My Department Stores Information Management Policy and Procedure

Information Management Policy and Procedure

Policy Statement

My Department Stores is committed to using staff record keeping practices to protect the information of customers and staff. Information must be organised and maintained to ensure that staff can easily access useful and current information.

Collecting Information

Information is collected from staff, customers and other stakeholders for a variety of reasons.

Staff may collect information using:

- Surveys
- Interviews
- Meetings
- Accessing records
- Informal discussions

Information Quality

Information which is collected for business tasks or project (such as reviewing customer satisfaction, bookkeeping, or preparing reports), it should be collected from reliable sources that are believable and relevant.

When information is collected, it should be checked to ensure it is valid. Valid information is:

- Clear (easy to understand)
- Current (recent or for a period of time that is being reviewed)
- Accurate (complete and correct)
- Relevant (related to the information need)

Permission

Information should not be collected from staff, customers or other stakeholders without their permission. Staff should ensure that the person providing the information understands why it is being collected and how it will be used.

Interviewing Procedure

The following steps should be completed when information is collected in an interview:

1. Prepare questions

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2. Ask the interviewee to participate
3. Arrange a time and place to complete the interview
4. Ask the interview questions
5. Document the interviewee's answers

Surveying Procedure

The following steps should be completed when information is collected in a survey:

1. Prepare questions
2. Prepare a survey form
3. Select target group to survey
4. Distribute the survey
5. Collect survey answers
6. Review survey results

Organising Information

When information is collected, it should be organised in a way that allows it to be used by My Department Stores staff to make decisions.

Formatting Information

Information should be organised in a clear easy to understand format and follow My Department Stores style requirements for fonts, colours, headers and footers, tables of contents, and version control.

Organising Data

Information will often contain data which can be presented visually to assist readers in understanding the information. When possible and appropriate staff should use graphs and charts to display data.

For example:

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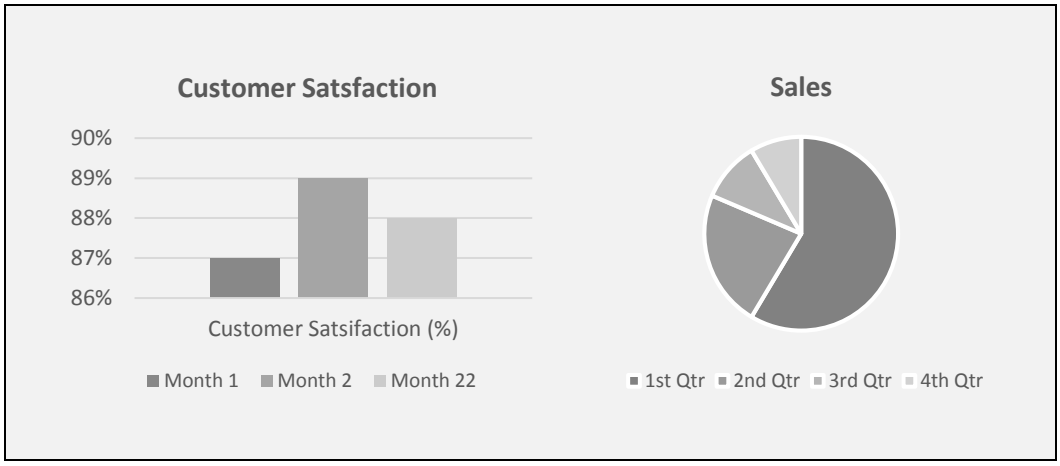

Prepare Summaries of Information Procedure

The following steps should be completed when preparing summaries of information:

1. Collect information (see Collecting Information)
2. Select key points of information to include in the summary
3. Create a new document in MS Word, Pages (or another software)
4. Prepare document outlining each key point. Include:
    - Headers
    - Table of Contents
    - Graphs or charts (when needed)
    - My Department Stores fonts, colours, and logo
5. Complete and spelling and grammar check
6. Save a copy of the summary
7. Print the summary to distribute

Storing Information

Information may be stored on the My Department Stores server, or using an online file sharing platform. My Department Stores staff may use Box; www.box.com, Dropbox; www.dropbox.com, or Google Docs; https://docs.google.com/.

File Naming Conventions

All documents should be saved using the following file naming convention:

[File Name] ([Author Name]) [DDMMYYYY]

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For example:

Customer Survey Results (John Smith) 04072018

Folders

Information should be organised into folders when it is stored on the My Department Stores server, or using an online file sharing platform. Folders should be named so that it is easy for staff to identify what information will be contained in each folder.

For example:

- **Policies and Procedures**
  - Customer Service Policy and Procedure (John Smith) 01032017
  - Information Management Policy and Procedure (John Smith) 28042017
- **Survey Results**
  - Customer Survey Q1 2018 (John Smith) 13042018
  - Customer Survey Q2 2018 (John Smith) 21072018
  - Staff Survey Q2 2018 (John Smith) 09042018
  - Staff Survey Q2 2018 (John Smith) 17072018

Privacy and Security

Records which contain sensitive or private information (such as customer or staff details) must be stored securely in a way that protects the customer or staff member's privacy.

Private information can be protected by:

- Redacting/removing personal details
- Limiting the people who can access the information
- Using passwords

Staff should be aware of the requirements of the Privacy Act 1988 (https://www.oaic.gov.au/privacy-law/privacy-act/) and Australian Privacy Principles (https://www.oaic.gov.au/privacy-law/privacy-act/australian-privacy-principles).

Storing Information Procedure

The following steps should be completed when storing information:

1. Set up an organised Folder structure to save files into
2. Set passwords for folders (when applicable)
3. Redact any private information from documents (when applicable)
4. Save files using My Department Stores File Naming Conventions

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5. Move files into the most relevant folders

Distributing Information

Information which is shared within the My Department Stores business should be clear, organised and formatted professionally. Refer to Organising Information

Information which is shared with stakeholders or customers outside of the My Department Stores business should be reviewed by the Marketing team before distribution.

Privacy
Internal business information may not be shared outside of My Department Stores without permission from management.

Staff will often work with private and sensitive information as part of their roles. When information is distributed to stakeholders within My Department Stores who do not typically have access to this information, it should be protected.

Privacy can be protected when distributing information by:

- Redacting/removing personal details
- Seeking permission to share information from the party the information is about

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