

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY
SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

COURSE TITLE: OFFICE PROCEDURES

CODE NO.: OPC100 **SEMESTER:** ONE

PROGRAM: OFFICE ADMINISTRATION - COMMON

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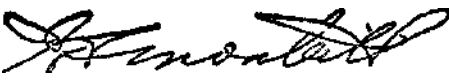
DATE: SEPTEMBER, 1989

PREVIOUS OUTLINE DATED: SEPTEMBER, 1988

New

Revision:

APPROVED;


CHAIRPERSON

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DATE

OFFICE PROCEDURES

OPC100

COURSE NAME

COURSE CODE

Total Credit Hours - 75

Prerequisite(s) - None

1. **PHILOSOPHY/GOALS**

This course is an introduction to basic office procedures and technology geared to reflect current changes in the workplace contrasting the "traditional office of yesterday with the sophisticated "electronic" office of today," Topics to be covered include time management, dictation/transcription techniques, postal requirements, appointment scheduling, travel and meeting arrangements, reprographics, telephone techniques and human relations.

II. **STUDENT PERFORMANCE OBJECTIVES**

Upon successful completion of this course, the student will have:

- 1- Gained an understanding of how a knowledge of office procedures assists the office worker in the business field.
2. Gained an understanding of the application of office procedures in both "traditional" and "electronic" offices.
3. Become familiar with the office environment in the following areas:
 - equipment
 - ergonomics
 - organization
 - human relations
4. Gained an understanding of the role and duties of a secretary (and related titles) in both the large and small business setting. Duties students will become familiar with include taking/transcribing dictation, greeting callers, handling mail responsibilities, making travel and meeting arrangements, filing and utilizing appropriate reprographic services.
5. Acquired an understanding of the various services in the business community (telecommunications, postal, courier, travel, office supply houses, equipment, vendors, etc.)

III. TOPICS TO BE COVERED

1. Filing
2. Human Relations
3. Time Management
4. Dictation/Transcription
5. Mail
- 6 • Callers/Appointments
7. City Directory
8. Telephone
- 9- Reprographics
10. Travel
11. Meetings

IV. LEARNING ACTIVITIES

CHAPTER 7 - FILING

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, as well as weekly quizzes, the student will demonstrate the ability to respond to questions in the following areas:

- describe the procedure for preparing records for filing
 - identify correspondence and card filing
 - describe methods of record transfer and storage
 - describe charge-out methods in filing
 - index and alphabetize names in alphabetic filing system
 - file relevant material using alphabetic, subject, geographic and numeric filing systems
- compare the four major filing systems listed above

LEARNING ACTIVITIES:

Text Reading: pp. 119-147
Questions: pp.146-147, 1-30
Progressive Filing Kit

ESTIMATED TIME TO ACHIEVE: (13) 50-minute periods

Chapter 1 - HUMAN RELATIONS

LEARNING ACTIVITIES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- the desirable personality traits and attitudes of an effective secretary
- the possible arrangements for assigning a secretary to more than one executive
- the priorities to be considered when scheduling secretarial work assignments
- the secretary's responsibilities when deputizing work
- methods that save time when answering telephones for a group
- methods that increase filing accuracy when filing for more than one employer
- preparing and keeping a time distribution chart

LEARNING ACTIVITIES:

Text Reading: pp. 13-25
Questions: pp. 24-29, 1-29
Production Problem: pg. 27, 1A

ESTIMATED TIME TO ACHIEVE: (4) 50-minute periods

Chapter 2 - MANAGEMENT OF WORK AND TIME

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- methods for planning work efficiently
- procedures that ensure accuracy when checking typewritten work
- ways in which slack time can be used to increase efficiency
- handling interruptions in work without wasting time
- methods of preparing for the next day's work
- the working area at a desk and the appropriate placement of equipment and supplies
- a tickler file and a reading file
- a daily plan chart

LEARNING ACTIVITIES:

Text Reading: pp. 29-43
Questions: pp. 42-43, 1-30
Production Problem: pg. 44, 2A

ESTIMATED TIME TO ACHIEVE: (6) 50-minute periods

CHAPTER 5 - DICTATION AND TRANSCRIPTION

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- efficient notebook techniques when taking shorthand dictation
- marking shorthand notes with signals and special instructions
- procedures for taking dictation over the telephone and at informal meetings
- methods for taking dictation for completion of a form
- steps taken to produce error-free transcripts from shorthand notes and dictation equipment
- methods for keeping transcripts confidential
- procedures for addressing envelopes, assembling enclosures, and folding and inserting letters in envelopes
- transcribing, arranging and submitting dictated letters for signature

LEARNING ACTIVITIES:

Text Reading: pp. 71-87

Questions: pp, 85-87, 1-30

Production Problems: pp. 88-89, 5A, 5B, 5C

ESTIMATED TIME TO ACHIEVE: (7) 50-minute periods

CHAPTER 6 - POSTAL INFORMATION AND MAIL SERVICES

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- select the most suitable classification of domestic mail service for specified items
- distinguish between the three categories of mail - domestic, U.S.A., and international
- find information regarding the application of rates of postage to items of mail
- discuss the packaging and addressing of parcels in a manner acceptable for mailing
- identify when the following methods of postage payment should be used: postage stamps, postage meters, postage-paid-in-cash permit system, and business reply mail
- define the following postal services and recognize when it is advantageous to use each service: registered mail, certified mail, insurance, money orders, special delivery, C.O.D. service, redirection of mail, and lock box and bag service
- list the various kinds of common "courier" services
- define "electronic" mail
- describe "Telepost" and "Intelpost" and describe how to use locally

LEARNING ACTIVITIES:

Text Reading: pp. 91-113 and Instructor Handout

Questions: pp. 113-115, 1-26

Production Problems: pp. 116-117, 6A, 6B

ESTIMATED TIME TO ACHIEVE: (11) 50-minute periods

CHAPTER 8 - OFFICE CALLERS AND APPOINTMENTS

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- schedule and cancel office appointments
- explain techniques for keeping a well-ordered appointment book
- describe the courtesies necessary when receiving office callers
- explain secretarial responsibilities regarding appointments in the following areas: (a) advance preparation;
(b) interruption of the executive or the caller;
(c) termination of the appointment
- prepare a daily appointment calendar
- type an appointment schedule from a daily calendar

LEARNING ACTIVITIES:

Text Reading: pp. 154-168
Questions: pp. 167-168, 1-25
Production Problem: pp. 169, 8A

ESTIMATED TIME TO ACHIEVE: (5) 50-minute periods

CHAPTER 9 - TELEPHONE AND TELEGRAPH USAGE

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- use a telephone directory to locate information
- describe the procedures for answering and transferring office calls
- describe the procedures for placing and receiving long distance calls
- state the various kinds of long distance service
- identify basic telephone equipment and systems
- describe auxiliary telephone services
- determine the appropriate time to call offices in other time zones
- record telephone messages on telephone message blanks
- plan and record information needed before placing calls
- describe the classes of domestic and international telegraph service
- evaluate a telegraph message for completeness and conciseness
- determine the factors which could influence the delivery of international telegrams

LEARNING ACTIVITIES:

Text Reading: pp. 173-187

Instructor Handout

Questions: pp. 196-197, 1-23

Production Problems: pp. 199-200, 9A and 9B

ESTIMATED TIME TO ACHIEVE: (5) 50-minute periods

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REPROGRAPHICS - HANDOUT

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- recognize and identify the difference between copying and duplicating
- specify which process is best suited to a variety of office reprographic needs (copy vs. duplicating)
- prepare typewritten originals for copy and facsimile masters
- discuss the necessity for controls in office copying
- identify items which are protected by law against illegal copying
- discuss the role of the copier in the integrated office
- list and discuss reprographic equipment and specialized reprographic services

LEARNING ACTIVITIES:

Reading: Instructor Handout
Jobs: Handout

ESTIMATED TIME TO ACHIEVE: (3) 50-minute periods

CHAPTER 10 - MAKING TRAVEL ARRANGEMENTS

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- list the services provided by travel agencies
- indicate the information needed before contacting a travel agent about a proposed trip
- classify the types of air-travel service
- describe the procedures for making flight, car and hotel reservations
- interpret a flight timetable
- state the requirements for acquiring passports, visas, and immunizations
- outline the secretarial responsibilities before, during and after an executive's trip
- prepare and type an itinerary
- prepare an expense account statement

LEARNING ACTIVITIES:

Text Reading: pp. 203-217
Questions: pp. 217-218, 1-27
Production Problems: pp. 219-220, 10A and 10B

ESTIMATED TIME TO ACHIEVE: (5) 50-minute periods

CHAPTER 11 - ASSISTING WITH MEETINGS AND CONFERENCE

LEARNING OBJECTIVES:

Given an in-class test consisting of T/F, fill-in, multiple choice, matching, short essay, and an application element, the student will demonstrate the ability to respond to questions in the following areas:

- describe the preliminary arrangements to be made for informal and formal meetings
- explain how to prepare notices for meetings and agendas
- describe the assembly of supportive materials before and after meetings
- compare the procedures for taking minutes in shorthand and with a tape recorder
- prepare a notice of meeting in post-card form
- compose and type minutes from rough notes

LEARNING ACTIVITIES:

Te Xt Re ad i ng: pp. 222-235
Questions: pp. 235-236, 1-28
Production Problems: pp. 237-239, 11A and IIB

ESTIMATED TIME TO ACHIEVE: (5) 50-minute periods

EVALUATION METHODS

GRADE/NUMERICAL EQUIVALENCIES :

A+	90% - 100%	CONSISTENTLY OUTSTANDING
A	80% - 89%	OUTSTANDING ACHIEVEMENT
B	70% - 79%	CONSISTENTLY ABOVE AVERAGE ACHIEVEMENT
C	60% - 69%	SATISFACTORY OR ACCEPTABLE ACHIEVEMENT
R	BELOW 60%	REPEAT - OBJECTIVES OF THE COURSE HAVE NOT BEEN ACHIEVED AND THE COURSE MUST BE REPEATED

MID-TERM REPORTING

- S - Satisfactory Progress
- U - Unsatisfactory Progress
- R - Repeat (objectives have not been met)
- NR - Grade not reported to Registrar's Office. This grade issued to facilitate transcript production when faculty, because of extenuating circumstances, find it impossible to report grades by due dates-

OPC100 METHODS OF EVALUATION

<u>Test No*</u>	<u>Weighting</u>	<u>Objective Coverage</u>
1	15%	Chapter 1 (Human Relations) Chapter 2 (Time Management)
2	20%	Chapter 5 (Dictation/Transcription) and Chapter 6 (Postal)
3	20%	Chapter 8 (Callers/Appointments)/ Chapter 9 (Telephone) and City Directory (Vernon's)
4	20%	Chapter 10 (Travel), Chapter 11 (Meetings) and Reprogphics
5	20%	Filing

PERCENTAGE OE GRADE - TESTS - 95%

PERCENTAGE OF GRADE - PRODUCTION PROBLEMS/ASSIGNMENTS - 5%

GUIDELINES RE GRADING:

1. If a student is not able to write a test because of illness, or a legitimate emergency, that student must contact the instructor prior to the test and provide an explanation which is acceptable to the instructor (medical certificates or other appropriate proof may be required). In cases where the student has contacted the instructor, and where the reason is not classified as an emergency, i.e. slept in, forgot, etc., the highest achievable grade is a "C"- In cases where the student has not contacted the instructor, the student will receive a mark of "0" on that test. **THERE WILL BE NO REWRITES OF TESTS OR QUIZZES.**
2. Production problems and any other assigned work where a "due date" has been announced are due in the assigned class period. Late assignments will not be accepted.
3. Each student will be required to keep a file in a designated classroom. This will facilitate the return of assignments, grades and any messages the Office Administration faculty need to relay to the student.
4. Field trips and guest speakers are arranged to supplement classroom activities. Attendance is mandatory. If a student is not in attendance, then the student will have a choice of either (a) a loss of 10% of the accumulative semester mark (daily) work, or (b) preparing a paper relating to the field trip or topic under discussion - particulars to be approved by instructor.

VI. REQUIRED STUDENT RESOURCES:

Textbooks;

1. Secretarial and General Office Procedures, Canadian Edition, Lucy Mae Jennings, Blanche M. Fedoruk, Prentice-Hall, Canada, inc, 1984-
2. Progressive Filing Practice Set, 9th edition, Stewart, Scharle and Kahn, McGraw-Hill Publishing Co., 1980.

Supplies:

Paperclips

Notepaper for lecture notes (type your choice)

Newsprint (file copies)

Onionskin (carbon copies)

Carbon paper (heavy duty)

Manilla File Folders - 8 1/2" x 11" (minimum of 3)

Erasing Material (duplex eraser, liquid paper, etc., instructor will advise), "Lift-off" tape

Dictionary - Webster's New World Dictionary, 3rd College Edition, Indexed Version

Note: This course outline is subject to change.

ESTIMATED COURSE SCHEDULE

Review of Course Outline	(1 period)
Filing Kits and Chapter 7 - Filing (filing class every Wednesday)	(12 periods)
Chapter 1 - Human Relations	(4 periods)
Chapter 2 - Time Management	(6 periods)
Test #1 - Chapters 1 and 2	(1 period)
Chapter 5 - Dictation & Transcription	(7 periods)
Chapter 6 - Postal Information and Mail Services	(11 periods)
Test #2 - Chapters 5 and 6	(1 period)
Chapter 8 - Callers and Appointments	(5 periods)
City Directory (Vernon's)	(2 periods)
Chapter 9 - Telephone	(5 periods)
Test #3 - Chapters 8, 9 and City Directory	(1 period)
Reprographics	(3 periods)
Chapter 10 - Travel	(5 periods)
Chapter 11 - Meetings	(5 periods)
Test #4 - Reprographics, Chapters 10, 11	(1 period)
Test #5 - Filing	(1 period)
Guest speakers	(2 periods)
Review period	(1 period)

ESTIMATED TIMETABLE ONLY

Week 1 - September 5-8

Tues., Sept. 5	Review Course Outline Students to have slip for filing kits for Wednesday
Wed., Sept. 6	Introduce Filing Kits
Thurs., Sept. 7	Chapter 1 - Human Relations
Fri., Sept. 8	Chapter 1 -

Week 2 - September 11-15

Mon./ Sept. 11	Chapter 1 -
Tues., Sept. 12	Chapter 1 -
Wed., Sept. 13	Filing Kit
Thurs., Sept. 14	Chapter 2 - Time Management
Fri., Sept. 15	Chapter 2 -

Week 3 - September 18-22

Mon., Sept. 18	Chapter 2 -
Tues., Sept. 19	Chapter 2 -
Wed., Sept. 20	Filing Kit
Thurs., Sept. 21	Chapter 2
Fri., Sept. 22	Chapter 2 -

Week 4 - September 25-29

Mon., Sept. 25	Chapter 5 - Dictation and Transcription
Tues., Sept. 26	Chapter 5
Wed., Sept. 27	Filing Kit
Thurs., Sept. 28	Chapter 5 -
Fri., Sept. 29	TEST #1 - CHAPTERS 1 &

Week 5 - October 2-6

Mon., Oct. 2	Chapter 5 -
Tues., Oct. 3	Chapter 5 -
Wed., Oct. 4	Filing Kit
Thurs., Oct. 5	Chapter 5 -
Fri., Oct. 6	Chapter 5 -

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Week 6 - October 9-13

Mon., Oct. 9
 Tues., Oct. 10
 Wed., Oct. 11
 Thurs., Oct. 12
 Fri., Oct. 13

THANKSGIVING
 Chapter 6 - Mail
 Filing Kit
 Chapter 6 -
 Chapter 6 -

Week 7 - October 16-20

Mon. r Oct. 16
 Tues-, Oct. 17
 Wed., Oct. 18
 Thurs., Oct. 19
 Fri., Oct. 20

Chapter 6 -
 Chapter 6 -
 Filing Kit
 Chapter 6 -
 Chapter 6 -

Week 8 - October 23-27

Mon., Oct. 23
 Tues., Oct. 24
 Wed. r Oct. 25
 Thurs./ Oct. 26
 Fri., Oct. 27

Chapter 6 -
 Review use of Postal Directory
 Filing Kit
 Chapter 6
 Chapter 6 -

Wee 9 - October 30-Nov. 3

Mon., Oct. 30
 Tues. I Oct. 31
 Wed./ Nov. 1
 Thurs., Nov. 2
 Fri., Nov. 3

Chapter 8 - Callers and
 Appointments
 Chapter 8 -
 Filing Kit
 Chapter 8
 TEST #2 - **CHAPTERS 5 & 6**

Week 10 - Nov. 6-10

Mon., Nov. 6
 Tues., Nov. 7
 Wed. r Nov. 8
 Thurs., Nov. 9
 Fri., Nov. 10

Chapter 8 -
 Chapter 8 -
 Filing Kit
 Vernon's Directory (handout)
 Vernon * s Directory (assignment)

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Week 11 - Nov. 13-17

Mon., Nov. 13	Chapter 9 - Telephone
Tues., Nov. 14	Chapter 9 -
Wed., Nov. 15	Filing Kit
Thurs., Nov. 16	Chapter 9
Fri., Nov. 17	Chapter 9

Week 12 - Nov. 20-24

Mon., Nov. 20	Chapter 9 - Telegram Handout
Tues., Nov. 21	Reprographics (Handout)
Wed., Nov. 22	Filing Kit
Thurs., Nov. 23	Reprographics Handout
Fri., Nov. 24	Reprographics

Week 13 - Nov. 27-Dec- 1

Mon., Nov. 27	TEST #3 - CHAPTERS 8,9, AND VERNON'S DIRECTORY
Tues., Nov. 28	Chapter 10 - Travel
Wed., Nov. 29	TEST #4 - FILING
Thurs., Nov. 30	Chapter 10 -
Fri-/ Dec. 1	Chapter 10 -

Week 14 - Dec. 4-8

Mon./ Dec. 4	Chapter 10 -
Tues., Dec. 5	Chapter 10 -
Wed., Dec. 6	Guest Speaker (if available)
Thurs., Dec. 7	Chapter 11 - Meetings
Fri., Dec. 8	Chapter 11

Week 15 - Dec. 11-15

Mon., Dec. 11	Chapter 11 -
Tues., Dec. 12	Chapter 11 -
Wed., Dec. 13	Chapter 11 -
Thurs., Dec. 14	Guest Speaker (if available)
Fri.r Dec. 15	Review Period

Week 16 - Dec. 18-20

Mon., Dec. 18	TEST #5 - CHAPTERS 10,11 AND REPROGRAPHICS
Tues., Dec. 19	
Wed., Dec. 20	
Thurs-, Dec- 21	
Fri., Dec. 22	

ESTIMATED FILING SCHEDULE

DATE	ASSIGNMENT
Wed., Sept (Week 1)	Introduction to Filing Kits Lecture - Review Rules 1-2-3-4-5, pg, 6 Homework - Kit - Jobs 1-2-3. pg. 11 - Text - Read page 119 - The Need for Filing Systems - Questions 1-3 - pp. 131-132 - Alphabetic Filing Procedures - Primary Guides, Individual Name Folders, Miscellaneous Folders - Special Guides - Colour Coding - Questions 28-30
Wed., Sept, 13 (Week 2)	Discuss Homework (take up jobs and readings) Lecture - Rules 6-7-8, pg 7 Homework - Kit - Jobs 4-5 6, pg. 11 - Text - Read pp 125-127 - Supplies, Guides, Folders and Labels - Questions 15-21 Quiz next week on Rules 1-8
Wed., Sept 20 (Week 3)	Discuss homework (take up jobs) Quiz - job #8 (Rules 1-8) Discuss homework readings Lecture - Rules 9-10-11-12, pg. 7 Homework - Kit - Jobs 9-10, pg. 13 - Text - Read pp. 127-129 Equipment for Correspondence and Cards - Housing Correspondence - Maintaining Card Files - Questions 22-24
Wed., Sept 27 (Week 4)	Discuss homework (take up jobs and readings) Lecture - Rules 13-14-15-16-17-18, pg. 8 Homework - Kit - Jobs 11-12-13-14, pp. 13-14 - Text - Read pages 124-125 - Techniques for Filing Papers - Charge- out Methods - Questions 11-14 Quiz next week on Rules 1-18

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- Wed-, Oct. 4
(Week 5)
- Discuss homework (take up jobs)
Quiz - Job #16 (Rules 1-18)
Discuss homework readings
Lecture - Rules 19-20-21-22, pg- 9
Homework - Kit - Jobs 17-18, pg. 14
- Text - pp. 119-124 - Filing
Procedures - Preparation of Papers for
Filing - Inspecting, Reading and
Indexing, Coding and Cross-Referencing
- Questions 4-10
- Wed-, Oct 11
(Week 6)
- Discuss homework (take up jobs and
readings)
Lecture - Rules 23-24-25, pg. 9
Homework - Kit - Jobs 19-20-23,
pp. 14-15
Quiz next week on Rules 1-25
- Wed-/ Oct 18
(Week 7)
- Discuss homework (take up jobs)
Quiz -Job #22 (Rules 1-25)
Lecture - Introduce Alphabetic
Correspondence Filing
Homework - Kit - Jobs 25-26-27-28 -
pp. 17-21
- Text - pp- 129-131
Records Retention and Transfer -
Retention Transfer Methods - Perpetual
Method - Periodic Method - Microfilm
and microfiche - Questions 25-27
Subject Filing - pg. 142
Quiz next week on Jobs 25-28
- Wed., Oct 25
(Week 8)
- Discuss homework (take up jobs)
Quiz - Job #31 (alphabetic
correspondence filing)
Discuss readings
Lecture - Introduce Alphabetic Subject
Filing
Homework - Kit - Jobs 32-33-34-35,
pp. 23-27
- Wed., Nov,
(Week 9)
- Discuss homework (take up jobs)
Lecture Numeric Subject Correspondence
Filing
Homework - Kit - Jobs 36-37, pp, 27-29
- Text - pp. 144-145 -
Numeric Filing
Quiz next week on subject filing

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- Wed., Nov. 8
(Week 10)
- Discuss homework (take up jobs)
 - Quiz #40 (subject filing)
 - Discuss readings
 - Lecture - Chronological Filing Practice and Numeric Card Filing
 - Homework - Kit - Jobs 41 and 42, pp. 31-35
- Wed./ Nov. 15
(Week 11)
- Discuss homework (take up jobs)
 - Lecture - Numeric Card Filing and Terminal Digit
 - Homework - Kit - Jobs 4 and 47, pp. 35-37
 - Text - pp. 142-144 - Geographic Filing
 - Quiz next week on numeric filing
- Wed., Nov. 22
(Week 12)
- Discuss homework (take up jobs)
 - Quiz - Job #48 _ **Numeric Filing**
 - Discuss homework (take up readings)
 - Lecture - Geographic Card Filing and Geographic Correspondence Filing
 - Homework - Kit - Jobs 49-51-52 - pp. 37-39
 - Quiz next week on Geographic Filing
- Wed./ Nov. 29
(Week 13)
- Discuss homework (take up jobs)
 - Quiz - Job #54 (geographic filing)
 - Final Major Test - Job #55 from kit and theory from text