



# SYLLABUS

## SECRETARIAL OFFICE TECHNIQUES 3

### 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 an executive secretary or personal assistant.

### 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:

Office Administration I, S Steenekamp & M Bekker: Lexicon. 1987.

Office Administration II, by S Steenekamp & M Bekker: Lexicon. 1987.

Administrative Office Management, by B Keeling & N Kaliaus: South-Western Education Publishing, Cincinnati, Ohio. 1996.

Office Practice, by F Eksteen: Nassou 1994.

### SYLLABUS

#### 1. MANAGEMENT FUNCTIONS AND ACTIVITIES

##### 1.1 Levels of management

- 1.1.1 Vertical (top, middle, lower)
- 1.1.2 Horizontal (functional)

##### 1.2 Functions of management

- 1.2.1 Planning
- 1.2.2 Organisation
- 1.2.3 Leadership/Direction
- 1.2.4 Control
- 1.2.5 Other (communication, delegation, co-ordination)

##### 1.3 Departments (some activities/tasks that are performed in each)

- 1.3.1 Public Relations
- 1.3.2 Personnel/Human Relations
- 1.3.3 Finance
- 1.3.4 Administration
- 1.3.5 Production
- 1.3.6 Purchasing
- 1.3.7 Sales
- 1.3.8 Marketing

#### 1.4 Organisation chart

##### 1.4.1 Horizontal functions

##### 1.4.2 Vertical functions

### 2. SCANNING THE MEDIA

#### 2.1 Why is it necessary to scan the media?

#### 2.2 Media scanning strategy/method

#### 2.3 Summarising/highlighting relevant information

#### 2.4 System for storing and indexing useful information obtained

#### 2.5 Circulation lists for magazines

### 3. FORMS OF OWNERSHIP

#### 3.1 Sole proprietor

#### 3.2 Partnership

#### 3.3 Close Corporation

#### 3.4 Private Company

#### 3.5 Public Company

The following characteristics of each of the above:

- ❖ Name
- ❖ Membership
- ❖ Establishment procedures
- ❖ Advantages
- ❖ Disadvantages
- ❖ Capital structure
- ❖ Legal personality
- ❖ Comparisons between various types of ownership
- ❖ Dissolution
- ❖ Management and control

### 4. INSURANCE

#### 4.1 Terminology

##### 4.1.1 Insurance contract

##### 4.1.2 Indemnification

##### 4.1.3 Insurer and Insured

##### 4.1.4 Premium

##### 4.1.5 Good faith (uberima fides)

##### 4.1.6 Ceding

##### 4.1.7 Contribution

##### 4.1.8 Subrogation

#### 4.2 Fire insurance

#### 4.3 Fidelity guarantee

#### 4.4 Pension and Provident fund

#### 4.5 Annuities

#### 4.6 Unemployment Insurance Fund

#### 4.7 Workmen's Compensation

#### 4.8 Medical Insurance

#### 4.9 Group Insurance

#### 4.10 Motor Vehicle Insurance

#### 4.11 Travel Insurance

#### 4.12 Accident Insurance

## **5. HUMAN RESOURCES**

### **5.1 Forecasting of**

- 5.1.1 Job analysis
- 5.1.2 Job specification
- 5.1.3 Job description
- 5.1.4 Job enhancement
- 5.1.5 Job enrichment

Be able to write a forecast, using previous headings, for

Dictaphone/shorthand typist  
General/computer secretary  
Private secretary  
Executive secretary  
Personal assistant

### **5.2 Recruitment**

- 5.2.1 Definition of recruitment
- 5.2.2 Internal and external recruitment
- 5.2.3 Discrimination

### **5.3 Interviewing**

- 5.3.1 Curriculum vitae
- 5.3.2 Preparing to interview applicants
- 5.3.3 Expected responses from interviews

### **5.4 Selection and appointment**

- 5.4.1 Second/final interview
- 5.4.2 Acceptance of contract
- 5.4.3 Service contract

## **6. SUPERVISION**

### **6.1 Relationships with**

- 6.1.1 subordinates
- 6.1.2 colleagues/equals
- 6.1.3 superiors

### **6.2 Characteristics of a good supervisor**

- 6.2.1 Supervisor as manager
- 6.2.2 Human skills
- 6.2.3 Technical skills
- 6.2.4 Conceptual skills

### **6.3 Duties of a supervisor**

- 6.3.1 Definition of a supervisor
- 6.3.2 Liaison with management
- 6.3.3 Pleasant working environment/atmosphere
- 6.3.4 Management functions/activities

### **6.4 Motivation**

- 6.4.1 In a secretarial division
- 6.4.2 Factors of motivation

## **7. DECISION MAKING**

- 7.1 Definition
- 7.2 Types of decisions
- 7.3 Nature of decision-making
- 7.4 Decision-making process

## **8. LEGAL ASPECTS OF MEETINGS**

- 8.1 Essential of a valid meeting
- 8.2 The constitution and regulations
- 8.3 Requirements of a valid notice of meeting
- 8.4 Quorum
- 8.5 Chairman
  - 8.5.1 Election
  - 8.5.2 Powers
  - 8.5.3 Duties
  - 8.5.4 Characteristics of a good chairman
- 8.6 Motions/counter-motions/formal motions
- 8.7 Amendments
- 8.8 Points of order
- 8.9 Resolutions
- 8.10 Closure/postponement/adjournment
- 8.11 Voting procedures
- 8.12 Proxy

## **9. FINANCE**

- 9.1 Short-term financing
  - 9.1.1 Commercial banks
  - 9.1.2 Trade credit
  - 9.1.3 Bill of exchange
  - 9.1.4 Bank acceptances
  - 9.1.5 Factoring
- 9.2 Medium term financing
  - 9.2.1 Leasing
  - 9.2.2 Sale and re-hiring
  - 9.2.3 Installment sale
- 9.3 Long term financing
  - 9.3.1 Shares (ordinary and preference)
  - 9.3.2 Undistributed profit
  - 9.3.3 Value depreciation
  - 9.3.4 Reserves for obsolescence
  - 9.3.5 General reserves
  - 9.3.6 Debentures

## **10. FORMS MANAGEMENT**

- 10.1 Forms analysis
- 10.2 Layout of a form (functional considerations)
- 10.3 Physical considerations
- 10.4 Common faults in forms design

## **EXAMINATION**

All questions will count between 4 & 10 marks.

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