

Trainer Manual & Assessment

Manage Business Document
Design and Development

BSBADM506

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- Go to **bounce.precisiongroup.com.au**
- Complete all fields under 'Register An Account' and 'Account Details' using Access Code below (this code can only be used once)
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BSBADM506
Manage Business Document
Design and Development

BSB Version

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Previous	

Precision Group Updates

Current	V1 Jul '15
History	

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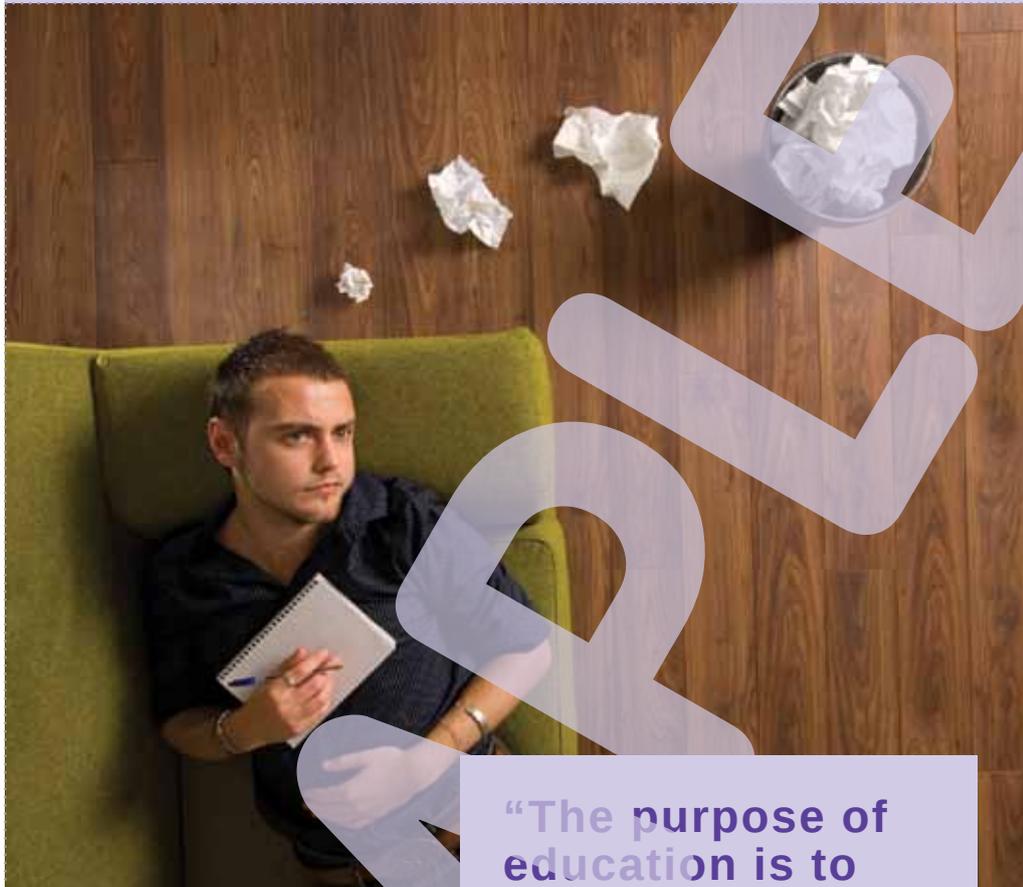
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About BSB Business Services Training Package



“The purpose of education is to replace an empty mind with an open one.” Malcolm Forbes

About the Business Services Industry

The BSB Business Services Training Package covers a diverse range of industries and occupations. Business Services covers a range of cross-industry functions and services supporting the commercial activities of all industries.

Defining Qualifications

When units of competency are grouped into combinations that meet workplace roles, they are called qualifications. These qualifications are aligned to the Australian Qualifications Framework (AQF). Each qualification will have 'packaging rules' which establish the number of core units, number and source of elective units and overall requirements for delivering the qualification.

Delivery and Assessment of Qualifications

RTOs must have the qualifications (or specific units of competency) on their scope to deliver nationally recognised training and assessment. RTOs are governed by and must comply with the requirements established by applicable national frameworks and standards. RTOs must ensure that training and assessment complies with the relevant standards.

Qualification Training Pathways

A pathway is the route or course of action taken to get to a destination. A training pathway is the learning required to attain the competencies to achieve career goals. Everyone has different needs and goals, and therefore requires a personalised and individual training pathway.

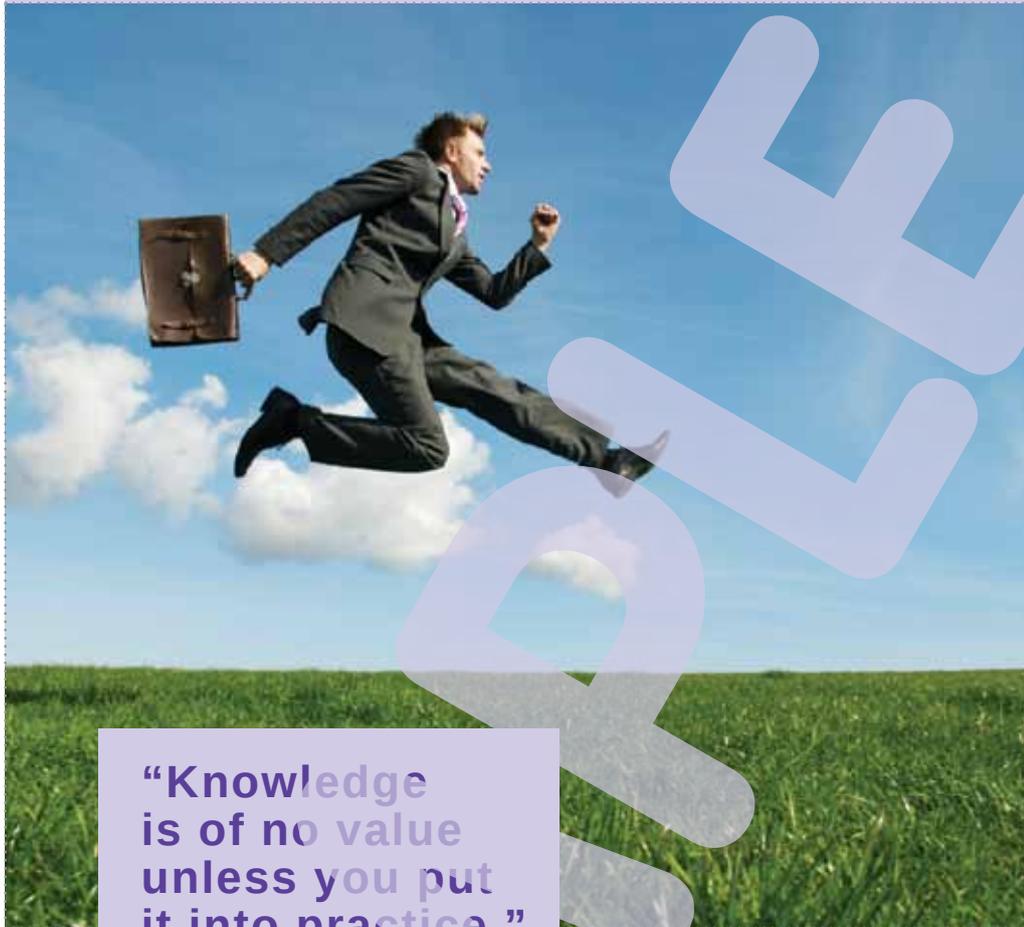
Foundation Skills

Foundation Skills are the non-technical skills that support the individual's participation in the workplace, in the community and in education and training.

Australian Core Skills Framework (ACSF)

This Assessment meets the five ACSF core skills as described in the Foundation Skills mapping.

Introduction



“Knowledge is of no value unless you put it into practice.”

Anton Chekhov

This unit of competency is about being able to establish standards for the design and production of organisational documents and to manage document design and production processes to ensure agreed standards are met. It will help you with the skills you need to demonstrate competency for the unit BSBADM506 Manage Business Document Design and Development. This is one of the units that make up the Diplomas in Business.

This manual is broken up into five Elements. They are:

- 1. Establish Documentation Standards**
- 2. Manage Template Design and Development**
- 3. Develop Standard Text for Documents**
- 4. Develop and Implement Strategies to Ensure the use of Standard Documentation**
- 5. Develop and Implement Strategies for Maintenance and Continuous Improvement of Standard Documentation.**

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 manage the document design for your organisation.

SAMPLE



ELEMENT 1:

Establish Documentation Standards



Performance Criteria Element 1

- 1.1 Identify organisational and legislative requirements for information entry, storage, output, and quality of document design and production
- 1.2 Evaluate organisation's present and future information technology capability in terms of its impact on document design and production
- 1.3 Identify types of documents used and required by organisation
- 1.4 Establish documentation standards and design tasks for organisational documents in accordance with information, budget and technology requirements

Establish Documentation Standards

What are the Document Standards?

It goes without saying that in any organisation, you must understand what is available on many levels before you can develop changes or generate improvements or even initiate a new project. Document design is one area where this is certainly the case. After all, in a functioning business, paperwork has always been used – so this must be assessed and subsequent decisions made regarding any new document standards.

There is a great cost involved in designing, developing and implementing a new range of documents. It often is included in the re-branding process. Regardless, a thorough investigation should be conducted prior to deciding to design and develop new documents.

The steps for investigation are much the same for any project. There are no shortcuts if decisions are to be based on the best information. Provision of the best information will allow the best decisions.

We will consider what is needed to be known on the following pages.

Identify Organisational and Legislative Requirements for Information Entry, Storage, Output, and Quality of Document Design and Production

The first stage in this process involves you in attempting to identify the areas that you need the document to address. Every document has a set function that is designed to ensure that the document itself is useful to the end user and for the activities they are designed to support. Think about what you expect from the document in use and attempt to define those requirements which are critical for the document to be most useful to your organisation. If a document is currently used for this function, describe it in detail and look for ways of improving it.

A document is a piece of written, printed, or electronic matter that provides information or evidence or that serves as an official record. The word 'document' used to refer to paper or 'hard copy', however, documents may be produced, distributed or filed in hard copy or electronically today. This is one of the issues to consider in planning the design of documents and standards for their production.

The range of documents required by an organisation can be quite vast. On the simulated business *Bounce Fitness* you can see a wide range. In the *Documents* section are documents specifically used for different purposes and include documents for administration, customer relationship management, WHS, financial, human resources, marketing, travel and small business. Each of these features the style of *Bounce Fitness* and are readily identifiable as such. This is a requirement of the business and another consideration when planning to design documents.

Every organisation has an image it would like to portray. Documents are key internal and external communication tools. Some levels of consistency and standards of information quality are required to ensure the desired message and tone is achieved.

These documents are just a sample of the types of documents that might be produced by a business organisation. What is produced will depend on the types of activities undertaken by the organisation and their requirements for communicating internally and externally.

Each new document should be based on a style that has gone before. Of course letters, like memos or faxes, have a standard form established over many years of business communication. Software packages often provide templates (standard forms) to help you present consistent document styles. Your own organisation's requirements must be taken into consideration when planning to use these templates.

Like many other organisations, *Bounce Fitness* has information on their requirements presented in a style guide. You can access this in the *Procedures* tab under *Administrative Procedures*. This sets down the standards for:

- Visual presentation, including margins, fonts and style
- Spelling, grammar, punctuation and writing style
- Graphics standards, including the use of the logo

This style guide enables *Bounce Fitness* to achieve consistency and quality in its documentation, enables staff to efficiently produce material without having to spend time thinking about style issues and enables it to have control over the image presented by its staff.

In small organisations, these guides may not exist. In this case, a new member of staff should check the style and layout of previous documents or ask for advice on the usual practices from more experienced colleagues.

It is important to use the most efficient ways to produce documents and to customise hardware and software to reduce production time and achieve maximum efficiency.

Costs to consider include:

- The cost of the operator's time spent researching, keying in information, checking, correcting and printing the document
- The cost of stationery
- The effectiveness of hardware, including operating speed and configuration for optimum performance
- The effectiveness of software, which must allow for simple and fast input, manipulation and output of data.

In many organisations there will not be the opportunity or responsibility to identify appropriate hardware, as this will be installed by experienced IT staff. However, the options include a range of commercial and organisational software packages including:

- **Databases**

A Database is a structured set of data held in a computer, especially one that is accessible in various ways. *Microsoft Access*, *Filemaker Pro* and *Oracle* are purchased. Others such as *SQL Server Express* and *FileAigo LE 11.0* are available to download free online.

- **Desktop Publishing (DTP)**

Desktop Publishing is the production of printed matter by means of a printer linked to a desktop computer, with special software. The system enables reports, advertising matter, etc., to be produced more cheaply with a layout and print quality similar to that of typeset books. The Adobe suite, *Corel Draw* and *Microsoft Publisher* are all purchased for Desktop publishing. Free packages include *Gizmo's Freeware* and *PagePlus Starter Edition*.

- **Spreadsheets**

A spreadsheet is an electronic document in which data is arranged in the rows and columns of a grid and can be manipulated and used in calculations. Perhaps the most commonly known and used is *Excel*. *Lotus 1-2-3*, *Ability Office* and *Corel Calculate* are also popular. *Open Office Calc* and *Kings of Spreadsheets* are free versions of spreadsheets.

- **Word Processing**

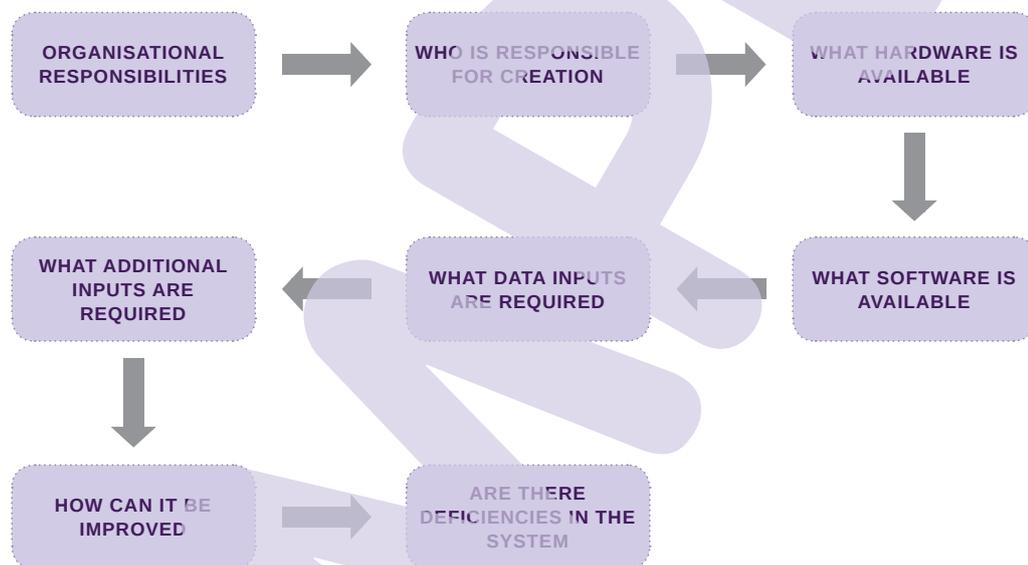
Wordprocessing is the production, storage, and manipulation of text on a computer or word processor. *Microsoft Word* is probably most popular and familiar to most users. However, *Corel WordPerfect* and *Lotus Symphony Documents* are also used. In the free category are *Google Docs*, *Textilus* and *TestEdit*.

Even if you do not have responsibility for purchasing and installing software, you should be able to have access to suitable programs to produce the range of documents required. These may include any of the programs above, or be entirely different.

You will need to identify the most appropriate types of software to satisfy particular requirements.

Evaluate Organisation's Present and Future Information Technology Capability in Terms of its Impact on Document Design and Production

Next look at the current way the documents are used within the organisation. Look at the way that documents are created, used and reviewed within the organisation. This should be a complete system review – from the moment the document has specific data entered into it right through to the stage where the actual document is put to use and its function is reviewed. A flow chart is a useful means for developing this, and you need to ensure that when you are reviewing these systems that you include:



There two complementary approaches that can be used. You may find that one approach is more useful than the other.

The *criteria-based* approach is a quantitative assessment of the software in terms of sustainability, maintainability, and usability. This can inform high-level decisions on specific areas for software improvement

The *tutorial-based* approach is a pragmatic evaluation of usability of the software in the form of a reproducible record of experiences. This gives a developer a practical insight into how the software is approached and any potential technical barriers that prevent adoption.

A software evaluation is done for an organisation. The organisation wants to know about the state of a particular package. Begin by gaining agreement on the scope of the evaluation. This includes what software and other project resources will be evaluated and the user classes from whose perspective the evaluation will be done. The user classes determine the tasks that will form the basis of any evaluation. Let's assume that our user has some experience but does not write any code to use in conjunction with it.

One important thing to determine before embarking on a major evaluation is the level and availability of support in case you run into technical problems. This is quite important if you're evaluating it for someone else! What support you might need depends on the type and depth of the evaluation, and the nature of the software.

When you write up your evaluation findings, don't forget to include the basic facts:

- When the evaluation was done.
- A brief overview of the software, what it does, and the project/researcher that produced it.
- What versions of the software were used and where these came from e.g. a web site, the developer.
- The classes of user considered in the evaluation.

As there may be dozens of issues identified, have a recommendations section listing what you believe to be the most pressing or important issues encountered, along with a rough estimate as to the impact of addressing these (e.g. time to do, impact upon architecture etc.), if possible. These should be grouped into sensible categories and it may be helpful to cross-reference these to the relevant sections in the report.

Identify Types of Documents Used and Required by the Organisation

Next, think carefully about any documents that you think your organisation needs to create in order to provide the organisation with the information it requires to be successful and achieve its goals. This should flow out of an evaluation of the documents that you have and their deficiencies. Look at those documents that could be incorporated into your system to allow it to better meet your goals and objectives.

Next, you need to think through and outline the specific impacts that the new document may have on your overall systems. Look at the need for new staff, new training, how the data and documents are to be backed up, need for new software or hardware, creation or elimination of areas of responsibility and any other area which may be affected by the changes being made.

The simulated business *Bounce Fitness* has a range of possible workplace documents relating to the Fitness Industry, small business and business generally. You can review these and then create a checklist for determining the documents required by your organisation.

Within your organisation, collect the ten most commonly used documents (e.g. forms, SOPs, stock inventories, point of sale documents, employment agreements, induction, health and safety material) and supplement them with your observation of employees.

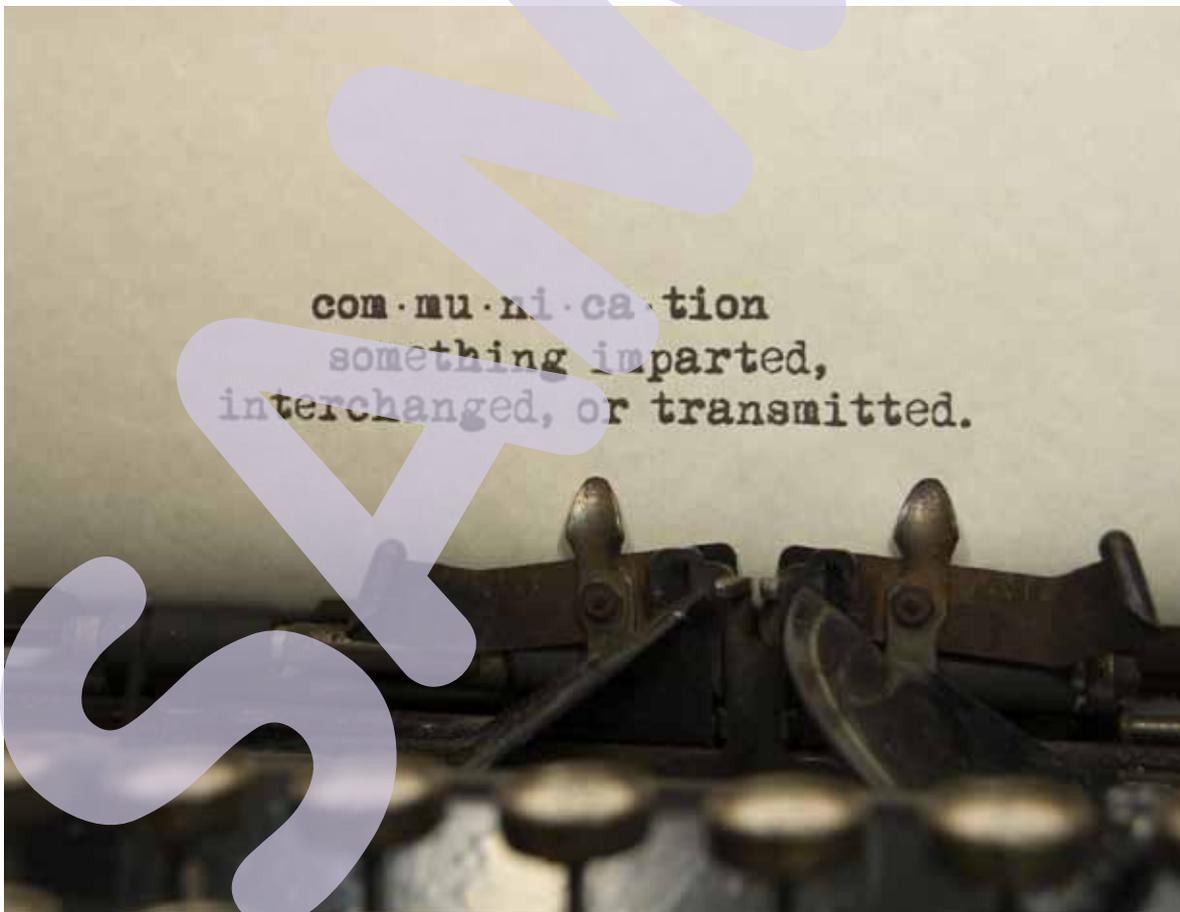
After the documents have been collected you need to review them with a suitable person nominated by the organisation and mark them with 'low', 'medium' and 'high' rankings according to:

- Importance (how important it is to the company that this document is read or filled in)
- Frequency (how often it is used, e.g. every hour, every day, once a month, once a year)

This analysis will help you to evaluate workplace documentation.

The impacts that you define may be quite wide-ranging in their nature, so it is important that you have carefully considered all areas which may be affected. This could include:

- How the document will be distributed or stored
- How the information will flow through the organisation
- How the end user will be impacted when switching from one document to another
- Where any new software will come from and the costs to the organisation
- A discussion of how the documentation will be added into the system
- How the operation of the system will be affected during contingency situations.



Each of these areas of impact may have a significant effect on the way which you work to develop, design and document your particular documents. You need to consider the way that you will be impacted by these changes carefully.

Establish Documentation Standards and Design Tasks for Organisational Documents in Accordance with Information, Budget and Technology Requirements

Next, we need to examine the way in which the assumptions you have made during document development will affect the rest of the process. Assumptions may be any area where you have provided details which you are not 100% clear about, such as changes you think may occur to systems in the future. With regards to constraints you may look at organisational preparedness or skill levels among your staff.

Standards and design tasks may include:

- Binding
- Binding media
- Checking final print copy
- Client requirements
- Colour photocopy
- Copying
- Creating templates and style or procedures manual
- Drafting
- Drawing
- Editing
- Electronic or paper-based
- Enterprise policies and procedures
- Enterprise templates or house style conventions for margins, fonts, use of colour
- Final document presentation
- Formatting
- Language and style of document
- Liaison with external personnel
- Locating and collecting appropriate information or precedents
- Print quality
- Production of graphics
- Production of multiple and subsequent copies
- Quality standards
- Use of page layout software
- Writing

So consider each in terms of your organisational requirements and the document needs.

Legislative Requirements

Legislation is the act of making or enacting laws. When people talk about 'the legislation', they mean a law or a body of laws. The legislation in a state or territory are the laws enacted specifically to control and administer the state or territory.

There are several key provisions of relevant legislation and regulations from all forms of government, codes and standards that may affect aspects of business operations, such as:

- **The Anti-Discrimination Act 1977**

Addresses discrimination issues related to:

- Sex
- Race, colour, nationality, ethnic or ethno-religious background
- Physical or intellectual or psychiatric disability, or any organism capable of causing disease
- Homosexuality (male or female, actual or presumed)

Racial Discrimination, harassment and defamation are all unlawful. People may not be treated unfairly because of their nationality, descent, race, religion or colour. Any behaviour that is unwelcome and puts someone down, embarrasses them relating to any of the things listed earlier.

Anyone who believes they have been subjected to racial discrimination, harassment or vilification have the option to seek assistance from the relevant Anti-Discrimination Board and/or the Human Rights and Equal Opportunity Commissioner who will advise them of their rights under the legislation.

Federal, State and Territory laws:

The laws protecting individuals from being treated unfairly because of their race, colour, nationality, descent, ethnicity or ethno-religious background are the *Federal Racial Discrimination Act (1975)*, and the *Racial Hatred Act (1995)*. Each state and territory has specific legislation cover in this area. Further information is available at <http://www.humanrights.gov.au>.

- **Disability Discrimination Act 1992**

The Federal *Disability Discrimination Act 1992* (D.D.A.) provides protection for everyone in Australia against discrimination based on disability. It encourages everyone to be involved in implementing the Act and to share in the overall benefits to the community and the economy that flow from participation by the widest range of people.

Disability discrimination happens when people with a disability are treated less fairly than people without a disability. Disability discrimination also occurs when people are treated less fairly because they are relatives, friends, carers, co-workers or associates of a person with a disability.

<https://www.humanrights.gov.au/our-work/legal/legislation>

- **Age Discrimination Act 2004**

Age discrimination occurs when people are treated unfavourably because of their age, or because of assumptions made about people of that age. Common examples of age discrimination include preferring to hire younger over older workers regardless of competence, refusing to consider job applications from people over pension age, or sacking younger workers when they reach the age where adult wages will apply.

However, specific laws that set age requirements are not age discrimination. For example, laws that limit alcohol sales to adults, or laws requiring that anyone aged between 6 and 17 must attend school, are not age discrimination.

<https://www.humanrights.gov.au/our-work/legal/legislation>

- **Racial Discrimination Act 1975**

Racial discrimination is when a person is treated less favourably than another person in a similar situation because of their race, colour, descent, national or ethnic origin or immigrant status. The Racial Discrimination Act aims to ensure that Australians of all backgrounds are treated equally and have the same opportunities.

This Act makes it against the law to treat you unfairly, or to discriminate against you, on the grounds of race, colour, descent, national or ethnic origin, and immigration status.

The Act also makes racial hatred against the law.

<http://www.humanrights.gov.au>

- **Sex Discrimination Act 1984**

The Act protects people from unfair treatment on the basis of their sex, sexual orientation, gender identity, intersex status, marital or relationship status, pregnancy and breastfeeding. It also protects workers with family responsibilities and makes sexual harassment against the law.

<http://www.humanrights.gov.au>

- **Ethical Principles**

Ethics is a system of moral principles that helps us determine right from wrong, good from bad. Ethical principles refer to the values of openness, honesty, integrity, impartiality, accountability, tolerance, respect for people, fairness and personal responsibility.

Many organisations have implemented Codes of Ethics which outline the ethical principles, values and behaviours expected of staff in that institution, government department, university or profession.

Most codes:

- Define ethics as a system of moral principles that allows people to determine right from wrong, good from bad behaviour in their daily life or in a situation where there is a conflict of interest
- Explain why the advertising industry needs a code of ethics
- Set out how to behave in situations where there are ethical dilemmas
- Identify 10 basic principles as part of its voluntary code which it believes is 'doing the right thing'.

It is important that businesses are in tune with the wishes of the society they serve or they run the risk of tarnishing their image, and alienating their shareholders, stakeholders and customers. This would be bad for business, reducing growth and potentially affecting profit.

- **Codes of Practice**

Codes of Practice are sets of guidelines and regulations to be followed by members of some profession, trade, occupation, organisation etc. They are not usually covered by law, but rather by agreement of participants or members. Data in the Codes of Practice database consists of several different types - Codes of Practice (Australian & International) and Standards (Australian & International).

<http://www.business.gov.au/business-topics/selling-products-and-services/fair-trading/Pages/codes-of-practice.aspx>

- **Privacy Laws**

The *Privacy Act 1988* (Privacy Act) is an Australian law which regulates the handling of personal information about individuals. This includes the collection, use, storage and disclosure of personal information, and access to and correction of that information. The Privacy Act includes:

1. 13 Australian Privacy Principles that apply to the handling of personal information by most Australian and Norfolk Island Government agencies and some private sector organisations
2. Credit reporting provisions that apply to the handling of credit-related personal information that credit providers are permitted to disclose to credit reporting bodies for inclusion on individuals' credit reports.

The Privacy Act also:

3. Regulates the collection, storage, use, disclosure, security and disposal of individuals' tax file numbers
4. Permits the handling of health information for health and medical research purposes in certain circumstances, where researchers are unable to seek individuals' consent
5. Allows the information commissioner to approve and register enforceable app codes that have been developed by an app code developer, or developed by the information commissioner directly

6. Permits a small business operator, who would otherwise not be subject to the Australian privacy principles (apps) and any relevant privacy code, to opt-in to being covered by the apps and any relevant app code
7. Allows for privacy regulations to be made.

<http://www.oaic.gov.au/privacy/privacy-act/the-privacy-act>

- **Policies and Guidelines**

Policies are written by organisations to ensure that staff and stakeholders act responsibly and make rational, well-informed decisions. They help it to be consistent in its approach to decision-making and problem-solving across the organisation's locations if appropriate. In order for staff and stakeholders to understand their responsibilities within the organisation, it is very important that policies and procedures are adopted and clearly communicated to everyone.

Guidelines are developed to assist and guide members in the workplace in relation to policy implementation. Guidelines are also intended to complement the development of local workplace policies and protocols.

Policies are written by organisations to ensure that staff and stakeholders act responsibly and make rational, well-informed decisions. They help it to be consistent in its approach to decision-making and problem-solving across the organisation's locations if appropriate. In order for staff and stakeholders to understand their responsibilities within the organisation, it is very important that policies and procedures are adopted and clearly communicated to everyone.

A policy is a formal statement of a principle or rule that members of an organisation must follow. Each policy addresses an issue important to the organisation's mission or operations.

A procedure tells members of the organisation how to carry out or implement a policy.

Policy is the 'what' and the procedure is the 'how to'.

Policies are written as statements or rules. Procedures are written as instructions, in logical steps.

Define Performance Requirements

- **Budget:** Document creation will cost your organisation money in terms of resources used and the time of those involved in the process. Attempt to estimate each of these costs and look at the amount of money allocated to you.
- **Accuracy and validity:** The document will be required to provide accurate and valid data to the organisation, so you will need to look at how you can ensure:
 - Data is valid
 - You have accurate information about mail merge
 - Look at how data between different databases is interrelated.

- **Inputs and Outputs:** Look at what is entered and what is outputted including:
 - Reports generated by the system
 - Relationship between systems
 - Allowing data to be entered electronically.

You must also look at the methods that are to be used to deal with failures and contingencies. There is nothing worse than seeing your system going down and wondering what on earth is going to happen to all the data in the system.

Consider what you would do if your main servers are not working in the way you desire them to. What would you, as an organisation, have in place to ensure continuity? Consider the methods used for backing up your documents and restoring data that could potentially be lost. How often would backups and checkpoints be saved for rolling the servers back as required?

If major issues such as complete electricity failure must also be considered, you may then fallback to manual procedures for a given time. This is often the case in critical functions such as hospitals, where if all else fails the contingency procedure is to fall back to backup procedures. This would then require additional functions regarding how this data is then entered back into the system at a later date.

Often a complete failure does not occur; rather you will have the system not working up to a desired level of performance. In these cases you need to have contingency plans for eliminating any non-essential processing until full performance is back online to prevent slowness within the system for critical functions.

Define Operational Environment

The next step in defining the system behind document development is to consider the environment within which your system will be required to operate, This will include a discussion of:

- **Operational Considerations**
 - Data transfer rates
 - Where data needs to be moved from and to
 - Communication media within the organisation and external to it
 - Interface type being developed
 - Procedures
 - Range of data to be transferred.
- **Software and Hardware**
 - What type of software is being used
 - Level of hardware within the system

- Networking equipment and format
- Storage requirements and capabilities.
- **Service Volumes**
 - How much data do you expect to flow through a system at peak times?
 - How much data do you anticipate storing every month, every year?
 - What level of data processing do you expect to process?
 - What level of outputs do you anticipate processing?

- **Estimate What You Need in Terms of Software and Hardware**

Now that you have considered changes that need to be made to the system, consider exactly what you need to make changes to and outline these changes in terms of:

- Data transfer rates
- Ability to embed data
- Ability to export data
- Ability to transfer or email data
- Do you require?
 - › Form fields
 - › Formulae
 - › Ability to import data
 - › Ability to make a table of contents or index
 - › Mail merging
 - › Linking data
 - › Creation of macros
 - › Sorting data
- What level of support do you desire?
- How easy to maintain is the data?
- Will it run on current systems?
- Define hardware requirements in terms of:
 - › Quantity
 - › Size
 - › Any specialist equipment needed

This then puts you in a position to outline the requirements for your new document system.

Key Points Element 1



- There is a great cost involved in designing, developing and implementing a new range of documents.
- Documentation development is often included in a re-branding process.
- A thorough investigation should be conducted prior to deciding to design and develop new documents.
- Identify all functional requirements the documents are expected to fulfil.
- Briefly describe current documents employed to satisfy existing requirements.
- Provide an explanation of how the proposed documents will interact with processes that the proposed documents will support.
- Describe any organisational impacts that may occur, including branding impact and addition or elimination of responsibilities that may be required when using the proposed system.
- Include a discussion of impacts on the organisation during use of the proposed documentation.
- Discuss all user impacts on development and all user efforts required before implementation of the development and design of documents.
- Describe any user assumptions and constraints that will affect development and operation of the documents.
- Identify all performance requirements the documentation is expected to meet.
- Define the operational environment in which the document system will be required to perform.
- Determine hardware and software expected to be required to operate the proposed document system.
- Include such hardware items as number and type of storage devices required, specialised input devices, and number and type of printers required.
- Discuss possible failures of the hardware or software systems, the consequences (in terms of system performance) of such failures, and the alternative courses of action that may be taken to satisfy information requirements.

Element 1 – ‘True’ or ‘False’ Quiz

		True	False
Q	Requirements for the number and skills of additional personnel, including changes in authorised strength, location and position, should be identified.	✓	
Q	Accuracy requirements to be imposed on the system, should be described.	✓	
Q	It is important to identify such software as languages, compilers, the operating system, report and code generators, database management systems, and text editors.	✓	
Q	Discussion of limitations affecting desired capability is not necessary until implementation.		✓
	Do discuss limitations.		
Q	Identify all performance requirements the documentation is expected to meet.	✓	
Q	If hardware and software items are not currently in place, document the plan for acquiring them in the System Support Plan.	✓	
Q	In the event that a primary system element is dysfunctional, backup requirements for ensuring continued achievement of document functions should be described in advance.	✓	
Q	Provision of the best information will allow the best decision.	✓	
Q	The steps for investigation are different for every project.		✓
	The steps for investigation are much the same for any project.		