

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY

SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

COURSE TITLE: OFFICE MANAGEMENT
CODE NO.: BUS224 SEMESTER: FOUR
PROGRAM: NATIVE COMMUNITY WORKER
AUTHOR: ELSIE LALONDE
DATE: JANUARY, 1995
PREVIOUS OUTLINE
DATED: JANUARY, 1994

New: _____ Revision: X

APPROVED:

Ross M. Coiro
DEAN, SCHOOL OF BUSINESS
& HOSPITALITY

95-01-03
DATE

COURSE NAME

COURSE CODE

TOTAL CREDIT HOURS: 48

PREREQUISITE(S) None

I. PHILOSOPHY/GOALS:

EDUCATIONAL - to provide the NATIVE COMMUNITY WORKER student with the knowledge and basic skills to handle administrative duties related to their employment with an agency, etc.

INSTRUCTIONAL - to provide a basic knowledge of office "management" skills both of a personal and interactive nature aimed at responding to the administrative duties of an agency or like work situation.

To provide basic knowledge of the steps required to organize a meeting, be an active participant (either informal or formal meeting structure), record minutes or act as the chair.

To provide an overview and introductory exposure level to WordPerfect 5.1 Software features.

II. STUDENT PERFORMANCE OBJECTIVES:

Upon successful completion of this course, the student will:

1. Understand the value and use of time management techniques as well as be able to apply same to diaries, calendars, reporting forms, etc.
2. Understand the value and appropriate application of basic records management techniques including record retention, record retrieval, filing supplies, filing rules in the areas of alphabetic, subject, numerical, geographical filing.
3. Understand the value and the application of the various meeting paperflow (notices, minutes of meetings, motions/resolutions, agenda, press release, etc.)
4. Understand the value and application of Robert's Rules of Order from the viewpoint of member and/or executive participation at committee or general meeting level.

5. Understand the value and the application of such administrative paperwork as:

Travel Expense Request Forms	Travel Advance Forms
Travel Expense Reports	Government Forms
Petty Cash	Purchase Requisitions
Cheque Requisitions	Time Sheets
6. Understand the value and application of mail handling procedures for incoming mail as well as outgoing mail.
7. Understand the value and application of correspondence procedures (formats, correction, distribution copies, copyright, proofreading, alternate languages, word processing, reproduction, and dictation).
8. Understand the value and application of reference materials.
9. Understand the value and application of good telephone techniques including recording and logging procedures.
10. Understand the value and application of decision-making software packages.
11. Understand the value and application of WordPerfect 5.1 features at an introductory level.

III. TOPICS COVERED:

1. * Time Management ✓ 2 one hour.
2. Communication Systems -
3. Filing ✓ 30 min. -
4. Correspondence -
5. Administrative Paperwork -
6. Telephone -
7. * Reference Materials - Admin services
8. * Meetings ✓ 6 periods.
9. * Decision-Making 2 periods
10. WordPerfect 5.1 Features

IV. LEARNING ACTIVITIES AND RESOURCES

See attached Pages 7 -16

revised through
computer applications
formal testing →

Shut answer test
- application test
- assignments
meetings - testing materials →
writing across the curriculum
Diff → 10 to

V. EVALUATION METHODSMID-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 is issued to facilitate the production of a student transcript when faculty, because of extenuating circumstances, find it impossible to report grades by due dates.

FINAL GRADE REPORTING

- A+ 90% - 100% - Consistently Outstanding
 A 80% - 89% - Outstanding Achievement
 B 70% - 79% - Consistently Above Average
 C 60% - 69% - REPEAT - objectives of this course have not been achieved and the course must be repeated.

EVALUATION

Participation Activities	=	20%
Test #1	=	20%
Test #2	=	20%
Test #3	=	<u>20%</u>
		<u>100%</u>

AT 10%

NOTE: 60% attendance required to receive grade credit regardless of standing as much of participation/assignments are integrated with lectures. This condition has been requested by the coordinator of this program.

Pickus →

GUIDELINES RE GRADING:

1. TESTS:

If a student is not able to write a test because of illness or a legitimate emergency, that student should 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). If this is not possible, student should contact instructor before next class. 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" (60%). 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 ON TESTS/QUIZZES.

2. ASSIGNMENTS:

100% completion of all assignments is expected. No extensions unless a valid reason is provided in advance to the instructor and instructor approval is received in writing or the instructor deems the reason given after due date to be a legitimate basis for postponement.

3. Field trips, guest speakers and specified visuals or like are arranged to supplement classroom activities. Attendance is mandatory. If a student is not in attendance, the student will have a choice of either (a) a loss of 10% of the accumulative semester mark (all items except tests), 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/Materials (available at Campus Book Store)

WORDPERFECT MADE EASY WITH EXERCISES (Shelley Boushear)

- Sault College production

(3) Disks (typed to be specified by instructor in Jan.)

CHAIRING A MEETING WITH CONFIDENCE (Kevin Paul) - Self
Counsel Press - ISBN 0-88908-992-2 (1992 - 2nd ed.)

Bureau of Business Practice (Prentice Hall) Series:

ENHANCING YOUR EFFICIENCY (BMSR-12 [2-0])

PROBLEM-SOLVING HANDBOOK (BMSR-18 [2-1])

THE EXECUTIVE ORGANIZER (BMSR-2 [6-8])

YOUR GUIDE TO MEETINGS (BMSR-14 [6-0])

THE MINUTE TAKER'S HANDBOOK (Jane Watson) - Self Counsel
Press - ISBN 0-88908-994-9 (1992)

USING THE OFFICE TELEPHONE EFFECTIVELY (Patricia A. Garner)
- Prentice Hall - ISBN 0-13-953704-X

(3) file folders as designated by instructor

VII. ADDITIONAL RESOURCE MATERIALS AVAILABLE IN COLLEGE LIBRARY

Reserve Items - Circulation Desk - reserved in name of
Elsie Lalonde

HOW TO CONTROL YOUR TIME AND YOUR LIFE

CANADA POSTAL DIRECTORY

U.S.A. POSTAL DIRECTORY, ZIP +4

GOVERNMENT OF ONTARIO TELEPHONE DIRECTORY (1988)

COMMUNITY INFORMATION DIRECTORY (1988-89)

FAX DIRECTORY

NATIVE COMMUNITY BRANCH DIRECTORY

KWIC INDEX TO SERVICES, 1988 (GOV. OF ONTARIO)

THE MEETING WILL COME TO ORDER

ROBERT'S RULES OF ORDER (illustrated edition)

Others - to be advise

VII. SPECIAL NOTES - none

OBJECTIVE: WORDPERFECT SOFTWARE

Given a combination of in- and out-of-class assignments/projects as well as short essay, multiple choice, and/or matching questions on tests (either written or computer application), the student will demonstrate the ability to satisfactorily handle the specific areas highlighted below at an introductory awareness and application level.

WordPerfect

- recognize and apply proofreading techniques
- format and label disks
- locate function keys and recognize relationship to activity generated by key
- locate and interpret information on Status Line
- locate and understand short-cut methods when using cursor keys
- be able to create a document:
 - * input using wordwrap
 - * edit using insert, delete and typeover and restore text
 - * save - document names and types
 - methods
 - clearing screen
 - exit WordPerfect
 - retrieve a document
 - * print - entire document, current page, screen, cancel
 - * help menu
- be able to enhance text:
 - * centre, underline, bold
 - * reveal codes - viewing, deleting
 - * Spell - document, page, word
- manipulate text:
 - * block - define, 3-step process, bold & underline, delete, block commands w/move, copy, etc.
- formatting text:
 - * indent -> and <- ->, right align, menus, margins, tabs, line spacing, justification, top - bottom page centering, widows and orphans, suppress page numbers, hard page breaks, view and preview a document

LEARNING ACTIVITIES:

LECTURE - Instructor lecture and demonstrations

FILMS/VIDEOS - If available

APPLICATIONS -Text Assignments - WORDPERFECT MADE EASY WITH EXERCISES

EVALUATION: Class Assignments, Test #1

TIME TO ACHIEVE: (15) 50-min. periods plus out-of-class time

OBJECTIVE: ADMINISTRATIVE SKILLS

Given a combination of in- and out-of-class assignments/projects as well as short essay, multiple choice, and/or matching questions on tests, the student will demonstrate the ability to satisfactorily handle the specific areas highlighted below at a job-entry level.

Time Management

- explain time management concepts and techniques
- identify low-payoff items and suggest methods to avoid them
- identify high-payoff items and discuss their importance
- identify typical time wasters and explain how to remove them from your routine
- explain what is meant by the term "work simplification"
- List and discuss a minimum of ten techniques which will provide for more efficient use of time

LEARNING ACTIVITIES AND APPLICATIONS:

LECTURE Instructor lecture and demonstrations

**FILMS/
VIDEO** It's About Time (C290 - 30 min., expiry 1994 04 29)
The Time of Your Life (C255 - 30 min., no expiry)
Time Management (C1256 - 25 min., no expiry)
Project Management (C560 - 30 min., 1993 08 31)

LIBRARY Reserved Reading - **ASK AT CIRCULATION DESK, SAULT COLLEGE LIBRARY** - listed under my name - How to Control Your Time and Your Life - max. 3 day loan - in library use only.

DEMO Tickler Files; Perpetual Diary, To-Do Lists, Software (if available) - calendar, telephone, meeting

**APPLICA-
TION** Perpetual Diary Maintenance
1-week maintenance of TO-DO-LIST

HANDOUTS * "Procrastination" . . . etc. - by instructor
To-Do Lists, Time Study

TEXT Enhancing Your Efficiency
The Executive Organizer

EVALUATION: Class assignments
Test #1

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

OBJECTIVE: CORRESPONDENCE

Given short essay, matching, or fill-in the blank questions and/or practical application, the student will demonstrate a basic knowledge of:

- various duplication methods (decision-making information re appropriateness of quality to task, timeliness, costing)
- methods of proofreading and proofreading symbols
- methods of copy control
- copyright regulations
- communication in languages other than English
- procedure for use of hand-held dictaphone equipment
- dictation procedure
- graphics

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor lecture and demonstration

TOUR Printing Department (if feasible)

VIDEO Business of Better Writing (C1083 - 30 min. '94 04 30)
Copyright Law (646 - 30 min. - no expiry date)

HANDOUTS Provided by instructor - e.g. Dictation Checklist, copyright regulations, proofreading reference chart, word processing request forms, reprographic request forms, typeset/style chart.

DEMOS Transcription of a tape using a Word Processor or typewriter.

EVALUATION: Class Assignment; Test #1

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

OBJECTIVE: ADMINISTRATIVE PAPERWORK

Give application questions, the student will demonstrate ability to handle the following general office forms at a satisfactory job-entry level (printed or handwritten work must be readable to a third-party; overall presentation businesslike):

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor

HANDS-ON Work packages distributed by instructor; in-class participation.

VIDEOS Computer Application/Software Intro., 60 min.-no expiry
Database Management/Computers in Business " " "

EVALUATION: Participation Exercises
 Test #1

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

OBJECTIVE: FILING

Given an in-class test, the student will be able to respond to brief essay or multiple-choice questions covering the following areas connected to filing:

- management of paperflow
- materials
- equipment
- basic agency/band filing methods
- electronic filing and retrieval
- microfiche filing and retrieval
- security of information
- retention schedule
- classification of records as vital, important, useful, or non-essential
- colour coding
- ARMA filing rules (card and correspondence filing as it pertains to a private individual; a business or agency; a government office)
- traditional filing rules

LEARNING ACTIVITIES AND APPLICATIONS

- LECTURE** Lectures and handout assignments where appropriate.
- VIDEOS** Pendaflex
Canon-Micrographics Micropoint
- DEMOS** Paper shredder; Microfiche and hard copy; Compact Disk Filing Materials; Mini-File; Card File; some filing equipment (desk); Business Card File
- GUEST LECTURER** First Nations Technical Institute, R. R. #1, Deseronto,
ON - Dave Wilson (if available)
- HANDOUTS** Filing Rule Notes
Filing Quizzes
Records Management Mini-Seminar (E. Lalonde, Oct. '84)
(to be returned to professor)
- PRACTICAL** In-class quizzes and hands-on experience where available.
- EVALUATION:** Test #2
- ESTIMATED TIME TO ACHIEVE:** (1) 50-minute periods
- NOTE:** TIME ALLOWANCE does not INCLUDE OUT-OF-CLASS HOMEWORK OR ASSIGNMENTS. THIS NOTE APPLIES TO THIS AND ALL SUBSEQUENT

OBJECTIVE: TELEPHONE

Given short essay and application questions on recording messages, logging calls, telephone courtesies, the student will demonstrate knowledge and application of same at a job-entry level.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor

**FILM/
VIDEO** How to Lose Your Best Customer, 16mm, 28-min., col.
Telecommunication (C475 - 30 min., expiry '93 08 31)
Client Counsellor Relationships and Other Things
That Go Bump (C111 - 60 min. - no expiry)
Telephone (C541 - 30 min. - 1993 09 01)
Telephone Mastery

SLIDES Telephone Techniques

SPEAKERS Related agencies/CommSoc/Sault College - telephone
personnel (if possible)
Telephone Service Company

**APPLICA-
TION** Voice-messaging assignment; message pads/record
books; tape assignment; telephone directory assignment

TEXT Using the Office Telephone Effectively

EVALUATION: Application Assignments
Text Assignments
Test #2

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

OBJECTIVE: REFERENCE MATERIAL

Given projects and test questions of a short essay, matching, or fill-in blank variety the student will demonstrate ability to find and record names of individuals, ministries, agencies, etc., applicable titles, telephone numbers, addresses, etc.

LECTURE Instructor

VIDEO Locating & Using Information (C1157--20 min. '04 03 27)
Techniques for " & " " (C1158--20 min. '04 03 27)

DEMOS Canadian and U.S.A. Postal Directory
Software Program re Canadian Postal Directory
Zip +4 Directory
City Directory
Telephone Directory (government, KWICK-FIND)
Fax Directory
Compact Disk
On-Line Services
Community Information Directory
Native Community Branch Directory

EVALUATION: Projects; Test #2

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

OBJECTIVE: COMMUNICATION SYSTEMS (traditional & electronic)

Given short essay, matching, or fill-in the blank questions of either a theory or application nature, the student will be able to respond to questions based on:

- the processing of incoming mail (annotation, dating, logging, release, etc.)
- the processing of outgoing mail including:
 - hand delivery
 - postal system (domestic, U.S.A. and international) including rates, classes of service, special procedures
 - courier service
 - electronic mail (word processing, fax, telegrams, computers, telex)

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor - including practical in-class quizzes on rates and services

FILM-STRIP Processing Incoming and Outgoing Mail

SPEAKERS Postal Rep/Roger Grey; Courier Rep (if available)

DEMOS Central Stores (folding, weighing, stamping, etc.)

HANDOUTS Courier Rate Sheets (Domestic, U.S.A. & International - regular mail, special mail features, parcels), mail preparation information - env. setups, parcels, etc.

EVALUATION: Test #2

ESTIMATED TIME TO ACHIEVE: (1) 50-minute periods

OBJECTIVE: MEETINGS

Given the following in/out-of-class assignments/projects, the student will perform the following tasks at a min. job-entry level:

- preparation of a written motion
- preparation of a written resolution
- prepare minutes of a formal and informal meeting
- preparation of an agenda
- notice of meeting.....as well as:

- be able to demonstrate through fill-in/matching the formal terms used at meetings
- be able to select or provide appropriate motions for given situations
- be able to explain the main goals of formal and informal meetings (their similarities and their differences)
- be able to use reference material which would provide assistance in chairing a formal or informal meeting
- be able to arrange for meetings - equipment, etc.
- be able to demonstrate an understanding of the role of a secretary/recorder

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor and demo

VIDEO Point of Order
Ken Robb Meeting - EP187 - 20 min., no expiry
Hemi Series - (2) 50-minute periods

REFERENCE Robert's Rules of Order (Sault College Library REF.)
The Meeting Will Come to Order (" - Circulation Desk -
under professor's name) - in Library use only -
max. 5 hrs.

TV Watch The Corporation of the City of Sault Ste. Marie
Council Meetings
Watch the Provincial or Federal Legislative Meetings

HANDOUTS Minute-Taking Technique - Parts I, II - Part III
(test)

TEXTS Your Guide to Meetings
Chairing a Meeting with Confidence
The Minute Taker's Handbook

EVALUATION: **Minutes of Meeting Assignment**
Resolution, Agenda, Notice Assignment
Test #3

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

000224

~~an~~ ~~the~~ ~~of~~ ~~application~~ nature, the student will be able to respond to questions based on:

- priorities
- assess strengths as a decision maker
- problem-solving tools
- resource network
- knowing extent of authority
- proven approaches to problem-solving
- problem-solving as an ongoing process
- software - decision-making model
- software - dBase capabilities
- software - spreadsheet

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor review of case situations

VIDEO Decision-Making & Problem Solving (C335-30 min-no exp.)
Spreadsheet (C1067 - 30 min., 1993 08 31)
Techniques for Making & Responding to Stress
(C1148 - 10 min. - 2004 03 27)
Making & Responding to Requests: An Introduction
(C1149 - 20 min. - 2004 03 27)
Working Better (Stress) #3 (C1297 - 30 min., '96 06 18)
Fitting In (C1182 - 15 min. - 1994 11 26)
Moving On (C1183 - 15 min. - 1994 11 26)
Getting the Facts (C1184 - 15 min. - 1994 11 26)

DEMO dBase Tutorial; Lotus 1-2-3; Word Perfect 5.1;
decision-making software

HANDOUTS Samples of software output

EVALUATION: Test #3

ESTIMATED TIME TO ACHIEVE: (2) 50-minute class periods
Note: the (2) sessions are included in the (11) assigned to meetings.