# SAULT COLLEGE OF APPLIED ARTS \& TECHNOLOGY <br> SAULT STE. MARIE, ONTARIO 

Sb iq 1992
COURSE OUTLINE

| Course Outline: | OFFICE PROCEDURES |
| :--- | :--- |
| Code No, : | OPCIOO |
| Program: OFFICE ADMINISTRATION -- COMMON <br> Semester: One <br> Date: 19890901 <br> Author: Sheree Wriaht <br> Previous Outline <br> Dated: 19880901,$l$ |  |

New
Revision: X


## Total Credit Hours $=75$

Prerequisite $<$ s > - None

## I. 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 procedures 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 an alphabetic filing system
prepare cross-reference cards for alphabetic filing
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

OFFICE PROCEDURES (COMMON) - OPCIOO

## Chapter 1 - HUMAN RELATIONS

## 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:

```
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, lA

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

## Chapter 2 - HANAGEMEKT OF WORK AND TIME

LEARNING OBJECTIVES:

Given an in-class test consisting of $T / E$, jfUl-io, 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-rainute periods

OFFICE PROCEDURES (COMMON) - OPCIOO

## 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

OFFICE PROCEDURES (COMMON) - OPCIOO

## CHAPTER 6 - POSTAL INFORMATION AND MAIL SERVICES

## LEARNING OBJECTIVES:

Given an in-class test consisting of $T / E, f i l l-i n$, multiple choice, matching, short essay, and an application elejnent^ 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.5.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-ininute periods

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CITY DIRECTORY - HANDOUT
LEARNING OBJECTIVES:
The student will demonstrate the ability to:
    discuss a buyer's guide and classified directory
    discuss an alphabetical name directory which lists
    residents' names, addresses, and occupations
    discuss an alphabetical street directory of householders and
    businesses
    discuss a numerical telephone directory
LEARNING ACTIVITIES:
Instructor Handout
ESTIMATED TIME TO ACHIEVE: (2) 50-minute periods
```

OFFICE PROCEDURES (COMMON) - OPCIOO

Chapter 9 - TELEPHONE AND TELEGRAPH USAGE

LEARNING OBJECTIVES:

Given an in-class test consisting of $T / F, f i l l-i n, ~ m u l t i p l e$ 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

## 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 differences 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 $T / E, f i l l-i n, ~ m u l t i p l e$ 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, lOA and lOB

ESTIMATED TIME TO ACHIEVE: <5) SO-minute periods

## Chapter 11 - ASSISTING WITH MEETINGS AND CONFERENCES

LEARNING OBJECTIVES:
Given an In-class test consisting of $T / E$, 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:

Text Reading: pp. 222-235
Questions: pp. 235-236, 1-28
Production Problems: pp. 237-239, llA and IIB

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

## EVALUATION METHODS

GRADE/NUMERICAL EQUIVALENCIES


OPCIOO METHODS OF EVALUATION


## 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. Cdn. 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)
Typing Paper (not corrasable bond)
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 \& 2 | (1 period) |
| Chapter 5 - Dictation \& |  |
| Transcription | (7 periods) |
| Chapter 6 - Postal Information and Mail Services | (11 periods) |
| Test \#2 - Chapters 5 \& 6 | (1 period) |
| Chapter 8 - Callers \& |  |
| Appointments | (5 periods) |
| City Directory (Vernon's) | (2 periods) |
| Chapter 9 - Telephone | (5 periods) |
| Test \#3 - Chapters 8, 9 |  |
| \& 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

| 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.f Sept. 8 | Chapter 1 - |
| Week 2 - September 11-15 |  |
| Mon.f Sept. 11 | Chapter 1 - |
| Tues., Sept. 12 | Chapter 1 - |
| Wed., Sept. 13 | Filing Kit |
| Thurs., Sept. 14 | Chapter 2 - Time Management |
| Fri.f Sept. 15 | Chapter 2 - |
| Week 3 - September 18-22 |  |
| Mon.p 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 \& Transcription |
| Tues., Sept. 26 | Chapter 5 |
| Wed., Sept. 27 | Filing Kit |
| Thurs., Sept. 28 Fri. p. Sept. 29 | Chapter 5 - |
| Fri.p. Sept. 29 | TEST \#1 - CHAPTERS 1 \& 2 |
| 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
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Mon., Oct, 9
Tues., Oct. 10
Wed., Oct. 11
Thurs., Oct. 12
Fri., Oct. 13
Week 7 - October 16-20
Mon., Oct. 16
Tues., Oct. 17
Wed., Oct. 18
Thurs., Oct. 19
Fri., Oct. 20
Week 8 - October 23-27
Mon, , Oct. 23
Tues., Oct, 24
Wed, , Oct. 25
Thurs, Oct. 26
Fri, Oct. 27
Week 9 - October 30 -Nov, 3

Mon.f Oct. 30
Tues-, Oct. 31
Wed, , Nov. 1
Thurs., Nov. 2
Fri., Nov, 3
Week 10 - Nov. 6-10
Mon., Nov. 6
Tues., Nov. 7
Wed., Nov. 8
Thurs., Nov. 9
Fri., Nov. 10

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

Chapter 6
Chapter 6
Filing Kit
Chapter 6
Chapter 6

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

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

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

## Week 11 - Nov, 13-17

Mon., Nov. 13
Tues., Nov. 14
Wed., Nov. 15
Thurs., Nov. 16
Fri., Nov. 17
Week 12 - Nov. 20-24
Mon., Nov. 20
Tues., Nov. 21
Wed., Nov. 22
Thurs., Nov. 23
Fri., Nov. 24
Week 13 Nov. 27-0ec. 1
Mon., Nov. 27
Tues., Nov. 26
Wed., Nov. 29
Thurs., Nov. 30
Fri., Dec. 1
Week 14 - Dec. 4-8

Mon., Dec. 4
Tues.^ Dec. 5
Wed., Dec. 6
Thurs., Dec. 7
Fri., Dec. 8
Week 15 - Dec 11-15
Mon., Dec. 11
Tues., Dec. 12
Wed., Dec. 13
Thurs. Dec. 14
Fri., Dec. 15
Week 16 - Dec. 18-20
Mon., Dec. 18
Tues., Dec. 19
Wed., Dec. 20
Thurs., Dec. 21
Fri-, Dec. 22

Chapter 9 - Telephone
Chapter 9 -
Filing Kit
Chapter 9 -
Chapter 9 -

Chapter 9 - Telegram Handout
Reprographics (Handout)
Filing Kit
Reprographics Handout
Reprographics

TEST \#3 - CHAPTERS 8, 9 AND
VERNON'S DIRECTORY
Chapter 10 - Travel
TEST \#4 - FILING
Chapter 10 -
Chapter 10 -

Chapter 10 -
Chapter 10 -
Guest Speaker (if available)
Chapter 11 - Meetings
Chapter 11 -

Chapter 11 -
Chapter 11 -
Chapter 11 -
Guest Speaker <if available)
Review Period

TEST \#5- CHAPTERS 10, 11 AND REPROGRAPHICS

| Date |  | Assignment |
| :---: | :---: | :---: |
| Wed, (Week | $\begin{aligned} & \text { Sept. } 6 \\ & \text { 1) } \end{aligned}$ | Introduction to Filing Kits <br> Lecture - Review Rules 1-2-3-4-5, <br> PS- 6 <br> Homework - Kit - Jobs 1-2-3- pg. 11 <br> - Text - Read page 119 - The <br> Need for Filing Systems - Questions <br> 1-3 - pp.. 131-132- Alphabetic Filing <br> Procedures - Primary Guides, <br> Individual Name Folders, Miscellaneous <br> Folders - Special Guides - Colour <br> Coding - Questions 28-30 |
| Wed. (We< | $\begin{aligned} & \text { Sept. } 13 \\ & \text { 2) } \end{aligned}$ | Discuss Homework (take up jobs and readings) <br> Lecture - Rules 6-7-8, pg. 7 <br> Homework - Kit - Jobs 4-5-6, pg- 11 <br> - Text - Read pp, 125-127 - <br> Supplies, Guides, Folders and Labels - <br> Questions 15-21 <br> Quiz next week on Rules 1-3 |
| Wed. , (Week | $\begin{aligned} & \text { Sept } 20 \\ & 3 \text { ) } \end{aligned}$ | Discuss homework (take up jobs) <br> Quiz - Job \#8 (Rules 1-8) <br> Discuss homework readings <br> Lecture - Rules 9-10-11-12, pg. 7 <br> Homework - Kit - Jobs 9-10, pg. 13 <br> - Text - Read pp, 127-129 - <br> Equipment for Correspondence and Cards - Housing Correspondence - Maintaining Card Files - Questions 22-24 |
| Wed., (Week | $\begin{aligned} & \text { Sept, } 27 \\ & 4) \end{aligned}$ | Discuss homework (take up jobs and readings) <br> Lecture - Rules 13-14-15-16-17-18, <br> pg. 8 <br> Homework - Kit - Jobs 11-12-13-14, pp. 13-14 <br> - Text - Read pages 124-125 <br> Techniques for Filing Papers - Chargeout Methods - Questions 11-14 <br> Quiz next week on Rules 1-18 |


| Wed<, Oct. (Week 5) | Discuss homework (take up jobs) <br> Quiz - Job \#16 (Rules 1-18) <br> Discuss homework readings <br> Lecture - Rules 19-20-21-22, pg. 9 <br> Homework - Kit - Jobs 17-18, pg. 14 <br> - Text - pp. 119-124 - Filing <br> Procedures - Preparation of Papers for <br> Filing - Inspecting, Reading and <br> Indexing, Coding and Cross-Referencing <br> - Questions 4-10 |
| :---: | :---: |
| Wed. Oct, 11 (Week 6) | Discuss homework (take up jobs and readings) <br> Lecture - Rules 23-24-25, pg. 9 <br> Homework - Kit - Jobs 19-20-23, <br> pp. 14-15 <br> Quiz next week on rules $1-25$ |
| $\begin{array}{ll} \text { Wed-, Oct- } 18 \\ \text { (Week 7) } \end{array}$ | Discuss homework (take up jobs) <br> Quiz - Job \#22 (Rules 1-25) <br> Lecture - Introduce Alphabetic <br> Correspondence Filing <br> Homework - Kit - Jobs 25-26-27-28 pp. 17-21 <br> - Text - pp. 129-131 - <br> Records Retention and Transfer - <br> Retention Transfer Methods - Perpetual <br> Method - Periodic Method - Microfilm <br> and Microfiche - Questions 25-27 - <br> Subject Filing - pg. 142 <br> Quiz next week on Jobs 25-28 |
| Wed., Oct, 25 (Week 6) | ```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``` |

Wed., Nov. d
(Week l0)

