



# SYLLABUS

## SECRETARIAL OFFICE TECHNIQUES 2

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### OBJECTIVE

To enable the secretarial student, with the required knowledge of the secretarial profession and with skills in office procedure, to perform with self-confidence the role of a general/computer or private secretary.

### RECOMMENDED TEXTBOOKS

Since the field of study is so varied, it is not possible to recommend one textbook only. However, the examiner is in the process of compiling a set of notes to cover certain topics, which may be difficult or impossible to find in any of the recommended textbooks.

These are as follows:

Administrative Office Management, by B Keeling & N Kallaus: SouthWestern Education Publishing, Cincinnati, Ohio.

Office Practice, by F Eksteen: Nassou Latest edition.

On a Point of Order, BY HF Jooste: Pitman, Latest Edition

The Perfect Private Secretary, by JF Louviaux

### SYLLABUS

#### 1. ERGONOMICS

- 1.1 Creating a safe and comfortable working environment
- 1.2 Safety and security problems and controls
- 1.3 Physiological factors
  - 1.3.1 Colour
  - 1.3.2 Lighting
  - 1.3.3 Noise/music
  - 1.3.4 Temperature
  - 1.3.5 Plants
  - 1.3.6 Cleanliness
  - 1.3.7 Floor covering
  - 1.3.8 Energy conservation
- 1.4 Office space
  - 1.4.2 Conventional office
  - 1.4.3 Open plan office
- 1.5 Office furniture
  - 1.5.1 Desk
  - 1.5.2 Chair
- 1.6 Value of rest periods and work breaks

- 1.7 Choice of tools and aids
  - 1.8 Choice of equipment and technology
  - 1.9 Space utilisation for effectiveness
  - 1.10 Features and fittings
  - 1.11 Features of a good office
- 2. RECORDS MANAGEMENT**
- 2.1 Control of files (removal/return)
  - 2.2 Follow-up system
  - 2.3 Possible causes for poor filing system
  - 2.4 Transfer to archives
- 3. TIME MANAGEMENT**
- 3.1 Importance of time management
  - 3.2 Suggestions for effective use of time
  - 3.3 Obstacles to proper time management
  - 3.4 Resistance to planning
  - 3.5 Required skills for effective planning
  - 3.6 Designing an efficient time management schedule (time sheet)
  - 3.7 The office diary
- 4. STATIONERY AND STOCK CONTROL**
- 4.1 Stock control card system
  - 4.2 Maximum/minimum stock and re-ordering
  - 4.3 Determining the re-order level of stock
  - 4.4 Advantages of stock control
  - 4.5 Efficient organisation of stationery stock room
  - 4.6 Functioning of a computerised stock control system
- 5. BUSINESS INFORMATION MANUAL/DOSSIER**
- 5.1 Contents
  - 5.2 Sources of reference
  - 5.3 Regular updating
- 6. DEALING WITH DIFFICULT SITUATIONS AND PEOPLE**
- 6.1 From clients, supervisors, colleagues, subordinates
    - 6.1.1 Complaints
    - 6.1.2 Aggression
    - 6.1.3 Persistence
    - 6.1.4 Criticism
    - 6.1.5 Unfair pressure
    - 6.1.6 Disrespect of access control
    - 6.1.7 Gossip
    - 6.1.8 Breach of confidentiality
    - 6.1.9 Sexual harassment
  - 6.2 Manager's failure to
    - 6.2.1 return messages
    - 6.2.2 set priorities
    - 6.2.3 convey expectations
    - 6.2.4 communicate clearly
    - 6.2.5 be consistent
    - 6.2.6 inform you of his/her whereabouts or time of return

- 6.3 Messengers
  - 6.3.1 Instructions and directions
  - 6.3.2 Security
  - 6.3.3 Co-ordination routines
  - 6.3.4 Systems of control and monitoring
  - 6.3.5 Handling collections
  - 6.3.6 Route planning
  - 6.3.7 External messengers

## **7. BUSINESS RECEPTIONS AND SOCIAL FUNCTIONS**

- 7.1 Definition of
  - 7.1.1 Conference
  - 7.1.2 Seminar
  - 7.1.3 Symposium
  - 7.1.4 Convention
  - 7.1.5 Congress
  - 7.1.6 Annual general meeting
  - 7.1.7 Committee meeting
- 7.2 Organisation
  - 7.2.1 Choice of venue
  - 7.2.2 Setting of budget
  - 7.2.3 Nature and length of gathering
  - 7.2.4 Guest speakers, guest of honor, master of ceremonies
  - 7.2.5 Invitations/advertisements/notes
  - 7.2.6 Planning of events (programme)
  - 7.2.7 Accommodation, transport, parking
  - 7.2.8 Sub-committee to arrange function
  - 7.2.9 Seating arrangements
  - 7.2.10 Delegates' folders
  - 7.2.11 General publicity
  - 7.2.12 Refreshments, incidentals
  - 7.2.13 Speakers' notes
  - 7.2.14 Audio-visual and presentation aids
  - 7.2.15 Registration procedure
  - 7.2.16 Message service for delegates
  - 7.2.17 Signage
  - 7.2.18 Regular feedback to manager
- 7.3 Secretary's role during the event
- 7.4 Secretary's role after the event

## **8. TRAVEL ARRANGEMENTS**

- 8.1 Method of arranging
- 8.2 Planning with manager
- 8.3 Preparing itinerary
- 8.4 Making reservations/accommodation arrangements
- 8.5 Travel documents
  - 8.5.1 within the borders of the country
  - 8.5.2 internationally

- 8.6 Travel information file
- 8.7 Car rental
- 8.8 Checklist for employer
- 8.9 Office routine before the trip
- 8.10 Duties during employer's absence
- 8.11 Duties after employer's return

## **9. CORRESPONDENCE**

- 9.1 Preparation of responses for manager's approval
- 9.2 Develop approved writing style
- 9.3 Typical documents (preparation, presentation)
  - 9.3.1 Business letters
  - 9.3.2 Memorandum
  - 9.3.3 Reports
  - 9.3.4 Circulars
  - 9.3.5 Press releases
- 9.4 Presentation material
  - 9.4.1 Transparencies
  - 9.4.2 Slides
  - 9.4.3 Video
- 9.5 Business cards

## **10. CASH CONTROL**

- 10.1 Remittance register
- 10.2 Basic wage system
- 10.3 Petty cash management
- 10.4 Depositing money
- 10.5 Internal claims
- 10.6 General cash control
- 10.7 Methods of payment
  - 10.7.1 Cash on delivery
  - 10.7.2 Credit card
  - 10.7.3 Cheque
  - 10.7.4 Cash

## **11. BANKING SERVICES**

- 11.1 Cheque account
  - 11.1.1 Procedure for opening
  - 11.1.2 Advantages
  - 11.1.3 Disadvantages
  - 11.1.4 Other services offered by banks
- 11.2 Cheques
  - 11.2.1 Completion
  - 11.2.2 Signing
  - 11.2.3 Crossing and endorsing

- 11.3 “Plastic money”
  - 11.3.1 Credit card
  - 11.3.2 AYM card
  - 11.3.3 Charge account card
  - 11.3.4 Phone card
  - 11.3.5 Garage and petrol cards

## **EXAMINATIONS**

**All questions will carry equal marks and students will be given a choice of eight questions from which they will be required to answer any five.**

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