



## SYLLABUS

### SECRETARIAL OFFICE TECHNIQUES 1

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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 junior secretary.

#### RECOMMENDED TEXTBOOKS

Since the field of study is so varied, it is not possible to recommend one textbook only.

Business & Office Administration: A guide to Business Administrators and Managers – Book 1:  
Hernemans Educational Publishers ISBN 0796201854

Office Practice for Management Assistants: Rensu Nel & Truter Vogel: Hernemans Educational Publishers  
ISBN 1868538737

#### SYLLABUS

##### 1. THE SECRETARY

###### 1.1 Profile

- 1.1.1 Personal appearance
- 1.1.2 Personal characteristics

###### 1.2 Training and development

- 1.2.1 General education
- 1.2.2 Specialised training
- 1.2.3 Development opportunities

###### 1.3 Functions and duties

###### 1.4 Remuneration structure

- 1.4.1 Basic
- 1.4.2 Leave
- 1.4.3 Benefits
- 1.4.4 Other

###### 1.5 Promotion opportunities

- 1.5.1 Within the post structure
- 1.5.2 Outside the post structure

###### 1.6 Sources of information

- 1.6.1 Internal sources
- 1.6.2 External sources

- 1.6.3 Travel and accommodation sources
- 1.6.4 Social and cultural sources

#### 1.7 Interpersonal relationships

- 1.7.1 Employer
- 1.7.2 Colleagues
- 1.7.3 Subordinates
- 1.7.4 Outside world
- 1.7.5 Cross-cultural relationships

#### 1.8 Basic work etiquette

- 1.8.1 Report your whereabouts
- 1.8.2 Obtain permission to leave early or arrive late
- 1.8.3 Boring/repetitive tasks – conscientiousness
- 1.8.4 Get to know colleagues
- 1.8.5 Be yourself
- 1.8.6 Be happy – develop and grow

#### 1.9 Business receptions and social functions

- 1.9.1 Planning
- 1.9.2 Invitations/rejections/acceptances/thanks
- 1.9.3 Conduct at receptions and functions
- 1.9.4 Introductions

### 1. THE TELEPHONE

- 2.1 Communication device
- 2.2 Necessity
- 2.3 Technological advances
- 2.4 Suitable system to meet needs of organisation
- 2.5 Types
- 2.6 General rules
- 2.7 Incoming calls
- 2.8 Outgoing calls
- 2.9 Telephone messages
- 2.10 Telephone aids
- 2.11 Telecommunication Services
  - 2.11.1 Cell phones
  - 2.11.2 Teleconferencing
  - 2.11.3 Video conferencing
  - 2.11.4 Facsimile
  - 2.11.5 Voice message/mail

### 2. RECEPTION

- 3.1 Personality traits as pre-requisite
- 3.2 Arranging appointments
- 3.3 Reception of visitors
- 3.4 Cancelling appointments
- 3.5 Useful hints

### **3. MAILROOM SERVICES**

#### **4.1 Handling correspondence**

- 4.1.1 Incoming mail
- 4.1.2 Outgoing mail
- 4.1.3 Internal mail

- 4.2 Equipment in the mailroom
- 4.3 Remittance registers
- 4.4 Services rendered by the Post Office
- 4.5 Guidelines towards quick and efficient delivery of mail
- 4.6 Useful hints about mail
- 4.7 Registered and Insured mail
- 4.8 Priority mail
- 4.9 Business Reply Services or Free Post Service
- 4.10 Bulk posting
- 4.11 Delivery of mail
- 4.12 Parcel service
- 4.13 General update from Post Office

### **4. PREPATION OF CORRESPONDENCE**

- 5.1 Transmitting information to secretary
- 5.2 Preparation of correspondence
- 5.3 Template/shell document
- 5.4 Drafting of correspondence
- 5.5 Enclosures
- 5.6 Copies for attention of third parties
- 5.7 The envelope
- 5.8 Presentation of documents for signature
- 5.9 Choosing method of dispatch

### **5. REPROGRAPHY**

- 6.1 Essentials of a good copy
- 6.2 Factors determining the most suitable process
- 6.3 Reprographic processes
  - 6.3.1 Carbon paper process
  - 6.3.2 Photocopying
  - 6.3.3 Computers

### **6. RECORDS MANAGEMENT**

#### **7.1 Filing**

- 7.1.1 Definition
- 7.1.2 Filing systems
  - 7.1.2.1 Centralised
  - 7.1.2.2 Decentralised
- 7.1.3 Essentials of a good filing system
- 7.1.4 Filing equipment
- 7.1.5 Filing methods

- 7.1.6 Classification of files
- 7.1.7 Alphabetical arrangement of files
- 7.1.8 Numerical arrangement of files
- 7.1.9 Colour coding
- 7.1.10 Filing procedure
- 7.2 Indexes
- 7.3 Electronic document storage and retrieval

## **7. MEETINGS**

- 8.1 Definition
- 8.2 Control of meetings
- 8.3 Types of meetings
- 8.4 Procedure for convening a meeting
  - 8.4.1 Validity of a meeting
  - 8.4.2 Requirements for valid Notice of Meeting
  - 8.4.3 Agenda
- 8.5 Register of Members and attendance list
- 8.6 Minutes
  - 8.6.1 Methods
  - 8.6.2 Characteristics of good minutes
  - 8.6.3 Rules regarding keeping minutes
  - 8.6.4 Signing of minutes
  - 8.6.5 Amendments to minutes
- 8.7 Hints for the secretary
  - 8.7.1 Before the meeting
  - 8.7.2 At the meeting
  - 8.7.3 After the meeting

## **8. EMERGENCY SERVICES AND SECURITY**

- 9.1 Firm's own safety and security policy
- 9.2 Security clearance for personal and visitors
- 9.3 Desk-top and workstation security
- 9.4 Industrial espionage
- 9.5 Safeguarding classified information
- 9.6 Computer access
- 9.7 Fire
- 9.8 Bomb scare
- 9.9 Minor injuries

## **EXAMINATION**

All questions will count between 4 & 10 marks.

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