



SYLLABUS

SECRETARIAL OFFICE TECHNIQUES 2

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. 1996.

Office Practice, by F Eksteen: Nassou 1994.

On a Point of Order, BY HF Jooste: Pitman

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 or 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 count between 6 & 10 marks.

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