INFORMATION TECHNOLOGY SUPPORT SERVICE
Level II

Learning Guide #17

Unit of Competence: -	Update and Document Operational Procedures
Module Title: -	Updating and Documenting Operational Procedures
LG Code:	EIS ITS2 M05 1019 LO3-LG17
TTLM Code:	**EIS ITS2 TTLM 1019 V1**

LO3: Update documentation

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Instruction Sheet	Learning Guide #17

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

- Reviewing Feedback and making appropriate changes

- Updating Technical and user documentation

- Submitting technical and user documentation for final approval

- Distributing technical and user documentation

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 –

- Feedback is reviewed and appropriate changes are made as needed.

- Technical and user documentation are updated to incorporate changes.

- Technical and user documentation are submitted to appropriate person for final approval.

- Technical and user documentation are distributed as agreed with appropriate person.

Learning Instructions:

1. Read the specific objectives of this Learning Guide.

2. Follow the instructions described below 3 to 4.

3. Read the information written in the information "Sheet 1, Sheet 2, and Sheet 3" in page **1, 3, and 6** respectively.

4. Accomplish the "Self-check 1, Self-check 2, and Self-check 3" , in page ,**2 , 5 and 7** respectively

Information Sheet – 1	Reviewing Feedback and making appropriate changes

1.1. Why user documentation is important

Computer users need documentation so that they can make the best use of their computers as work tools. A computer system can assist them to do their work efficiently and effectively but they need to be able to do three things:

- learn how to use the system and its applications

- know how to get help when they need to learn more

- know what to do when they experience problems.

Users will be working across all parts and levels of an organisation carrying out different functions such as data entry, financial administration, executive and middle management. However, user documentation is for anyone in an organisation who needs assistance with these three tasks.

1.2. Types of user documentation and appropriate media

Books, manuals, computer-based tutorials and online help are all media for user documentation. Traditionally user documentation has consisted of a range of paper-based documents. However, we are no longer limited to these, and organisations are shifting their paper-based user documentation to an online form. There are very good reasons for this:

1 increased productivity — users have up-to-date, comprehensive information that they can access quickly and easily.

2 increased corporate intelligence — information is stored centrally but distributed universally

3 consistency and quality — documentation appears in the same format and is easily updateable

4 reduced printing costs.

1.3. Reflect

What user documentation are you familiar with? Make a list of the different kinds of user documentation you have used or you are familiar with, both personally and at work.

1.4. Feedback

Your list could include a training manual, user guide, quick reference sheet, licensing agreement software registration form, maintenance manual, procedure manual, documentation register, online help, online tutorial, organisation's intranet, the Internet.

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. Decreasing productivity users have up-to-date, comprehensive information that they can access quickly and easily.

2. Increased corporate intelligence information is stored centrally but distributed universally

3. consistency and quality documentation appears in the same format and is easily updateable

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	Updating Technical and user documentation

2.1. Determining your needs

Before any venture into selecting any new equipment or services, it is important to have a clear understanding of your needs. If you don't fully understand your needs then it is not possible to ensure those needs are correctly met. In other words, know exactly what you want before you try to get it.

2.2. Undertake a requirements analysis

While we will not be examining all the finer details of performing a proper requirements analysis, it is worthwhile covering some of the basics.

Firstly, it is vitally important to put your goals into clear and concise terms. This might be in terms of a problem definition, or business plan for expansion, or upgrading your capabilities. Your definition should not include any details of specific solutions as far as equipment, suppliers etc.

You should also include a set of criteria such as time and cost limitations, types and levels of support, etc. If you document all these requirements, when you finally make your decision and implement it, you will be able to determine if it constitutes a successful project or not.

After considering your overall goals and criteria, you can then put into simple and uncomplicated terms what would be a solution to the problem or requirement.

2.3. Evaluate your alternatives

Collect all the information you can about the types of equipment available, the suppliers of that equipment, the training required to use the equipment or associated programs.

You need to have an open mind about the alternatives. Do not think that there is only one right choice, as there are always viable options. For example, you may not need to purchase all new equipment when a few upgrade options may be both acceptable and economical. There is always more than one option!

Once you have a comprehensive list of what is available, compare that list with any organisational guidelines and policies that are in place. Many large organisations and government departments have set criteria for purchasing equipment. It's necessary to familiarise yourself with those guidelines before making any recommendations or

purchases. There may be organisation guidelines on the minimum standards required for equipment. Those standards might relate to:

- international or industry standards

- supplier restrictions, approved suppliers or other requirements

- purchasing guidelines (there may be different guidelines depending on the amount of money to be spent)

- minimum warrantees and/or guarantees

- support levels required

- how often equipment should be automatically reviewed or updated etc.

2.4. Making recommendations

After reviewing all the information above, you would then make recommendations, or make the purchases.

The important point to note is that if you do not have clearly in mind the equipment and services that you need, it is unlikely that you will make the best choices. In addition you may make the best choices in equipment, etc but there may be organisational reasons why your selection will not be approved.

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.   Write short answer

1. Determining your needs requirement?

2. List minimum standards required for equipment?

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 – 3	Submitting technical and user documentation for final approval

3.1. Standards organizations

What are 'standards organizations'?

Standards ensure that levels of quality, safety, reliability and efficiency are incorporated into products and services when they are developed and used. Sometimes if we are disappointed in the quality of a product it is because it was not produced to a recognised standard. Standards organisations, such as **Standards Australia**, develop, monitor and maintain standards in many areas of business and industry.

3.2. What is ISO?

ISO stands for the International Organisation for Standardisation. This is a global organisation that produces standards. Members are government bodies, industry associations and private organisations that have an interest in industry standardisation. They reach consensus on standards for industries that meet the needs of both industries and consumers.

The ISO standard IS1590 outlines the way user documentation should be planned. This standard is designed to be part of a contract but there is a new standard (ISI8019) that will not have this restriction.

ISO 9000 is a quality management system. Organisations that meet the ISO 9000 standards are entitled to include this standard in their documentation. For example, the Open Training and Education Network, part of the NSW Department of Education and Training, is entitled to display the quality logo accredited by an organisation called Benchmark.

3.3. What is IEC?

The International Electrotechnical Commission (IEC) prepares and publishes international standards for all electrical, electronic and related technologies. The IEC often works in conjunction with the ISO to put standards together, particularly standards for the IT industry. ISO user documentation standards were developed in conjunction with the IEC.

3.4. What about Standards Australia?

Standards Australia is our organisation for the development of national standards. It has been in existence since 1922 and is a member of ISO and IEC. Members represent groups who have an interest in the development of standards through committees of special interest groups.

Standards Australia has developed its own user documentation standard that is based on the ISO/IEC standard. It is called AS4258. It outlines the processes for creating all forms of user documentation for software and can be used as a contract with external customers or between internal customers.

3.5. Reflect

Have you, or anyone you work with, used any of these standards in the production of user documentation? If so, what did you or your colleagues think of the standard?

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.   write Short

1. What is IEC?

2. What about Standards Australia?

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: _____

Information Sheet – 4	Distributing technical and user documentation

4.1. Document control and distribution

In an IT organization or department, the controlled distribution of documentation is of paramount importance.

4.1.1. Levels of security and confidentiality

The inventory record of any document should show the security level.

- **High security — valuable originals, etc**

Some documents in the care of IT must be kept safe, perhaps in their original condition. They may hold trade secrets or confidential information. Some documents are held in a form that is liable to damage and must be kept in a secure area, not to be removed, with even authorised people only able to access copies or images of them.

- **High security — critical information and fragile media**

Original documents that may have a critical value, or be recorded on a fragile medium such as tape, should not be allowed to leave their secure storage place. Only copies should be taken out.

- **Medium security — sensitive and restricted material**

Some records contain sensitive material, and may not be seen by all employees. Each document and each authorised user of a system should be assigned a security level. Unauthorised people can be denied access to the whole system. If a person's security level were lower than the security level of a document or record, access would be denied.

- **Low security — general access required**

Other documents might hold knowledge that is critical to the workings of IT equipment, but copies or images can be freely distributed, so long as the version of the document is clearly marked, and the reader has the necessary authority.

4.2. Hard copy documents

If a document is in hard copy, and the user is authorised to access it, the lender's details can be recorded in a simple database to keep track of it

Sample loan database

Item	Restrictions	On loan by	Phone	Date	Return date

Soft copy documents

Distribution can be made secure and tracked by granting access to only the appropriate documents (by pre-determined levels of security) and by sending documents by email and filing/registering a copy of the email.

If the customer is off site, the email attachment must be in a compatible format. In the case of intranet html documents, usage can be tracked by the number of times that the page has been accessed, and privileges can be allocated of access needs to be restricted.

Reporting, auditing and archiving documentation

Your manager could ask you for a report on who has been using the technical documents listed in the index or inventory. You may need to show what's been added, what's been deleted, or transferred.

You may be asked to extract from your index or inventory a summary of who has borrowed books, or taken, or even read various documents.

Technical records need regular auditing. You may be called on at intervals to check records and manuals. If so, you would look for items missing, damaged, misplaced, borrowed for too long, or materials that are out of date.

Some documents have to be kept, by law, for a certain amount of time and should be archived. Records or books that have not had any activity for a while can be transferred to archives, freeing up valuable space.

Self Check 4	Written Test

Name:_____ Date:_____

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

I.   short answer

1. Write List Levels of security?

2. Define Hard copy documents?

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: _____ |

	List of Reference Materials

1. **BOOKS**

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

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

1. **BOOKS**