PAN AFRICA SKILLS & CONSULTING LTD

International Diploma

in

Office Management & Administration

(Administrative Management)

Learn how to efficiently organise, manage and administer the office and the workplace environment, including both personnel and office equipment and systems.

This very practical Program provides expert training on the most important duties of modern office managers, administrators, supervisors and personnel; it aims to produce office managers/administrators who can effectively and efficiently supervise services essential to the smooth running of the enterprise. The office and its personnel must be well managed, which requires training, supervision and control of personnel, equipment, and computer systems; and management of the communications network, the reception, the mailroom, cashiering, accounts work, stationery, office layout, and much more. This practical and useful Program covers all of this and more.

Course Outline

Module 1 - The Office and Management

The role of the Office in enterprises
Activities of the Office:
its concern with information
The need for efficient management of the Office
What modern management involves:
practical analogy
managing the work of others
teams, roles
management in business
The purpose of and need for good management
The "technical" aspect of any manager's job
The "human" aspect of any manager's job
Objectives of an enterprise
Policy formulation
Interpretation and implementation of policies
Henri Fayol's functions of management:
planning:
plans as routes to objectives
strategic, tactical and activity planning
organising:
what is involved
what it seeks to achieve
co-ordinating resources
commanding:
what it involves
leadership
the necessity for motivation
importance of the correct motivation
controlling:
supervising subordinates
setting and maintaining standards
maintaining records

Module 2 - The Office Environment

The modern world of commerce and industry:
the public sector
the private sector
Types of enterprises:
industrial
distributive and trading
service-providing
multi-activity
the interdependence of enterprises
The Office and information
The organisation of enterprises:
line organisation
functional organisation
line and staff organisation
Organisation charts:
their purposes
updating and avoiding ambiguity
Office location:
centralisation
decentralisation:
clerical centres
Office layouts:
multi-room - advantages and disadvantages
open-plan - advantages and disadvantages
combinations of layouts
Health and safety in Offices:
hazards, health, accidents, welfare
major causes of accidents and injuries in Offices
accident prevention
Providing the best Office working environment:
avoidance of overcrowding in the Office
minimisation of staff movement:
organisation and method (O&M) studies
prevention of physical and health complaints
minimisation of noise levels and distractions
providing suitable lighting
ventilation: natural and artificial
heating and/or cooling
walls and ceilings
floor coverings
toilet and cloakroom and washing facilities:
separate facilities for men and women, facilities for the disabled
The importance of adequate supervision:
spans of control:
factors which can affect effective supervision

Prevention of accidents in the Office:
floor stairs, aisles
desks, cabinets, filing
siting of equipment, safety guards
fire-fighting equipment, smoking
electrical equipment, cables, checks and servicing
safety awareness, instructions
tidiness and cleanliness - good "housekeeping"
First aid, first aiders and first aid kits
Office furniture and furnishings:
utility, cost, image, status
standardisation
office desks:
matters to be considered
office chairs:
desirable features

Module 3 - Office Activities and Responsibilities

Gathering information:
internal sources
external sources
determining who provides and needs information
Information and the Internet:
pitfalls to beware of
Recording information:
types of records, subject matters
the importance of full, accurate and up to date information
Processing information:
collating and analysing
presentation, formats
Storing information - filing:
types of documents
categorising information by subject matter:
accounts records
sales records
personnel records
stock or inventory records
what filing involves
desirable features of filing systems:
economy, compactness, simplicity,
accessibility, convenience, elasticity
tracers or out guides
forecasting filing requirements:
stages in filing system development
centralised filing
decentralised filing
training filing personnel:
personal attributes required

filing schemes:

alphabetic

numeric

geographic,

chronological

subject

using cross references; value of indexes

Record retention:

the retention policy

microfilming

scanning

Filing equipment:

vertical filing

lateral filing

loose cards

visible cards

Electronic filing

Communicating information - communication:

definition of communication:

terms explained

the necessity for two-way communication

importance to enterprises of effective communication:

the benefits which can accrue

vertical communication:

passage of information and instructions downwards

passage of information upwards

avoiding workforce reliance on the grapevine

horizontal or lateral communication:

its concern with information

its role in co-ordinating enterprise-wide activities

ensuring an uninterrupted flow

establishing and maintaining effective lines of communication

management's role in effective communication

external communication:

sources and destinations

the principles of effective communication:

identifying the sender and intended recipient(s)

selecting the best method of transmission

ensuring correct interpretation of messages

providing for feedback

changing roles from sender to receiver

ensuring an uninterrupted flow of communications:

removing obstructions and barriers

actions which can be taken

The Office as an aid to administrative control:

responsibilities and role of the office manager or administrator

Module 4 - The Management of Office Personnel (1)

The importance of selecting, training and retaining good staff
Recruitment of personnel:
internal recruitment:
what it can involve
benefits which might accrue
avoiding problems for personnel promoted
external recruitment:
sources of recruits which might be available
introductions by existing employees
job analysis;
its purpose
job descriptions:
why they are prepared
information they might contain
employee specifications:
reasons why they are prepared
personal attributes which might be sought
advertising to fill employment vacancies;
classified advertisements
display advertisements
advertising vacancies on the Internet
employment application forms:
design, layout and arrangement
information which might be requested
helping applicants complete forms properly
a specimen examined
attachments to application forms:
testimonials/recommendations from previous employers
certificates and/or diplomas
curriculum vitae or CVs
The selection process:
employment interviews
their importance and aims
advance planning
conducting interviews for the best results
selection tests
Appointment:
the letter of appointment
terms and conditions of employment
Trial or probationary periods
Unsuccessful candidates

Module 5 - The Management of Office Personnel (2)

The induction process:
its aim and importance
the essence of good induction
advance planning and arrangements
showing the newcomer around:
the work area, toilets/cloakrooms, lockers
locations of materials, machines and equipment
introductions to the workgroup or team members
avoiding problems for the newcomer
assessing progress
developing good relations
Training and development:
what on-the-job training might involve
simplifying the tasks to be taught
methods of training
advantages of continuous training
group training
ongoing training and learning
health, safety and accident prevention training
Settling-in and follow-up
Remuneration:
meaning
salary based on time
overtime payments
payment based on quantity
benefits and entitlements:
paid holiday/vacation time
sickness benefit
management's two-edged problem in formulating
an acceptable policy
types of remuneration
Flexible working time:
"flexitime" in practice
benefits claimed
The shorter working week
Job evaluation:
what is involved
Job ranking and grading:
their aims
rating according to:
ability, knowledge, skill, experience
The office manager and subordinates:
workgroups and team building:
size of the group, leadership, nature of the tasks,
the work environment, individual roles,
methods of motivation, cohesiveness, group norms

attributes of good office managers:
the need for an honest, fair and unbiased approach
the need for understanding
displaying interest in subordinates
setting good examples
providing encouragement
relations with subordinates
delegation of responsibility:
what is involved and its value
Disciplinary action
Employee counselling:
what it should involve
its benefits
work-related problems
Unspoken communication and body language
Resignations:
unavoidable resignations
avoidable resignations
Departure of subordinates
Retirements
Work-related stress:
causes of work-related stress
responses to stress - stressors
balancing job demands and pressures
Combating bullying and harassment in Offices:
sexual harassment
Equal opportunity:
in practice
legislation
Sex discrimination
Racial and religious discrimination
Disabled persons and those with special needs
Employees' representatives:
trade unions
white collar unions
staff associations
the office manager's dealings with a mixture of
trade union and staff association members

Module 6 - Office Equipment, Telecommunications and Computer Mediated Communication

Office equipment:
office supplies
common office machines
important features
dependence of modern offices on machines
General rule for the provision of machinery and equipment:
factors to consider in deciding what to buy or rent:
cost effectiveness
what machines and equipment are really necessary
exactly what is required from them
Possible problems with highly skilled/trained personnel
Difficulties with sophisticated machines and equipment
Computer systems:
as machines
as aids to management and administration
important characteristics
limitations of computer systems
Telecommunications :
developments in telephone technology:
the global communications infrastructure
throughput speeds and bandwidths
answering and recording devices
portable and mobile phones or cellphones:
feature phones and smart phones
SMS text messaging:
advantages and dangers of its use in business
the need for clarity
predictive text: usefulness and dangers
Internal communication (intercom)
Fax transmission
uses and advantages
fax machines and phone/fax machines
computers with fax cards
Computer mediated communication
effective management of information:
Email:
advantages over other methods
avoiding potential problems with emails
standard features and facilities of email packages
delays and delivery failures
management considerations
dangers of spam - junk or unsolicited - emails:
spam filters, avoiding opening spam emails or links
synchronous and asynchronous communication

Local area networks (LAN)
Remote access - VPN connection: the firewall, benefits
Data processing and security
types of software - the programs:
tailor-made, applications packages, database packages
database systems: using shared data
a manually performed and computerised task compared
how a computer works:
input, storage, arithmetic, output, logic, processing, control
the importance of accurate data
security of computer data:
backup copies, passwords or security codes
dead or inactive data, data deletion
computer viruses and antivirus software
The electronic office

Module 7 - Forms and Business Documents

Forms as the basic "tools" of Office work
The many and varied uses of forms
Manual completion or on screen completion of forms
Factors involved in designing or formatting a form:
the information really needed
sizes of spaces required for information
logical and coherent sequence
standardisation of layout
catering for filing
the presentation
codes or reference numbers
The proper and accurate completion of forms:
guidance notes on completion
reducing work in form completion:
ticks, crosses, boxes
training staff on form completion
Copies and sets of forms:
factors to consider
Serial numbers
Computerised forms:
files, records and fields
master and movement data
file updating
manual and computerised invoice systems compared
The Office's responsibilities as regards forms
Indexes of forms:
maintaining them up to date

Common Forms and Business Documents

Descriptions, uses and illustrations of:
form-type business letters
form-type reply letters
enquiries and covering letters
quotations
estimates and tenders
orders and order forms
acknowledgements of orders
invoices
proforma invoices
credit notes
statements of account
bank cheques/checks:
counterfoils
paying-in or deposit slips:
counterfoils
receipts for payments
petty cash vouchers
delivery notes
goods received notes
Series or chains of documents

Module 8 - Business Letters

Differences between business letters and 'personal' letters
Objectives of business letters
The style or tone of business letters
Features of business letters:
a typical specimen business letter examined:
the letterhead
the date
its addressee
the writer's designation
the greeting
references
the message - the body of text
the closing
Wording of business letters
Layout of business letters:
indentation, block, justification
Importance of attractive appearance of business letters
Pre-planning letters
The advantages of drafting letters
Training subordinates to draft letters
Typing from drafts
Stock sentences and paragraphs
Stock letters

Notes or annotations:
building complete letters
Shorthand or abbreviated writing
Dictation:
dictating letters directly to subordinates
using a dictating or recording device
Letter-writing by computer:
using a virtual private network (VPN)
Writing letters making complaints
Letters written in response to complaints received:
justified and unjustified complaints
References on business letters:
why they are used
constructing them
Postscript to letters
Letters copied to other parties:
forwarding emails

Module 9 - Memoranda

When and why memos might be written and sent
Ways in which memos differ from business letters
Features of memoranda:
specimens examined and commented upon

Reports
Management information:
statistical reports and financial reports
Special reports
Features of good reports
Prior information needed
Obtaining and compiling information for reports
Spreadsheets:
what they can do, and how
examples of spreadsheet uses in business and management
spreadsheet software
formulas, functions and conditional functions
practical example, illustrated and explained

Meetings
Informal meetings
Formal meetings:
how they differ from informal ones
Notices of meetings:
the date and time
the venue
Agendas:
what they may contain
why they are circulated
preparation and circulation

Procedures during meetings:
the role of the chairman
Minutes of meetings:
why they are prepared
types of information contained
methods of preparation
distribution
Arrangements which may have to be made
prior to and during meetings:
security and ID
room layout and seating
furniture
Audiovisual equipment:
computer software for "presentations"
Arranements for the course of a meeting
Conferences and conventions
Video-conferencing

Module 10 - Checking Letters and Documents Before Despatch

Types of errors to look for; examples
problems if they are missed
Features to be checked:
addressee's name and address
the date
references
spelling and punctuation
layout
typing and general appearance
figures and specific details
copies or forwarding to other parties
enclosures with letters
attachments to emails
Envelopes:
correct sizes and colours

Word Processing and Text Editing
Advantages of WP over other methods of letter production
text storage
avoiding the need for complete retypes
Standard features of WP software
Spelling checkers or spell checks
Thesaurus facilities
Online dictionary websites
Predictive text:
avoiding mishaps
OCR and scanning
Personalising letters and circulars
Types of printers:
selecting the best for the job

Outgoing Mail and Despatching

Methods of despatch by post:
by surface and by air
sealed and unsealed envelopes
postage rates
Different types of mail
letters, packets and parcels, postcards
Special postal services:
certificate of posting, recorded delivery, registration, express
Scales and balances
manual and electronic
Postage stamps
Franking machines
Other postroom equipment
The despatch department:
controlling postroom staff
Other methods of despatch/transmission:
faxes, emails, courier

Module 11 - Incoming Mail

Centralised treatment of incoming mail
Types of mail
Collections from private post boxes or bags
Deliveries of mail
Procedures on receipt of incoming mail:
the preliminary sort
Mail likely to contain money
Slitting of envelopes:
letter-opening machines
Contents of envelopes/wrappers
Date-stamping and or time-stamping
Sorting of contents:
distribution of sorted mail
Incoming mail supervisors and the office manager role

The Reception

Visitors and callers
Reception as the "showcase" of the enterprise
Attention required to the area
Furniture and furnishings:
desks and counters
seating for visitors, the waiting room
Selection and training of receptionists
Main duties of reception staff:
welcoming and directing visitors:
security, ID cards, CCTV
supplying information
maintaining records
making appointments
accepting deliveries

Telephone operators:
outgoing telephone calls
training and attributes

Stationery and Printing
The value of stationery and printed materials
Ordering stationery items:
orally by telephone or in person
using order forms
by letter
Orders for printed items:
reprints and new jobs
Internal printing;
desktop publishing (DTP):
how it differs from WP
Storing stationery and printed items
Dangers against which protection is needed
Ensuring adequate stocks
Stock records:
manual and computerised
the need for accuracy

Module 12 - Financial Matters

Transactions in business
Principles and basic rules of double-entry bookkeeping
Books of account:
the ledger:
the information or data it records and provides
ledger accounts
the cash book:
records of cash and bank transactions
the sales book:
what it records
source documents
the purchases book:
what it records
source documents
the returns books:
what they record
the journal:
what it records
Computerised accounting packages:
advantages over manual systems

Final Accounts
Why final accounts are prepared:
Trading Accounts:
gross profit or loss
Profit & Loss Accounts:
net profit or loss
Balance Sheets:
the financial position of a business as at a specified date

Cashiering Work
Forms and methods of payment:
cash - currency notes and coins
cheques or checks
bank transfers
credit cards or debit card
telephone banking
online banking
Receipting incoming payments
Banking:
what is involved
security
Checking bills received:
matters to be checked
Passing bills for payment
Methods of paying bills
Issuing/drawing cheques/signing
Cheque security:
crossing
Cashing cheques:
security necessary with open cheques

Petty Cash
Examples of petty or minor expenses incurred
The ordinary of keeping petty cash
The imprest systems of keeping petty cash
The petty cash book:
analysis columns
Security of petty cash

Budgets and Budgetary Control
What budgets are and why they are prepared
Budget review statements:
contents and uses
Investigating variances from budget allocations:
adverse and favourable variances