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

SbP *i9* 1992

COURSE OUTLINE

bALL

Course Outline: OFFICE PROCEDURES

Code No,: OPCIOO

Program: OFFICE ADMINISTRATION -- COMMON

Semester: One

1989 09 01 Date:

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Previous Outline

1988 09 01 Dated:

> Revision: Χ New

**APPROVED** 

Chairperson

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

## 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/F, 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

#### 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 elejnent<sup>^</sup> 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, postagepaid-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

OFFICE PROCEDURES (COMMON) - OPCIOO fi

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

# 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

## 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/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) SO-minute periods

# Chapter 11 - ASSISTING WITH MEETINGS AND CONFERENCES

#### 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:

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

	80% - 89 70 - 79	- 89% _ - 79% _ - 69% _ V 60% _	G - CONSISTENTLY OUTSTANDING G - OUTSTANDING ACHIEVEMENT
C			- CONSISTENTLY ABOVE AVERAGE ACHIEVEMENT - SATISFACTORY OR ACCEPTABLE ACHIEVEMENT
R			- 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 circumstanceSr find it impossible to report grades by due dates.

## OPCIOO METHODS OF EVALUATION

Test No.	Weighting	Obiective Coverage
1	15%	Chapter 1 (Human Relations) & Chapter 2 (Time Management)
	20%	Chapter 5 (Dictation/ Transcription) & Chapter 6 (Postal)
	20%	Chapter 8 (Callers/ Appointments), Chapter 9 (Telephone) & City Directory (Vernon's)
	20%	Chapter 10 (Travel), Chapter 11 (Meetings) and Reprographics
	20%	Filing

PERCENTAGE OF 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 <u>must</u> contact the instructor <u>prior</u> 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 OUIZZES.
- 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. <u>Secretarial and General Office Procedures</u>. Cdn. Edition, Lucy Mae Jennings, Blanche M. Fedoruk, Prentice-Hall, Canada, Inc., 1984.
- 2. <u>Progressive Filing Practice Set.</u> 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	(10
Wednesday)	(12 periods)
Chapter 1 - Human Relations	(4 periods)
Chapter 2 - Time Management	(6 periods)
<b>Test</b> #1 - Chapters 1 & 2	(1 period)
Chapter 5 - Dictation & Transcription	(7 periods)
Chapter 6 - Postal Information and Mail Services	(11 periods)
<b>Test</b> #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

## Week 1 - September 5-8

Tues., Sept. 5

Wed., Sept. 6
Thurs., Sept. 7
Fri.f Sept. 8

# Week 2 - September 11-15

Mon.f Sept. 11 Tues., Sept. 12 Wed., Sept. 13 Thurs., Sept. 14 Fri.f Sept. 15

# Week 3 - September 18-22

Mon.p Sept. 18 Tues., Sept. 19 Wed., Sept, 20 Thurs., Sept. 21 Fri., Sept. 22

# Week 4 - September 25-29

Tues., Sept. 26 Wed., Sept. 27 Thurs., Sept. 28 Fri. p. Sept. 29

Mon., Sept, 25

## Week 5 - October 2-6

Mon., Oct. 2 Tues., Oct. 3 Wed., Oct. 4 Thurs., Oct. 5 Fri., Oct. 6 Review Course Outline Students to have-slip for filing kits for Wednesday Introduce Filing Kits Chapter 1 - Human Relations Chapter 1 -

Chapter 1 Chapter 1 Filing Kit
Chapter 2 - Time Management
Chapter 2 -

Chapter 2 -Chapter 2 -Filing Kit Chapter 2 -Chapter 2 -

Chapter 5 - Dictation & Transcription
Chapter 5
Filing Kit
Chapter 5 -

TEST #1 - CHAPTERS 1 & 2

Chapter 5 -Chapter 5 -Filing Kit Chapter 5 -Chapter 5 -

## Week 6 - October 9-13

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)</pre>

Review Period

TEST #5- CHAPTERS 10, 11 AND

REPROGRAPHICS

## ESTIMATED FILING SCHEDULE

Date			Assignment
Wed,, (Week	Sept. 1)	6	Introduction to Filing Kits Lecture - Review Rules 1-2-3-4-5, PS- 6 Homework - Kit - Jobs 1-2-3- pg. 11
Wed. (We<	Sept. 2)	13	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 1-3
Wed., (Week	Sept 3)	20	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., (Week	Sept, 4)	27	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

Wed<, Oct. (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 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. (Week 10)	d	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 (Week 11)	15	Discuss homework (take up jobs) Lecture - Numeric Card Filing and Terminal Digit Homework - Kit - Jobs 45 and 47, pp. 35-37
Wed., Nov (Week 12)	22	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 (Week 13)	29	Discuss homework (take up jobs) Quiz - Job #54 (geographic filing) Final Major Test - Job #55 from kit and theory from text