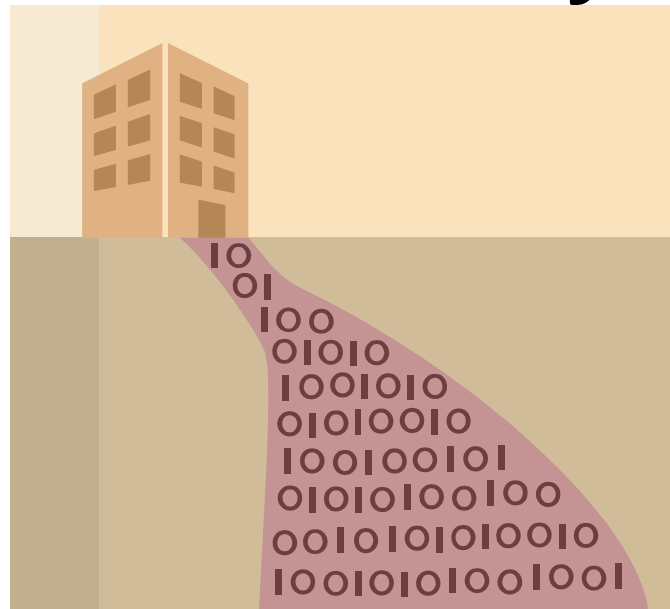




Candidate Resource and Assessment

BSBADM504B

Plan or Review Administration Systems



Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.

Focusing on your training needs



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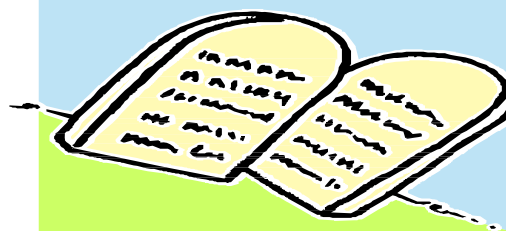
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"You're either part of the solution or part of the problem".

Eldridge Cleaver

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Focus on

Your Area of Influence

Use considered risk taking in your 'grey' area

And others will follow you!

Legend	This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page.
	This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities.
	Activity: Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action.
	This symbol is used at the end of a section to indicate the summary key points of the previous section.

Qualification Pathways



A goal without a plan is just a wish.

Antoine de Saint-Exupery

Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although it can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated candidates and business customers.

Qualification Rules

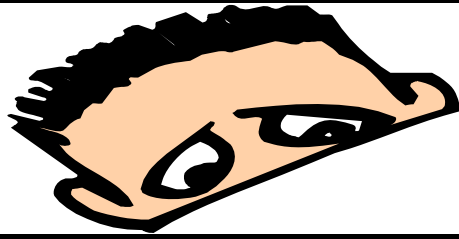
Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allow for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

Introduction



"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."

Gould, DiBella, Nevis

Introduction

This unit of competency is all about being able to implement administrative systems in your workplace. It will help you with the skills you need to demonstrate competency for the unit *BSBADM504B Plan or review administration systems*. This is one of the units that make up the Certificates in Business.

This manual is broken up into three distinct sections. They are:

1. **Plan or Review Administration Systems**
2. **Implement New or Modified Administration System**
3. **Monitor Administration System**

At the conclusion of this training you will be asked to complete an Assessment Pack for this unit of competency. The information contained in this resource will assist you to complete this task.

On competent completion of the assessment, you will have demonstrated your ability to plan or review the requirements of effective administration systems and procedures for implementing, monitoring and reviewing the system.

SAMPLE

BSBADM504B/01
Plan or Review Administration Systems



"Information is not knowledge."

Albert Einstein



Identify requirements of, or modifications to, administration system through consultation with system users and other stakeholders in accordance with organisational and budgetary requirements

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

Make selection of supplier or developer in accordance with organisational policy and procedures

Managing Administration

In this manual, we will be examining the processes behind the review and planning of an Administration System, and how you can go about implementing such a system in your workplace. An administration system is a system that works behind the systems holding all administrative information for easy access in the future. What this means is that such a system needs to be able to handle the vast amounts of information that your organisation holds, as well as being able to produce the given information quickly and effectively whenever it is required.

Administrative systems can be either electronic or paper based. A good example of a paper based system is generally found in most hospitals, where all medical records are generally paper based, as the nurses write their notes manually. However, some systems may be solely electronic, where no paper based records at all are produced, or a hybrid system where paper notes and records are produced, but this information is then scanned electronically into the system (such as student enrolment systems or a school, where enrolments may be paper based, but then this is entered or scanned into a computer system for processing).

Because of the complicated nature of developing any such system, administrative systems are generally not developed or designed by an organisation itself. Rather the work in developing any such system is outsourced to one or more experts who work to develop and implement the systems into your workplace.

The outside knowledge is crucial to the success of the system, but it does mean that planning of the system must be careful and complete, as the outside consultants are unlikely to have a complete knowledge of exactly what your organisation's requirements actually are. To this end, we will begin by examining the process of planning the system and finding the experts that you need to undertake the system's development.

With regard to the process of identifying requirements for large scale projects, as the saying goes, it is often difficult to see the forest for the trees. This is especially true of managing large projects like systems development. There is so much information available in the average workplace that often you are unable to zero in on an important concept simply because you cannot get the right information that you need to make a decision effectively. An effective administrative system however can allow you to sift through the information you have and attempt to find that information which is most relevant to your specific project.

When developing any system, we begin by examining the requirements of the end user. That is, we want to know the purpose of the administrative activities the organisation undertakes. Why are we performing certain tasks? By examining the priorities of the end user, and what they require from the system provided to them, you should be able to determine the most appropriate type of information to provide them with – and develop strategies that will enable your systems to do this.

A very effective way to begin your examination of system requirements is to examine the purpose for which the end user requires certain information from the system. By attempting to ascertain the purpose of certain actions undertaken, you will be able to determine the type of systems that you should provide. If the information is needed to make a decision related to a quality initiative, what will be required are the pros and cons of the various initiatives.

However, if the end user of your administrative system will just be reporting the information (perhaps in the form of a business plan) they will simply require the facts. Therefore the purpose that the end user requires information for will affect the nature of the information that you are required to present to them. When considering the administration information's purpose it is important to ensure that the purpose meets with the objectives of your organisation, the requirements set out by the organisation and the organisation's capabilities.

At this stage it is important to assess whether the system being developed will meet with your organisation's requirements. All organisations have a set of objectives that they want to achieve. Much of system management is about ensuring that your organisation is achieving its objectives, and thus you should carefully evaluate the purpose of your administrative system to ensure that it meets with the objectives of your organisation. Ensure that the system will assist in meeting the required objectives. For example if the system is being developed to record and assist with customer service within your organisation, look at the customer service objectives set for your organisation, and ensure that the types of information that you gather will assist in measuring those particular objectives.

It is likely that for any administrative system development, you will be provided with a brief by your managers. This brief will outline exactly what it is that your managers want you to achieve - these are the requirements set out by your organisation. All information that you gather needs to be aligned to the specific requirements of your organisation. Some of the requirements that you should ensure that your information meets include:

Possible Administrative System Requirements	
Scope	The scope of the administrative requirements will also affect the system. Is the system only required for your organisation, or will it be used across your subsidiaries? Will it be required to hold information for just 1 year or multiple years? As you can imagine, the greater the scope that is required, the more work will need to be done to meet all the requirements. Determining the scope of the required system will enable you to determine the amount of data you will need to obtain and the amount of processing that is likely to be required.
Form	Both data and information come in many forms. To be able to make an effective decision, that information needs to be in the most suitable form for the decision maker. This means that in the early stage you should attempt to determine the most suitable form for this system to take. What forms of information will be used to input into the system? What will the major outputs be? These many and varied types of information each have their own relative advantages and disadvantages.
Presentation	The end presentation format of the information from the system also needs to be strongly considered. Should the data be a report, a chart? What level of presentation does your organisation require? Will this information need to be provided in draft form, or in a final, finished and polished report?

Finally, we need to look at whether it is within the capabilities of your administrative system to gather the information that you are being asked to bring together. In attempting to establish this, it is important to consider the level of resources available to you.

Resources available are a significant matter when looking at administrative strategies. With unlimited resources, you would be able to collect all the information you could possibly imagine, and this could be used to help make the most effective decision possible. However in the real world there are limits to what we can do. Budgets, time, and expertise constrain our ability to gather the best information. Therefore the strategies that you develop must take the limited resources you have into account. Having fewer resources means you need to be much more careful with how you approach the problem.

Think carefully about the resources that you have been provided with by your organisation. How will you utilise these resources? Are these sufficient for your needs?

Whether we like it or not, the finance department and supervisors and managers will play an important role in our ability to utilise the right administrative strategies. Before you begin the process of developing such a strategy, it is important to determine the amount of money that you are able to spend on the project. This will affect spending in terms of your time, the types of information you gather, and expertise you are able to bring in. Let's look at the three major resource constraints that may be placed on us by budgets.

Budgetary Constraints	
Scope	We mentioned scope previously. Essentially scope is how wide your system will be. Will it only cover a single facet of the organisation (such as customer services or marketing), or will you attempt to cover a much broader range. While the initial proposal you are given will state the scope of the system that is desired, the actual budget that you are provided may dictate whether this scope is feasible or not. If the budget provided is not high enough, you may find that you cannot conduct the data collection and information processing as widely as you would have hoped.
Time	Time is money in business, and your provided budget will have a significant effect on the time you can put into a given project. The wider the system is the more money you are likely to use and the more time it is going to take. The time that you can put into the system development will be affected by the money that you receive to do it. If only a small amount of money is received, you will not be able to spend as long on the system development as you could if a large amount of money is received.
Expertise	Expertise is likely to be related to the effects of budget. Essentially the less money you have, the fewer experts you are able to employ. For example you may not be able to hire consultants to help you put together and run a system if you do not have enough money, so you may be forced to conduct the system development yourself. You may not have the expertise to run this program as well as an administrative consultant, and so the information provided may not be as accurate as could be done.

One method of attempting to ascertain whether the expenditure is justified is through the use of cost benefit analysis. For a particular system to be seen as being useful, the benefits of gathering the information must outweigh the costs associated with gathering it. You will find that for the most part, this will always be true. Your costs associated with gathering the required information will be low, as most quality information will be easily found. However if extensive analysis, market research, expensive software or difficult procedures are required to gather the information you may find that the costs outweigh the benefits. In these cases you may find that an extensive system is not fully justifiable.

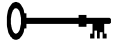
Let's now look at the various requirements that may make up an administrative system. Your evaluation should consider each of these points:

- **Components of the System:** You should consider the various components that make up your system. This should include an examination of what is needed, whether current systems are providing this as well as the budget you have been provided and what components this budget will allow you to purchase.
- **Number and Type of Users:** The number of users of the system will constrain the type of hardware that is likely to be utilised. The higher the number of users, the more complicated the hardware is likely to be. There will also be issues with regards to concurrency of data use that needs to be addressed if the number of users is high. For example, what will happen if two people are working on the same information at the same time?
- **Organisation/Staff Requirements:** We have already reviewed requirements, however, it is important that you fully understand what is required of your administrative system in terms of the information that will be input into the system and which will be output from the system.
- **Purpose and Nature of System:** You need to consider exactly what the purpose and nature of the system is. What is its place in the organisation? What systems will it interconnect with? What information will be provided by the system and will it be electronic or paper based or a combination of the two?
- **Purpose and Nature of Organisation:** The actual organisation itself will have an impact on the nature of the system. What is the purpose of the organisation? What work does it undertake and what information is needed for this work to be undertaken?
- **Size of System:** How many people will use the system? How large is the organisation? Does it operate from a single site or from multiple sites? How are the sites connected?
- **Skills of Existing Staff:** What skills do staff have in administration? How about management? Do they have the skills required to undertake this position? Where are there gaps in knowledge?
- **Staff Training Needs:** Based on the above analysis, there will be an understanding of where further training may be required. The more extensive the training requirements, the more expense there will be in undertaking this training.
- **Type of System:** Paper, electronic or a hybrid? This will impact on the type of consultants you may need to hire as well as the hardware needed to address those needs.
- **Work Practices:** What work practices are present in your organisation? How effective are these currently and where will improvements need to be made?

After you have all of your requirements set, you can begin the task of attempting to find staff whose expertise can help in implementing the system and areas where outside consultants will be needed to assist in the implementation and design of your administrative system.

Now, we will examine the types of individual whom you may need to utilise in the development of your system:

- **Administration System Consultants:** There are specialised consultants whose work revolves around the design and implementation of administrative systems. These individuals will assist you in developing the requirements that your system will have, as well as determining the most appropriate processes within the system as a whole.
- **Computer/Software Suppliers:** An administrative system is likely to require one or more computer systems to run effectively. Therefore you will need to form relationships with key suppliers of computer hardware and software. As this type of resource is extremely expensive, forming a relationship with suppliers is likely to lead to discounts being available over time.
- **Efficiency Consultants:** Efficiency consultants work to ensure that your organisation is working to the highest levels of efficiency. They will look at the processes within your organisation, and suggest ways in which they can be improved. Specifically, they will be of use in the development of an administrative system in that they are able to find areas where improvements can be made.
- **Equipment Suppliers:** Like computer hardware and software suppliers, building a relationship with equipment suppliers is important in gaining knowledge of what is required in your business and gaining better deals. Working with sales reps is a useful way of building these relationships.
- **Information Technology Technicians:** Information technology technicians will assist in installation of any system within your organisation and are likely to be hired by the consultants who design the system. These individuals will also be useful in troubleshooting the system when problems develop. It is useful to build a relationship with a technician so that they become familiar with your system and its intricate nature.
- **Information Technology Trainers:** As we mentioned on the previous page, information and administration systems often present a new challenge to those working with them. They may not have all the skills required to undertake working with the system, so will require training. This training is most effectively delivered by specialists in information technology and they can also work with you on improving the system's efficiency by ensuring that all staff are familiar with the system.
- **Internal Staff/Clients:** Of course, your staff are important in the development of any system. By including them in the development and implementation process, you are able to ensure that the system meets your needs perfectly and that they are familiar with how the system operates.
- **Office Equipment Suppliers:** Finally, paper based systems will often refer to more than just computers and hardware. They will need filing cabinets, sorting systems and the like. So building relationships with office equipment suppliers is also very important in ensuring that the system will be able to be brought together effectively.



Key Points Section 1

- When planning and reviewing and administration system:
 - Identify the requirements of the system by consulting with the users of the system and others involved in it.
 - Get quotations for suppliers and developers.
 - Select the appropriate suppliers for the system.

SAMPLE



Section 1 - 'True' or 'False' Quiz



T	F	A hybrid system utilises both electronic and paper systems.
----------	----------	---



T	F	Managers' requirements are all that need consideration in systems development.
----------	----------	--



T	F	An administrative system may involve a single or multiple sites.
----------	----------	--



T	F	Resources available to you only include budget.
----------	----------	---



T	F	Most systems can be created entirely "in-house".
----------	----------	--



T	F	For a particular system to be seen as being useful, the benefits of gathering the information must outweigh the costs associated with gathering it.
----------	----------	---



T	F	Information technology trainers are specialists in showing individuals how a system works.
----------	----------	--



T	F	System scope refers to the number of users involved in a system.
----------	----------	--



T	F	Starting a relationship with suppliers can assist in getting the right information you need.
----------	----------	--



T	F	Administrative systems are always electronic.
----------	----------	---