



Australian Government

SIRXADM002A Coordinate retail office

Revision Number: 2

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Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to coordinate a retail office. It involves maintaining office procedures, processing data in response to information requests, composing reports and correspondence, maintaining recording and filing systems and maintaining digital storage media and computer filing systems.

Application of the Unit

This unit applies to team member who coordinate a retail office, responding accurately and appropriately to requests for information and maintaining records and filing systems, including computerised records, according to store policy and procedures. Those with managerial responsibility undertake this unit.

Licensing/Regulatory Information

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

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
1. Maintain office procedures.	<p>1.1. Monitor, record and <i>order</i> office supplies as required according to <i>store policy and procedures</i>.</p> <p>1.2. Implement store policy and procedures in regard to <i>special requests and requirements</i>, according to set timeframes.</p>
2. Process data in response to information requests.	<p>2.1. Document requests for information and identify responses according to store policy.</p> <p>2.2. Identify <i>relevant external information sources</i>.</p> <p>2.3. Obtain <i>access to identified sources</i>.</p> <p>2.4. Access and extract <i>relevant information</i>.</p> <p>2.5. Identify and offer <i>options and alternatives</i> where available information does not match defined needs.</p> <p>2.6. Accurately copy or summarise extracted information.</p> <p>2.7. Compile and update appropriate records required for regulatory compliance to maintain security and confidentiality of contents.</p>
3. Compose reports and correspondence.	<p>3.1. Collate relevant information and edit as required.</p> <p>3.2. Use clear, concise, easily understood language when writing text.</p> <p>3.3. Use correct spelling, punctuation and grammar.</p> <p>3.4. Draft and set out correspondence and reports according to store policy.</p> <p>3.5. Produced edited report and dispatch to <i>relevant personnel</i>.</p> <p>3.6. Copy and securely file final report according to store policy.</p>
4. Maintain existing recording and filing systems.	<p>4.1. Maintain <i>recording and filing systems</i> according to store policy.</p> <p>4.2. Allocate new documents to designated category.</p> <p>4.3. Monitor the issue and return of documents to ensure the integrity of the system is maintained.</p> <p>4.4. Archive, remove and update documents to ensure appropriate space available for current records.</p> <p>4.5. Identify and locate required files and dispatch to nominated person or section within designated time limits.</p>

- 4.6. Monitor and record file and document movements.
- 4.7. Maintain documents in good condition and in correct location.
- 4.8. Separate confidential files from general files, with access available to nominated personnel only.
- 4.9. Monitor security system to ensure issued files are traceable at all times.
- 5. Maintain computer storage media.
 - 5.1. Maintain storage media and filing system according to store policy and procedures.
 - 5.2. Format **digital storage media** using correct procedures.
 - 5.3. Create back up files to ensure safety, security and confidentiality of files is maintained.
 - 5.4. Store back up files in the designated manner and location.
 - 5.5. Regularly perform virus checks on the system and back up storage media.
 - 5.6. Store **hardware** according to manufacturer instructions.
 - 5.7. File and store software according to organisational procedures.
 - 5.8. Observe **Work Health and Safety (WHS) guidelines** relating to screen based equipment and ergonomic work stations.
- 6. Maintain computer filing system.
 - 6.1. Determine document filing requirements.
 - 6.2. Create a filing system that reflects the size, nature and complexity of the workplace.
 - 6.3. Implement security checks where necessary.
 - 6.4. Add file names to the filing system as required.
 - 6.5. Update the filing system regularly by deleting or archiving old files.
 - 6.6. Exit programs according to screen prompts to preserve data.

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills

- literacy and numeracy skills to:
 - process, record and document information
 - write reports
 - use various computer software packages
- interpersonal communication skills to:
 - deal with information requests through clear and direct communication
 - ask questions to identify and confirm requirements
 - share information
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication

Required knowledge

- store policy and procedures in regard to:
 - store administration and financial systems
 - systems and methods for organisation of work routine
 - appropriate clerical or office systems
 - mail procedures
 - transport procedures, including cab charge and courier systems
 - systems and procedures for processing information
- types and functions of records management systems
- types and functions of office technology, including:
 - computer
 - printer
 - software packages
 - installation of hardware and software packages
 - software licensing requirements
- relevant WHS requirements in relation to the retail office
- principles and techniques in interpersonal communication skills

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- consistently implements workplace office procedures
- responds accurately and appropriately to requests for information according to store policy
- consistently applies procedures for maintaining records and filing system, including computerised records.

Context of and specific resources for assessment

Assessment must ensure access to:

- a retail work environment
- sample policy and procedures in regard to:
 - store administration and clerical or office systems
 - processing of information
 - format and technical vocabulary
 - WHS legislation and codes of practice
- a range of office equipment, including:
 - computer
 - printer
 - software packages
 - a work team.

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- third-party reports from a supervisor
- answers to questions about specific skills and knowledge
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

Ordering procedures may include:

- fax
- phone
- email
- internet.

Store policy and procedures in regard to:

- store administration and clerical systems
- document format and technical vocabulary.

Special requests and requirements may include:

- mail
- ordering of stock
- bill payment
- taxation paperwork
- courier service
- transport, e.g. taxi, cab charge
- special mail procedures.

External information sources may include:

- distributors
- suppliers
- manufacturers
- technical support personnel
- maintenance personnel.

Modes of ***access to identified sources*** may include:

- contact person
- contact details.

Relevant information may include:

- orders
- files
- letters
- correspondence
- warranties.

Options and alternatives may be limited by:

- regulatory requirements
- cost-effectiveness
- store policy.

Relevant personnel may include:

- relevant managers
- supervisor
- team leader.

Recording and filing systems may be:

- paper-based
- electronic.

Digital storage media may

- floppy disk
- USB drive

include:

- zip disk
- CD-ROM
- DVD-ROM
- digital tape
- external hard drive.

Hardware may include:

- computer
- keyboard or typewriter
- printer
- scanner
- monitor
- mouse
- storage media.

OHS guidelines may include:

- lighting
- seating
- posture
- ventilation
- glare and reflection
- keyboard equipment and radiation
- eye strain
- setting up work stations.

Unit Sector(s)

Cross-Sector

Competency field

Administration