

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

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SEP 28 1992

COURSE OUTLINE

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COURSE TITLE: OFFICE PROCEDURES
CODE NO.: OPC100 **SEMESTER:** ONE
PROGRAM: OFFICE ADMINISTRATION - COMMON
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PREVIOUS OUTLINE DATED: SEPTEMBER, 1989

New

Revision:

APPROVED ^{Z^'}
DEAN, BUSINESS & HOSPITALITY

 Cpi 90
DATE

OFFICE PROCEDURES

OPC100

COURSE NAME

COURSE CODE

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, 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 (in the order to be covered)

1. A Secretarial Career
2. The Impact of Computers on the Secretary's Role
- 3- Filing & Information Management
4. Management of Work and Time
5. Human Relations
6. Organization Structure and Office Layout
7. Transcription and Reprographics
8. Incoming and Outgoing Mail
9. Office Callers and Appointments
10. Vernon's City Directory
11. Telephone Usage
12. Making Travel Arrangements
13. Assisting with Meetings and Conferences

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IV. LEARNING ACTIVITIES

INTRODUCTION - A SECRETARIAL CAREER

Objectives:

After completing the introductory chapter, you will be able to:

1. Define the role of the secretary.
2. Describe ways the secretary uses electronic equipment.
3. Identify titles and duties for various secretarial positions.
4. Prepare and type a chronological vacation request list.
5. Prepare a requisition for supplies.

Text Reading: pp. 3-6

Production Problems: pp. 9-10

ESTIMATED TIME TO ACHIEVE: (1) 50-minute period.

CHAPTER 4 - MICROCOMPUTERS AND OFFICE APPLICATIONS

Objectives;

After completing Chapter A, you will be able to:

1. Explain how the computer as an office tool has enhanced the secretary's job.
2. Identify secretarial tasks that are made possible by a local area network.
3. Compare a dedicated word processor with a microcomputer using word processing software.
4. Describe the secretary's role in desktop publishing.

Text Reading: Pp. 63-74

ESTIMATED TIME TO ACHIEVE': (1) 50-minute period.

CHAPTER 7 - FILING & INFORMATION MANAGEMENT

Objectives:

After completing Chapter 7, you will be able to:

1. Describe the procedures for preparing records for both conventional filing and for computerized filing.
2. Identify filing supplies and equipment for both hard and soft copies of correspondence.
3. Describe methods of records transfer and storage.
4. Describe the meaning of a "paperless office".
5. Index and alphabetize names in an alphabetic filing system.
6. Prepare cross-reference cards for alphabetic filing.
7. Compare alphabetic, subject, geographic, and numeric filing systems.

LEARNING ACTIVITIES:

Text Reading: pp. 123-141 and 150-153

Questions: pp. 153-154, 1-30

Filing and Database Systems Kit

ESTIMATED TIME TO ACHIEVE: (14) 50-minute periods

CHAPTER 1 - HUMAN RELATIONS

Objectives:

After completing Chapter 1, you will be able to:

1. Describe the desirable personality traits and attitudes of an effective secretary.
2. Explain the importance of effective teamwork.
3. Recognize the importance of accepting change,
4. Identify ways of dealing with stress.
5. Prepare and summarize a time distribution chart.
6. Select the most appropriate common courtesies, to use in a given situation.
7. Prepare and keep and time distribution chart.

LEARNING ACTIVITIES:

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

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

CHAPTER 2 - MANAGEMENT OF WORK AND TIME**Objectives;**

After completing Chapter 2, you will be able to:

1. Explain the difference between working efficiently and working effectively.
2. Outline methods for working efficiently.
3. Assign priorities to secretarial tasks.
4. Identify methods for managing a large project.
5. List the procedures that ensure accuracy when checking keyboarded work.
6. Describe ways in which slack time can be used to increase efficiency.
7. Describe ways to prevent interruptions and to handle interruptions without wasting time,
8. Suggest a systematic method of preparing for the next day's work.
9. Determine the normal working area at a desk and the appropriate placement of equipment and supplies.
10. Distinguish between a tickler file and a reading file.
11. Prepare a daily plan chart.

LEARNING ACTIVITIES:

Text Reading: pp. 24-41
Questions: pp. 41-42, 1-29
Production Problem: pp. 43-45

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

CHAPTER 3 - ORGANIZATION STRUCTURE AND OFFICE LAYOUT

Objectives;

After completing Chapter 3, you will be able to:

1. Compare the structure of line organization with the structure of line-and-staff organization,
2. Compare participatory management with the line-and-staff management style.
3. Interpret an organization chart.
4. Describe the physical features of the landscaped office.
5. Assess the advantages and disadvantages of working in a landscaped office.
6. Describe how office ergonomics involve furniture, lighting, acoustics, and position of equipment in the office.

LEARNING ACTIVITIES:

Text Reading: pp. 46-55
Questions: pg. 55, 1-17a
Production Problems: pg. 57

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

CHAPTER 5 - TRANSCRIPTION AND REPROGRAPHICS

Objectives:

After completing Chapter 5, you will be able to:

1. Describe methods for keeping transcripts confidential.
2. Describe procedures for addressing envelopes, assembling enclosures, and folding and inserting letters in envelopes.
3. Transcribe handwritten letters and arrange and submit them for signature,
4. Compare desktop dictating machines with centralized dictation systems.
5. Identify special features on reprographics equipment that would make the secretary's job more efficient.

LEARNING ACTIVITIES:

Text Reading: pp. 79-89
Questions: pg. 90, 1-12
Production Problems: pp. 91-92

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

CHAPTER 6 - INCOMING AND OUTGOING MAIL

Objectives;

After completing Chapter 6, you will be able to:

1. Identify the benefits of electronic mail.
2. Describe different methods of electronic mail.
3. Explain the procedures for processing incoming mail.
4. Describe the duties involved in answering mail when your employer is absent.
5. List the classes of domestic mail and given an example of what might be included in each class.
6. Describe the special mailing services available from the post office.
7. Explain the Canada postal code.
8. Explain metered mail.
9. Describe how to forward mail, return undeliverable mail, recall mail, and have mail delivered to a new address.
- 10; Prepare a daily mail record, a mail expected record, and routing slips.

LEARNING ACTIVITIES:

Text Reading: pp. 93-119 and Instructor Handouts
Questions: pp. 119-120, 1-26
Production Problems: pg. 122

ESTIMATED TIME TO ACHIEVE: (9) 50-minute periods

CHAPTER 8 - OFFICE CALLERS AND APPOINTMENTS

Objectives;

After completing Chapter 8, you will be able to:

1. Outline guidelines for scheduling and cancelling office appointments.
2. Describe how an electronic calendar can be used.
3. Explain techniques for keeping a well-ordered appointment book.
4. Describe the courtesies necessary when receiving office callers
5. 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 ,
6. Prepare a daily appointment-calendar.
7. Prepare an appointment schedule from a daily calendar.

LEARNING ACTIVITIES:

Text Reading: pp. 160-173

Questions: pp. 1-25

Production Problem: pp. 175-176

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

VERNON'S CITY DIRECTORY - HANDOUT

Objectives;

The student will demonstrate the ability to:

1. Discuss a buyer's guide and classified directory.
2. Discuss an alphabetical name directory which lists residents' names, addresses, and occupations.
3. Discuss an alphabetical street directory of householders and businesses.
4. Discuss a numerical telephone directory.

LEARNING ACTIVITIES:

Instructor Handout

ESTIMATED TIME TO ACHIEVE: (2) 50-minute periods.

CHAPTER 9 - TELEPHONE USAGE

Objectives;

After completing Chapter 9, you will be able to:

1. Use a telephone directory to locate information.
2. Describe the procedures for answering, transferring, and screening office calls.
3. Describe the procedures for placing and receiving long-distance calls.
4. Determine the appropriate time to call offices in other time zones.
5. State the various kinds of long-distance service.
6. Identify voice telephone equipment and telephone systems.
7. Explain both human-operated and automated telephone message systems.
8. Explain the benefits of facsimile transmission.
9. Record telephone messages on telephone message blanks.
10. Plan and record information needed before placing calls.

LEARNING ACTIVITIES:

Text Reading: pp. 177-195
Instructor Handout
Questions: pp. 195-196, 1-26
Production Problems: pp. 197-198

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

CHAPTER 10 - MAKING TRAVEL ARRANGEMENTS

Objectives;

After completing Chapter 10, you will be able to:

1. List the services provided by travel agencies.
2. Indicate the information needed before contacting a travel agent about a proposed trip.
3. Classify the types of air-travel service.
4. Describe the procedures for making flight, car, and hotel reservations,
5. Interpret a flight schedule.
6. State the requirements for acquiring passports, visas, and immunizations.
7. Outline secretarial responsibilities before, during and after an executive's trip.
8. Prepare and type an itinerary.

LEARNING ACTIVITIES:

Text Reading: pp. 200-210
Questions: pp. 210-211, 1-27
Production Problems: pp. 212-213

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

CHAPTER 11 - ASSISTING WITH MEETINGS AND CONFERENCES

Objectives;

After completing Chapter 11, you will be able to:

1. Describe the preliminary arrangements to be made for informal and formal meetings.
2. Explain how to prepare notices for meetings and agendas.
3. Describe the assembly of supportive materials before and after meetings.
4. Outline guidelines for typing minutes of informal and formal meetings.
5. Describe the benefits of teleconferencing.
6. Discuss different forms of teleconferencing that may be used by businesses.
7. Describe the secretary's role in teleconferencing.
8. Prepare a notice of meeting in postcard form.
9. Compose and type minutes from rough notes.

LEARNING ACTIVITIES:

Text Reading: pp. 214-235
Questions: pp. 2 35-2 36, 1-2 8
Production Problems: pp. 230-231

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

V 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

Test No-	<u>Weighting</u>	<u>Objective Coverage</u>
	20%	Chapter 1 (Human Relations) Chapter 2 (Time Management) Chapter 3 (Organization Structure & Office Layout)
	20%	Chapter 5 (Transcription and Reprographics) and Chapter 6 (Incoming & Outgoing Mail)
	20%	Chapter 8 (Office Callers and Appointments), Chapter 9 (Telephone Usage) and City Directory (Vernon's)
	20%	Chapter 10 (Making Travel Arrangements), Chapter 11 (Assisting with Meetings)
	15	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 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 Procedures for the Automated Office, Canadian Edition, Lucy Mae Jennings, Lauralee Kilgour, Prentice-Hall, Canada, Inc., 1990.
2. Filing and Database Systems, 10th edition, Stewart and Scharle, McGraw-Hall Publishing Co., 1990.

Supplies:

Paperclips

Notepaper for lecture notes (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)
A Secretarial Career	1 period)
Chapter 7 - Filing & Information Mgmt- Filing Kits	14 periods)
Filing (filing class once a week)	
Chapter 1 - Human Relations	3 periods)
Chapter 2 - Management of Work & Time	5 periods)
Chapter 3 - Organization Structure-and Office Layout	3 periods)
Test #1 - Chapters 1, 2 and 3	1 period)
Chapter 5 - Transcription & Reprographics	5 periods)
Chapter 6 - Incoming & Outgoing Hail and Mail Services	9 periods)
Test #2 - Chapters 5 and 6	1 period)
Chapter 8 - Office Callers and Appointments	5 periods)
Vernon's City Directory	2 periods)
Chapter 9 - Telephone Usage	7 periods)
Test #3 - Chapters 8^ 9 and Vernon's City Directory	1 period)
Chapter 10 - Making Travel Arrangements	5 periods)
Chapter 11 - Assisting with Meetings and Conferences	6 periods)
Test #4 - Chapters 10, 11	1 period)
Guest speakers	2 periods)
Review period	1 period)