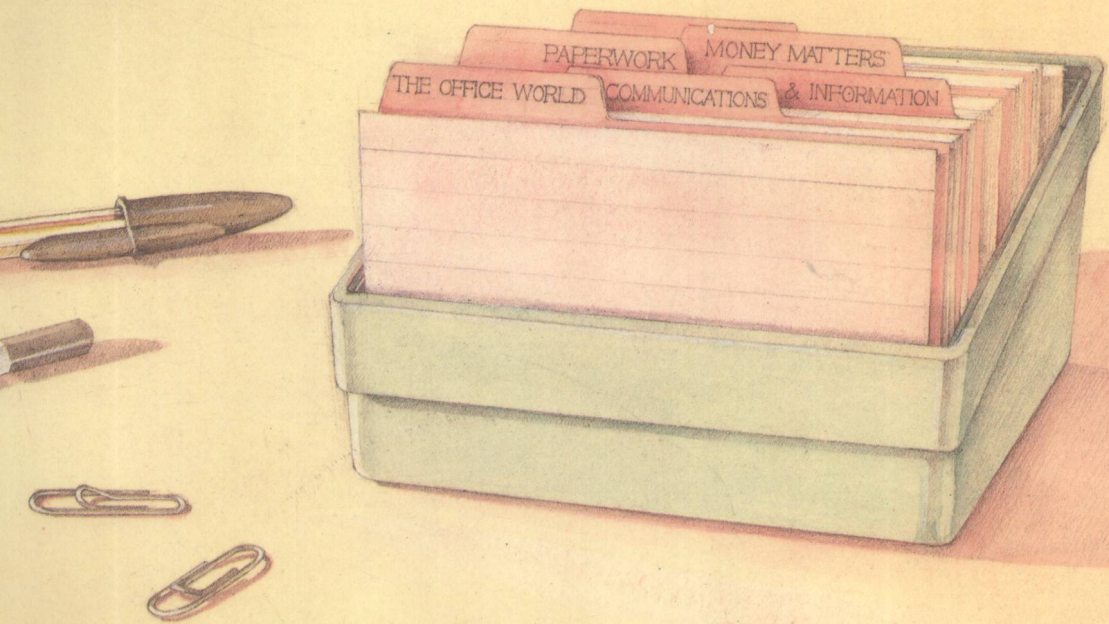


# Office Skills

- 2nd Edition -



Thelma J Foster

# Acknowledgements

I am grateful to Mr RAD Foster (my husband) for his advice on charts and graphs; to Dr RL Nowill for his advice on computers; and to Mr T Edwards, Mr D Manley and the staff of Stanley Thornes (Publishers).

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# Preface to 2nd Edition

A second edition of *Office Skills* has become necessary for several reasons. The first one is that since 1981 (when the first edition was published) many changes have taken place in Post Office, telephone, banking and building society services. Updating is essential — there is now no point in teaching students about telegrams!

Secondly, changing technology has affected offices in many ways, and while there are still thousands of small firms all over the world operating very competently with a typewriter, a telephone, a filing cabinet, a box of stamps and a postage book, it is the duty of teachers and lecturers to make their pupils and students aware of developments in office automation, not least because it is one of the important factors contributing to the fewer number of vacancies for school and college leavers. Therefore, I have incorporated brief outlines of the way automation will affect office procedures, where applicable, in the hope that it will be possible for young people to be taken into firms to see the latest developments for themselves.

Finally, after research into examination syllabuses and the needs of YTS and other courses, I have enlarged the scope of *Office Skills* to include sections on charts and graphs, the use of underground maps and railway timetables, travel itineraries and keeping diaries — all topics that appear regularly in examination papers.

I hope that these changes will make *Office Skills* even more useful for hard-pressed teachers of Office Practice, and, what is just as important, more interesting for those pupils and students being introduced to the commercial world through its pages.

THELMA J FOSTER  
Studley, 1984

# Preface to 1st Edition

I have written this book in the hope that young people will enjoy reading it. My experience of teaching the subject over the past 20 years has shown me that pupils in schools and students in colleges will not read their textbooks unless absolutely obliged to do so and I have tried to make this one interesting, attractive, funny (in places), and, perhaps most important, simple — especially when dealing with points which I know very well young people find confusing,

Ideally, Office Practice should be correlated with Commerce, Economics and Accounts — not to mention typewriting, but I know this is a counsel of perfection and difficult to achieve. What I hope this book will do is to enable teachers in schools and colleges to make Office Practice as practical as possible; even where equipment is inadequate, it is possible to organise supplies of forms so that the lessons can be interesting and imaginative. Typewriting lessons could be used for this purpose, once some degree of proficiency has been reached.

Technology is bringing changes in offices, as elsewhere, but the fundamental principles of storing and finding information, dealing with visitors to firms and answering the telephone, will remain for many years to come and study of Office Practice can only be of use to the office workers of the future.

*Office Skills* will be especially useful for pupils in schools studying the CSE syllabuses on Office Practice, and also for students in Colleges of Further Education working towards the Secretarial Studies Certificate. BEC/General students should also find much of this book relevant.

My most heartfelt thanks are due to my husband for his patience and help, to my colleagues for their interest and encouragement and, especially, to all those students who have worked painstakingly through the exercises and shown me the error of my ways. I should also like to acknowledge Mr Tony Edwards, who made helpful comments and suggestions on the first draft, and the staff of Stanley Thornes (Publishers) who turned the final draft into a book.

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THELMA FOSTER  
Worcester, 1981

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\*The cartoon 'What's Wrong?' is reproduced by kind permission of The Royal Society for the Prevention of Accidents.

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## SECTION A **THE OFFICE WORLD**

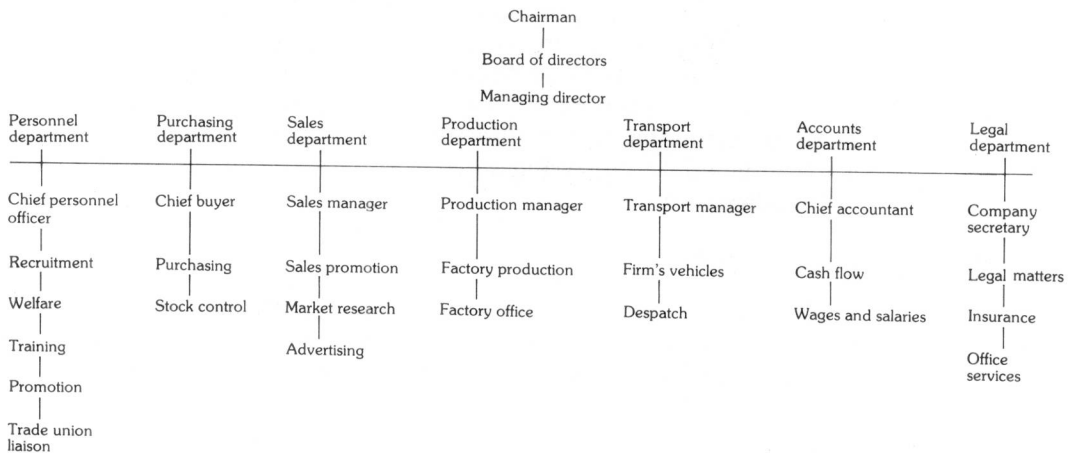


# The Departments of a Company

## Introduction

Most companies are divided up into departments, with a manager to take responsibility for each one. The managers report to the managing director, who in turn works in close cooperation with the board of directors and the chairman.

The organisation chart below shows the responsibilities of each manager, including the manager in charge of office services.



A typical organisation chart. The exact structure of any firm will of course depend on the particular type of business being conducted

A separate chart (see p. 5) shows what office services consist of, with each department controlled by a supervisor under the authority of the company secretary. The supervisors have the responsibility of ensuring that the work of their staff is carried out efficiently, accurately and promptly.

## **The Purpose of the Office**

An 'office' is a place where any clerical work is done, and the word 'clerk' means any office worker – typist, computer programmer, receptionist, for example. Offices exist in firms mainly to receive, record and find information. In a small one-man business, separate office services will not be necessary. The manager can receive and give information himself. In larger businesses the managing director cannot deal personally with all inward and outward communications (see pp. 124 – 36); nor can he supervise everything that takes place. The office services are there to carry out these functions on his behalf.

## **The Key People**

### **THE CHAIRMAN OF A COMPANY**

The chairman is the most important member of the board of directors (and is usually elected by them). He represents his company both outside the firm to the public (shareholders, for example) and in the firm – he may make presentations to employees with long-service records or who have given exceptional service. He takes the 'chair' (i.e. presides – see p. 137) at board meetings and presents the annual report on the company's progress to shareholders. The chairman depends upon his fellow directors for information and advice – no single individual could be expected to know every detail of what is going on in a large firm.

### **BOARD OF DIRECTORS**

Each director may be responsible for a particular section of the business – production, sales or buying, for example – but they are also responsible to the managing director and have to accept the board of directors' decisions.

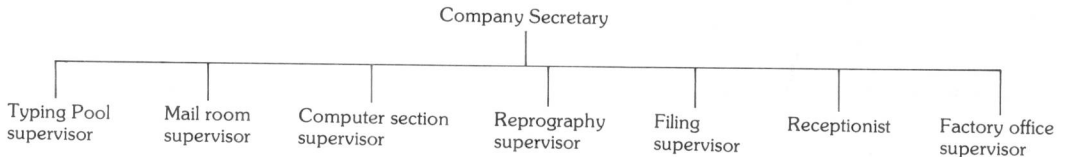
### **MANAGING DIRECTOR**

The managing director's chief responsibility is to see that the decisions made by the board of directors are carried out. He works in close cooperation with the chairman; in order to achieve this he also spends a great deal of time with the managers (known as 'executives') of the various departments. It is through the managing director that important matters are passed to the board of directors for discussion and decision.

### **THE COMPANY SECRETARY**

The company secretary is mainly responsible for making sure that his company does not break the law (taking care of legal matters). He also acts as a link between the company and the shareholders and sends

them information about their shares, and the company's financial position (i.e. how much profit or loss it has made in the previous 12 months). The company secretary is responsible for keeping an account of proceedings at all meetings (minutes: see pp. 138—9) and that the company keeps proper records of its financial transactions (buying, selling, borrowing, paying wages). The company secretary works closely with the chief accountant. As well as legal matters, the company secretary handles insurance matters. In many firms he is responsible for the office services. In all firms he is the link between the board of directors and the office staff.



The organisation of office services in a typical large firm may look like this

## **The People and Departments in a Large Firm**

We now look at the departments in a large firm and see 'who does what'.

### **THE PERSONNEL DEPARTMENT**

The word 'personnel' means 'the persons employed in any service', and the main duties of the staff working in a personnel department are connected with people. Such duties may include:

- Advertising vacancies for jobs.
- Training employees; promoting them.
- Transferring employees from department to department.
- Keeping staff records.
- Looking after the welfare of staff.
- Organising negotiations with trade unions.
- Dealing with resignations and dismissals.
- Helping to run social events and 'public-relations' exercises such as open days for visitors.

The first step towards obtaining a job in a large firm is usually taken by completing an application form for the personnel department. This may be a general form (suitable for any vacancy in the firm) or a specialised one—perhaps (say) suitable for office staff only. A completed application form will tell the firm whether an applicant is suitable enough to be interviewed. If so, he or she is put on what is called a 'short list'.

## EMPLOYMENT APPLICATION FORM (Office Staff)

Surname (in CAPITAL letters, please) .....

Forename(s) ..... Mr/Mrs/Miss

Address .....

Date of birth ..... Nationality .....

### Education

	<i>Name</i>	<i>From</i>	<i>To</i>
Last school attended	.....	.....	.....
Further education	.....	.....	.....

### Examinations passed

<i>Subject</i>	<i>Board</i>	<i>Grade</i>
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....

### Previous office experience

<i>Name of firm</i>	<i>Position held</i>	<i>From</i>	<i>To</i>
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

### Any other work experience

.....	.....	.....	.....
.....	.....	.....	.....

### Hobbies and other interests

.....

.....

Please tick any of the positions below in which you are interested and for which you consider you would be suitable. Number them in order of interest and suitability.

- |                                       |                                               |
|---------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Audio-typist | <input type="checkbox"/> Receptionist         |
| <input type="checkbox"/> Book-keeper  | <input type="checkbox"/> Secretary            |
| <input type="checkbox"/> Copy-typist  | <input type="checkbox"/> Shorthand-typist     |
| <input type="checkbox"/> Filing clerk | <input type="checkbox"/> Switchboard operator |

Signed .....

Date .....

An application form for employment



Personnel records contain a great deal of information which is confidential and must be filed in lockable cabinets, which should never be left open when the office is unattended. Staff working in a personnel department have to be trustworthy and discreet—never passing on information about staff to anyone outside or inside the firm.

A staff record sheet

## PURCHASING DEPARTMENT

The purchasing department is the responsibility of the purchasing officer (sometimes called the 'chief buyer'). The chief buyer carries out three important duties:

- He must make sure that value for money has been received.
- He must make sure that accurate records of money spent are kept by his department.
- He must authorise all payments made on behalf of his department.

The purchasing department arranges for the buying of raw materials to be used by the production department, as well as office equipment, stationery and possibly the food and other requirements of the canteen. Frequent visitors to the purchasing department are salesmen from other firms, hoping to be given orders for the goods they are trying to sell. Invoices from suppliers are sent to the purchasing department for checking, after which they are sent to the accounts department for payment. Other forms used are orders and enquiries. Another important responsibility of the purchasing department is stock control.



Stocktaking

The 'stock' in a firm consists of supplies of everything likely to be needed. Because it costs money, it is very important to make sure that too much stock is not piling up on the shelves. Money can earn interest—idle stock on shelves which is not likely to be required for months earns nothing. The supervisor in charge of stock control has to arrange security for the goods in store so that they cannot easily be stolen, and he also has to prevent stock being wasted. Stock record cards (see p. 253) enable him to see at a glance how much of any article is in stock, and who is 'requisitioning' it from him. Stock requisitions (see pp. 253—55) are forms completed by employees requiring goods from the stores.