INFORMATION TECHNOLOGY SUPPORT SERVICE
Level II

Learning Guide #16

Unit of Competence: -	Update and Document Operational Procedures
Module Title: -	Updating and Documenting Operational Procedures
LG Code:	EIS ITS2 M05 1019 LO2-LG16
TTLM Code:	**EIS ITS2 TTLM 1019 V1**

LO2: Update procedures

Instruction	LO2- Update procedures

This learning guide is developed to provide you the necessary information regarding the Following content coverage and topics –

- Determining operational procedure

- Developing / updating operational procedures

- Submitting proposed operating procedures to appropriate person.

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 –

- Operational procedure requirements are determined using review outcomes.

- Operating procedures are developed / updated for the system.

- Proposed operating procedures are submitted to appropriate person.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.

2. Follow the instructions described below 3 to 6.

3. Read the information written in the information "Sheet 1, Sheet 2, and Sheet 3" **in page 1, 4 and 8** respectively.

4. Accomplish the "Self-check 1, Self-check 2, and Self-check 3" , **in page 3,6 and 16** respectively

5. If you earned a satisfactory evaluation from the "Self-check" proceed to "Operation Sheet 1" **in page 8.**

6. Do the "LAP test" **in page 19.**

Information Sheet – 1	Determining operational procedure

1.1. Operating Procedure (OP)

An Operating Procedure (OP) is a set of written instructions that document a routine on repetitive activity followed by an organization. The development and use of Ops are an integral part of a successful quality system as it provides individuals with the information to perform a job properly, and facilitates consistency in the quality and integrity of a product or end-result.

1.1.1. Operational Procedure: Creating, updating and reviewing policies and procedures

This Operational Procedure is issued under the authority of the Assistant Commissioner (General Counsel) and should be read together with the ACNC Policy Framework, which sets out the scope, context and definitions common to our procedures.

Procedure

- This Operational Procedure sets out the procedures for developing, updating and reviewing policies and procedures used at the ACNC. In this procedure, the term 'policy or procedure' includes Commissioner's Policy Statements, Commissioner's Interpretation Statements, Corporate Policies, Operational Procedures and Work Instructions.

- Each Directorate is responsible for updating and reviewing the policies and procedures relevant to their business (see list in Policy & Forms database of policies, procedures and their responsible directorates). Development of new policies and procedures can be undertaken by any Directorate, as needs arise.

Identifying the need

- You may need a new policy for several reasons, including:
  - there is a decision or discretion that the ACNC needs to exercise under ACNC legislation
  - there is a need to develop a policy for some aspect of the ACNC's business, or
  - there is an emerging or significant risk.

- You may need a new procedure for several reasons, including:
  - to assist staff with implementing a new policy
  - to clarify roles and responsibilities, or
  - to ensure consistency in administering our legislation.

- You may need a new work instruction for several reasons, including:
  - to assist staff with implementing a work process
  - to clarify particular roles and responsibilities, or
  - to ensure consistency in our work processes.
- You may need to revise a policy or procedure if there is a change to our legislation, policy or work processes.

Self Check 1	Written Test

Name:_____   Date:_____

Instruction: Answer all the questions listed below, if you have some clarifications- feel free to ask your teacher.

I.   **Say True if statement is correct say False if statement is Incorrect**

1. An Operating Procedure (OP) is a set of written instructions that document a routine on repetitive activity followed by an organization.

2. Operational Procedure is issued under the authority of the Assistant Commissioner (General Counsel) and should be read together with the ACNC Policy Framework, which sets out the scope, context and definitions common to our procedures.

3. You may need a new work instruction to assist staff with implementing a work process

Note: **Satisfactory rating – 2 points**   **Unsatisfactory - below 2 points**
You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = _____
Rating: _____

Information Sheet – 2	Developing / updating operational procedures

2.1.   Updating Software

Software programmers gradually develop updates for their software packages as they discover problems with the software and design tools to address or fix these problems. This can be true for any of the types of software described in <u>section 2.3,</u> but is typically most common and important for operating systems. It is important for a computer user to find and install software updates in order to have well performing computers. Updating software can be done in a variety of ways, described below.

2.1.1. Automatic Updates.

If a computer is on a reasonably fast Internet connection, the easiest way to keep it up to date is to allow the programs to automatically check for updates and download and install them as needed. When setting up a new computer with Microsoft Windows, this is the choice that the software recommends. It does not require any action on the part of the user, and results in a computer system that is current. To turn on automatic updates for a Windows operating system, find the Systems and Maintenance options in the Control Panel.

2.1.2. Automatic Alerts for Updates.

 If a computer is connected to the Internet, but the connection is slow at some times of the day, another option is to have the computer automatically check for updates but not download or install them until the user elects to do so. For Microsoft Windows computers, if this option is selected, an alert appears in the computer's system tray stating that there are updates waiting, and then the user can wait until the Internet is faster to install these updates.

2.1.3. Manual Updating.

A computer user can also turn off all automatic update checking and choose to manually check for updates. For a computer that is rarely connected to the Internet, this would be a good option as long as the user remembered to check when connecting to the Internet. Also some programs do not have automatic update options, and can only be updated in this manner. A program usually has a menu item titled "check for updates" that a user can click on when connected to the Internet.

2.1.4. Offline Updating.

If a computer is in a location that never has access to the Internet, a computer lab manager will need to download updates from a computer that is connected to the Internet and then transfer them (via a disk or flash drive) to the computer in question to be installed. This option is also useful if a computer lab has several computers that all need the same update. Instead of having each computer download the update separately, one computer could download the update and then it could be shared amongst all of the computers. Offline updates for operating systems can easily be found through Internet searches. Updates to download for Windows computers can also be found through www.microsoft.com/downloads.

Self Check 2	Written Test

Name:_____   Date:_____

Instruction: Answer all the questions listed below, if you have some clarifications- feel free to ask your teacher.

I. Choose the correct answer

1. .If a computer is on a reasonably fast Internet connection, the easiest way to keep it up to   date is to allow the programs to automatically check for updates and download and   install them as needed.

    A/ Offline Updating   B/ Manual Updating   C/ Automatic Updates   D/None

2. A computer user can also turn off all automatic update checking and choose to manual check for updates.

    A/ Offline Updating   B/ Automatic Updates   C/ Manual Updating   D/None

Note: **Satisfactory rating – 1 points   Unsatisfactory - below 1 points**
You can ask you teacher for the copy of the correct answers.

                                Answer Sheet

Score = _____
Rating: _____

Operation Sheet 1	Developing / updating operational procedures

Method of operational procedures

Automatic Updates software

> **Step 1-** connect to internet the device
>
> **Step 2-** Allow the program automatically check for update
>
> **Step 3-** download
>
> **Steep4.** Install

Information Sheet – 3	**Submitting proposed operating procedures to appropriate person.**

1.1. Types and purpose of user documentation

Types of user documentation

Users might need to consult a range of documentation in order to install, configure and/or use the functions of a system or application. There are many different types of user documentation depending on what users require. For example, a new staff member using a particular IT system for the first time needs to refer to a user guide and tutorials and online help. In other words, they firstly need documentation that helps them learn to use the software. As they become more familiar with the system, they will need access to other types of documentation such as FAQs (Frequently Asked Questions).

Reflect

Think of the types of user documentation you have seen at a workplace. Do some of your examples include the following?

Documentation type	Description
Project specifications	specifies the detailed business requirements of the project including how the system will work and the underlying functionality
Reports	produced by the system, program, network or application
Help resources	provides online Help, quick reference cards, scenarios, FAQs (Frequently Asked Questions). Users can search for help on using of a specific system, program, network or application
User manual/guide	describes how the user will use a system, program, network or application to do their job

Training materials	train staff in how to use a system, program, network or application to do their job
Self-paced tutorials	teach staff how to use a system, program, network or application to do their job. These may be online or paper-based tutorials.
Brochures	outline what a computer application does

The purpose of user documentation

What is the documentation going to be used for? This is the first question to ask before starting to create any user documentation. When you are satisfied that you have an answer, you can then decide what type of documentation you are going to produce.

Reflect

Think about documentation you have used and recall why you needed to refer to it. What was the main purpose of the documentation? What did it enable you to do? These are some examples of user documentation and their purpose.

Examples	Purpose
A project specification, training manual, user guide, tutorials or help that provides step by step guidance in how to use the software.	to learn how to use a piece of software
A training manual, quick reference guide or user guide that provides detailed commands and specifications of a software package to assist with troubleshooting problems.	to refer to a specific feature of a piece of software

Once you have decided what the purpose of your documentation is and what type of documentation you are going to produce, you can look at the needs of the potential users of the documentation.

Users' needs

A **needs analysis** is a process where the needs of the target groups for the documentation are identified and analysed. This analysis helps to make decisions on what the documentation should contain and what format is most suitable. For example, Data Entry staff in a call centre need to know how to correctly enter data in a database so that orders can be generated correctly from a database.

For training materials and online help a needs analysis should be conducted in person with the staff who will need the documentation. For other documentation a look at the needs of the users without speaking directly to staff is sufficient.

After considering user characteristics and needs, possible solutions can be found, for example:

User characteristic	User need	Possible solutions
level of computing experience	beginner to expert	create different sections for different levels of experience
experience with the particular system or application	beginner to expert	create different sections for different levels of experience
frequency of use with a particular system or application	constant, frequent to weekly, monthly, annually	there must be initial training with some sort of follow-up support
workplace tasks	simple, repetitive tasks to complex tasks	documentation must clearly relate to the tasks at hand
work practices and environment	eg part-time, shift work, office, warehouse	occupational health and safety documentation is essential
language skills	difficulty reading and understanding written language to very competent readers	• keep language simple, use plain English • explain technical terms and jargon if they must be used

User characteristic	User need	Possible solutions
		• avoid long uncommon words if simple words will do
cultural background	language appropriate to some users may not be appropriate for others	• use language appropriate for all users • American spelling often appears in documentation, since it is often where the software originates
personal characteristics such as aptitude, educational background, age, disability	users will learn at varying pace	make sure individual needs are catered for to organisational policies
level of confidence	users might be fearful and not confident with computers	• be positive and encouraging in your approach • avoid reinforcing negative attitudes

It's almost impossible to cater for all these variations. However in preparing documentation for a new user, you would obviously not confuse them with technical jargon on the first page! You need to find a balance and remember that any documentation must be consistent with the organisation's policy, conventions and standards.

For any form of documentation to be useful it must be designed with the needs of its potential users in mind. An analysis of the requirements of the users, and the way their needs can be effectively addressed, is a critical step in the process of determining documentation requirements.

What to include in user documentation

It's a good idea at this stage to think about the content that you will include in the user documentation. This is so you can estimate the number of pages, the complexity of the content and what the graphic and text components will be.

The content will have some influence on:

- design of the documentation, including layout, use of text and graphics

- medium, eg paper-based or online

- the time and resources needed to develop the documentation.

Media for user documentation

You can consider paper-based documentation, online documentation or a combination of both. The media type you choose will be influenced by the:

1   purpose of the documentation

2   user needs and characteristics

3   content (subject matter).

Always keep in mind that you need to include a range of items that allow users to access the required information quickly and easily. There are advantages and disadvantages to online and paper media.

Media	Advantages	Disadvantages
Paper	• conventional, most people are used to paper products • easy and fast to prepare • inexpensive to produce	• hard to maintain control of different versions • costly to update

	• requires readily available software	
Online	• convenient • easy to reach many people geographically dispersed • can be colourful and fun • can link to other related documents • easy to maintain version control • not costly to update	• can be expensive • requires specialised software

Reflect

Think about when you would be most likely to use paper and when you would use online.

Paper is appropriate in most circumstances. It is the most commonly used method of delivering documentation, so most people are used to it and like it. However, when staff are dispersed across a country or around the world, online delivery is best. Everyone can access the same documentation and only one version is available. Where user documentation is going to be used primarily as a help tool, then online help is most appropriate. It allows for easy searching across the documentation.

Designing templates

Once you have determined the documentation requirements, you can develop a template that meets those requirements and makes the job easier. A template is a file that contains a standard layout, styles and fonts that are used in the production of the documentation.

When you want to create a file for user documentation, you open the standard template, usually in Word, and the layout, fonts and styles are already set up in the document. All you need to do is start writing. Everyone uses the same template, so there is a consistent look and feel to all of the user documentation.

The template may be:

- a Word template

- an HTML template

- an online help template.

The medium will determine what kind of template you use.

Features of templates

Paper-based documentation

Features that may be included in paper-based documentation are:

- table of contents

- columns and tables

- page and section numbering

- headers and footers

- graphics and text surrounds

- substantially chunked information.

Online documentation

Features that may be included in online documentation are:

- table of contents hyperlinks

- tables

- links to other pages/sites

- navigation icons

- usability/functionality

- heavy use of graphics.

Obtaining sign-off on templates

Like all documentation, templates also need to be signed-off by the relevant people. The sign off process will be outlined in the organisational documentation policy.

The content of the template will depend on the purpose of the documentation. A template for training materials will look quite different to a template for a procedural manual.

The template should be designed in consultation with users or a subject expert. Once the template has been designed, it should be distributed according to the user documentation policy, or, the agreed review process if you are working towards final sign-off.

Self Check 3	Written Test

Name:_____   Date:_____

Instruction: Answer all the questions listed below, if you have some clarifications- feel free to ask
            your teacher.

  I.   Fill the blank space

  1. _____ is a process where the needs of the target groups for the documentation are
     identified and analyzed.

  2. _____ specifies the detailed business requirements of the project including how the
     system will work and the underlying functionality.

  3. _____ how the user will use a system, program, network or application to do their job

Note: **Satisfactory rating – 2 points   Unsatisfactory - below 2 points**
You can ask you teacher for the copy of the correct answers.

                              Answer Sheet

Score = _____
Rating: _____

LAP Test	**Practical Demonstration**

Name: _____ Date: _____

Time started: _____ Time finished: _____

Instructions: Given necessary templates, tools and materials you are required to perform the following tasks within 1hour.

Task 1. Identify if connection present

Task 2. Automatic Updates software you want to update

List of Reference Materials

1. **BOOKS**

2. **https://training.gov.au/Training/Details/ICTSAS506**

3. **web1.keira-h.schools.nsw.edu.au/faculties/IT**