

# Easy Way



***Teach yourself...***

**Administration Processes  
and Office Equipment**

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Written in plain English

*A Cheryl Price Publication*

# Easy Way – Administration Processes and Office Equipment

This book Includes office processes such as telephone techniques, mail handling, filing, security of information, health and safety, use of office equipment etc.

It contains simple step-by-step exercises to guide you through the learning process.

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*Author:*

Cheryl Price

T.Dip.WP, T.Dip.T

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PO Box 187  
Matakana  
Auckland 0948

Phone: (09) 422 7230  
Mobile: 021 715566  
Fax: (09) 422 7236


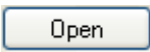




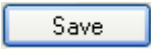
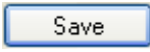
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# Downloading Exercise Files

Exercise files can be downloaded from the Cheryl Price web site as follows:

1	In your web browser, type: <b>www.cherylprice.co.nz</b>
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click on the Resources tab as shown at the right. 
4	Click on <u>Easy Way – Administration Processes and Office Equipment</u>
5	Under the <b>Exercise Files</b> heading click on the underlined blue hyperlink , ie Administration Processes and Office Equipment Exercise Files <u><a href="#">Free Download</a></u> The File Download dialog box will display.
6	If you have Winzip use the following instructions otherwise move to step 7.
	a Click on  .
	b Click on the  of the  button.
	c If My Documents folder is not displayed click on <b>Set default unzip folder</b> at the bottom of the list. Ensure My Documents is selected then click on Select Folder .
	d Click on the  of the  button and click on the My Documents folder. The files will be unzipped.
7	Click on  and ensure My Documents folder is displayed. Click on 
8	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files. You will need to double click on this folder to use the exercise files in this book.

# ***Introduction***

## ***Office Requirements***

This book makes reference to working in accordance with office requirements. You will need to ensure that you have access to the relevant requirements, in the following areas:

- Using a telephone
- Using a photocopier
- Using at least one other item of office equipment
- Administration processes pertaining to customer services
- Administration processes pertaining to mail handling
- Administration processes pertaining to filing
- Administration processes pertaining to maintenance of security of information, resources, environment, and visitors
- Administration processes pertaining to one other administration process

## ***Use of Office Equipment***

Outcome 2 requires you to demonstrate the use of at least one item of office equipment (in addition to a photocopier). You may like to tailor your learning to the specific equipment allowing you to omit parts of the relevant section of this book (Section 3).

You will also need to practise using these and other items of office equipment/administration processes. Some of these activities may be simulated as necessary.

## ***Use of Computers***

You will need access to computers for printing exercise files for practising photocopying in Section 3 and information for a telephone role-play in Section 2.

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## Files used in this book

(Instructions are at the front of this book for downloading retrievable files from our web site.)

Name of Files
Cairns
Draft Watermark
Paris
Sample Advert
Sample Watermark
Shareholders Report 2012
Telephone Role-play

Sample Document

Sample Document

# Office Administration Processes

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## Learning Outcomes

*At the end of this section you should be able to describe -*

- ☐ Roles of office personnel
- ☐ Mail handling
- ☐ Filing
- ☐ Customer services
- ☐ Maintenance of security of information, resources, environment and visitors
- ☐ Maintenance of a healthy and safe office environment
- ☐ Use of office equipment
- ☐ Clerical services

Sample Document

# Offices

## What is an office?

An *office* is a general term meaning a „place of business where professional or clerical duties are performed“. To name but a few examples: a law firm, a real estate agency, a public relations firm and a publishing company are all *offices*.



To be efficient and effective, employees in an office must successfully manage information related to that particular business's transactions using various administration processes and equipment which we will discuss in this workbook.

## Who works in an office?

The roles of office staff will vary depending on the size and type of business. Descriptions of some office personnel are as follows.

### ***Receptionist***

A receptionist is normally the first person a customer/visitor is greeted by and sits near the entrance of the office. Responsibilities include greeting people, answering the telephone, sending faxes, typing general correspondence, filing. Duties will vary depending on the size and type of business.

### ***Word processing operator***

A word processing operator processes correspondence such as letters, emails, faxes, reports, newsletters, etc. The role may also include creating presentations and the input of accounts using a spreadsheet program.

### ***Office clerk***

The duties of an office clerk may include accounts, filing, updating databases, maintaining records, etc.

### ***Office manager***

An office manager oversees duties performed in the office by junior staff. They also usually set up and oversee procedures for the processing of information within the office. Other duties may include the hiring of office staff, the layout of the office, establishing filing procedures, management of office equipment and furniture, placing stationery orders, etc.

# Office Administration Processes

## What happens in an office?

Even from the short list of examples given above, it can be seen that many different individual tasks must take place in an office in order to successfully manage the business. One thing all these businesses have in common is that the office provides a location where business information can be received or sent from, whether that be by post, telephone, fax, email or some other method.

Each type of office processes information that is specific to their particular line of work. For example, a law firm will receive instructions from clients, that is, directions on how the client wants the firm to deal with its problem; a real estate agency will receive listings, that is, requests from property owners for the agency to market and sell their properties; a publishing company will receive manuscripts, that is, work by authors who hope that the company will publish and sell their book or article.

Administering all this information involves having and using efficient processes so that the business runs smoothly. In a busy office, new information will be received on a daily basis, so if the office staff do not have effective office administration processes in place to ensure that all information is dealt with in a timely and efficient way, valuable clients (and therefore income) will be lost.

In addition to the information that the office staff work with, the office itself must be administered efficiently.

Today, there is almost an unlimited number of businesses that could set up an office. Although the work will vary, and offices will do specialist work, all offices will perform the following general administration processes:

- Mail handling
- Filing
- Customer services
- Maintaining security of information and resources
- Maintaining security of environment and visitors
- Maintaining a safe and healthy office environment
- Use of office equipment
- Clerical services



### Exercise 1

Describe briefly how you think an office environment would differ from a factory environment.

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# Office Requirements

In order to ensure that offices run smoothly and that the administration processes are carried out consistently (ie done the same by different people) and efficiently, offices usually develop their own requirements that state how their processes work and should be administered.

## Where to find information on your office's requirements

Office requirements on various office administration processes could be found in any of the following places and documents.

- Guidelines
- Quality assurance manual
- Job descriptions
- Employment contracts
- Workplace manual or guide
- Records management policy
- Statements of objectives
- Recommended procedures guide
- Health and safety procedures
- The organisation's intranet



## Mail Handling

All organisations send and receive mail during the course of their operation. Mail is the principal way for organisations to conduct business and exchange information with other businesses and individuals. Because mail is so important, it is essential to the smooth running of any organisation that it is processed in a planned, disciplined and consistent way.

When written information is received in an office, the first step in managing it is to interpret it, ie to check what it is, what it relates to and who can most appropriately deal with it. This is usually the job of the staff member who opens the post or receives the fax or email. In an office there is usually someone, such as a receptionist, who has the task of receiving incoming mail, interpreting it and ensuring that it is relayed to the correct person.

There are various ways in which offices may create or receive written communications: hand-delivered messages, standard internal memos or inter-office mail and letters and other documents sent through the mail or by courier.

For example, an employee of the Inland Revenue Department will open the mail and separate mail to be dispatched to the different departments dealing with company tax returns, requests for general information, parental pay applications, complaints, GST returns, and so on. Their interpreting of the information ensures that the forms are sent to the correct department to be dealt with.

Another example is a company that imports cars, which may receive information from manufacturers and wholesalers regarding a new car specification. This information would need to be forwarded in-house to sales representatives, and the marketing department.

Mail can be received from (or be sent to) someone or a business not connected to the office (which is called „external“ mail). Mail can also be circulated within the office itself („internal“ mail).

## Exercise 2

Summarise here in your own words what the purpose of having good mail handling procedures is.

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## Filing

„Filing“ is the act of creating a bundle of related records kept together in order to provide complete and thorough information about a matter. This file will often cover events that happen over a period of time.

Filing is an important task in any office as it ensures that old and working documents can be retrieved from storage whenever they are needed. A misfiled document is often as good as lost, as it is very unlikely ever to be found and retrieved.

A lawyer for example will keep a file on Mr and Mrs Webb’s relationship property agreement when they get married. If the couple later buy a house, the lawyer will open a new file to cover their house purchase. A doctor will keep a file on Mr Webb containing his medical records, and a separate one on Mrs Webb, plus separate files on any children they have. An architect will keep a file on the development of a shopping arcade, and a separate file regarding the fit-out of an individual shop within that arcade.

A file ensures that whoever needs to work on the matter can feel confident that they have all the information to hand, and that they will not unnecessarily duplicate work. In all cases, files will contain every piece of documentation that has gone through the office regarding the matter. A file could include any of the following items.

- Contact details for all relevant parties
- Correspondence (letters, printouts of emails, internal memos)
- Notes of telephone calls held
- Minutes of meetings
- Copies of invoices issued or received
- Drawings and designs
- Referral letters
- Contracts
- Timesheets
- Results of investigations
- Relevant legal information



All these documents are put into a cardboard folder to keep them together, and then stored according to the office’s preferred filing system (eg alphabetically by client surname) in the available hardware (eg a filing cabinet). Alternatively an office may require that all paper documents are scanned into a computer and stored on an electronic file.



## Active and archived files

Files remain „active“ while the matter is current (for example, while the Webbs“ house purchase is still going through, the file on the purchase is active). Active files are situated somewhere convenient to the team that is working on them. Once the matter has been completed (eg the contract for purchase is signed, the mortgage arranged, and money transferred), the file will be „archived“.

Since it is no longer needed on a regular basis, archives are usually in a far less accessible position, perhaps even offsite – this saves office space for more immediately useful material. In the event that the archived matter becomes active again or a closely related matter arises (say, the house turns out to be defective and the Webbs wish to sue the vendors), the file will be retrieved from the archive.

## Customer Services

Providing customer services is the action of supplying customers with what they need.

The following are examples of customer services.

- Greeting visitors
- Dispatching a product
- Referring customers to other people or services
- Providing training in management skills
- Setting up an account for a new customer
- Checking the insurance form a customer has filled out and advising of any gaps
- Responding to queries and complaints
- Sending out an informational brochure ... the list is endless!



Any job that involves dealing direct with customers puts those employees into the front line of the organisation. This means that customer service staff are a direct link between the organisation and its customers – the people who keep it in business. Customer service staff may deal with customers face to face, on the telephone or via email.

Providing efficient customer service is important because if customers are not treated well, they may well take their business somewhere that will provide them with better service. If they decide not to come back, the organisation“s business will suffer because customers are the people who pay money for products and services. Therefore it is vital for all employees who deliver a service to customers to deliver it well, and keep the customers happy. Good communication is key to delivering good service.

### Exercise 3

Summarise here in your own words what the purpose of having good filing procedures is.

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# Security of Office, Resources, Visitors and Information

When we talk about „security“ in an office, we could be talking about many different things.

The office itself must be kept safe, as must the people within it – both staff and visitors. In addition the information and resources that are stored within the office need protection.

Effective security measures to protect office staff and visitors, buildings, equipment and confidential information are essential to any business. Companies will implement their own policies and procedures to maintain security and confidentiality. These consist of rules and requirements that tell staff how to behave in certain situations where security, or confidentiality of information, could be compromised.



*Security* refers to precautionary measures taken to prevent unauthorised access to buildings, equipment or documents, which could lead to theft or damage; or to staff, which could lead to assault or abuse.

*Confidentiality* refers to information. If information is confidential, disclosure of it is prohibited to anyone other than authorised persons, for example Human Resources staff must keep wage levels and disciplinary matters confidential. There are also legal requirements for keeping personal information and companies’ policies and procedures must comply with these.

## Health and Safety in the Office

It is essential to establish and maintain a secure and healthy workplace to keep staff and visitors safe. As with other office administration processes, offices will implement their own policies and procedures to establish and maintain a safe and healthy workplace. These will contain rules that the organisation has laid down to say how things should be done. There are also legal requirements for keeping the workplace safe for employees and an organisation’s requirements must comply with these too.



If the working environment is pleasant and comfortable, it will help employees to fulfil their working obligations. Furthermore, if consideration is given to their health, employees are less likely to take time off due to eyestrain or injury.

When trying to achieve a healthy and safe office environment, consideration should be given to such factors as room temperature, ventilation, noise, lighting, accident hazards and workplace equipment – amongst other things.

### Exercise 4

Describe briefly the purpose of training staff to provide good customer service.

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# Office Equipment

During the course of office work, staff will be required to use office equipment. The equipment staff might use today has changed immeasurably in most offices even compared to just 20 years ago, when for example, widescale use of computers and the internet was only really just beginning.

While telephones, photocopiers and fax machines have been around much longer than computers, even the way we use them is changing (cordless phones, cell phones, texting, voice mail, multi-functional machines (which are photocopiers, faxes, scanners all in one), etc). But office equipment is here to make our lives easier and staying up to date with technology and using the most appropriate equipment in the right way is therefore vital to ensure we do our jobs as best we can, within the constraints of our office budget.

Use of office equipment must of course be done in accordance with the office's requirements. The office may, for instance, have cost-saving policies in place which dictate when documents can be printed in bulk and when they should be printed once and photocopied (the latter being perhaps cheaper). In addition there could be rules regarding when a colour printer or photocopier can be used, and when the cheaper black and white equipment must be used.

## Exercise 5

Summarise here in your own words why it is important to keep office buildings secure.

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## Exercise 6

Explain briefly how office staff can benefit from using office equipment correctly.

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## Exercise 7

"The mail handling process is far more important than keeping the office secure." Do you agree? Explain your answer briefly.

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# Providing Clerical Services

Providing clerical services is a basic function of an office. The headquarters (or head office) of a large chain of supermarkets, for example, is where the central administration for the business is conducted from.

In this context, clerical services are defined as administrative procedures and systems such as word processing, information processing, managing files and records, stenography and transcription, and designing forms, etc. Today, clerical jobs almost always require some computer expertise. Clerical job titles will be those such as Cashier, Customer Account Representative and Area Customer Representative.

While other functions occur in offices, such as negotiating leases, doing the accounts, marketing, advertising, due to their more „high-powered“ nature (usually the employees doing these jobs have specific qualifications) these are termed *professional* rather than clerical functions.

The following are examples of clerical tasks.

- Making appointments for other staff members.
- Managing information, eg customer database.
- Giving or sending out information.
- Writing letters or other informational documents.
- Information processing.



Examples of clerical services that may be provided in specific types of offices are described below.

## Law firms

- Processing and maintaining staff records.
- Creating and updating files.
- Organising domestic or foreign travel for senior staff.
- Responding to basic or general correspondence and other information received.
- Typing, photocopying and distributing contracts and other legal documents.

## Distribution outlets

- Maintaining stock and customer records.
- Reordering stock to ensure stock levels are satisfactory.
- Keeping customers up to date with new products and prices.

## Exercise 8

List as many other examples of basic clerical tasks that you can.

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# Revision

- 1 Why do offices create policy and procedure documents about office administration processes?

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- 2 Where might you find information on an office's policies and procedures? Give four examples.

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- 3 Explain why a business should spend money on maintaining a healthy office environment.

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- 4 Name three types of business that would create files on their customers or clients.

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- 5 Explain the difference between external mail and internal mail.

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- 6 Explain the difference between keeping information „secure“ and keeping it „confidential“.

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- 7 Why is good customer service important?

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