GOVERNMENT OF TAMIL NADU

HIGHER SECONDARY FIRST YEAR

VOCATIONAL EDUCATION

OFFICE MANAGEMENT AND SECRETARYSHIP - THEORY

Untouchability is Inhuman and a Crime

A publication under Free Textbook Programme of Government of Tamil Nadu
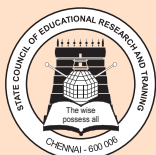
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PREFACE

In the view of the changing business environment and suggestions received from experts. This book has been thoroughly planned and updated. This book provides a comprehensive and balanced coverage of the subject. In addition to usual topics, the book presents contemporary topics also. High quality and quantity of topics is maintained for application in global set up. The student and faculty will find the contents of the book are short, precise and explanations are given in understandable language with a sufficient support from real business information. I also have great pleasure in presenting the book titled Office Management and Secretarial Practice.

This volume is an attempt to provide the students with thorough understanding of office management and secretarial practice concepts and methods. This book presents the subject in a systematic manner with liberal use of figures applicable.

This book will prove extremely useful to students and teachers alike. It also be adopted and used successfully. This book is even suited for self study.

This book covers following areas: Office Activities, functions and organization, Qualities of Office Manager, Office Accommodation and Principles, Office System and Procedures, Office records, Office Committee, Office Communication and Mail Service, Office Automation - Office Machines and Manuals, Importance of Typing in modern era, Book keeping and Accountancy, English and Communication Skills, Business Correspondence, Basis of Information Technology, Internet and Networking, Business Management, Personnel Management and Secretarial Practice

It's sure that this book will be more useful for the student fraternity, teachers, executives and other professionals. Suggestions and comments for the improvement of the books are welcomed.

Learning Objectives

Learning objectives are brief statements which explores what students are expected to learn in Office Management and Secretaryship vocational stream by the end of Class XI.

DO YOU KNOW?

Amazing facts and ideas to supplement the students' thinking and question.

Infographics

Visual representation creates interest enhance retention capacity and comprehend the topics in the book.

Tables and Flow Charts

The diagram and schematic presentations of the content provides a bird's eye view of the concepts.

To encourage the students to further browse the content through digital access in learning.

Activity

Directions are provided to teachers and students in order to explore and enrich the concepts to create innovative ideas.

Evaluation

Assess students and guide them effectively.

Keywords

The technical terms are explained to clarify the unknown facts related to food industry.

Exam Questions

Model questions to prepare the students for final exam.

References

List of related books for further details on each topic.

Web Links

Digital resources for extended learning.

Career Corner

List of professions particularly related to the Office Management and Secretaryship.

Chapter Content

A brief overview of each chapter has been mentioned.

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CAREER GUIDANCE AFTER COMPLETION OF 12TH STANDARD

After completion of Higher Secondary (+2) Vocational Engineering (EE) course, students can pursue the following courses / Jobs / Self-employment as detailed below:

Vocational Stream

The Vocational Engineering students are blessed with two major opportunities after completing their +2.

Educational Guidance	Job Opportunities
BBA in Management	Assistant to Company Secretary
B.Com. Office Management	Member in Company Secretary Team
B.Sc Management	Assistant to Executives in Office
BA Management	Executive Assistant
B.Com Corporate Secretaryship	Administration Executive
B.Com E-Commerce	Front Desk Executive
B.A. (Vocational Studies) Office Management & Secretarial Practice	Office Administrator
Diploma in Modern Office Management	Company Secretary
Diploma in Modern Office Management and Secretarial Practices	
Diploma in Modern Office Practices	
Diploma in Modern Office Management and Computer Application Engineering	
Diploma in Modern Office Management and Secretarial Practices	
ACS – Secretary Course	
Certificate course in Management	

BRIEF CONTENTS

E-book   Assessment   DIGI-Links

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• Download the QR code scanner from the Google PlayStore/ Apple App Store into your smartphone
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• Once the scanner button in the application is clicked, camera opens and then bring it closer to the QR code in the text book.
• Once the camera detects the QR code, a url appears in the screen.Click the url and goto the content page.

CONTENTS

OFFICE MANAGEMENT AND SECRETARYSHIIP

CHAPTER I

MODERN OFFICE AND FUNCTIONS

Content:

Introduction – Modern Office -Meaning- Definition- Changing Office Scenario – Importance of office- Functions of Modern Office – Types of Office- Office Manager - Qualifications of Office Manager- Functions of Office Manager

Learning Objectives

- Enable the students to understand the functions of modern office and its importance.

- To acquaint the students with qualifications, functions and duties of office manager.

Introduction:

An office is the center point of any business activity. It is like the brain in a human body. As human physical activities are regulated and controlled by the brain, the activities of department and people in an organization are as well regulated and controlled from office. In simple terms, we can say office is a place where business is carried on.

Today the modern, business houses do not limit the scale of their operation to local markets. They have expanded their operations to different countries of the world and have plants and sales offices all over the world. This vast expansion of business operations needs a well-equipped and different office to co-ordinate its affairs.

1.1.1. Meaning of Modern Office:

The term Office comes from the Roman Latin, Officium, a term loosely defined as a 'bureau' or 'a formal position'. In common parlance, it is a place where clerical work is performed and where all kinds of paper work (letters, correspondence, files, records etc.,) are dealt with. It is "a central place where all sorts of clerical work is done to co-ordinate and control the affairs of the whole organization".

In the modern days, with growth of industry and commerce, the amount of writing work, correspondence, filing, indexing, computing, scheduling etc. have increased to huge extent. Making or preparing records, using them and presenting them for future reference are office work. In this sense, the office work can be called as a facilitator of the modern management.

1.1.2. Definition of Modern Office:

According to Mills &Standingford "The office is the administrative center of a business.The purpose of an office has been defined as the providing of a service of communication and record".

As per Random House of Dictionary "An office is a place where business is transacted or professional services are available".

In modern times, the term 'office' is used in a broader sense to represent the functions performed by the clerical staff rather than the place where such work is performed.

1.2. Changing Office Scenario:

In the past Traditional offices, were found to occupy one or two small poorly lighted and ill-ventilated rooms in the least conspicuous part of the building. Most of the office work had to be performed manually and clerks spending most of their time in copying letters for dispatch to customers. Almost all internal and external communication had to be carried on through human agency.

Due to globalization and modernization for the past two decades constant changes have taken place in the size, nature of work and organization of the office.

Fig. 1.1. Traditional Office

In contrast with traditional office, modern offices were found to be located in well- lighted and ventilated, often air-conditioned rooms painted with pleasing colours and sometimes spread over several floors of the same building.

Office clerks often occupies streamlined desks and chairs of various designs arranged in neat rows. Typists and stenographers were found with headphones. Telephones, intercoms, desktops and lap tops and other devices would be found on the tables of executives and supervisors for communication with all parts of the office as well as with outsiders. All official communications are made through e-mails. Internet and intranet are used as possible means of communication.

Today modern offices are organized on scientific principles and their management and administration are in the hands of highly specialized office managers. They do not sit in the same room with the clerks, nor they deal personally with the customers, sitting in their separate rooms, they control and guide the work of clerks with the help of supervisors and through standardized office systems and routines, office manuals and other written instructions.

Fig. 1.2. Modern Office

These vast changes have brought raid

expansion in business activities, growth in the size of business enterprises and also lead to increase in the volume of office work.

1.3. Importance of Offices:

An office is an important unit of the whole organization which is also regarded as the mainspring of a watch. It has its equal importance in the government sector as well as in the private sector. It is essential for the office to perform a number of administrative as well as clerical functions in the process of achieving the organizational objectives.

Do You Know?

- The first modern business offices were those of London's Royal Navy built in 1726 and the East India Trading Company built in 1729 by Britishers to manage overseas operation.

- The invention of the elevator in 1852 saw the exploration of tall-building design.

- Home Insurance Building in Chicago, Illinois– considered to be the first skyscraper office building.

- In 1968, Robert Probst designed the "cubical", still widespread in the United States, which was followed by the now famous open space.

- Though Europeans referred to "Mad Men"-style offices as American plan, it was actually two German brothers who dreamed up the first open-plan office. They called Bürolandschaft, or "office landscape."

The importance of office can be explained with the help of the following point:

(a) Information Center: The office serves as an information centre. It collects information from sources like invoices, letters, memos, agreements, vouchers etc., and protects them in safe mode on the basis of their importance for future reference.

(b) Proof of Existence: The office is the evidence for existence and survival of business. As office coordinates the functions of different departments of an organisation, without office no business house can survive. People tent to generalize about the existence of business only with the help of regular functioning of an office.

(c) Channel of Communication: The office is the channel of communication between different people and department of business. The staffs working at various levels of managerial hierarchy are linked with one another through office. Office transmits the information about the functioning of different departments such as personnel, finance, production and marketing with each other.

(d) Co-Ordination of Work: Business is divided into department and sub-units for bringing simplicity in the operation. The office will work as a coordinator to maintain the relationship between departments. It develops productivity relationship to achieve common goals of an organisation.

(e) Centre for Formulation and communication of plan and policies: A business is established with the objective of attaining the certain result. To achieve this result top level manager formulate plans and policies from office. These plan and policies are communicated to related person through the office. Therefore, the office is a centre for the formulation and communication of plans and policies.

(f) Managerial Control: The process of developing performance standard and comparing with actual performance in order to take corrective action for deviations if any is called controlling. The office helps in controlling the activities of different people and department of an organisation. Through controlling it ensures that the various activities of business are performed with much accuracy.

(g) Memory Center: Office protects important information of past in a safe manner. The departments and people generally collect needed data from the office as and when they are required. It provides information storage facilities in the form of files and devices on the basis of their importance for future reference. Therefore, the office is considered as memory center.

(h) Service Center: The office works as a service centre for different units and departments of an organisation. It provides clerical services like mailing, filing, typing, printing,

supplying resource etc., to all people working in different departments of an organisation.

1.4. Functions of Modern Office:

BASIC FUNCTIONS

- Receiving And Collecting Information
- Recording Information
- Arranging And Processing Of Information
- Storing Of Data
- Communication Of Recorded Data

ADMINISTRATIVE FUNCTIONS

- Management Functions
- Office Systems And Procedures
- Designing And Purchasing Of Office Forms And Stationery
- Selection And Purchase Of Office Furniture, Equipments And Machinery
- Public Relation Function
- Retention Of Records
- Safeguarding Of Office Assets
- Controlling Office Cost

I. Basic Functions (or) Routing Functions: Following are some of the routine functions performed in office.

(a) Receiving and collecting information: It is the primary function of office to

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receive and collect the information for timely business decisions. Information is generally collected both from Internal sources such as letters, memos, circulars, notices etc., issued by different departments, sections and External sources like government departments, financial Institutions, banks, suppliers, customers, universities, general public etc.

(b) Recording of information: The collected Information has to be recorded for future reference in a suitable form. This recorded information is needed for preparing future plans, policies and taking decisions.

(c) Arranging (or) Processing of Information: All the information received cannot be used as it is. Office has to convert the collected information in the form of notes, reports, diagrams, graphs etc., depending upon the nature of information for easy access and understanding.

(d) Storing Data: The recorded information should be protected for future reference. The degree of necessity of data will determine the duration for protecting the same. Based on the importance of data, office will store them in a separate file.

(e) Communication of Recorded Data: Office has to supply the right information at the right time to different departments and also to outside bodies who are related in some way or the other for prompt and sound business decisions.

II. Administrative Management Functions: For the smooth functioning of the office there are certain administrative functions needed to be performed. These functions are outlined below:

1. Management Functions: Office work has to be properly planned, organized and executed according to the plan. For efficient functioning of an office the manager has to perform the following function such as.

- Planning.
- Organising.
- Staffing.
- Directing.
- Communication.
- Controlling.
- Co-ordination.
- Motivation.

2. Developing Office Systems and Procedures: Most important function of the office is to plan and set up suitable systems and procedures for the major activity of office. For the efficient and economical performance of office operations, each major work of the office is to be carefully planned and also the routine procedures for performing them to be determined beforehand itself.

3. Form Designing and Control: A form is a standardise record, which

is used to accumulate and transact information for reference purposes. These forms serve as a storehouse of information. Since the office work is largely paper work, the form used should be designed so as furnish the required information in an appropriate manner. It is the duty of the office to design the forms that can be used in various departments.

4. **Purchasing and Supply of Office Stationery:** Majority of office work are paper work. Consequently adequate supply of office stationery of suitable quality is of prime importance for the systematic and efficient performance of office work. It is the task of office to look after the standardisation, selection, and purchase of office stationery and its distribution to different departments.

5. **Selection and Purchase of Office Furniture, Equipment and Machines:** The office has to select and purchase the right type of furniture, equipment and machines in right quantities, so that office work can be carried out according to the planned system and routine without any interruptions and must also ensure their fullest utilisation in the organisation.

6. **Public Relations Functions:** An office has not only maintained relations with the other departments, it also needs to maintain a good dealings with the outside world such as suppliers, customers, bankers, government departments and the public at large. Maintaining good relations with these stakeholders increases the reputation and goodwill of the company.

7. **Retention of the Records:** Records are those documents which serves as objective evidence of activities performed, events occurred, results achieved, or statements made. They are created /received by an organization in routine transaction of its business or in pursuance of its legal obligations. Office retains records such as correspondence, invoices, orders, financial and cost records, and minutes etc., for future reference.

8. **Safeguarding Assets:** It is one of the functions of office to safeguard the assets of the organisation, such as immovable assets like buildings, plants, machinery, office equipments, lighting and air conditioning equipments, and movable assets like furniture, office machinery, title deeds, records and documents, or cash, etc., against loss or damages from unforeseen conditions.

9. **Controlling office Costs:** With the adoption of scientific methods in office management, a modern office discharges the function of controlling office costs through

   (a) Mechanization of the office.

   (b) Adopting time and labour saving devices in the office.

   (c) Using better forms.

   (d) Analyzing the existing office routines and adopting improved ones.

1.5 Types of Office:
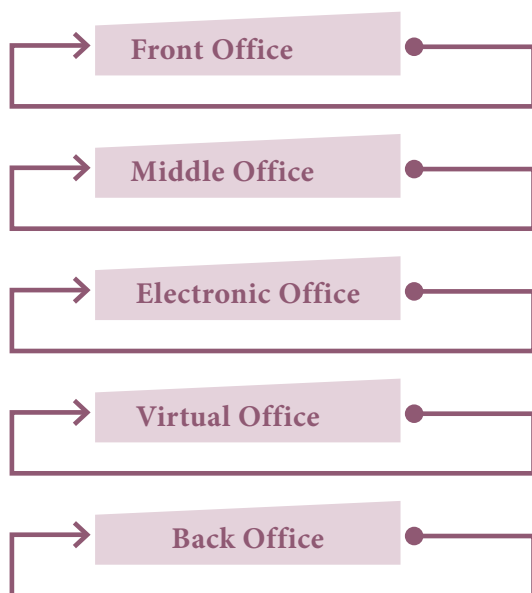
Fig. 1.3. Types of Office

The following are the different types of offices.

i.   Front office: The front office otherwise called reception. It refers to a company's department that come in contact with outsiders such as clients, suppliers, bankers, financial institutions and general public at large. The front office welcomes visitors, deals with queries of the visitors, and receives mails and disseminates the same to respective departments.

Fig. 1.4. Front Office

ii.   The Middle Office: The middle office is usually a part of operations division of the business unit. These divisions ensure the proper flow of work within the organisation. Middle office generally functions along with the front office and it comprises of departments of financial services. Due to their critical role, it is supervised by the back office managers.

Fig. 1.5. The Middle Office

iii. Electronic Office: It is integrated computer systems designed to handle office work. In this office all the activities are carried out with the help of software applications. The aim of e- office is to reduce paper work and speed up business operations. The introduction of e-office improves accuracy and efficiency of organizations and thereby improved their level of service. All modern offices are electronic offices.

Fig. 1.6. Electronic Office

iv. The Virtual Office: "Virtual Office" implies mobile or remote work environment equipped with telecommunication links and basic office furniture, but without a fixed office space. Office automation has led to the development of virtual office concept. It works just like a physical office but without physical space and facilities. Employees interact with others through portable communication tools such as electronic mail, cellular phone, voice mail system, laptop computer, fax machine, and audio/video conferencing system. Employees armed with these tools can perform their work from any place — their homes, cars, restaurants, airports, customers' offices, and so on.

Fig. 1.7. Virtual Office

vi. Back Office: These offices are generally found in operating corporate organisations where tasks dedicated to operating the company are performed. The term comes from the building layout of early organisations here the front office would contain the sales and other costumer-facing staff and the back office would be those manufacturing or developing the products or involved

in administration but without being seen by customers. Although the operations of back office are usually not given a lot of consideration, their contribution to the business is significant.

Fig. 1.8. Back Office

1.6 Office Manager:

An office manager is an individual, who is incharge of an office and whose function is to organize and control the activities of the office. He is appointed to head the office. "The office manager is the pivot around which the office function revolves" (Denyer, J.C.).

He extracts the work from the subordinates to achieve organizational goals. It is his responsibility to plan, organize and control the clerical aspects of the organization including the preparation, communication, coordination and storage of data to support production and other important operations of industrial establishments. He monitors the work processes and evaluates their outcome. On the whole he is appointed as an administrative head of office.

Some of the functional names associated with an office manager are Manager,

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Do You Know?

In 1974, Herman Hertzberger created the Central Beheer insurance company, a space conceived as a "village worker" designed so that the occupants 'would have the feeling of being part of a working community without being lost in the crowd'. The space was deliberately flexible and consisted of small workspaces, like the islands forming virtually to connect to one another. These structured platforms were built repeatedly throughout the space and can accommodate groups of ten people, who were encouraged to decorate their workspace themselves, including adding their own furniture.

Administrative Manager, Commercial Manager, etc.

Today, in the modern era of dynamic and competitive business environment, the office manager has to perform a wide variety of tasks from managing basic office services to handling of the most modern techniques of systems integration, automation, operations research and communication. In performing these tasks he assumes the position of a full-fledged functional executive at par with other operational executives.

1.6.1. Qualifications of Office Manager:

The qualifications of a successful office manager are grouped under the following three heads (i) Education and Practical training, (ii) Experience and (iii) Personal qualities.
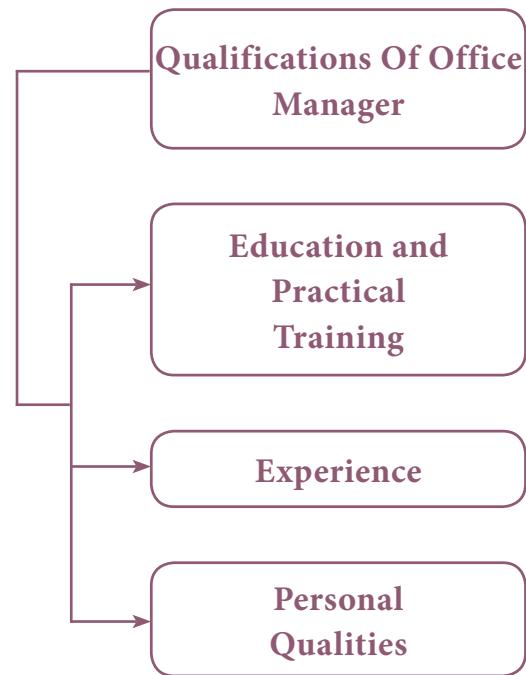
Fig. 1. 9. Qualifications of Office Manager

(i) Education and Practical training: An office manager must have appropriate educational qualifications. He should possess not only bachelor's degree in the relevant discipline, but also have proficiency in English and one or more foreign languages. The office manager must also have special training in business administration, accounting, office systems and procedures, office machines and data processing methods.

(ii) Experience: He should have sufficient business experience preferably be in a similar organization as the one employing him as office manager. This will enable the office manager to get familiar with the routine procedures of the organization and also the problems of the office that he has to manage.

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(iii) Personal Qualities: The main task of the office manager is to get the office work done by personnel of the office efficiently and economically. To achieve this objective he must be able to organize, inspire and lead the staff under him. He must also try to understand the ability and aptitude of each individual worker and delegate work to them accordingly. For this he must possess a number of personal qualities such as leadership, sound judgment, sense of justice and fair play, impartiality, sincerity, understanding of human nature, tact, persuasiveness etc.

1.6.2. Functions and Duties of Office Manager:

The scope of office manager's work is very wide. It differs from business to business and organization to organization and from office to office. No two office manager performs same set of functions. However, philosophers and researchers have classified the functions of office manager as below.

1.   Managerial Functions

2.   Supervisory Functions

3.   Personnel Functions

4.   Duties to the Management.

Fig. 1.10. Functions of Office Manager

1.   **Managerial Functions:** The office manager is the administrative head of office. It is his duty to manage the entire affairs of an office. As an administrative incharge, he is expected to perform the following functions.

a.   Planning the work to be performed before hand.

b.   Forecasting the future demands based on past records.

c.   Organising the activities of office.

d.   Co-ordinating the activities of various departments.

e.   Executing the policies and programmes of the management.

f.   Communicating various policy decisions to the functional managers.

g.   Designing and implementing new systems and procedures.

h.   Reviewing system and procedures periodically and effecting changes in them.

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2. **Supervisory Functions:** The prime duty of office manager is to extract the work from subordinates. In this regard, he performs the following supervisory functions:

a. Dividing and allocating the work among the subordinates based on their specialisations.

b. Ensuring that the work is carried out as per predetermined schedule.

c. Exercising regular control over the quantity and quality of the work done by the subordinates.

d. Ensuring the punctuality.

e. Providing adequate stationery and supplies and controlling their usage.

f. Arranging for appropriate equipment and maintaining them in proper working conditions.

g. Maintain the office, well organised, clean and tidy.

3. **Personnel Functions:** At times office manager acts as a human relation officer for his own department. To ensure higher degree of accuracy and efficiency at work he should have efficient subordinates. For that purpose he discharges the following duties.

a. Recruit or hire skilled workers for the departments.

b. Arranging for training and development programmes for the subordinates to upgrade their knowledge.

c. Conducting staff appraisal interviews periodically.

d. Measuring the work of subordinates through appropriate methods.

e. Fixing up remuneration for the staffs and devising methods for suitable compensation.

f. Dealing with matters as regards to indiscipline.

g. Counselling and settling the disputes among the subordinates to the possible extent.

4. **Duties to the Management:** Office manager is a functional head of the department. He acts as staff expert to top management and offers advices on various policy matters relating to office routine. He also performs the functions like

a. Provision of information that is needed to make policy decisions.

b. Supporting and implementing the policies of the top management.

c. Reporting the problems to the management which are beyond his limits.

d. Identifying problems in the implementation of the policies and reporting to the top management for remedial action.

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e. Handling mails and fixing up appointments on behalf of top managers.

1.6.3. Qualities of Good Office Manager:

In the recent years the authority and responsibilities of office manager have grown substantially. They are more involved in policy decisions. The office manager should be capable to face challenges of modern complexities of business world. Dynamic office manager possess the following qualities.

Organising Ability: A modern office manager must be a good organiser. He should organize the office services in such a way that it can be performed smoothly, efficiently and economically. He has to act in the following manner:

1. **Dynamic Leadership:** He should be an energetic leader. He should inspire and build confidence in the minds of the subordinates. He must also encourage the subordinates to perform their job effectively and efficiently to achieve the common goals of an organisation.

2. **Innovative:** He should be innovative. He should have creative thinking and capability to develop better methods and systems. Moreover, he should always in search of new and innovative methods and techniques of doing the office work in order to increase the efficiency and quality of the work.

3. **Ability to Delegate:** Office manager should be competent to divide and allocate the job among the subordinates according to their capabilities. Effective delegation of authority ensures accountability among subordinates and indirectly boosts their moral to a higher level.

4. **Development of Personnel:** He should be a demographic leader. He must encourage the subordinates to carry on their routine work without his interventions and also allow them to participate in the decisions relating to their work. He must conduct staff appraisal periodically to identify their progress and accordingly arrange for training and development programmes for their self-up gradation.

5. **Forward Looking:** The office manager should be forward looking. He should be competent to forecast the future, visualize the future problems and devise plan to avoid such problems. E.g. heavy competition, fall of demand, price hikes etc.,

6. **Other Qualities:** In addition to the above mentioned qualities, the office manager must have highest level of integrity and should be honest and ethical in his dealings with everyone both inside and outside the organisation. He should be freely contacted and consulted by people from all the departments in the organisation. He should be able to handle situations diplomatically.

Points to be Remembered:

- Office is nerve center of business organisation.

- Functions of office classified as Basic functions and Administrative functions.

- Based on nature of work performed offices are classified as front office, middle office, e-office, virtual office and back office.

- Office manager is considered as administrative head of office.

- Office manager should have sound education, adequate training, relevant experience and energetic personality.

- He performs managerial, supervisory, personnel and other functions for better administration of office.

- As a departmental head he should possess the qualities like integrity, honesty, creativity, trustworthy, innovative and motivating. On the whole he should be a man of high calibre.

Evaluation

OBJECTIVE TYPES:

Part - A

I. Choose the correct answer: (1 Marks)

1. The place where clerical activities are carried out is called ----------------.

    a. Company   b. Enterprise

    c. Office   d. Department

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2. ----------------- is one of the administrative functions of an office.

    a. Receiving information   b. Arranging information

    c. Recording information   d. Planning and organising

3. --------------- is one of the basic functions of an office

    a. Office systems and Routine

    b. Designing and Purchasing of office Forms and Stationery

    c. Recording of information

    d. Safe guarding the assets.

4. A person who is incharge of office is called ----------------

    a. Office Manager   b. Secretary

    c. Director   d. None

5. An office which has direct contact with outsider is known as ------------.

    a. Front office   b. Back office

    c. Virtual office   d. Middle office

6. ---------------- is an office where office activities are carried out without any physical space.

    a. Virtual office   b. Middle office

    c. Back office   d. E-office.

7. Back offices are generally found in -------------.

    a. Government Department.   b. Public Sector units.

    c. Corporate Bodies   d. None.

8. In -------------- office all activities are transacted through integrated computer network.

    a. e-office   b. Virtual office

    c. Middle office   d. Back office

9. An office is considered as ------------------ of Business enterprise.

    a. Head   b. Hand

    c. None.   d. A and B

10.   An office manager is the------------------- of an office

       a. Director   b. Supervisor

       c. Secretary.   d. Administrative head

II.   **Very Short Answers:**

Answer in Five lines.   **(3 Marks)**

1.   Define Modern Office.

2.   Who is office manager?

3.   List out the functions of modern office.

4.   What is e-office?

5.   Write a short note on virtual office.

6.   Explain the term front office.

7.   What is back office?

8.   List out the qualities of good office manager.

9.   What is the role of middle office?

Part - C

III.   **Short answers:**

Answer in one page.   **(5 Marks)**

1.   State briefly the importance of office.

2.   Explain the various types of office.

3.   State the qualities of a good office manager.

4.   Discuss the Basic Functions of office manager.

5.   State the Administrative Functions of modern office.

6.   What are the qualifications of office manager?

7.   Bring out the difference between traditional office and modern office.

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1.   Elaborate the functions of modern office.

2.   Discuss in detail about the functions of office manager.

ACTIVITY

Teachers Activity:

- Should teach basic concepts through classroom discussion.

- Prepare charts on functions & types of modern office and also on functions of office manager.

Students Activity:

- Students can be asked to conduct Role play as office manager.

- Students should prepare charts on functions of modern office and office manager.

References:

1.   Modern Office and its Functions - by Dr. R K Chopra

2.   Source: www.slideshare.net

3.   Office Management – by P.K. Ghosh

4.   Office Management –by Kathiresan&Dr.Radha

GLOSSARY

1	*Accuracy : The state of being correct.*
2	*Administration : The process of running a business.*
3	*Affair : An event or sequence of events of a specified kind.*
4	*Complexities : The state of being complicated.*
5	*Correspondence : Communication by exchanging letters.*
6	*Cost : An amount spent to buy or acquire something.*
7	*Counselling : Giving professional advice.*
8	*Delegation : The process of deputing the power.*
9	*Diplomatic : An ability to deal with people in a sensitive and tactful way.*

10	Dispute : Misunderstanding or disagreement between people.
11	Documented : Recorded.
12	Dynamic Leader : Leader having positive attitude and full of energy and new ideas.
13	Equipment : An apparatus used for specified purpose.
14	Facilitator : A person who assist in completion of work.
15	Globalisation : Growth of business activities to a global or worldwide scale.
16	Goal : An ambition or objective to be achieved.
17	Hire : Rent or Lease.
18	Implement : Put into practice or Use.
19	Innovative : The quality of being thinking creatively of generating new ideas.
20	Integrity : The quality of being honest.
21	Mechanization : Computerization of Office.
22	Modernisation : Incorporating changes according to new technology.
23	Organising : Arranging the work systematically.
24	Personnel : People employed in an organisation.
25	Policy : A principle of activity adopted by an organisation.
26	Procedures : An established or official way of doing something.
27	Recruitment : The process of finding people.
28	Scheduling : Planning the work to be completed within a particular time.
29	Systems : A set of principles or procedures according to which something is done.
30	Upgrade : Raise to a higher standard.

Content:

Introduction – Meaning of Automation – Objectives of Automation – Merits and Demerits of Automation – Modern Equipment Used in an Office –Factors to be Considered for Selecting Various Equipment – Office Furniture, Fittings and Accessories – Principles in Selecting the Office Furniture.

Learning Objectives

- Enable the students to gain awareness about the concept of Automation.

- To acquaint the students about know the various factors to be considered in selecting office appliances, furniture's, filing and accessories.

Introduction:

As discussed in the earlier chapter, the term office has undergone drastic changes. "The Office is now in a period of transition" where more and more information processing functions are being automated through sophisticated electronic systems. New electronic procedures and systems becoming more and more popular in modern Automated Office which otherwise called as "Paperless Office". A 'Paperless Office' is one in which paper has been replaced by electronic, digital, micrographic and micro processing systems.

This Paperless Office incorporates voice inputs, word processing, optical character recognition, electronic mail, calendars, message sending, filing directions and text editing, computer indexing and processing, telecommunications and colour graphics systems into a fully automated office facility. Several Modern Offices provide satellite communication video teleconferences, electronic mail and computer-to-computer hook-ups for intra-company use. This chapter focuses on office automation and various modern equipment used in modern office.

2.1. Automation:

2.1.1. Meaning:

Automation may be described as usage of advanced technology with the help of specific devices of communication and control in self-regulation without human intervention. It can also be termed as application of information technology to the typical clerical and secretarial tasks such as communication, correspondence, documenting and filing.

2.1.2. Definition:

Business Dictionary defines the term office automation as "Method or

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system of using automated or electronic equipment, as word processors and computers, in the operations of an office". It is basically application of information technology to the typical, clerical and secretarial work such as communication, correspondence, documenting and filing.

The Committee on Automation (1972) defines the term automation as "Usage of technical advancements such as automatic machinery, automatic transfer system or automatic control or feedback through electronic devices".

In simple words automation means "Creation and application of technology to monitor and control the production and delivery of products and services".

2.1.3. Objectives of Automation:

Automation in the office refers to a process whereby sophisticated machines and equipment are introduced in the office with a view to aid administrative process. Automation in the office has the following objectives.

1. **Saving Manpower:** Automation aims at saving manpower. It eases the process of work and thereby reduces work load of employees.

2. **Time Saving:** Office automation enables promptness. The work that would take hours can be done in no time with the aid of machines.

3. **Accuracy:** As the task to be performed is planned well ahead in advance in the form of programmed schedules, automation enables completion of

work with accuracy.

4. **Elimination of Monotony:** In case of routine or repetitive job the data which is already feed in the system can be retrieved instead of typing again and again. Repetitive processes may sometimes lead to monotony and office machines eliminate the monotony of these repetitive processes.

5. **Lesser Frauds:** Automation also minimizes the chances of fraud in office work.

6. **Storage of Facts and Data:** Once the data entered in the computers, can be stored forever. At a time it can store large volume of facts and data for future reference.

2.1.4. Merits of Automation:

1. Automation increases the productivity.

2. Automation eliminates heavy physical labour. The employees have to work less which in turn increases their job satisfaction.

3. Automation improves the quality of decision making in business. Computers have become indispensable in certain industries like defence, airlines, insurance, etc.

4. It improves the working conditions and employees work in safe and comfortable environment.

5. Automation leads to quick completion of work, which in turn enables the

management to serve their customers promptly.

2.1.5. Demerits of Automation:

1. Automation results in technological unemployment.

2. Automation requires huge investment. Small Business units cannot afford it.

3. Automated plant cannot be introduced in industries where changes are rapid because of changes in tastes of customers.

4. Since various operations are interdependent, failure in one part of the automatic plant may shut down the entire plant.

2.2. Modern Equipment Used in an Office:

Instructional Machines

Accounting, Tabulating and Computing Machines

Miscellaneous Machines
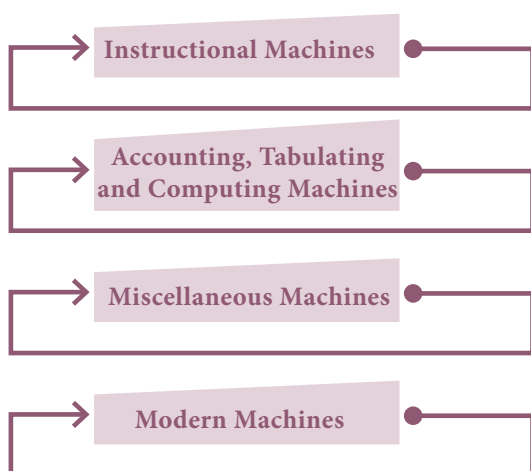
Modern Machines

Fig. 2.1. Classifications of Equipment

I. Instructional Machines:

1. Telephone:

Telephone becomes an important instrument in modern business houses. With the help of this facility, a firm can have quick and prompt communication with others. Now-a-days it is impossible to imagine the office without a telephone. It is the most convenient means of oral communication. It is widely used for internal as well as external communication. According to distance and area, telephone calls are classified as local calls, trunk calls and overseas calls.

Fig. 2.1. Telephone

The following are some of the internal and external services available to telephone users.

(a) Direct Link

(b) Direct Link with Extension

(c) Private Branch Exchange (PBX) System

(d) Private Automatic Branch Exchange (PABX) System

(e) Electronic Private Automatic Branch Exchange (EPABX)

(f) Intercom

2. Mobile Phone:

A mobile phone is a wireless device which can be used to make calls and send text messages. As the technology changes

rapidly; nowadays mobile phones are bundled with many additional features, such as web browsers, games, cameras, video players and even navigational systems. A mobile phone may also be known as a cellular phone or simply cell phone.

Fig. 2.2. Mobile Phone

3. Dictation Machines:

Dictation Machines are generally used by the executives who need to draft letters, memos, and reports are best off dictating the copy and recording it, as speaking is much faster than writing and can be done while performing other tasks. This type of equipment chosen depends on the preference of the dictators, number of users, frequency of use, and budget. Some dictation equipment use cassette tapes and most of the modern versions are digitally recorded and also this phone system is used for recording. Once the audio is recorded, this file is processed to another employee, who transcribes the audio into a written document, saves and emails or prints it.

Fig. 2.3. Dictation Machine

II. Accounting, Tabulating and Computing Machine:

1. **Adding Machine:** Adding machines may either be manually or electrically operated. Most adding machines have a roll of paper on which the figures are typed and this is known as a "Tally Roll". It is used for addition and also for multiplication, subtraction and division.

2. **Calculating Machines:** It calculates at a greater speed and runs without making any noise, but such machines are usually expensive. The essence of a calculating machine is that it can perform addition, subtraction, multiplication, and division operations.

3. **Billing Machine:** Billing machines are used to prepare invoices, bills of lading, cash memo, etc. The machine makes all calculations of discounts, commission, addition, subtraction, total, etc. Papers and carbons are fed into the machine and set automatically.

Fig. 2.4. Billing Machine

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4. Accounting and Book Keeping Machines:

These machines are used for

a. Posting in journals, cash book, ledger, etc.,

b. Preparation of cheques, pay rolls, cash receipt and payment sheet

c. Preparation of copies of ledger accounts along with posting

d. Calculating and computing figures and drawing ledgers or cash book balances

5. Tabulating Machines:

The tabulating machine is an electro mechanical machine designed to assist in summarizing information stored on cards. It was invented by Herman Hollerith.

Fig. 2.5. Tabulating Machine

6. Electronic Computer:

It is an electronic device by which data is processed electronically at great speed. It is a replica of human brain. It may be noted when the computers are used for data processing, the processes is known as Electronic Data Processing (EDP). There are two kinds of computers (a) Analog computer and (b) Digital computer. Analog computers are used for scientific and research data processing. Digital computers are used for calculating the data in one billionth of a second.

7. Electronic Payment or E-Payment:

Electronic payment system is a system which helps the customer or user to make online payment for their shopping to transfer money over the internet. Some examples of EPS: a. Online reservation b. Online bill payment c. Online order placing d. Online ticket booking (Movie)

Do You Know?

First Practical use of Tabulating Machine:

- The tabulating machine was developed to help process data for 1890 U.S. Census. The tabulating machine spawned a class of machines known as record equipment and the data processing industry.

- The term "Super Computing" was first used by the "New York World", newspaper in 1931 to refer to a large custom-built tabulator that IBM (International Business Machines Corporation) made for Columbia University.

III. Miscellaneous Machines:

1. Franking Machines:

Franking machine is used in large

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offices for affixing postage stamps on envelopes. The outgoing mail is inserted in the machine and a handle is operated either manually or electrically. It is automatically prints in a franking design comprising the postal charge and the date of posting in bright red ink. It has a meter which records the amount and balance on hand.

Fig. 2.6. Franking Machine

2.   Impression Stamps:

These include rubber stamps bearing certain impressions like "paid", "delivered", "checked", etc. Stamps bearing date with time and numbering devices also fall under this category.

3.   Time Recording Machines:

This popular machine is used for recording the accurate time of arrival and departure of the office employees in offices and factories.

4.   Payroll Machines:

It is used for making the payroll of the employees, calculating the amount to be paid to each employee.

5.   Slide Rule:

It is a type of scale which is used to make different measurements rapidly and accurately.

6.   Punching Machine:

This is a small apparatus which punches holes on papers. The holes are required to tag and fasten the papers. It is operated manually.

7.   Stapler:

It is a small machine which binds together a few papers with a small piece of thin wire. It is very commonly used in small offices.

8.   Calculators:

A variety of calculators are available in the market. It is useful for multiplication, division, addition and subtraction, calculation of discount, internet, wages, etc. It helps to reduce human labour in arithmetical calculations.

9.   Envelope Sealing Machine:

This is a machine which automatically seals the envelopes. It will dampen the gummed flaps of the envelopes; thus sealing of the envelopes becomes very easy.

IV.   Modern Machines:

1.   Swipe Machine:

A swipe machine is a payment terminal provided by the bank on which the merchant can swipe a dip card to receive payments. Since the card can be a debit or a credit card the machine is also known as

a credit card swipe machine or a debit card swipe machine.

Fig. 2.7. Swipe Machine

2.   Laptop:

It is a portable and compact personal computer with the same capabilities as a desktop computer. Laptop computers have an L-shape design and the screen can be lowered and closed to allow for easy transportation of the machine. It is a portable computer and suitable for using while travelling.

Fig. 2.8. Laptop

3.   Pen Drive:

A pen drive is small storage device shaped like a pen with built-in data storage that connects to a computer by a USB Port. (Universal Serial Bus- It is the most popular connection used to connect a computer to devices).

4.   Projector:

Projectors can be used for delivering lectures and presentations to large groups as well as watching movies and other videos at a backyard home theatre. They can be found in a variety of environments, including classrooms, conference rooms and in homes and yards.

5. LED (Light Emitting Diode) Projectors:

Instead of a traditional halogen lamp, they use light-emitting diodes, which are more environment friendly and long lasting. LED projectors use either DLP technology, replacing the colour wheel and white-light lamp with red, blue, green LEDs or LCOS technology which is found in projectors.

Fig. 2.9. LED Projector

6.   LCD:

Liquid crystal displays (LCDs) consist of liquid crystals that are activated by electric current. They are used most frequently to display one or more lines of alpha-numeric information in a variety of devices.

7.   Bio-Metric:

A Biometric device is a security identification and authentication device.

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Such devices use automated methods of verifying or recognizing the identity of a living person based on a physiological or behavioural characteristics. These characteristics include fingerprints, facial images and voice recognition.

Fig. 2.10 Bio-Metric System

8. Currency Note Sorting and Counting Machine:

A currency note sorting machine is a compact and portable desktop solution for multi-currency counting and sorting challenges. It can denominate and authenticate different currencies at a processing speed of 1000 notes per minute. A currency note counting machine is a machine that counts money either stacks of bank notes or loose collections of coins. Currency counters are commonly used in vending machines to determine the amount of money which has been deposited by customers.

Fig. 2.11. Currency Counting Machine

9. CCTV:

It is called closed circuit TV. A self-contained surveillance system comprises of cameras, recorders and displays for monitoring activities in a store or company.

10. Fax Machine:

A fax machine is the telephonic transmission of scanned printed material (text or images), usually to a telephone number associated with a printer or other output device. The original document is scanned with a fax machine, which treats the contents (text or images) as a single fixed graphic image, converting it into a bitmap. In this digital form, the information is transmitted as electrical signals through the telephone system. The receiving fax machine reconverts the coded image and prints a paper copy of the document.

Fig. 2.12. Fax Machine

11. Photostat Machine:

It is popularly known as "Xerox" machine taking its name from the company manufacturing this machine. Photocopying machines help in getting exact copies of the original at a greater speed. The term xerography means dry pictures. Copies of diagrams, illustrations, drawings etc. can also be obtained. It eliminates the need for checking.

Fig. 2.13. Xerox Machine

2.3. Factors to be considered for selecting equipment:

Following are some of the factor to be considered while selecting appropriate equipment:

(1) Ease of Operation: Faster operation, less fatigue, and fewer errors go with ease of operations. Here are some contributory factors; indexing the amounts, operating the control keys etc.

(2) Flexibility: Unless there is enough work to keep a highly specialized machine busy, it is better to select one which can be used for different types of work. In absence of flexibility, the purchase of the machine is not at all justified.

(3) Durability: A machine is used by different people under varying conditions. Unless, it is strong and durable, it would be a poor investment.

(4) Portability: A machine is frequently moved from user to user or from one place to another place in the same work area.

Compactness and ease of handling saves time and energy and increase the use of the machine. Modern machine have been reduced in size and weight without the sacrifice of the quality.

(5) Adaptability: If a machine can be used without disrupting an existing system, it would be better to do so than go in for one which necessitates a considerable rearrangement of the forms and records involved in extensive recopying of information and of adjustments in procedures.

(6) Service: Reliable and continuous performance demands quick repairs and proper maintenance. The machine which can be serviced promptly has advantage over one which cannot be serviced.

(7) Operating cost: This includes such things as supplies, the space occupied, the special equipment and forms required, repairs, etc.

(8) Reputation of the Supplier: Few people have the expertise to judge the mechanical qualities of a machine so one has to depend upon the integrity of the manufacturer and dealer to furnish a good machine and to backup claims and guarantees.

2.4. Office Furniture, Fittings and Accessories:

2.4.1. Office Furniture:

Office furniture is necessarily a part of total environment in which the employees work. Right kind of furniture must be provided so as to provide maximize comfort

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to the employee. The number and the type of furniture to be purchased for any office will depend on the number of departments and office workers, the nature and volume of work to be performed and the office space available for their accommodation

2.4.2. Fittings and Accessories:

Generally office fittings include desk lamp, telephone stand, waste paper basket, etc. When choosing or selecting such items, their colour may be considered, because the colour of these must not ruin the pleasing atmosphere of the office. Clerks should be provided with certain accessories in order to perform their work efficiently. Such items may be pen holders, sorting trays, boxes, cabinets, etc.

2.4.3. Types of Furniture Used in Office:

Every office requires different types of furniture. Furniture can be classified on the basis of its physical appearance and the purpose for which it is used. E.g. Executive furniture, Special purpose furniture, Built-in furniture and General clerical furniture.

1. **Desk:** The performance of an office employee is very much influenced by the type of desk he uses. The primary function of any desk is to provide a suitable surface for writing, checking, sorting and examining. There are different types of desks for different persons depending upon the nature of work and status. (i). Executive desk (ii). General purpose desk and (iii) Computer desk.

i. **Executive Desk:** These are designed to suit individual tastes and quite often

they are designed as a show piece of an organisation. Their purpose is also to impress visitors. Sharp edges and corners are eliminated. Table top is covered with a sheet of glass.

Fig. 2.14. Desk

ii. **General Purpose Desk:** It is a general purpose single pedestal desk with less elaborate design.

iii. **Computer Desk:** Computer desks are generally standard flat-topped, single or double pedestal desk with provision for placing keyboard.

2. **Tables:** Tables are generally needed for sorting of mail despatch, for holding meeting of committees, etc. However, in some office table fitted with drawers and other devices are still used by clerks for writing purpose.

3. **Chairs:** There is a need for providing the right type of chairs to the office employees as they spend most part of the day in the office. Chairs meant for computer operators should have adjustable back rest to enable the user to perform their work efficiently.

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Fig. 2.15. Chair

Fig. 2.16. Modular Furniture

4. **Filing Cabinet:** A filing cabinet is a piece of office furniture usually used to store paper documents in file folders. The two most common forms of filing cabinets are vertical files and lateral files. A vertical file cabinet has drawers that extend from the short side of the cabinet. A lateral file cabinet has drawers that extend from the long side of the cabinet.

5. **Modular Furniture:** Modular furniture is pre-made or readymade furniture which can be used according to the need and room spacing. It is easy to install and dismantle according to need. It gives modern look to office. It is also available in various colours and designs. There are various types of modular furniture

i. Two in one furniture. This type of furniture has two purposes.

ii. Three in one furniture. This type of furniture has three purposes.

2.4.4 Principles in Selecting the Office Furniture:

Following are some of the principles to be considered while selecting office furniture.

1. Suitability: The selected furniture must be suitable for the job. The working area of the table should be sufficient. It must also have space to keep files (incoming and outgoing), stationery, etc.

2. Comfort: The seat of the workers, shape of the chairs and tables must be so designed that the workers would not feel any fatigue while doing their jobs. This will result in efficiency, in turn, more output. The equipment, forms, stationery, etc., must be within easy reach. Those items frequently used, should be placed at hand.

3. Design: Prior to purchase, one must have an idea of the size, height and design of the furniture. For example, the size, height, design, number of drawers of the table should be decided on the basis of work done on it.

There are many designs of tables available in the market. One must decide whether the top of the table should be of polished wood or glass plate or laminate

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surface. The decision regarding the choice of the furniture, say table, desk, chairs, etc. as to its size and design depends on the officer who uses it.

4. Durability: Metal furniture is more costly than wooden furniture. But the maintenance charges of wooden furniture are more than those of the metal furniture. Nowadays, metal i.e., steel furniture is more popular, because it is more durable than wooden furniture. Moreover, steel furniture is safe against fire, burglary etc.

5. Weight: As the business expands, the size of the office also increases. The existing layout of the furniture has to be rearranged according to the required comfort. It may become often necessary to move the furniture from one place to another. Therefore, it is better to have light weight furniture. If the furniture is light, there will be less breakage and wear and tear when the furniture is shifted.

6. Space saving: Furniture which would occupy minimum space should be selected. The decision regarding the design of the furniture should depend upon the space available in the office and the number of persons who work there.

7. Cost: The cost of the furniture should not be neglected when selecting it. It should be kept within the financial limit.

8. Hygiene: The outlay of the furniture should be so made that it will be easy to clean the furniture as well as the floor underneath it.

9. Usefulness: The furniture should be selected according to the nature of the particular job. When it is not needed for the department, it can be easily transferred to another department, where it may be useful.

10. Appearance: Furniture should have a good appearance and be pleasing to the eyes. This will impress the workers and visitors. Wooden furniture looks attractive. Furniture of high quality wood is durable. It has a warm look and gives comfort to the users. Many varieties and designs of furniture can easily be made.

11. Multi-Purpose Uses: Furniture should be adaptable to multi-purpose uses, wherever possible. This permits standardization in the purchase of multi-purpose desks and enables office workers to perform more than one type of work with the help of same kind of furniture.

Points to be Remembered:

- Automation may be described as usage of advanced technology with the help of specific devices of communication and control in self-regulation without human intervention.

- Objective of Automation are Labour saving, Time saving, Accuracy, Elimination of Monotony, Lesser frauds, Storage of facts and data.

- Modern equipment used in office:

  Instructional Machines: Telephone, Mobile Phone, Dictation machine

Accounting, Tabulating and Computing Machine : Adding Machine, Calculating Machine, Billing Machine, Accounting Machine and Book Keeping Machine, Tabulating Machine, Electronic computer, Electronic E-payment.

Miscellaneous machines: Franking machines, Impression stamps, Time recording machines, Payroll machines, Slide rule, Punching machine, Stapler, Calculator, Envelope sealing machine.

Modern Machine: Swipe machine, Laptop, Pen drive, Projectors, LED Projectors, LCD, Bio-metric, Currency note sorting and counting machine, CCTV, Fax machine, Photostat machine.

- Factors to be considered in selecting various equipment.
- Office furniture, fitting and accessories.
- Types of furniture used in office.

I. Desk,

    i) Executive desk

    ii) General purpose desk

    iii) Computer desk.

II. Table,

III. Chair,

IV. Filing Cabinet,

V. Modular furniture.

- Principles in selecting the furniture.

Evaluation

OBJECTIVE TYPES:

Part - A

I. Choose the correct answer: **(1 Marks)**

1. A ---------------is one in which paper has been replaced by electric, digital, micrographic and equipments.

    (a) Paperless office   (b) Automated office

    (c) Front office   (d) Back office

2. _____ provide satellite communication, video teleconferences for intra-company use.

    (a) Automation office   (b) Several modern offices

    (c) Traditional office   (d) Back office

3. What is a Dictation Machine?

(a) Instructional Machines   (b) Computing Machine

(c) Duplicating Machine   (d) Modern Machines

4. Which computers are used for scientific and research data processing?

(a) Analog computers   (b) Digital computers

(c) Main-frame computer   (d) Super computer

5. The term Xerography means --------pictures.

(a) Grid   (b) Dry

(c) Faulty   (d) Printed

6. ---------- is small storage device shaped like a pen with built-in data storage

(a) Pen drive   (b) Laptop

(c) Computer   (d)Desktop

7. Which machine is used for affixing postage stamps on envelope?

(a) Addressing machine   (b) Duplicating machine

(c) Tabulating machine   (d) Franking machine

8. This popular machine is used for recording the accurate time of arrival and departure of the office employees in offices and factories.

(a) Payroll machine   (b) Intercom

(c) Time recording machine   (d) Swipe machine

9. A-----------is a piece of office furniture usually used to store paper documents in file folders.

(a) Chair   (b) Filing Cabinet

(c) Table   (d) Desk

10. The Currency note sorting and counting machine can denominate and authenticate different currencies at a processing speed of ------ notes per minute.

(a) 500   (b) 700

(c) 1000   (d) 1200

11. The Committee on Automation was held in the year ------.

(a) 1972   (b) 1973

(c) 1974   (d) 1975

II.   Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1)   What is Paperless Office?

2)   Define the term Automation.

3)   What is Dictation Machine?

4)   Write short notes on E-Payment?

5)   What is Swipe Machine?

6)   Write short notes on Bio-metric.

7)   What is Fax Machine?

8)   Write short notes on Modular Furniture.

9)   What is Photostat Machine?

10)   What is Franking Machine?

11)   Explain CCTV.

12)   Write in brief about LED and LCD.

13)   Give the uses of telephone and classify telephone calls.

Part - C

III.   Short answers:

Answer in one page.   **(5 Marks)**

1.   What are the objectives of Automation?

2.   Write notes on accounting, tabulating and computing machine

3.   What is computer? Explain its types.

4.   Write short notes on: a) Laptop b) Pen drive

5.   Explain the various types of furniture used in office

6.   Explain about currency sorting and counting machine.

7.   State the uses of Accounting and book keeping machine

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1.   What are the Merits and Demerits of Automation?

2.   Write any five types of miscellaneous machines and explain them.

3.   What are the factors to be considered in selecting various equipment?

4.   Explain the principles in selecting the office furniture.

5.   Write any five types of modern machine used in an office and explain them in brief.

Teachers Activity:

- Must teach basic concepts about office modernisation.
- Can take the students to nearby office to show various modern equipment and furniture used in office.

Students Activity:

- Students can be asked to prepare assignment on modern office equipment and their usage.
- Students can be asked to prepare models on office furniture.

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1. Office Management By Prasanta K. Gosh

2. Office Management By Katherasan and Dr.Radha

3. http://www.businessdictionary.com/definition/office-automation.html

GLOSSARY

1.	*Automation : A machine working for itself.*
2.	*Satellite communication : Communication through an artificial body placed in orbit around the earth.*
3.	*Video teleconferences : A meeting between people in different places who are able to see and hear one another using audio and video technology.*
4.	*Sophisticated machines : Highly developed machines.*
5.	*Electronic mail : It is a system of sending written messages electronically from one computer to another. E-mail is an abbreviation of electronic mail.*
6.	*Intra-company : Inside of the company.*
7.	*Dictation Machine : The act of dictating material to be recorded or taken down in writing.*
8.	*EPS : Electronic payment services for online reservation.*
9.	*Swipe Machine : To pass a machine-readable card, such as a credit card, debit card, etc., through a machine that electronically interprets the information encoded, usually in a magnetic strip on the card.*

10.	Laptop : L shape design. It is a small portable computer.
11.	Pen drive : It is small storage device shaped like a pen.
12.	Projector : It is used to project rays of light, especially an apparatus with a system of lenses for projecting slides or film on to a screen.
13.	LED : Light emitting diode (a semiconductor diode which glows when a voltage is applied).
14.	DLP technology : Digital light processing (DLP) is a display device based on optical micro-electro-mechanical technology.
15.	LCOS : Liquid crystal on silicon is a miniaturized reflective active-matrix liquid-crystal display or micro display.
16.	LCD : Liquid crystal display. It is activated by electric current.
17.	Bio-metric : A bio-metric device is a security identification and authentication device.
18.	CCTV : Closed circuit TV. A self-contained surveillance system.
19.	Fax : An exact copy of a document made by electronic scanning and transmitted as data by telecommunication links.

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Content:

Introduction - Factors to be considered while selecting office accommodation – Office Layout - Importance of office layout - Open Office and Private Office - Office Environment – Lighting – Ventilation – Cleanliness – Safety measures

Learning Objectives

- To comprehend the students about importance of office accommodation and office layout

- To acquire knowledge and apply the principles for designing office layout

- To understand the basic concepts related to office environment.

Introduction:

The place of work and its surroundings are important factors which affect the efficiency of the employees to a large extent. Since staff has to stay for long hours in the office and involved in intellectual work the office must be properly accommodated with good working environment and equipments to improve their work efficiency. Suitable accommodation, modern equipment and proper working conditions are very important factors in improving efficiency and reducing office costs.

3.1. Office Accommodation:

3.1.1. Principles of Office Accommodation:

The following are the principles of good office accommodation:

1) The office must be located at some convenient place so that it may serve the entire organization in the best possible manner.

2) Office space should be sufficient from the point of view of the present and future needs of the organization.

3) Suitable provision should be made for the convenience and amenities required for the comfort and wellbeing of the staff e.g. wash room, rest room, water cooler, canteen etc

4) Service facilities like telephone, lift, internal communication etc should be available in the office while others like banking, transport, market, post office etc should be available near the office premises.

3.1.2. Factors to be Considered While Selecting Office Accommodation:

Following factors are to be considered in providing the right type of office accommodation:

1. Location of the office building

2. Securing the required office accommodation

3. Size of office accommodation

4. Lighting and ventilation of the space

5. Layout and facilities for office organization

6. Customer and staff conveniences

7. Cost of office space or accommodation

8. Miscellaneous consideration

3.2 . Office Location:

3.2.1. Factors in selecting Office Location:

The following factors should be considered before making the final choice of location of office building:

(i) Suitability to Neighbourhood: The office must be located in a quiet and healthy neighbourhood free from noise dust, fumes or intolerable smell.

(ii) Proximity to Other Units: Different units of the enterprise (e.g., factory, warehouse, branches etc) should be located nearby for smooth operation of business.

(iii) Proximity to Related Business: It is desirable to have an office near other offices which are engaged in the same line of business activities which enables for the advantage of localization.

(iv) Nearness to service Facilities: Office should be located near service facilities like banks, post offices, markets, stock exchange etc.

(v) Nearness of Transport Facilities: For the convenience of the staff and the customers as well as for smooth operation of business, it is necessary that the locality should be adequately served by transport services of all kind i.e. railway station, port, air terminal etc.

3.2.2. Factors in Selecting Office Premises:

The characteristics of the building, the building facilities, the proximity of the office building to business factors, the cost involved, adaptability of space, natural; lighting and ventilation provided, freedom from dust and noise, favourable impression on visitors and general public, provision for employees comfort and health and facilitation of working processes are to be considered while selecting location of office. The following points are to be kept in mind while selecting office building:

1) Safety of Records and Staff: The safety and security of office records and of the personnel employed in an office building is most important. The office building should have the advantage of a fire proof construction, fire escapes, automatic safety devices etc.

2) Working Conditions: The office building must provide good and satisfactory working conditions. Facilities like water, lighting and ventilation should

be available. The building should be free from dust, noise, fumes and intolerable smells.

3) **Adaptability to Proposed Layout:** It should be capable of being modified or altered so that different sections of the office may be properly accommodated in it.

4) **Office Fitting:** It should be adequately provided with electricity, power, telephone, water connection and other fittings.

5) **Future Expansion:** It should offer enough scope for future expansion. When a building is owned or constructed by the organization, provision should be made for additional floor for future expansion requirements.

6) **Type of Building:** The most suitable type of office building is that which provides completely open space other than the supporting columns and temporary partitions which can be removed if required.

The office building must ensure that there is

- Sufficient floor space for each worker and furniture required by him.

- Facilities for fresh air, water, lighting and ventilation.

- Service facilities like telephone and lights in the building.

- Scope for renewal and alterations in the building if required in future

- Facilities of general convenience, toilet, canteen etc.

3.3. Office Layout:

3.3.1. Definition of Office Layout:

According to **Littlefield**, "Office layout may be defined as the arrangement of equipment within the available floor space".

According to _, "The problem of layout relates to the arrangement in the space involved so that all the equipment, supplies, procedures and personnel can function at maximum efficiency".

The object of an office layout is to make arrangements for placing of men, materials, machines, furniture and equipment within the available floor space of the office in such a way that everything can be utilized in the best possible manner. An office layout involves:

(i) The determination of the correct amount of space for each employee and for machinery and equipment they use

(ii) The correct arrangement of furniture, equipment and machinery and

(iii) The best possible environmental conditions.
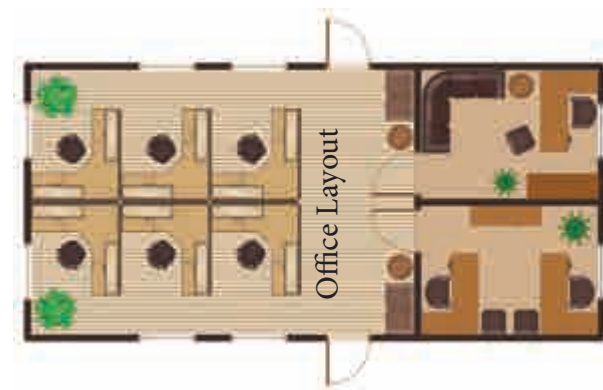
Fig.3.1. Office Layout

3.3.2. Objectives of Office Layout:

The objectives of an office lay out are:

1. The available floor space should be used to the greatest extent

2. Service such as electricity and telephone should be available wherever needed

3. Good working conditions should be provided for everyone.

4. The individual clerks should be so located that the supervisor should be able to see the staff at work.

5. A sense of belonging and loyalty to the working group should be encouraged

6. Communication and work flow should be facilitated

7. The movement of clerks between desks, filing cabinets, etc should be made easy. The work desks should be located within easy reach of equipment and machines which the clerk may need to use in course of performing the work.

8. Noisy and distracting operations should be segregated.

9. Mutual interference between clerks should be avoided.

10. Privacy and security should be provided to departments or individuals dealing with work of confidential documents or records.

11. Adequate safety arrangements should be provided for departments dealing with secret or valuable documents or records.

3.3.3. Importance of Office Layout:

A well planned layout brings a number of benefits to the office and to the employees. The benefits of proper office layout is given below:

1) Assists in the efficiency of getting the work done from employees.

2) Proper utilization of office floor space.

3) Facilitates smooth supervision.

4) Speeds up intercommunication.

5) Utilization of office machines and equipment to their optimum capacity.

6) Ensures better comfort and self esteem of the employees.

3.4 Open Office and Private Office:

3.4.1. Open Office:

The modern tendency is to adopt the open office instead of accommodating departments or sections in separate rooms. An open office refers to a large room where all the departments, men and equipment are housed under a single roof without partitions or walls separating them. Each department or section is allotted a separate space in the same room, which is often separated by placing filing cabinets between them. One or more passage throughout the whole floor may be provided and desks may be arranged facing one way so as to facilitate supervision and easy access.

Fig. 3.2. Open Office

3.4.2. Advantages of Open Office:

Open office offer the following advantages:

(i) **Economical:** Open office enable the management to save rent and reduce the cost of office operations since unnecessary partitions and corridors are avoided. Open office make better utilization of office space possible.

(ii) **Better Lighting and Ventilation:** Open offices allow a free flow of air and natural light, with the removal of unnecessary walls and partitions which increase the efficiency of the office staff.

(iii) **Better Supervision:** Only few supervisors are required to supervise the staff. The worker faces the supervisor and therefore he cannot waste time which encourages better work.

(iv) **Better Communication:** A worker is not required to go to another room for consultation, advice or instruction. Open office facilitate better interdepartmental communication.

(v) **Flexibility:** There is a greater flexibility in planning the layout of an open office which ensures more placements of office machines and equipment. Further changes in the layout can be effected without much difficulty.

(vi) **Other Advantages:** The other advantages of an open office are:

- Sharing of machines and equipments becomes possible

- Cost of decoration, cleaning and maintenance is low.

- All grades of staff are placed in the same room it creates a democratic set up.

3.4.3. Drawbacks:

The drawbacks of open office are:

(i) **Absence of Secrecy:** Privacy cannot be maintained in an open office for the work which is done in full view of all the staff.

(ii) **Concentration not Possible:** Open offices are not suitable for work which requires concentration of mind, e.g., accounting and statistical work. Moreover, distraction provided by visitors and the general movement of office staff cannot be avoided.

(iii) **Not Business Like Appearance:** Too many people working in the same room and moving about their work make an open office look untidy and shabby.

(iv) **Lowering of Self-Esteem:** Loss of individuality, reduced sense of belonging to a well-defined group and apparent loss of status among senior staff lowers self-esteem and efficiency of office workers.

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(v) Noisy: The efficiency of the staff may be reduced and distracted by the noise of telephones and clicking of typewriters and computers.

3.4.4. Private Office:

Private offices are small rooms or cubicles which are separated from similar other rooms or the open office by full or half partitions. Private offices are usually allotted to the top executives of the organization. Sometimes, a private office accommodation is provided for a group of people whose work is of a confidential nature. It may also be allotted for work which should be isolated in order to eliminate noise, e.g., accounting and statistical work.

Fig. 3.3. Private Office

3.4.5. Advantages of Private office:

(i) Privacy: Greater privacy is ensured for confidential work and discussions.

(ii) Better Environment: They promote a personal atmosphere and lend a sense of prestige or importance to the concerned staff.

(iii) Better Concentration: They increase the efficiency of the workers by facilitating concentration of mind which is possible because of the absence of noise.

(iv) Orderliness: They are more pleasing and well-ordered.

3.4.6. Drawbacks:

The disadvantages of private offices are:

(i) Uneconomical: When an office is situated in a rented building the cost of office operation increases considerably.

(ii) Costly Supervision: Private offices make supervision more difficult and costly. Supervision also becomes less effective because the supervisor loses personal contact with the staff.

(iii) Affects Flow of Work: Barriers and partitions in private offices adversely affect intercommunication and free flow of work.

(iv) Affects Lighting and Ventilation: Walls and partitions also adversely affect free ventilation and the flow of natural light.

(v) Inflexible: Private offices make the task of office layout more complicated and less flexible.

3.4.7. New Trends in Office Layout:

(i) Landscaped Office: A landscaped office is an open office where the desks are arranged individually or in groups and at different angles from one another.

(ii) Movable Partitions: Movable partitions are now being used in setting up private offices. These partitions are made of metal, wood, plastic or glass.

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(iii) Modular Units: Modular units are becoming increasingly popular now. These units normally consist of a combined desk and filing cabinet with dwarfed partitions up to a height of four to six feet. The most popular type of modular desk is the L pattern desk unit with a flat surface.

3.5. Office Environment:

Office environment has an important bearing on the efficiency of employees. It is common experience that people work better if they are given the surroundings and equipment appropriate to their work. According to **Terry**, "an individual's performance is significantly familiarized by the environment in which he works".

3.5.1. Lighting:

Lighting is the most important of all the physical conditions in the office. Proper lighting is important because it offers the following advantages:

- Increased productivity
- Better quality of work
- It results in fewer errors
- Reduction in eye strain and mental fatigue
- Better employee morale

Factors in Good Lighting:

Basic factors in good lighting are:

(i) Quantity of Light: It is necessary that the correct quantity of light is available for different types of work in the office.

(ii) Brightness of Light: The light should provide the right degree of intensity and brightness. It can be described as the amount of light reflected from an object. It also controls contrast which affects seeing.

(iii) Diffusion of Light: Proper diffusion of light can be obtained by having light in different amount that come from an adequate number of sources and directions and should not throw any shadow. It should also be spread uniformly over all parts of the working place.

Sources or Kinds of Lighting:

There are two main kinds of light available:

(i) Natural Lighting: The sun is the source of natural lighting which is considered as the best form of lighting from the point of view of the health and efficiency of the employees. Day light is admitted through large windows in the walls or from the roof.

(ii) Artificial Lighting: Artificial lighting may be used to supplement natural light. It is generally not possible to provide natural light over the whole working surface; artificial lighting has to be provided so that the working surface may be properly and evenly illuminated. Artificial lighting is of two kinds

a) Fluorescent: The illumination produced by fluorescent lighting closely resembles that of natural lighting. The light is evenly distributed and produces

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less heat and fewer glares and lasts longer even though it is very expensive.

b) **Incandescent:** It is most commonly used, less expensive lighting produced by filament bulbs. It consumes more electricity and produces more glare and shadows. Incandescent lighting may also be used to provide heat for the office building.

c) **LED:** The light-emitting diode (LED) is one of today's most energy-efficient and rapidly developing lighting technologies. Quality LED light bulbs last longer, and are more durable. They also offer comparable or better light quality than other types of lighting.

d) **Solar Lamp:** A solar lamp also known as solar light or solar lantern, is a lighting system composed of an LED lamp, solar panels, battery, charge controller and there may also be an inverter. The lamp operates on electricity from batteries, charged through the use of solar photovoltaic panel.

Do You Know?

- Lighting a typical office overnight wastes enough energy to heat 1,000 cups of water for tea.

- LED light significantly reduces bacteria when compared to halogen or fluorescent bulbs.

- 95% of LED are completely recyclable

Types of Office Lighting System:

The lighting system consists of the following five types

1. Direct Lighting:

Approximately 90% to 100% of the light is directed downward to the working surface in this type of lighting. This system uses some shade or reflector for the source of light. It provides a good intensity of light. At the same time, it casts dark shadows around and raises direct and reflected glare that could cause eyestrain to the office employees.

2. Indirect Lighting:

In this system, 90% to 100% of the light is directed towards the ceiling or walls and then the directed light is diffused and reflected on the work surface. This type of lighting system is soft and avoids shadows and glares and does not cause eyestrain. This type of lighting system is highly useful for general illumination but not for office work.

3. Semi-Direct Lighting:

In this type of lighting, a transparent or translucent shade is used which directs 60% to 80% of the light downward. The remaining light is directed upward and the directed light is reflected from the ceiling. This lighting system is an improvement of direct lighting. So, dark shadows on the ceiling and glare are eliminated in this system.

4. Semi-Indirect Lighting:

A transparent or translucent shade, bowl, cover or reflector is placed under the

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lamp in this lighting system. In this way, 20% to 40% of the light may be directly diffused downward on the working surface. The remaining 60% to 80% of the light may be directly towards the ceiling and walls. Such directed lighting is reflected downward to the working surface. This form of lighting is intermediate between direct lighting and indirect lighting.

5. General Diffuse Lighting:

An equal amount of light is diffused directly and indirectly by its reflection from ceiling and walls in this type of lighting system. This system gives more light with the same wattage than the semi-indirect lighting system does.
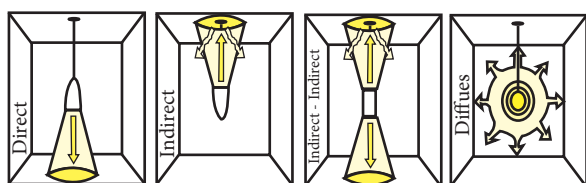
Fig. 3.4. Types of Lighting

3.5.2. Ventilation:

Ventilation in the office refers to the supply of clean and fresh air in the right amount, at the right temperature and of the right humidity. Proper ventilation is an important aspect of office environment. Fresh air must pass through the office regularly. Arrangements of rooms and partitions should be such as to allow free circulation of fresh and dustless air. The following methods are generally used to maintain proper ventilation:

(i)Natural Ventilation: Natural ventilation may be obtained by providing enough doors, windows and ventilators of the right type at the right place. Natural ventilation can be increased by providing roof ventilation and internal tube ventilators. They would ensure a regular flow of fresh air from outside and of decayed air from inside.

(ii) Artificial Ventilation: Artificial ventilation may be achieved by the use of electric fans, exhaust fans, air coolers, air filters, air conditioners etc in the toilets, basements, crowded rooms, canteens, machine rooms etc so that the warm air is let out and fresh air enters through windows and doors.

Temperature and Humidity: Temperature and humidity are two vital factors in the office that exercise a great influence over the worker and his output. Temperature and humidity in the rooms should be maintained at a proper level because too much heat or cold induces physical discomfort and affects the efficiency of the staff. The ideal office temperature is approximately 68 degree fahrenheit and humidity is between 40 to 60 percent.

Do You Know?

- Leaving a fan running overnight over the summer wastes enough energy to power the laptop for a year and iPhone for 25 years.

- A two degree increase in office temperature creates enough carbon di oxide in a year to fill a hot air balloon.

Freedom from Noise:

A noisy place is never an efficient office. Noise is one of the great disturbers.

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A noiseless and quiet atmosphere is a must for an office to maintain the efficiency of the employees at high level. Noise may be internal and external. Noise can be controlled through following measures:

- Separating noise making machines from the main office.

- Fitting doors with door closers and rubber lining.

- Housing the telephone switchboard away from the general office.

- Using sound absorbing material on floors, walls and ceilings.

- Covering floors with rubber, coir or plastic mats, etc.

3.5.3. Cleanliness:

A clean and tidy office is important as it offers the following advantages:

(i) It is healthier as a work place for different types of office workers.

(ii) Since people react to their surroundings, a clean and healthy office contributes to accuracy and efficiency

(iii) A clean and tidy office also projects a good image of the organization in the eyes of the people who visit it.

Disposal of Waste: Proper disposal of waste and waste paper is very essential.

Toilets: Proper provision of toilets and their proper cleanliness are important. Toilets should be conveniently located with adequate number. It must be properly stocked with soap, toilet paper and towels. Paper napkins or towels are convenient and hygienic.

The cleaning work should be undertaken either before or after the business hours in the office. In addition to the daily cleaning, a definite programme of special cleaning should be laid down and followed. This sort of special cleaning should be a comprehensive one and no part of the office should be left uncleaned.

3.5.4. Safety Measures:

One of the vital functions of a modern office is to keep and preserve documents and records for future guidance or reference. All documents or records of office should therefore be kept under proper security. The following precautions should be taken to secure documents and employees:

(i) **Fire Precautions:** Adequate fire precautions should be taken for the preservation of office records and documents, machines against risk of loss or destruction by fire. Similarly precautionary measures to safeguard the employees in the office should also be provided in the office. Adequate fire extinguishing equipment should be installed and the staff should be trained in its use. Fire alarms should be fixed in conspicuous places. Such appliances should be regularly inspected to ensure that they are in working order.

(ii) **Accident Prevention:** Most accidents occur due to overcrowding in the office; use of obsolete machines and

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equipment, improper and careless handling of machine etc. Hence adequate precautionary steps to prevent accidents should be taken in the office. The employees should also be made aware of the safety arrangements and should be advised to handle the office machinery and equipment carefully. Office machines and equipments should be placed on firm foundation and proper fitting of desk and file drawers should be ensured.

(iii) Provision of Safe Working Place: Arrangements should be made to provide a safe working place for the employees. Shape and size of the office rooms, location and size of doors, gangways, etc., must be such as to eliminate hazards of accident. Office floor should be covered with nonslippery material, lighting of stairways, gangways, etc should be adequate and desks and chairs should be free of sharp edges.

(iv) Provision of First Aid Service: To ensure immediate treatment to injuries, there should be a first aid box in every office with sufficient medicines. These should be regularly inspected to ensure that they are stocked with all necessary materials.

(v) Safety Education and Training of Employees: Each employee should be made thoroughly aware of the dangers of his job. Training should be given to employees in the correct and safe way of doing the job and trained in first aid and fire fighting work. Safety regulations should be carefully framed and strictly enforced.

Points to be remembered:

Office accommodation refers to the place of work and its surroundings which are important that affect the efficiency of the employees to a large extent.

Principles of Office Accommodation

1. Convenient Location

2. Sufficient space and scope for expansion.

3. Provision for the convenience and amenities for the well-being of the staff

4. Service facilities should be available in the office and near the office premises.

Factors to be Considered While Selecting Office Accommodation

1. Locating the office building

2. Securing the required office accommodation

3. Size of office accommodation

4. Lighting and ventilation of the space

5. Layout and facilities for office organization

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6. Customer and staff conveniences

7. Cost of office space or accommodation

8. Miscellaneous considerations.

Factors in selecting Office location

(i) Suitability to Neighbourhood

(ii) Proximity to other units.

(iii) Proximity to related business

(iv) Nearness to service facilities

(v) Nearness of Transport facilities

Factors in selecting office premises

1. Safety of records and Staff

2. Working Conditions

3. Adaptability to Proposed Layout

4. Office Fitting

5. Future Expansion

6. Type of building

Office Layout

Definition: arrangement of equipments within the available floor space

Objectives and Importance

- proper usage of space

- provision of sufficient services

- Good working conditions

- Facilitating communication

- Easy Supervision

- Sense of belongingness and loyalty

Types – Open office, Private Office

Office Environment

Lighting, Ventilation, Cleanliness and Safety Measures

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1. Arrangement of equipment within the available floor space is _____.

    (a) Office accommodation   (b) Office layout

    (c) Office Environment   (d) Office building

2. Flexibility is high in _____.

    a) Open office   b) Private office

    c) Modular units   d) Cubicles

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3. _____ must provide good and satisfactory working conditions.

   a) Office accommodation　　　　　b) Office layout

   c) Office Environment　　　　　　d) Office building

4. _____ is usually allotted to the top executives of the organization.

   a) Open office　　　　　　　　　b) Private office

   c) Modular units　　　　　　　　d) Cubicles

5. Air conditioner provides _____.

   a) Natural ventilation　　　　　　b) Artificial ventilation

   c) Humidity　　　　　　　　　　d) Air circulation

6. Today's most energy-efficient light is _____.

   a) Solar　　　　　　　　　　　　b) LED

   c) Fluorescent　　　　　　　　　d) Incandescent

7. Gently flow of an equal amount of light directly and indirectly by its reflection from ceiling and walls happens in _____lighting.

   a) Direct　　　　　　　　　　　b) Indirect

   c) Semi direct　　　　　　　　　d) General diffuse

8. Roof ventilation and internal tube ventilators provide _____.ventilation.

   a) Natural　　　　　　　　　　　b) Artificial

   c) Direct　　　　　　　　　　　d) Indirect

9. The ideal office temperature is approximately _____ fahrenheit.

   a) 58 degree　　　　　　　　　　b) 68 degree

   c) 78 degree　　　　　　　　　　d) 48 degree

10. The cleaning work should be undertaken _____the business hours in the office.

   a) During　　　　　　　　　　　b) Before

   c) After　　　　　　　　　　　　d) Either before or after

II.   Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1.   What is office accommodation?
2.   State the principles of office accommodation.
3.   Define office environment.
4.   What are the types of office layout?
5.   State factors in Good lighting system.
6.   Mention the types of ventilation.
7.   List out the sources of office lighting.

Part - C

III.   Short answers:

Answer in one page.   **(5 Marks)**

1.   Explain the factors to be considered in choosing office location.
2.   Mention the factors in selecting office premises.
3.   State the objectives and importance of office layout.
4.   Differentiate between Open office and Private Office.
5.   Explain about the types of Office Lighting System
6.   State the importance of maintaining cleanliness in office.
7.   Describe the general safety measures to be followed in Office.
8.   Explain new trends in office layout.
9.   What is open office? State its advantages and drawbacks.
10.   What is private office? State its advantages and drawbacks.

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1.   What do you understand by office accommodation? Enlist the factors to be considered while selecting office accommodation.
2.   What is Office layout? Discuss about the types with its advantages and disadvantages.
3.   Discuss about the components in Office Environment.

Teachers Activity:

- Take students to an office and expose them about office layout, ventilation, and lighting & safety measures.
- Organize a debate on Open office and private office in the classroom

Students Activity:

- Visit an office and observe office layout, ventilation and lighting arrangements
- Prepare model of office lay out in groups

References:

1. *Office Management – Kathiresan and Radha, Prasanna Publishers & Distributors, Chennai*

2. *Office Management – R.K.Chopra, Himalaya Publishing House, New Delhi*

3. *Office Management Revised Edition – P K Ghosh, Sulan Chand Publishers, New Delhi*

4. *Office Organisation and Management Second Revised Edition – S P Arora, Vikas Publishing House Pvt. Ltd, New Delhi*

GLOSSARY

1	*Amenities : A desirable or useful feature or facility of a building.*
2	*Cubicles : A very small enclosed area.*
3	*Diffusion of Light : Spreading of light.*
4	*Fluorescent : Fluorescence is the emission of light by a substance that has absorbed light or other electromagnetic radiation.*
5	*Humidity : A quantity representing the amount of water vapour in the atmosphere.*
6	*Incandescent : Producing a bright light from a heated filament.*
7	*Landscape : A landscape includes the physical elements of landforms and different forms of land use, buildings and structures.*

8	*LED Light : With an electrical current, the diode emits a bright light around the small bulb.*
9	*Modular : Employing or involving a module or modules as the basis of design or construction.*
10	*Office Accommodation : It is the process of selecting appropriate building in a favourable location, establishing different sections and departments, arranging resources in a scientific way.*
11	*Proximity : Nearness in space.*
12	*Office Lay out : Arrangement of furniture and equipment within a given floor area.*
13	*Office Premises : A room or set of rooms in which business, professional duties, clerical work, etc., are carried out.*

Content:

Introduction - Need for office stationeries and supplies-Factors to be considered for selecting stationery- Forms-Meaning of office forms - Definition-Types of forms-E-Forms-Importance and Needs of Forms- Advantages of using Forms- Factors to be considered in Form design – Form sets - Continuous stationery – Loose leaf ledger.

Learning Objectives

- To know the various factors to be considered for selecting stationeries.

- To enable the students to learn and understand various forms used in office.

- Equip the students to comprehend and use various forms in office.

Introduction:

Most of the office work is of clerical work which requires a large variety of stationery and other articles in connectionwith work. These are often known as 'office supplies' and include items like paper, paper pads, letterheads, carbon, typewriters, ribbons, pens, pencils, erasers, stamp pads, stencils and duplicating paper, writing, stamping and duplicating ink, paperknife, paper fasteners (pin, clips, glue, cellotape, stapler, etc.) , tags, rubber bands, sealing wax and so on. In each category of stationery, several types and qualities of items are often required.

Fig. 4.1. Office Stationery

4.1. Need for Office Stationery and Supplies:

The need for office stationeries can be well understood by the following points.

1. Cost: Office stationery and forms occupies a significant place in office management from cost point of view. Generally, the value of office stationery and forms is very small but used regularly in any office.

2. Availability: The effectiveness and efficiency of the office is based on the adequate availability of office stationery and forms. Every office staff must be provided with the best tools of right type in order to enable them to produce the best possible results.

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3. Right Type of Supplies: Each of the stationery is procured according to the needs of an office. For efficient performance of office work the employees should be provided with right type of stationeries.

4.2. Factors to be Considered for Selecting Office Stationery:

The office manager has to decide about the quality, types, and needs of stationery. Besides, the following points have to be considered while deciding the stationery.

1. **Standard:** Separate standard is followed for each type of stationery. There is no link of standard with cost. Only utility is taken into account while deciding the standard.

2. **Suitability:** The stationery should be capable of satisfying the needs of the office and well suited for the purpose for which they are purchased.

3. **Cost:** Clerical operations cannot be carried out in the absence of stationery. Even though, the cost of stationery should not exceed 40% to 50% of the non-salary expenditure.

4. **Goodwill:** The letters must give a good impression to the recipient. They create goodwill for the firm.

5. **Durability:** Cheaper quality stationery has a shorter life. The papers are kept for long period and used as documentary evidence. Hence, superior quality stationery should be used for important matters.

6. **Preservation:** The carbon copy of the letter is preserved for future reference. Hence, the letter appears on the carbon.

7. **Performance:** A specified brand of stationery has to be used continuously until the stage of availability of satisfaction. If not so, it has to be substituted by another brand.

8. **Quality:** Stationery has short life if ordinary quality is purchased. The

stationery of superior quality will be profitable since it may go for double the time of ordinary quality and incurred low expenses.

4.3 Forms:

An 'Office form' may be defined as a printed sheet of paper or card with marked headings for entries to be made in hand or by typing. Forms are the basic tools for all types of office work. It is through the office forms all essential information required for efficient conduct of business can be received, recorded, arranged and transmitted in a systematic manner. Generally, the data may be collected from outside sources through bills, quotations, orders, statistical data, return etc.

The ready-made forms help the employees to collect the data without much difficulty. These forms reduce clerical work and collects only required information instead of writing down the whole matter. Hence, the form is printed or cyclostyled format for future use. Forms may be filled in ink or with a typewriter.

4.3.1 Meaning of Office Form:

A form is printed piece of paper containing some information with blank spaces left for the entry of required information briefly by the persons using it. It is called the raw material for office work. Common examples of office forms are invoices, credit notes, debit notes etc.

Fig.4.2. Invoice

4.3.2. Definition:

J.C. Denier defines "Printed piece of paper or card on which entries are usually made against marked headings".

George R. Terry says that, "Office forms are the raw materials of the office".

4.3.3. Types of Forms:
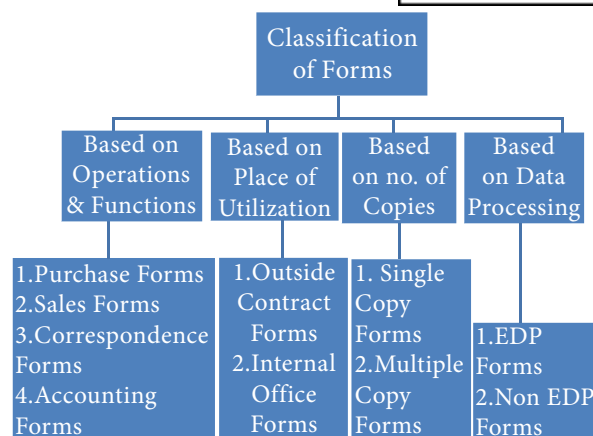
Fig. 4.3. Classifications of Forms

The forms can be broadly classified as under:

I. Based on the Office Function or Operation for Which They are Used, Viz.

1. Purchase Forms: A purchase form is a commercial document and first official offer issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services. E.g., Purchase requisition form, Order form

2. Sales Forms: A sales form is an internal document of the company. It is generated by the company itself for selling their goods.

3. Correspondence Forms: Any written or digital communication exchanged by two or more parties. Correspondences may come in the form of letters, emails, text messages, voicemails, notes, or postcards.

4. Accounting Forms: The account form balance sheet is a financial statement format where the assets are reported on the left side and the liabilities are reported on the right side. The account form is kind of a visual representation of the accounting equation.

II. Based on Place of Utilization:

1. Outside Contract Forms: Forms sent to customers, creditors and other persons (outside the office) with whom the firm does business from the office (e.g., cheques, orders, invoices, statements, vouchers, etc.)

Fig.4.4. Order Form

2. Internal Office Forms: Forms which are used by the employees of a business internally within the office (e.g., memorandum forms, requisitions, accounting forms, report forms, etc.).

III. Based on the Number of Copies Required:

1. Single Copy Forms: Single copy form is used to serve the only one purpose and kept by any one of the office employee. E.g. Employment application forms.
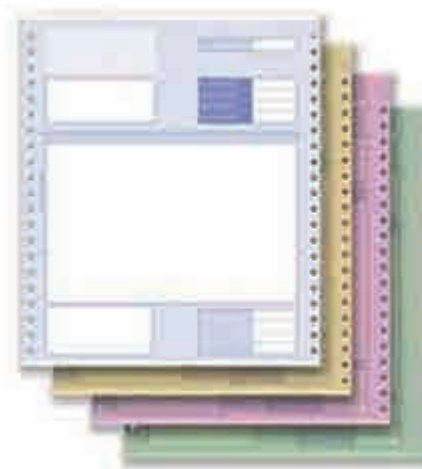
Fig.4.5. Multiple Copy Form

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2. Multiple Copy Forms: These are prepared in duplicate or triplicate-the copies being used to transmit information to other departments or used as additional record ex. sub type unit, fan or Z arrangement.

IV. Based on Data Processing:

(i) EDP Forms: EDP Forms which are used on computers and other data processing machines.

(ii) Non-EDP Forms: These forms are not used in EDP but are otherwise used on typewriters or to write in hand etc.

Fig.4.6. E-Form

E-Form (Electronic Form):

An e- form is a computer program version of a paper form. E-forms eliminate the cost of printing, storing, and distributing pre-printed forms, and the wastage of outdated forms. E-forms can be filled out faster because the programming associated with e-forms can automatically- format, calculate, look up and validate information for the user.

Benefits of E-Form:

1. It is easier to fill when compare to paper form.

2. It can be easily and quickly responded.

3. Adding questions and editing information can be done quickly and easily.

4. Forms are made secure through use of password protection.

5. It saves time and money.

4.3.4. Need for Office Forms:

Modern business depends much upon record. "A record is any written data that is made for possible future use." Forms are needed together and preserve information for present and future use. Need for office forms arise as they serve the following purposes:

1. **Gathering and Communicating Information:** They collect the needed data and then communicate the same to perform different tasks.

2. **Providing Specific Location:** They provide a specific location for each item of information needed and thus the work of data entry, processing and reference becomes easy.

3. **Elimination of Recopying:** As forms used to collect regular and standard information are prepared in duplicate and triplicate they eliminate the need for recopying repetitive or standard information, thus saving much time and money.

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4. Identification of Records: They help to identify records and facilitate filing for future reference.

4.3.5. Advantages of Office Forms:

1. It simplifies office methods and procedures.

2. It reduces cost of office operations by reducing the amount of manual or machine writing and thereby increasing the output of each worker.

3. Office forms are useful where it is desirable to fix responsibility for work done.

4. Business information can be received or collected, recorded, processed and transmitted in a systematic and efficient way with the help of office forms

4.3.6. Factors to be Considered in Forms Designing:

FORM DESIGN

Fig.4.7. Form Design

Following are the factors to be considered while designing office forms:

1. **Forms must be designed according to the purpose of their use:** The general purpose of a form is to make clerical work easier than what it would be if a blank paper was used.

2. **Forms should be easy to use:** The manner in which a form will be used must be kept in view while designing the forms and choosing the quality of paper for its printing. A form which is to be used on a typewriter or on a book-keeping machine should be so designed that it may have minimum number of starting places for the typist.

3. **The design of forms should be simple and facilitate the use:** A simple design generally makes the form more convenient to use. The design should enable the placing of matter to be easily done.

4. **Each type of form should bear a title and number:** To use a form, one must refer to it by a title or number. The title of the form should be standardised and printed at the top. It should be clearly descriptive but short. The form title is more easily remembered by the clerks than the serial number.

5. **The size of the form should be decided in accordance with the purpose in view:** There is no hard and fast rule regarding the exact size of a form.

6. **The type face for printing forms should be clear and distinct for purposes of reading:** The form designer has to keep in view the type- face for printing so as to make the printed form neat and compact.

7. **The right type of paper should be selected for every form:** The printing, typing or writing impression desired will determine the quality of paper suited for the purpose. The appearance

of the forms as regards finish colour, weight, etc., makes an appeal to the person to whom they are addressed.

8. **Adequate provision should be made for punching, scoring and perforating the forms:** If forms are required to be punched for binders, it should be arranged by specifying standard measurements from centre to centre of the holes. Scoring means impressing a line on the form which crease the paper so that time of printing. Perforation of certain forms may be required or a series of short dash(--) marks which cut partially through the paper.

4.4. Form Sets:

It is convenient to use sets of form to prepare more than one copy of a document. In this way, multiple copies can be made by a single writing method. The sets of forms can be constructed in the following ways:

1. Loose sheets put into sets

2. ingle sheet perforated and folded

3. Sets in gangs method

4. Sets in books or pads

5. Unit sets and

6. Continuous sets or continuous stationery

1. **Loose Sheets Put into Sets Method:** Under this method the office typist or clerk assembles the forms and carbon paper into place before typing or writing. The method is simple and hence used quite commonly. It has certain drawbacks

Fig.4.8. Loose Sheets Put into Sets

a) It requires the operator to do preparatory work before forms set is put together.

b) If the carbon papers are not used with care, copies may be illegible.

2. **Single Sheet Perforated and Folded Method:** Duplicate or triplicate form sets can be made by folding perforating or scoring single sheet of paper.

3. **Sets in Gang Method:** The term 'gang' means that a group of two or more identical forms are printed on a single sheet and are separated by perforations. These gang sheets may be in loose form but are often bound into pads or assembled and glued into unit sets. All the sheets may be assembled and perforated into gangs, or the record copies may not perforated and may be used as a register.

Fig.4.9. Sets in Pads or Books Method

Fig.4.10. Continuous Stationery

4. **Sets in Pads or Books Method:** Quit often forms of the same type or different forms comprising a set are padded in such a way that all the copies are perfectly aligned.

5. **Unit Sets:** Under this method variable lengths and breadths of the respective sheets in the set are used. This method of form set construction is economical where the quantity used is small and continuous forms happen to be costly. Unit sets can be constructed in two ways: (a) Unit blocked sets (b) Snap sets method.

6. **Continuous Sets or Continuous Stationery:** The time taken by the typist for putting the forms on the typewriter is long. To eliminate this, continuous stationery is used. Several copies are obtained by the use of copying methods without going through the process of tearing off forms and inserting carbon paper. It may be defined as a device whereby office forms are produced in a continuous strip and separate forms are divided from one another by perforations.

Different Types of Continuous Stationery: There are three basic types of continuous stationery which can be adopted when forms are designed and produced. They are:

Fig. 4.11. Roll Stationery

(i) **Roll Stationery:** In this type, the form is continuous roll. There are no perforations and the torn against a metal cutting edge when message have roll is inter-leaved with a single carbon paper used in tele printers, telex etc.,

(ii) **Interfold Stationery:** In this type of stationery perforated and the stationery is inter-leaved and form fashion. This is also called as "Flat".

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Fig. 4.12. Fanfold Stationery

Uses of Continuous Stationery:

Continuous stationery is also used in all types of book keeping, accounting machines and also in punched card tabulation. It is also used the print out of work processing machines and computer. It is also used in Desk sized manifold register, Portable sized Mani folder, Auto graphic Register.

Advantages of Continuous Stationery:

(i) It saves the time of the typist by avoiding boring and difficult task of assembling various forms to construct a form set.

(ii) It facilitates the speedy use of all machines.

(iii) It brings about efficiency in office operations because of considerable savings in time by eliminating various operations.

Disadvantages of Continuous Stationery:

(i) Making alterations or corrections is difficult.

(ii) Forms are soiled by the pressure of the typing machine roller on the carbon papers.

(iii) Bottom copies are faint and unreadable.

(iv) Where several forms are interleaved with carbon papers they tend to get out of alignment and in certain forms like invoices, figures may be typed in wrong places.

4.5. Loose Leaf Ledger:

Fig.4.13. Loose Leaf Ledger

Loose sheets are used while preparing the ledger. The loose sheets are fitted into metal hinges of screws, which allow pages to be taken out or additional pages to be inserted as and when necessary. The ledger may also be fitted with a lock. When a leaf or page is inserted or removed from it, the book is unscrewed and the relevant leaf put in or taken out.

A separate sheet is allotted to each account. In the case of large accounts many sheets may be used. The accounts may be

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arranged and rearranged in any orderdesired – alphabetical, numerical or geographical. For easy reference index can be used.

Advantages of Loose Leaf Ledger System:

1. Dead or closed accounts can be removed at any time.

2. It is not necessary to open new ledgers at the commencement of each balancing period.

3. The insertion of new leaves or removal of dead or closed accounts does not affect the order.

4. At the time of balancing, the ledger may be divided between several clerks so that the work of extracting balances may be made quickly.

5. Transfer ledger is used for keeping old records.

Disadvantages of Loose Leaf Ledger System:

1. The leaves may be lost or misplaced unintentionally.

2. The leaves may be intentionally destroyed or substituted with a view to commit some fraud already committed.

Points to be Remembered:

- Office stationery includes items like paper, paper pads, letterheads, carbon, typewriters, ribbons, pens, pencils, erasers, stamp pads, stencils and duplicating paper etc.

- Need for control of office stationeries and supplies.

- While selecting office stationery the factors like standard, suitability, performance, cost, goodwill, usage, quality etc., to be considered.

- Office form may be defined as a printed sheet of paper or card with marked headings for entries to be made in hand or by typing.

- Office forms can be of following Types;

    1. Purchase forms

    2. Sales forms

    3. Correspondence forms and
    4. Accounting forms.

    Again office forms may be classified into

        (a)Outside contract forms,

        (b)Internal office forms

        (c) Single copy form

        (d) Multiple copy forms.

        (e) EDP Forms and

        (f) Non-EDP Forms

- E-Form (Electronic Form): An e-form is a computer program version of a paper form.

- Following are the factors to be considered while designing Office forms

        a. Suitable for the purpose

        b. Ease in Use

        c. Simple Design

d. Title of form and number

e. Size of the form,

f. Proper Printing

g. Use of paper

h. Ease in Punching, Scoring and Perforation.

- Form Sets includes

  a. Loose sheets put into sets

b. Single sheet perforated and folded

c. Sets in gangs method

d. Sets in books or pads

e. Unit sets

f. Continuous sets or continuous stationery

g. Loose leaf Ledger.

Evaluation

OBJECTIVE TYPES:

I. Choose the correct answer: (1 Marks)

1. Office stationeries are known as _____

   a) Office supplies
   b) Equipment

   c) Sheets
   d) None of the above

2. A _____ is appointed to store the stationery and forms.

   a) Individual
   b) Separate person

   c) Company
   d) Group

3. The _____forms help the employees to collect the date without much difficulty.

   a) Ready-made
   b) Analytical

   c) Copy sheets
   d) Logical

4. What are the raw materials for office work?

   a) Stationery
   b) Typewriters

   c) Office forms
   d) Paper Fasteners

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5. Example for office forms are_____

a) Copy sheets b) Invoices

c) Plain sheets d) Manila sheets

6. This type of form sent to customers, creditors and other persons outside the business.

a) Accounting forms b) Internal office forms

c) Sales forms d) Outside contract forms

7. _____forms, are prepared in duplicate, or triplicate the copies being used to transmit information to other departments

a) Single copy b) Multiple copy

c) EDP forms d) Internal office forms

8. _____forms, are used on computers

a) EDP forms b) Non-EDP forms

c) Sales forms d) Single copy

9. An _____ is a computer program version of a paper form.

a) Readymade form b) Accounting forms

c) Single copy forms d) E-form

10. The title of the form and number should be printed at the _____of the form.

a) Bottom b) Top

c) Side d) All the above

11. _____is convenient to use sets of form to prepare more than one copy of a document.

a) Duplicating paper b) Carbon paper

c) Form sets d) Copy sheets

12. The time taken by the typists for putting the forms on the typewriter is long. To eliminate this, _____ is used.

a) Continuous stationery b) Single sheet

c) Loose sheets d) Unit sets

13.	In this type of stationery, the form is continuous roll.

	a) Inter fold stationery	b) Continuous stationery

	c) Roll stationery	d) Fanfold stationery

14.	_____ is used for while preparing ledger.

	a) Unit sets	b) Form sets

	c) Copy sheets	d) Loose sheets

Part - B

**II.	Very Short Questions:**

Answer in Five lines.	**(3 Marks)**

1.	What is stationery?

2.	What is office form?

3.	Define the term office form.

4.	Write short notes on E-form.

5.	What are form sets?

6.	List out the drawbacks of loose sheets put into sets method?

7.	Write short notes on set in gang method?

8.	What is continuous stationery?

9.	What are the uses of continuous stationery?

10.	What is loose leaf ledger?

Part - C

**III.	Short Questions:**

Answer in one page.	**(5 Marks)**

1.	What are the uses of paper?

2.	Write note on need for office supplies and stationery.

3.	Explain the needs of office forms?

4.	What are the advantages of office forms?

5.	 What are the types of office forms?

6.	Explain the different types of continuous stationery?

7.   What are the advantages and disadvantages of continuous stationery?

8.   What are the advantages and disadvantages of loose leaf ledger?

9.   What are the benefits of E-Form?

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1.   Explain the factors to be considered for selecting stationery.

2.   What are the factors to be considered in forms designing?

3.   Write notes on Form sets.

4.   What is continuous stationery? Explain its merits and demerits.

5.   What is loose leaf ledger? Explain its merits and demerits.

ACTIVITY

Teachers Activity:

- Must ask the students to download specimens of various e-forms used in office
- Must give assignment on various stationeries used in office
- Help the students to find Tamil meaning for the technical terms mentioned in the lesson

Students Activity:

- Must collect specimen forms used in office and submit as assignment.
- Have to prepare folders in the various forms.

References:

1. Office Management – P.K. Gosh

2. Office Management- Dr.T.S.Devanarayanan and N.S. Ragunathan

3. Office Management-Katherasan and Dr .Radha

1	Office form : A printed sheet of paper or card.
2	EDP form : Electronic data processing forms used in computers.
3	E-form : Electronic form. It is a computer program version of a paper form.
4	Gang : Two or more identical forms are printed on a single sheet.
5	Form sets : A group of paper of the same type that belong together.
6	Continuous stationery : Printed sheets of paper are often folded zigzag and are perforated. Hence it can be separated into sheets.
7	Interfold stationery : It is perforated and inter-leaved and form fashion.
8	Fanfold stationery : Various forms are kept together at the sides, the top and bottom are divided by perforation both horizontally and vertically. If the stationery is pulled out, the forms open up as called as fanfold stationery.
9	Loose leaf ledger : Loose sheets are used while preparing the ledger.
10	Invoices : A list of goods sent with their cost.

Content:

Introduction – Types of Records - Records Management – Objectives of Records Management – Filing – Advantages of Filing – Essentials of Good Filing System – Organisation of Filing - Types of Filing – Classification of Files Indexing – Objectives of Indexing – Essentials of Good Indexing System – Advantages of Indexing – Selection of suitable Indexing System.

Learning Objectives

- To know the importance of records for day to day business activities and its functions.

- To know what is records files, Vouchers, and filing methods of records.

- To analyses the principles of maintaining records.

- To understand the advantages of filing of records, organizing of records, its types and classification.

Introduction:

The very existence of business organizations, government and other social institutions is based on records. Keeping good records is very important to any business. Record keeping system should be accurate, reliable, easy to follow, consistent as to the basis used and be very simple. Good record keeping is vital in regards to meeting the financial commitments of the business and providing information on which decisions for the future of the business can be based. While business maintains the records to monitor and to record normal business activities, it is also necessary because of obligations under the taxation laws. These records are official documents and also serve as legal evidence in case of emergencies.

In day to day business operation many documents are received, sent out and created. These documents play a very important role in business operation and for taking some decisions. So such documents should be preserved to obtain at the time of need. For that a filing system is developed in every organization. Filing is the memory of any organization.

Hence, filing is the process of systematic and scientific preservation of official document for future reference or evidence. It is putting the documents, letters etc into a file. It is a scientific and systematic process of saving important documents for future reference.

5.1. Meaning of Records:

Records refer to a document,

utilized by an organization to carry out its various functions. A record constitutes some type of tangible evidence of the operations of an enterprise. If may take the form of a letter, circular, invoice, voucher, picture, report, payroll, contracts, deeds, progress of work, orders, stock records, estimates, progress reports, financial and statistical statements etc.

Fig. 5.1. Office Records

5.2. Types of Records:

1. Correspondence: Correspondence includes letters, notices, circulars, memorandum, reports etc., received by the firm and the copies of letters sent out. It also includes telegrams and fax messages.

2. Accounts Department Records: These include all papers or documents connected with accounts of the firm. E.g. invoices, petty cash vouchers, receipts, bank statement, accounting ledgers etc.

3. Purchases and Sales Records: These includes all papers connected with purchases, sales and stock keeping of goods handled by the firm, e.g. Price list, quotations, samples, copy orders etc.

4. Personal Records: These include all papers connected with the employees of the firm e.g. completed application form etc. and records of employees' attitude, absenteeism, and turnover etc.

5. Administrative Records: All records which are necessary with regard to the administration of the firm either because of statutory requirements otherwise e.g. Insurance policies, vehicle registration books, licenses, hire purchases agreement, share certificates and so on.

6. Miscellaneous Records: Modern business firms also keep records which have not been included in either of the above categories for instance records relating to advertisement campaign marketing research etc.

5.3. Records Management:

Records management is a modern business program that embraces filing and is supplemented by the design and review of business forms and records. It is that area of office administration which is concerned with creation, presentation, and use and disposal of records.

According to **Jane K Cruible** "Records management refers to me activities designed to control the lifecycle of a record from its creation to its ultimate disposition. The functions of records management under these stages are discussed below.

1. Creation of Records: New forms and records should be developed only when their need is fully satisfied. The design of the forms should be given careful

attention. Data should be recorded in the documents accurately and completely.

2. Storage of Records: The storage is concerned with the classification of records and then filing in the suitable filing equipment which is in the easily accessible location. Arrangement should also be made to protect the records against disaster or unauthorized use.

3. Retrieval of record: The records are store for further use. An efficient procedure must be established so that records may be retrieved and delivered in time. The utilization of records is greatly influenced by the mode of their creation.

4. Disposal of records: The last stage in the record cycle is the disposal stage which is concerned with preserving valuable documents and disposing the expired documents. A record retention schedule classifies records based on the time period and the requirement of the same.

5.3.1. Objectives of Record Management:

The basic objective of records management as given by **Leffingwell and Robinson** are as follows:

1. To keep an Orderly Account of Progress: The purpose of writing down and preserving memoranda of transactions, (financial and other kinds) various documents, papers, correspondent etc, are to record the progress of the business. This may be referred to as historical function of records.

2. To Facilitate Comparison: Records facilitate comparison between one period of time and another, between

different product lines and between firms operating in different lines of business. This analytical function of records play a vital role in today's business.

3. To Detect Errors and Wastes: Errors and wastes can be known and controlled only with the help of proper records and management. Records management is a control function which facilitates the evolution of techniques for the elimination of errors and waste.

4. Legal Formalities: Certain records are to be kept for a specified period of time under the provisions of the various Acts. For instance, sales records have to be kept for several years under the sales Tax Act, receipts and payment vouchers and accounts books have to be kept for several years under the Income Tax Act and so on.

5.4.   Filing:

Filing can be described as the core of records management. It is rightly said that the keystone of office organization is the maintenance of comprehensive, simple and efficient filing system. Filing cannot be treated as an unimportant function of the office, perhaps it is the most important amongst its functions. **Denyer** gives a very simple definition of filing. He describes it as the "process of arranging and storing records so that they can be located when required, "thus filling as process has following major objectives (i) Proper arrangement of records, (ii) Careful storing of records, (iii). Easy availability of records without these objectives in view, filing system will not be useful and so the organization can not function successfully.

G.R Terry has defined filing as "the placing of documents and papers in acceptable containers of document and paper in acceptable containers according to some predetermined arrangement so that any of these may be located quickly and conveniently, when required".

According to **Zane K. Quible,** "Filing is one of the activities in the records management programme which involves systematically classifying, coding, arranging and placing of records in storage".

5.4.1. Advantages of Filing:

Records are stored under a suitable system of filing in order to achieve the following purposes and benefits.

1. Ready Reference:

Records constitute the storehouse of information relating to past events. They can be referred conveniently if they are filed in a systematic manner and a proper index is maintained for various files.

2. Safety of Records:

Filing ensures the safe storage of records of different types. Letters and other documents are put into folders and the folders are kept in cabinets. Thus records are saved from unforeseen happenings like theft fine etc.

3. Documentary Proof:

Records serve as documentary evidence in case of disputes. Copies of records can be produced to settle the claims with different parties. Records can also be produced in a court of law as evidence when a party to the dispute resorts to the process.

4. Prompt Handling of Correspondence:

Filing enables the handling of correspondence properly without any delay. It builds up the reputation of the organization and helps in securing orders.

5. Statutory Requirements:

Records are kept in compliance with provisions of various statutes like companies Act, Income tax Act, Factories Act, etc

6. Barometer of Progress:

Filing makes available the records of previous years. It helps in comparing the current year's performance with the previous years. Thus it is an important aid in measuring the efficiency of the enterprise and various departments.

7. Decision Making and Policy Formulation:

Availability of up-to-date information is essential for taking important decisions and for formulating policies. The degree of risk is increased if to decisions are based on relevant facts and figures.

8. Increased Efficiency:

Filing increased the efficiency of the office. It makes available to the management the required information with speed and

accuracy which is helpful for prompt decision-making. Follow-Up actions are also taken quickly if records of the past correspondence are easily available.

5.4.2. Organization of Filing:

In any large business establishment, the management has to decide whether filing should be centralized (i.e.: Spread among the different departments). The main object filing is speedy and accurate location of records at minimum cost. This is best achieved under the centralized filing arrangement.

1. Centralized Filing of Records or Centralized Filing:

Centralized filing of records refers to graphing and storing of records in the same place where they are accessible to a number of persons. In other words, the records pertaining to activities of all the departments of an enterprise are preserved in the centralized index plan. Central file comprises papers relating to general correspondence, office branch correspondence, orders, invoice, vouchers, estimate, quotations, credit and debit memos and other papers which several departments need to refer.

(i) Merits of Centralized Filing:

1. It eliminates duplication, as all papers pertaining to a particular subject are kept in the central file thus eliminating duplication.

2. This system provides better service by employing trained clerks exclusively for filing purpose.

3. It ensures a more uniform system of filing.

4. It helps to save time as there is only one place to send material for filing and locate the same.

5. It provides economy in space, equipment and supplies as there is no duplication of records and equipments.

6. It helps to serve other departments by relieving them from the burden of maintaining the records.

(ii)   Demerits of Centralized Filing:

1.   Physical difficulties are caused when departments are located away from the filing room.

2.   Leakage of information is possible since files are centrally placed.

3.   Since there is no duplication of records there is a fear of losing records. Therefore, it is advisable to have a copy of each record in the respective departments file.

2. Decentralized Filing:

In this system files relating to different departments are kept in the respective departments. Decentralized filing is necessary for maintaining records of work-in-progress, such as unexecuted orders, unpaid bills etc. Further there are certain records which will be used only by certain departments, for e.g. Price quotation in the purchase department, blueprints and drawings in the engineering department. In every department a filing clerk does the filing work along with his other duties.

(i)   Merits of Decentralized Filing: The disadvantages of centralized filing are the advantages of decentralized filing and vice versa.

1.   It is more suitable where the information relating to a department is of confidential nature.

2.   It is useful when departments are located far away from the filing department.

3.   This system is useful when certain papers are relevant for one department only.

4.   There may be delay in locating records under centralized filing. Decentralized filing is recommended in order to remove inconvenience likely to result if the records are not located on time.

(ii) Demerits of Decentralized Filing:

1.   Expenses on filing are high, as it leads to duplication of space, equipment and supplies.

2.   Since every department does its own filing work, appointment of filing clerk is not economical and feasible.

3.   There will be lack of uniformity in the filing routines and equipment in different departments.

4.   Departmental filing may create difficulties when a piece of paper is relevant to more than one department.

5.4.3. Types of Filing:

The important types or methods of modern filing are:

1. Horizontal or Flat Filing: Under this method the documents or letters are placed in a horizontal or flat position one on the top of another in order of date and the latest is on the top. The letters are filed along with their replies. These files come in a variety of folders. More important of horizontal files are discussed below:

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Fig. 5.2. Horizontal Filing

i.   **Lever Arch Files:** It is a very popular type of horizontal file. It can be described as a strong card-board folder which contains strong metal arches which can be opened with the help of a lever. Records to be filed are punched with two holes with the help of the punching machine either at the top or on the left hand side of the forms, and are then files on the metal uprights, after the arch has been opened by the lever. The arch lever file facilitates alphabetical division which is done by inserting thick cards at suitable places. The great advantage of this file is that papers can be inserted or taken out with great ease without disturbing the order of other papers in the file. The file also offers the advantage of proper preservation of papers free from mutilation and dust, if the files are stored properly in the almirahs.

Fig. 5.3. Lever Arch

ii. **Flat Files:** The "files" (or covers) are made of cardboard or thick paper. A separate cover is allotted to each subject or customer, which contains all the relevant correspondence and documents in this file. The received letters and invoices posted and other relevant documents get filed in the chronological order where a letter or a document needs to be filed at more than one place, the necessary number of copies is made and filed in each relevant file. The flat file has metal hinges which are inserted into the holes punched by the punching machine.

The prepared files are stored in almirahs and placed on top of each other. They are also stored in drawers.

Fig. 5.4. Flat Files

Advantages of Horizontal Filing:

1.   It is a simple method to operate.

2.   It is a cheap method to install.

3.   The papers are kept in order in which they have been filed.

4.   Speedy reference can be made to papers without removing them.

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5. The contents are kept clear and dust free, especially where good covers and almirahs are used.

Drawbacks of Horizontal Filing:

1. Papers cannot be taken out without dislocating other papers because the latest document is on top where a flat file is used.

2. Where a file has become bulky, location of papers become very difficult.

3. It is suitable for offices where transactions are not many.

4. This method does not allow for expansion behind a certain point.

5. It requires an index to find out the concerned file.

2. Vertical Filing:

This method of filing can be said to be the most modern. It is so named because the contents are kept in an upright or standing position. This method of filing is the result of the growing needs of business organization. The greatest drawback of the horizontal filing is the time consumed in locating a paper or document. As the business expands, the bulk of papers increases and location of a paper becomes difficult and time consuming activity, vertical filing eliminates this drawback of horizontal filing. Hence it has become a very popular method of filing in large offices where number of subjects is large.

Fig. 5.5. Vertical Filing

Advantages of Vertical Filing:

Vertical filing offers many advantages over horizontal filing, which are summarized below:

1. **Economical:** Vertical filing is more economical on account of two reasons.

i. The folders are cheap, and

ii. Many folders can be accommodated by a single filing cabinet.

Hence there is saving in terms of money as well as space.

2. **Ready Reference:** Any paper can be traced without wasting time. This is possible because there is a separate folder for each customer or subject and its contents are easily known due to description given on the tab or projected part of the back sheet. Besides, any paper can be inserted and taken out with great ease in a short time.

3. **Elasticity:** Filing cabinets provide ample scope for expansion of filing facility. A single drawer can accommodate a large number of folders. As the number of folders increases the same drawer can be accommodate more folders upto some extent.

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4. **Safety and Security:** Greater safety is another feature of this method of filing. Papers do not get torn or gather dust since they are well- protected by manilafolders kept safety in drawers, which can also be locked to provide security to confidential documents.

5. **Universal Application:** Vertical filing has proved useful in preserving all types of papers, documents and memorandum. Orders, invoices, letters, quotations, tenders, government circulars, etc., can be filed with great ease and preserved without difficulty.

6. **Adaptability:** Vertical filing can be easily adapted to all types of classification. The folders can be arranged alphabetically, numerically, geographically, subject-wise or on some other basis according to the needs of an individual office.

5.4.4. Classification of Files:

There are five methods of classification. They are:

1. Alphabetical Classification

2. Numerical Classification

3. Geographical Classification

4. Subject Classification and

5. Chronological Classification.

1. Alphabetical Classification: Alphabetical classification is based on the occurrence of the letters in the alphabet as it is done for the dictionary.

Telephone directory is another example. If several names occur having the first letter, the arrangement takes into account the subsequent letters also, for example:

A, AB, AC ----------- etc

B, Bb, BC ------------- etc.

Under the alphabetical classification, the filing of papers and documents is either by the names of the correspondents or the subjects. In a large office, it would be proper if 26 letters of the English alphabet are divided into small equal parts considering the letters which are bound to have more names. This method of classification can be used in correspondence filing, contracts, orders and staff records.

Fig. 5.6. Alphabetical Classification

2. Numerical Classification:

In this method of classification, each folder or record is given a number, and the files are placed in strict numerical order. For example Mr. Gnanasekar Ltd, may be assigned No 25. If they deal in a number of lines, each line may be classified with a number beginning with 25, for example, 25.1, 25.2, 25.3, etc.,

The system of numerical classification is generally recommended for filing of orders, sales, invoices, contracts, (where numbered) and committee minutes.

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Fig. 5.7. Numerical Classification

3. Geographical Classification:

As the name implies, this classification is based on the geographical origin of a document or paper. This system is combined with one of the two systems already discussed. The classification can be town-wise, district-wise, state wise, country-wise and continent-wise.

The steps in geographical classification are outlined as follows:

(i). First of all geographical limits are set and areas are defined which will make one unit, for example, in export-import trade

(ii). Next step will be to arrange these countries in their alphabetical order, for example, Algeria, Bolivia, Canada, France, Great Britain, USA and USSR, etc.,

(iii). Within each sub-division classification of different parties may be arranged alphabetically or numerically. Such method of classification is very useful for customers' orders in a given area and for filing of correspondence according to town.

4. Subject Classification:

It is a method of classification in which all documents relating to a subject are brought together in one file, even though they may have come from different sources and from many different people. Following steps are taken to install subject classification

5.1. Defining Subject

5.2. Sub-dividing subjects into smaller fractions

5.3. Assigning numbers or arranging subjects in alphabetical order, including sub-subjects, and

5.4. Miscellaneous folders are made for subjects which have not been classified.

Example:

Main Subjects Classified:

Purchases

Sales

Advertising

Sub-division of classified subjects:

Purchases -------------- Scooter Parts.

Purchases ------------- Tractor parts.

Purchases -------------- Motor Parts

Fig. 5.8. Subject Classifications

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5. Chronological Classification

Under this method various records are identified and arranged in strict date order and sometimes even according to the time of the day. It is a useful method for filing invoices and other vouchers associated with accounts.

This system may be useful if used along with some other system. The records may be arranged alphabetically first and then can be arranged date-wise within each folder. So this system cannot be used independently.

Fig. 5.9. Chronological classification

5.5. Indexing:

Index is anything that "points out" or indicates. Indexing can be described as a method of providing indicators for a body of data or collection of records. The term "indexing" should not be confused with the term "classification". Classification is the method of filing while indexing is basically the method used for making reference to the matter filed.

Fig. 5.10. Indexing

5.5.1. Objectives of Indexing:

The principal objective of indexing is to assist filing so that filed papers are located easily and quickly whenever they are needed. Indexing thus adds to the efficiency of the filing method. It ensures speed and consequently economy results due to increased speed. The objective of indexing is best achieved where the right type of indexing system is chosen. Where files are arranged in geographical-cum-alphabetical or only alphabetical order, an index is not needed. However, in other systems of classification, it becomes essential to provide an index for customers, suppliers, credit ratings telephone numbers and soon. Index is also required for different kinds of registers and ledgers.

5.5.2. Essentials of a Good system of Indexing:

In order to achieve its objectives, a good system of indexing should have the following essential features;

1. It should be simple.

2. It should be economical in operation.

3. It should allow for speed.

4. It should go well with the system of filing in the organization.

5. It should be flexible to allow for expansion when needed.

5.5.3. Advantages of a Good System of Indexing:

A good system of indexing, i.e., which goes well with the filing methods in the organization, offers the following benefits in the field of records management.

1. **Easy Location:** The required papers and documents are located very easily with the help of their index. Referencing is not a painful process.

2. **Easy Cross-Referencing:** A good system of indexing also ensures easy cross-referencing and thus saves on time and botheration.

3. **Lower Costs:** The operating costs of records administration are also low due to improved efficiency of the records administration. Time is not wasted in locating the necessary documents or papers.

5.5.4. Systems or Methods or Types of Indexing

Indexing may be classified into the following main categories, namely: (a) Page Index; (b) Card Index and (c) Visible Index.

(a) **Page or Book Index:** This system is also known as alphabetical indexing as classification is based on the letters of the alphabet. One page or leaf is allotted for each letter of alphabet, fitted with a tab showing the letter and quoting the relevant page numbers. The pages may be held in a loose form or in a bound book form. Each page consists of a list of all the correspondents whose names begin with the letter to which that page or sheet is allotted. For example, all names beginning with the letter 'A' like Anuradha, Anandhi, Akila will be written on the page allocated to the letter 'A'. The folder number of correspondents relating to a particular person will appear against his/ her name.

Page Index may take the form of either (1) Bound Book Index (2) Loose Leaf Book Index and (3) Vowel Index. These are described below:

i. **Bound Book Index:** It is in the form of bound book or register which is divide into alphabetical sections where in the names of persons are entered.

Each section has the leaves cut way at the right hand side so that the initial letters of all the sections are visible at a glance. The book index is very cheap and is a good long time record. The pages cannot be lost or disarranged because they are bound. This is an inflexible method since alterations are difficult and it accommodates a comparatively less number of entries. Example: Telephone Index.

ii. **Loose leaf Book Index (or) Vertical Card Index:** Loose sheets are used for indexing and the fastened are metal rings or hinges or some other device which allows the pages to be taken out and also helps in insertion of additional pages. This type of index is also fitted with a lock. It is very much used by the commercial banks and the joint stock companies for keeping the records

of their customers, shareholders and debenture holders.

Loose Leaf Indexing is flexible and adaptable to different users. It offers ample scope for expansion with the main drawback of loss or damages.

Merits of Page or Book Index:

1. It is very cheap and simple method.

2. It requires less space.

3. It can be carried from one place to another.

Demerits of Page or Book Index:

1. A strict alphabetical arrangement of names on each page may not be possible.

2. Names must be deleted once they are no longer of any use. This may present a shabby appearance.

3. It is an inflexible system of indexing, scope for further entries even in case of loose leaf index is limited.

iii. **Vowel Indexing:** In case where the number of correspondents is very large the alphabetical indexing is further classified. The names of the correspondents are entered on one page or the other according to the letter with which his name begins and first vowel in his name. This sort of indexing is known as "Vowel Indexing". E.g. AShika the first vowel in the name is "I". It will be classified under "Ai"

(b) Card Index: Under this method references are entered on the cards of

uniform size. These cards bear the names, number of the files and other particulars to be indexed. Cards are arranged in either alphabetical or numerical order and are place in drawers or boxes which may have a rod running from one ending to the other end for holding cards in their places. These drawers are divided into alphabetical sections by means of guide cards.

Fig. 5.11. Card Index

The purposes for which card index may be used are listed below.

a) As catalogue of books in library;

b) To contain specimen signatures of customers in bank.

c) To contain addresses and other particulars of customers;

d) To maintain accounts of store items;

e) To maintain history of employees;

f) To keep records of installment sales.

Merits of Card Indexing System:

1. The cards provide a complete list of

the names, addresses and telephone numbers of the persons or the firms with whom the dealings take place.

2. Each card may be ruled according to the particulars desired to be recorded.

3. Ready information is available for different purposes, e.g., for knowing the number of customers in a particular territory.

4. It has greater flexibility because the number of cards can be increased or decreased as desired. Cards may be grouped and re-grouped in any manner and in any order.

5. The index is always alive since the dead cards are removed and transferred to dead cabinets.

6. Card index can be used by a number of persons at the same time.

Demerits of Card Index system:

1. There is danger of separate cards being lost by the persons who take them away from the drawers for reference.

2. Ready reference may be difficult if the cards are allowed to be removed freely from the drawers.

3. Card index is blind since cards are not visible at a glance.

4. Card indexing is comparatively costlier than page indexing.

5. Card gets torn or spoiled through constant handling. Thus, they have to be replaced from time to time.

6. Cards may be substituted to commit or to conceal fraud where card ledgers are kept.

Despite these drawbacks, the system of card indexing is very elastic and simple to operate and so is used frequent by libraries, hospitals, banks (for maintaining specimen signature) and other offices (to keep credit records, staff records and so on).

(c) Visible Index:

The major defect of card indexing is that a large number of cards cannot be seen at one glance. This defect is overcome by visible indexing under which a large number of cards are visible at one glance. Visible card index, strip index and wheel index are the systems of visible indexing.

1. Visible Card Index: Visible card index system has gained more popularity in recent years. It is based on the principle "look at the card, not for it". Visible card indexing can be used for retaining records such as accounts receivable, personal history of employees and specimen signatures of customer in a fairly permanent position for frequent reference. The speed in which the cards can be located and the necessary entries made, justifies the use and cost of visible card filing equipment.

The main feature of visible filing is that the main reference (i.e. the main information) on each card is visible at all times. The cards are arranged in such a way that it overlaps the one before it leaving a narrow strip at the bottom containing the name, telephone number of the subject visible.

Merits of Visible Card Index:

1. Speedy reference is possible as the names of the customers or subject are all visible.

2. Though visible indexing costs more, it saves time and labour much that it offsets the additional cost.

3. Additional information can be easily written on the cards even without disturbing the order in which they have been kept.

4. Cards can be removed and inserted with great ease.

5. Visible card indexing is very compact as a large number of cards can be accommodated in every tray.

Demerits of Visible Card Index:

1. The visible card index equipment is costlier than the equipment required for card index.

2. The filing staff must be trained properly for its operation.

2. Strip Index:

It is a type of visible indexing which is used when the entries are limited to a few lines (names, addresses, etc ;). It consists of a frame into which strips of stiff paper can be fixed in any required order. Each strip is devoted to one name only. Frames containing these strips may be either fixed on the wall or arranged on a rotary stand which can be turned round to look at any part of the index. These strips can be protected from exposure or damage by using removable transparent celluloid covers.

3. Wheel Index:

It is an improvement over visible card index. Cards are arranged about the circumference of the wheel. A single wheel can hold as many as 1000 cards. Cards can be inserted into or taken out of the slits of the metal rod whenever needed. An entry can be made on the card by applying the brakes to keep the wheel fixed. Thus, entries can be made on the cards and cards can be referred to without removing them from the wheel.

Fig. 5.12. Wheel Index

Merits of Wheel Index:

1. Wheel index makes reference very easy and quick. It saves time and efforts.

2. It is economical in space as a large number of cards can be accommodated in a wheel.

3. Entries can be made on the cards without removing them from the wheel.

4. New cards can be added and old ones removed without much difficulty. Thus wheel index allows flexibility in operations.

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5.5.5 Selection of a Suitable Indexing System:

Every system of indexing has its own merits and demerits. Some methods are rigid while others are flexible through expensive. The installation of a suitable indexing system depends mainly on the following factors.

1. The type and extent of information needed.

2. The cost of equipment in each system.

3. The cost of labour in each system.

4. The space required for each system.

5. The frequency of adding or deleting.

6. The purpose of using an index

Points to be Remembered:

- The very existence of business organizations, government and other social instillations is based on records.

- Types of Records: Correspondence, accounts departments, records, purchase and sales records, personnel records, administrative records and miscellaneous records.

- Records Management.

- Functions of record management: Creation of records, storage of records, retrieval of records, disposal of records.

- The objective of records management are to keep an orderly accounts of progress, facilitate preparation of statement of true condition, facilitate comparisons, and detect errors and complying with legal formalities.

- Principles of record keeping.

- Justification, verification, period, classification, safety, economy.

- Filing: Most of the records have to be preserved for reference in the future, at the same time they must be easily available.

- Advantages of filing: Ready reference, safety of records, documentary proof, prompt handling of correspondence, statutory requirement, barometer of progress, decision making, policy formulation and increased efficiency.

- Essentials of good filing system: Accessibility, simplicity, economy, suitability, flexibility, classification, cross reference, movement, safety, indexing, retention.

- Organizing of filing.

- Types of filing: Horizontal filing, vertical filing.

- Classification of filing: Alphabetical classification, numerical, alpha numerical, geographical, subject wise and chronological classification.

- Indexing: The principal objective of indexing is to aid filing so that filed papers are located easily and quickly whenever they are needed and improve efficiency and speed of the filing method.
- Essentials of a good system of indexing.
- It should be simple, economical in operation allow for speed, go well with the system of filing in the organization, flexible to allow for expansion when needed.
- It should be simple, economical in operation allow for speed, go well with the system of filing in the organization, flexible to allow for expansion when needed.
- Advantages of good system of indexing.
- Easy location, easy cross
- referencing, lowest cost.
- Types of indexing system.
- Page or book index, card index, visible index.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: (1 Marks)

1. Purchase and sales records include --------------------

   a) Price List   b) Record of Employees' Attitude

   c) Insurance Policies   d) Marketing Research.

2. A modern business program that embraces filing and is supplemented by the design and review of business forms and records is known as ----------------------

   a) Record keeping   b) Records Management

   c) Indexing   d) None of the above.

3. The -------------- stage deals with preserving valuable documents and doing away with unnecessary expired documents.

   a) Storage stage   b) Creation stage

   c) Disposal stage   d) Retrieval stage.

4. The analysis, which determines the proportion of benefit derived from maintaining records in comparison to their respective costs, is called ----------------------

   a) Ratio analysis   b) Cost benefit analysis

   c) Justification   d) All the above.

5. ----------------------- should be avoided when taking decisions.

   a) Statutory requirements   b) Relevant facts

   c) Changing political scenario   d) Guess work and intuition.

6. A good filing system ensures -----------------------

   a) Systematic organization   b) Simplicity

   c) Accuracy   d) All the above.

7. Chief Record and filing officer is incharge of the -------------------------- department.

   a) Filing   b) Indexing

   c) Records   d) None of the above.

8. In ----------------------- papers are inserted in chronological order are on top of the other.

   a) Vertical filing   b) Geographical classification

   c) Horizontal filing   d) Indexing.

9. ------------------------- indexing does not come under "Page or Book Index".

   a) Loose leaf   b) Vowel

   c) Card   d) Bound Book.

10. In ----------------------- indexing, the cards are arranged about the circumference of a wheel.

    a) Card index   b) Visible Card Index

    c) Strip Index   d) None of the above.

Part - B

II. Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1. What do you mean by filing?

2. What are the essentials of a good indexing system?

3. What is the difference between indexing and classifying?

4. What is meant by subject-wise classification?

5. List the various stages during which the functions of records management are performed.

6. What do you understand by the term "Vowel Indexing"?

7. What do you mean by Centralized Filing?

8. List out the various factors that influence selection of a suitable indexing system.

9. What is decentralized filing?

10. What is the main purpose of using card index?

11. List out the benefits derived out of page index.

12. What is meant by Strip Index?

13. What are the key advantages of a good indexing system?

14. What kind of records is to be maintained by a business house? Name them.

Part - C

III.   Short answers:

Answer in one page.   **(5 Marks)**

1. Explain the objectives of records management.

2. Bring out the principles of record keeping.

3. What is horizontal filing? Explain in detail analyzing its merits and drawbacks.

4. What is vertical filing? Bring out the merits and demerits of this method.

5. What are indexing and its main objective?

6. How indexing is different from filing?

7. Explain the concept of page index in detail with examples.

8. Explain in detail the benefits that can be derived from Card indexing and the drawbacks it suffers form.

9. What is the purpose of filing?

10. Bring out any two types of classification of files.

11. Bring out the significance of the various types of records maintained in an office.

IV. Essay type questions:

Answer within three pages. **(10 Marks)**

1. What is records management? Explain in detail the various functions and objectives of record management.

2. What are the essentials of a good filing system? How is it beneficial?

3. What are the various types of files?

4. How can the files be classified? Analyze.

5. What are the different types of indexing systems? Elaborate.

6. Explain the organization of filing with reference to centralized and decentralized filing.

ACTIVITY

Teachers Activity:

- Ask the students to file all their test papers and prepare an index of the same.

- Must ask the students to submit the assignment on various filing systems and indexing methods followed in offices by referring the net.

Students Activity:

- Must download the materials regarding various filing and indexing Systems followed in offices and submit the assignment on the same.

References:

1. *Office organization and Management- By S.P.Arora.*

2. *Office Management- By P.K. Ghosh*

3. *Office Management – By Kathiresan &Dr.Radha*

GLOSSARY

1	*Almirah : A cupboard or wardrobe that is not fixed to a wall.*
2	*Blueprints : Scheme, Plan, Design, System, Idea.*
3	*Cabinet : A cupboard with drawers or shelves for storing or displaying articles.*
4	*Chronological : (Of a record of events) following the order in which they occurred.*
5	*Circumferences : The enclosing boundary of a curved geometric figure, especially a circle.*
6	*Coding : (Computer science) the symbolic arrangement of data or instructions in a computer program or the set of such instructions.*
7	*Disaster : A sudden accident or a natural catastrophe that causes great damage or loss of life.*
8	*Dispositio : The way in which something is placed or arranged, especially in relation to other things.*
9	*Embrac: Accept (a belief, theory, or change) willingly and enthusiastically.*
10	*Estimat : An approximate calculation or judgement of the value, number, quantity, or extent of something.*
11	*Feasible : Capable of being done, accomplished or carried out.*
12	*Horizontal filing : A technique to store documents horizontally.*
13	*Key stone : The central principle or part of a policy, system, etc., on which all else depends.*
14	*Manila folders : The manila folder is a file folder designed to contain documents. It is generally formed by folding a large sheet of stiff card in half. Though traditionally buff, sometimes other colours are used to differentiate categories of files.*
15	*Obligation : The act of binding oneself by a social, legal, or moral tie to someone.*
16	*Quotation : A formal statement setting out the estimated cost for a particular job or service.*
17	*Retrieved : Get or bring (something) back from somewhere.*
18	*Shabby : In poor condition through long use or lack of care.*

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CHAPTER VI

ELECTRONIC DATA PROCESSING

Content:

Introduction – Meaning - Types of Data - Data Processing – Objectives of a Data Processing - Modes of Data Processing -Components of EDP - Role of Computers in Office - Computer Network – LAN, WAN, PAN, MAN –Internet and Intranet – Basic Internet Terms - Connections - Wired Technologies – Twisted Pair Cable, Coaxial Cable, Optical Fibre - Wireless Technologies – Bluetooth, Infrared Radio Link, Satellite Link - Cybercrimes.

Learning Objectives

- To acquire knowledge about data, types of data and fundamentals related to data processing.

- To understand the modes of data processing.

- To expand knowledge and able to acquaint with the concepts related to computer

- To acquaint students about the cybercrimes and safeguarding against it.

Introduction:

Electronic data processing (EDP) enables the firms to quickly process large volume of data accurately through application of computer. It applies variety of logical and mathematical decision making techniques to carry out the functions of data processing with predetermined priorities of the data. EDP increased the output of the work and efficiency by adopting proper mechanisms of storing, maintaining and retrieval of data when needed, based on the purpose which is meant for.

6.1. Meaning:

The word 'data' is the plural of 'datum' though data is commonly used as both in the singular and plural forms. Data refers to any fact, observation, assumption or occurrence. Data are facts which form the basic material to be processed to produce information. Data are compiled to form reports, figures or documents etc. Data can be a form of numerical or alphabetical characters or special symbols (viz=,+,% etc). Some important data definitions are given below.

Digit: A simple numeric character 0, 1, 2 ...9.

Character: A simple alphabetic, numeric or special character that is used to represent data. For example,0,1,2 ...9, A, B, C......Z, +,-,%, etc.

Data item (field): A set of characters which are used together to represent a specific data element, e.g., a name items contains the alphabetic characters in a name, and an amount of items that contains the numeric in an amount.

Record: It consists of a group of data items related to an object of data processing e.g., a payroll, record of an employee which contains data fields as name, age, qualification, sex, wage rate etc.

Data file is a compilation of related data records maintained in some pre-arranged order. Files are usually created function-wise e.g., a payroll file might consist of 1,000 individual employees data records and the records might be arranged in file by employee number.

The relationship of a character, data item, record and the file is shown in figure 1 below
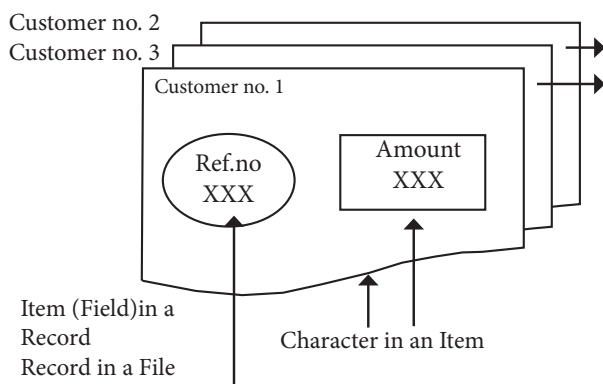
Fig.6.1. Relationship of Character, Data, Record and File

6.2. Types of Data:

Data are broadly divided into two types namely quantitative (or numeric) and qualitative:

1) **Quantitative Data:** Quantitative or numerical data refers to the observations that can be counted or measured. The data are said to be discrete if the measurements are integers (e.g. number of members in a family, number of students in the classroom, number of chocolates consumed per day) and continuous if the measurements can take on any value, usually within some range (e.g. weight).

2) **Qualitative Data:** Qualitative data is descriptive information (describes something). It arises when the observations fall into separate distinct categories. Since qualitative data always have a limited number of alternative values, such variables are also described as discrete.

Examples are: Colour of eyes: blue, green, brown etc

Exam result: pass or fail

Socio-economic status: low, middle or high.

Qualitative Data is broken down into Two Sub-Types:

- nominal if there is no natural order between the categories (e.g. eye colour), or

- Ordinal if an ordering exists (e.g. exam results, socio-economic status).

6.3. Data Processing – Meaning:

Data processing means taking raw data (facts and figures) and processing them manually or with the help of machines to produce, organized and useful information. It is restructuring \

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or recording of data to increase their usefulness and value for some particular purpose. Data processing can be performed

a) Manually with the aid of simple tools as paper, pencil and filing cabinets

b) Electro-mechanically with the aid of unit record machines

c) Electronically with the aid of a computer.

Data processing is a series of operations that use information to produce a result. Common data processing operations include validation, sorting, classification, calculation, interpretation, organization and transformation of data.

Electronic Data Processing:

Electronic data processing (EDP) refers to the use of automated methods to process commercial data. Typically, this uses relatively simple, repetitive activities to process large volumes of similar information. For example: stock updates applied to an inventory, banking transactions applied to account and customer master files, booking and ticketing transactions to an airline's reservation system, billing for utility services.

The term electronic data processing dates back to the 1960s when automation began to replace manual data processing tasks. In modern times, the term tends to be associated with large scale automation of administrative tasks.

Data processing is manipulation of data by a computer. It includes the conversion of raw data to machine-readable form, flow of data through the Central Processing Unit (CPU) and memory to output devices, and formatting or transformation of output. Any use of computers to perform defined operations on data can be included under data processing.

Data Processing in a Computer:

Computer data is information processed or stored by a computer. This information may be in the form of text documents, images, audio clips, software programs, or other types of data. Computer data may be processed by the computer's CPU and is stored in files and folders on the computer's hard disk.
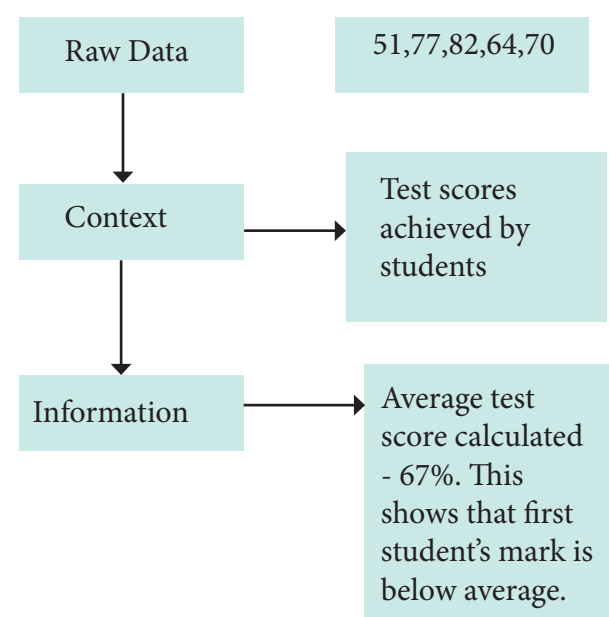
Fig.6.2. Data processing in Computer

Hence, data processing is defined as series of actions or operations that converts data into useful information. The data

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processing system is used to include the resource such as people procedures, and devices that are used to accomplish the processing of data for producing desirable output. Data processing is restructuring or recording of data to increase their usefulness and value for some particular purpose.

6.4. Objectives of Data Processing:

The following are the objectives of data processing:

1. To provide mass storage for relevant data.

2. To make easy access to the data for the user.

3. To provide prompt response to user requests for data.

4. To eliminate redundant data.

5. To allow multiple users to be active at one time.

6. To allow for growth in the data base system.

7. To protect the data from harms like physical and unauthorized access.

Types of Data Processing Systems:

Types of data processing can be understood on basis of methods and technology adopted. Generally mechanical and electronic data processing is used and at times manual data processing is used. According to their working, Data processing systems can be of different types:

a) **Manual :** In manual data processing system, whole processing is done manually without use of machine or electronic device i.e. the clerical staff that perform data processing in an organized way with the goal of producing meaningful information. This method is slow and less reliable, chances of error are high and this method is very old when technical innovations were few and rare. This also makes processing expensive and requires large manpower depending on the data required to be processed. Data acquisition, filing, storage, processing, calculation, output production, all these tasks are done manually.

b) **Mechanical Data Processing:** Data processing is done by use of mechanical device or very simple electronic devices like calculator and typewriters. The advantage of this method is more reliability and saving of time as compared to manual data processing but still the output is limited. Any device which facilitates data processing can be considered under this category.

Fig.6.3. Mechanical Data Processing

c) Electronic Data Processing (EDP) : This is the fastest and best available method with highest reliability and accuracy. With the growth of the organization, it becomes inefficient to process large amount of data with high accuracy through manual or mechanical method. EDP offers better method of data processing at a low cost as it relies on the computer and principles of electronics for processing data.
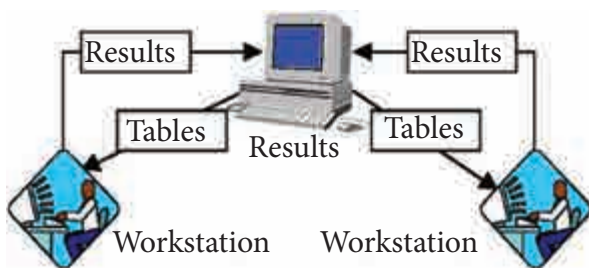
Fig.6.4. Electronic Data Processing

Do You Know?

- TYPEWRITER is the longest word that you can write using the letters only on one row of the keyboard of your computer.

- Typist finger travel at an average rate of about 12.6 miles per day on a regular working day

6.5. Modes of Data Processing:

Modes of processing data involve the following:

Interactive Computing or Interactive Processing: refers to software which accepts input from humans — for example, data or commands. Interactive software includes most popular programs, such as word processors or spread sheet applications. By comparison, non- interactive programs operate without human contact; examples of these include compilers and batch processing applications.

Transaction Processing: is information processing that is divided into individual, indivisible operations, called transactions. Each transaction must succeed or fail as a complete unit; it cannot remain in an intermediate state.

Batch Processing: is execution of a series of programs ("jobs") on a computer without human interaction. This is one of the widely used types of data processing which is also known as serial/sequential, tacked/queued of offline processing. The fundamental of this type of processing is that different jobs of different users are processed in the order received. Once the stacking of jobs is complete they are provided/sent for processing while maintaining the same order. This processing of a large volume of data helps in reducing the processing cost thus making it data processing economical.

Examples Include: Examination, payroll and billing system.

6.6. Components of EDP:

The electronic data processing cycle consists of four stages, or components.

- Input: Input refers to all the activities associated with recording data and making it available for processing.

- Processing: After data is recorded and converted into an appropriate form, it must be processed.

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- Output

- Storage

Each of this stage performs specific function which is enumerated below:
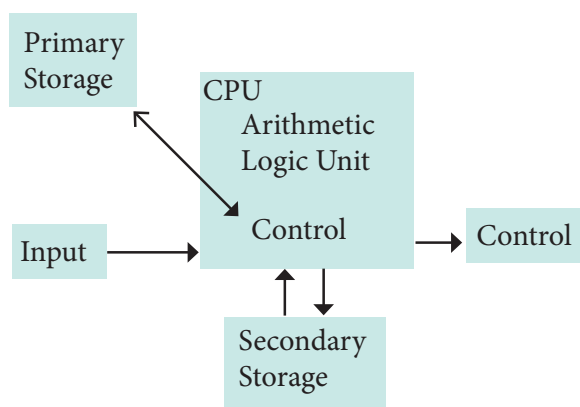
Fig.6.5. Components of EDP

Input: A computer must receive both program statements and data to solve problems. The entry of program statements and data into a computer occurs by means of an input device such as keyboard, mouse and joystick. Regardless of the type of device used they are all instruments of interpretation and communication between people and the computer.

Central Processing Unit (CPU): CPU is the heart of the computer which makes comparisons, performs calculations, reads, interprets and controls the execution of the instructions. it consists of three separate sub-units.

(1) The Control Unit – Control unit supervises the operations of the entire computer. The control unit instructs the input device when to start and stop transferring data to storage unit and it instructs the storage unit when to start and stop transferring data to output devices.

Thus the control unit does not perform the actual processing operations of the data. Rather, its function is to maintain order and direct the flow of sequence of operations and data within the computer.

(2) The Arithmetic / Logic Unit: Arithmetic and logic unit performs mathematical calculations, compares numeric and non-numeric values and makes decisions. The data flows between this unit and the storage unit during processing.

Storage: Storage consists of primary and secondary storage. Primary storage of the computer consists of the devices used to store the information which will be used during the computations. The storage section of the computer is also used to hold both intermediate and final results as the computer proceeds through the program. Common storage devices are RAM. Since the primary storage capacity of computers is limited it is not always possible to hold a large volume of data and instructions in the primary storage. Hence it becomes necessary to have secondary or auxiliary storage for holding data and programs not currently in use. The various secondary storage devices are CD, DVD, USB flash drive (Pendrive), Hard disk etc.

Output Devices: Output devices are used to record the results obtained by the computer and present them to the outside world. They take information in machine coded form from storage unit and convert them typically into a form that can be used i.e. printed forms. The most commonly used output devices are printers, visual display unit, monitor etc.

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Hardware: Hardware is the physical aspect of computers. Computer hardware is the collection of physical parts of a computer system. This includes the computer case, monitor, keyboard, and mouse. It also includes all the parts inside the computer case, such as the hard disk drive, motherboard, video card, and many others. These are called hardware since these components can be seen and touched by the user.

Software: The sets of computer program instructions that direct the operation of the hardware are called software. A complete set of instructions to execute a related set of tasks is a program. These are called software because the programmes cannot be seen or touched. Software instructions are termed as code. Software can be divided into two major categories:

1) **System Software :** System software means the operating system. It is the collection of programs that directs a computer to perform functions associated with controlling and directing computer hardware and also determines how application software is run.

2) **Application Software:** Application software refers to the computer programs written for an individual application such as payroll processing or personnel skill analysis. They generally require system software in their execution. For example, the application program may specify reading data from a record stored on a disk; the operating system provides the instructions to manage the physical reading of the record from disk storage.

6.7. Role of Computers in Office:

The following are the major role of computers in office

1) **Data Storage:** The data storage and retrieval capacity of computers are greater and more advanced as technology improves. Files are easily retrievable through search functions, and hard drives can hold extraordinary volumes of files and data. For offices with large databases this data storage and retrieval function provides unparalleled advantages over traditional paper file storage, such as the ease and speed of information retrieval, the ease of changing data records and the ease of tracking changes made to customer record.

2) **Communication:** Internal and external communication is much easier with the use of e-mail and internal messaging systems on computers. Office staffs are able to pass information throughout the office quickly and effectively, as most office setups have an alert system on individual computers when a message or e-mail is received.

3) **Networking:** File sharing is one of the key benefits of networking computers in an office environment. Office networking, or the creation of an office intranet means that a common database of files is accessible to all users. This also applies to software and management of computers, which significantly reduces costs for offices, as they can purchase one networkable software product instead of having to purchase multiple copies for individual computers. Networking also

provides communal access to printers, fax machines and copiers.

4) **Productivity:** Computers in the office environment significantly enhance productivity. Computers in the office increase productivity not only in areas such as word processing, data management and information access, but also in information creation, collation and ultimately storage.

5) **Improving Efficiency:** Computers can increase the speed and accuracy of many work processes, which improves overall worker efficiency. Documents can be written and edited much more quickly with the aid of a word processing program, and procedures, such as billing and accounting, can also occur more rapidly and with fewer errors. Computers can produce reports with great speed and allow for the easy insertion of enhancements, such as charts, graphs and pictures if desired. Computers also help companies in administrative tasks, such as keeping up-to-date and accurate records.

6.8. Computer Network – LAN, WAN, PAN, MAN:

Computer network is a collection of computers and terminal devices connected together by a communication system that facilitates communication among users and allows users to share resources with other users.

Local Area Network (LAN): A local area network is primarily a data transmission

system intended to link computers and associated devices within a restricted geographical area (room, building or a group of closely placed buildings). The key characteristic of a local area network is the fact that the whole of the network, confined to one site, is completely under the control of one organization.

The most relevant application of LAN is

- File transfer and access

- Word and text processing

- Electronic message handling

- Personal filing and information handling

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Wide Area Networks (WAN): Wide area networks include all the networks which are involved in transporting information from one geographical location to another. One of the most significant aspects of a wide area network is the involvement of a public telecommunication authority.

Personal Area Network (PAN): A personal area network (PAN) is a computer network used for data transmission amongst devices such as computers, telephones, tablets and personal digital assistants.

Metropolitan Area Network (MAN): A metropolitan area network (MAN) is a computer network that interconnects users with computer resources in a geographic area or region larger than that covered by even a large local area network (LAN) but smaller than the area covered by a wide area network (WAN).

PERSONAL AREA NETWORK (PAN)
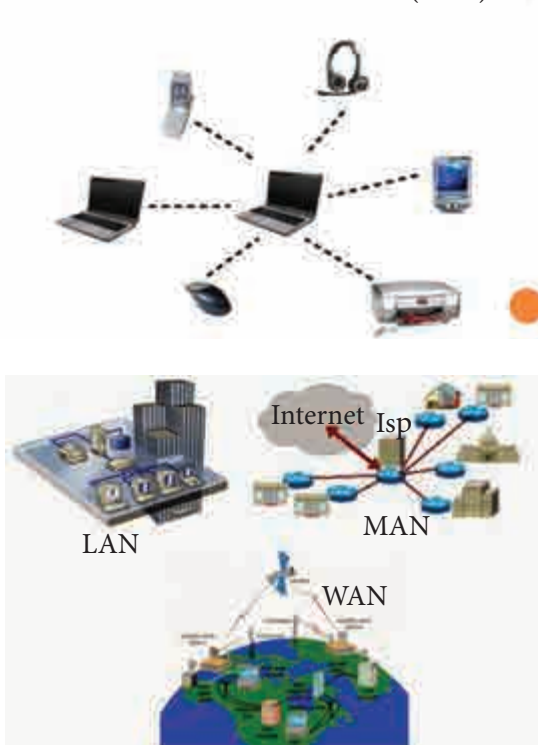
Fig.6.6. Computer Network

6.9. Internet and Intranet and Basic Internet Terms:

Internet: The Internet is the global computer network providing a variety of information and communication facilities, consisting of interconnected networks using standardized communication protocols. It is a network of networks that consists of private, public, academic, business, and government networks of local to global scope, linked by a broad array of electronic, wireless, and optical networking technologies. The Internet carries a vast range of information resources and services, such as the inter-linked hyper text documents and applications of the World Wide Web (WWW), electronic mail, telephone, and file sharing.

Intranet: An intranet is a private network that is contained within an enterprise. It may consist of many interlinked local area networks and also use leased lines in the wide area network. The main purpose of an intranet is to share company information and computing resources among employees. An intranet can also be used to facilitate working in groups and for teleconferences.An intranet uses TCP/IP, HTTP, and other Internet protocols and in general look like a private version of the Internet.

There's One Major Distinction between an Intranet and the Internet: The Internet is an open, public space, while an intranet is designed to be a private space. An intranet may be accessible from the Internet, but as a rule it's protected by a password and accessible only to a company's employees or other authorized users.

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Basic Internet Terms:

Browser - A browser is a software application for retrieving, presenting and traversing information resources on the World Wide Web. An information resource is identified by a Uniform Resource Identifier (URI/URL) that may be a web page, image, video or other piece of content.Hyperlinks present in resources enable users easily to navigate their browsers to related resources.

E-mail - Electronic Mail (email or e-mail) is a method of exchanging messages between people using electronic devices. E-mail (electronic mail) is the exchange of computer-stored messages by telecommunication.

Homepage - A home page or a start page is the initial or main web page of a website or a browser.

Hypertext Transfer Protocol (HTTP)- HTTP means Hypertext Transfer Protocol. HTTP is the underlying protocol used by the World Wide Web and this protocol defines how messages are formatted and transmitted, and what actions Web servers and browsers should take in response to various commands.

File Transfer Protocol (FTP) - The File Transfer Protocol (FTP) is the standard network protocol used for the transfer of computer files between a client and server on a computer network.

Internet Protocol (IP) Address - An Internet Protocol address (IP address) is a numerical label assigned to each device connected to a computer network that uses the Internet Protocol for communication. An IP address serves two principal functions: host or network interface identification and location addressing.

6.10. Connections:

A computer network, or data network, is a digital telecommunications network which allows nodes to share resources. In computer networks, networked computing devices exchange data with each other using a data link. The connections between nodes are established using either cable media or wireless media.

6.10.1. Wired Technologies – Twisted Pair Cable, Coaxial Cable, Optical Fibre:

Wired technologies refer to the transmission of data (communication) over a wire-based technology. The following are the types of wired technologies:

Twisted Pair Cable: Atype of cable that consists of two independently insulated wires twisted around one another. The use of two wires twisted together helps to reduce crosstalk and electromagnetic induction. Twisted-pair cable is the least expensive type of local-area network (LAN) cable.

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Twisted - Pair
Cabling (10Base-T)

Coaxial Cable

Pratective outside cover

Pratective Outside Cover

Copper/Alumi-num mesh

Inner Single Wire Cover

Insulator

Copper Center Conductor

Fiber-Optic Cable

Copper Wire

Jacket

Caldding
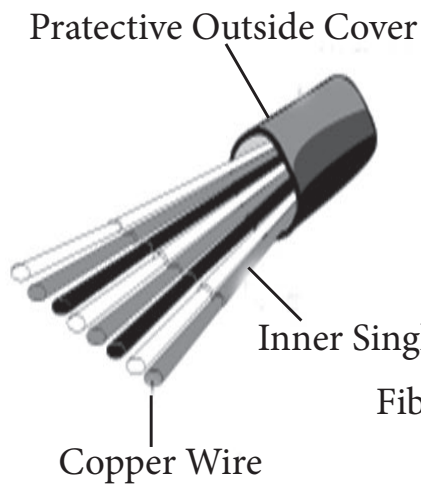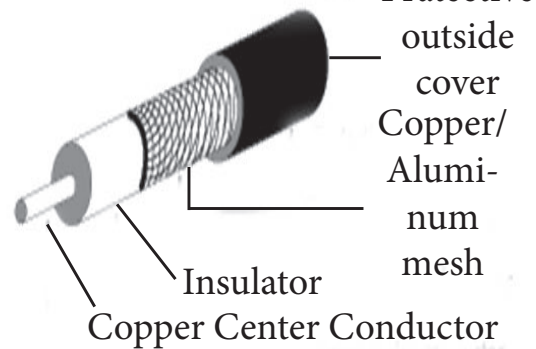
Glass Fiber Core
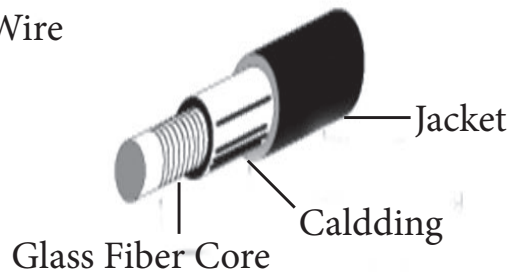
Fig.6.7. Wired Technologies

Coaxial Cable: Coaxial cable is a type of electrical cable that has an inner conductor surrounded by a tubular insulating layer, surrounded by a tubular conducting shield. Along with stable transmission of data, coaxial cables also have anti-jamming capabilities and can effectively protect signals from being interfered.

Optical Fibre: An optical fibre cable consists of a centre glass core surrounded by several layers of protective material. Instead of transferring data over copper wires, these cables contain optical fibres that transmit data via light. Each optical fibre is individually coated with plastic layers and contained in a protective tube, making it extremely resistant to external interference.Optical fibre deployment is more expensive than copper but offers higher band width and can cover longer distances.

6.10.2. Wireless Technologies – :

Bluetooth, Infrared Radio Link, Satellite Link:

Wireless technology is the transfer of information between two or more points that are not connected by an electrical conductor.

Bluetooth: Bluetooth is a wireless technology for exchanging data over short distances

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using short-wave length UHF radio waves from fixed and mobile devices, and building personal area networks (PANs).

Infrared Radio Link: IR wireless is the use of wireless technology in devices or systems that convey data through infrared (IR) radiation. IR wireless is used for short- and medium-range communications and control.

Satellite Link: Satellite is a wireless technology having significant importance across the globe. They have found wide spread use in specialized situations. The devices using satellite technology to communicate directly with the orbiting satellite through radio signals. This allows users to stay connected virtually from anywhere on the earth. Portable satellite phones and modems have powerful broadcast feature and reception hardware than the cellular devices due to the increased range. The satellite communication consists of a space segment and a ground segment. When the signal is sent to the satellite through a device, the satellite amplifies the signal and sent it back to the receiver antenna which is located on the earth's surface. The ground segment consists of a transmitter, receiver and the space segment, which is the satellite itself.

Wi-Fi: Wi-Fi is a low-cost wireless communication technology. A WiFi setup consists of a wireless router which serves a communication hub, linking portable device with an internet connection. This network facilitates connection of many devices depending on the router configuration. These networks are limited in range due to the low power transmission, allowing the user to connect only in the close proximity.

Fig.6.8. Wireless Technologies

Do You Know?

- E-mail was in existence even before the origin of the web.
- More than 80% of the emails sent daily are spams.
- CAPTCHA – Completely Automated Public Turning test to tell Computers and Humans Apart
- 40 – 55% of Wikipedia vandalism is caught by a single computer program with 90% accuracy.

6.11. Cybercrimes:

Any criminal activity that uses a computer either as an instrumentality target or a means to spread further crimes that comes within the scope of cyber crime. A generalized definition of cybercrime may be "unlawful acts wherein the computer is either a tool or target of both".

Types of Cybercrimes:

1. **Unauthorized Access to Computer Systems or Networks / Hacking:** Hacking is an attempt to exploit a computer system or a private network inside a computer. It is the unauthorised access to or control over computer network security systems for some illegal purpose.

2. **Theft of Information Contained in Electronic Form:** This includes information stored in computer hard disks, removable storage media etc. Theft may be either by appropriating the data physically or by tampering them through the virtual medium.

3. **E mail Bombing:** This kind of activity refers to sending large numbers of mail to the victim, which may be an individual or a company or even mail servers thereby ultimately resulting into crashing.

4. **Data Diddling:** This kind of an attack involves altering raw data just before a computer processes it and then changing it back after the processing is completed.

5. **Virus/Worm Attacks:** Viruses are programs that attach themselves to a computer or a file and then circulate themselves to other files and to other computers on a network. They usually affect the data on a computer, either by altering or deleting it. E.g. love bug virus, which affected at least 5% of the computers of the globe. The losses were accounted to be $10 million.

Worms unlike viruses do not need the host to attach themselves to. They merely make functional copies of themselves and do this repeatedly till they eat up all the available space on a computer's memory. The world's most famous worm was the internet worm let loose on the internet by Robert Morris in 1988 which almost brought development of internet to a complete halt.

6. **Trojan Attacks:** It is an unauthorized programme which passively gains control over another's system by representing itself as an authorised programme. The most common form of installing a Trojan is through e-mail.

7. **Internet Time Thefts:** In these kinds of thefts the internet surfing hours of the victim are used up by another person. This is done by gaining access to the login ID and the password.

8. **Email Related Crimes:** E-mails are used to send viruses, Trojans etc through emails as an attachment or by sending a link of website which on visiting downloads malicious code, sending threatening emails, defamatory emails etc.

9. **IPR Violations:** These include software piracy, copyright infringement, trademark violations, theft of computer source code, patent violations etc.

10. **Banking /Credit Card Related Crimes:** In the Corporate World, internet hackers are continually looking for opportunities to compromise a

company's security in order to gain access to confidential banking and financial information.

Securing the Electronic Transactions:

By becoming aware of the risks of internet-based transactions, the organization can acquire technology solution to overcome those risks such as:

- Follow systematic working procedures i.e., work norms and controlled access to data.

- Install virus and spy ware protection software in the computer.

- Install Firewalls that prevent unauthorized access to or from a private network.

- Store back up data in the secondary storage devices like hard disk etc. A data backup is copying files and folders for the purpose of being able to restore them in case of data loss.

- Use secure password to access data in the computer.

Points to be Remembered:

- Data can be defined as any fact, observation, assumption or occurrence. Data are compiled to form reports, figures or documents etc. Data can form of numerical or alphabetical characters or special symbols.

Types of Data

✓ Quantitative Data: Quantitative or numerical data arise when the observations are counts or measurements.

✓ Qualitative Data: Qualitative data is descriptive information (describes something).

- Data processing is the restructuring \or recording of data by people or machines, to increase their usefulness and value for some particular purpose.

- Objectives of Data Processing

1. Mass storage of relevant data,

2. Access to the data

3. Prompt response

4. Eliminate redundant data

5. Allow multiply users

6. Growth in the data base system

7. Protect the data harm from physical and unauthorized access.

- Components of EDP – Input, Output, Processing, Storage, Hardware, Software

- Role of Computers in office: Data Storage, Communication, Networking, Productivity, Improving Efficiency.

- Computer Network – LAN, WAN, PAN, MAN

- Internet - The Internet is the global computer network consisting of interconnected networks using standardized communication protocols.

- Intranet - An intranet is a private network that is contained within an enterprise.

- Basic internet terms – Browser, E-mail, Homepage, Hypertext Transfer Protocol (HTTP), File Transfer Protocol (FTP),

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Internet Protocol (IP) Address.

- Connections

    ✓ Wired technologies – Twisted pair cable, Coaxial cable, Optical fibre

    ✓ Wireless technologies – Bluetooth, Infrared radio link, Satellite link

- Cybercrime - Unlawful acts wherein the computer is either a tool or target of both.

- Types of Cyber crime:

1. Unauthorized access to computer systems or networks/Hacking

2. Theft of information contained in electronic form

3. E mail bombing

4. Data diddling

5. Virus/Worm attacks

6. Trojan attacks, and

7. Internet time thefts

8. Email related crimes

9. IPR Violations

10. Banking /Credit card related crimes.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1. Data is a _____.

    (a) Number   (b) Character

    (c) Digit   (d) Digit and character

2. An attempt to control over computer network security systems for some illegal purpose is called as _____.

    (a)Virus attack   (b) e-mail bombing

    (c) Hacking   (d) IPR violations

3. _____ is a private network that is connected within an organization.

    (a) Internet   (b) e-mail

    (c) Website   (d) Intranet

4. _____ attack deletes or alters data on a computer.

    (a) Virus   (b) Worm

    (c) Trojan   (d) e-mail

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5. _____ is a low-cost wireless technology network which connects many devices.

   (a) Bluetooth　　　　　　　　(b) Infrared

   (c) WIFI　　　　　　　　　　(d) Satellite

6. _____is the least expensive type of local-area network (LAN) cable.

   (a) Twisted Pair Cable　　　　(b) Coaxial Cable

   (c) Optical Fibre　　　　　　(d) Bluetooth

7. Wireless technology for exchanging data among personal area network is _____.

   (a) Satellite　　　　　　　　(b) Bluetooth

   (c) Infrared　　　　　　　　(d) WIFI

8. An information resource in the browser is identified by a _____

   (a) URL　　　　　　　　　　(b) http

   (c) WWW　　　　　　　　　(d) IP

9. _____refers to the use of automated methods to process commercial data.

   (a) Manual　　　　　　　　　(b) Electro Mechanical

   (c) Electronic　　　　　　　(d) Mechanical

10. Transporting information from one geographical location to another is _____

    (a) LAN　　　　　　　　　　(b) MAN

    (c) WAN　　　　　　　　　　(d) PAN

Part - B

II.　Very Short Answers:

Answer in Five lines.　　　　　　　　　　　　　　　　**(3 Marks)**

1. What is data? List out the types of data.

2. What is data processing?

3. Write about internet and intranet.

4.What are the components of EDP?

5. List out few basic internet terms.

6. What is Optical fiber cable?

7. Write about satellite link

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III.   Short answers:

Answer in one page.   **(5 Marks)**

1. Explain the role of computers in office

2.Examine about few basic internet terms.

3. State the objectives of data processing.

4. Differentiate between internet and intranet.

5. Explain about wired technologies.

6. Explain about wireless technologies.

7. Mention the types of cybercrimes and explain it.

8. How can office data be secured from Cybercrimes?

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1. What is data processing? Describe various modes of data processing.

2. Discuss about the computer network with examples.

3. Explain the various components of EDP.

4. Describe about various connections of Electronic Data Processing.

5.What is cyber crime? Enlist the types of cyber crimes in office.

Teachers Activity:

- Explain the students about computer and its functions by taking them to computer lab.
- Provide hands on experience to the students to feed data in the computer and create files such as MS word, Excel and ask them to create E-mails.
- Filed visit to various organisations can be arranged to understand the function of EDP.
- Take students to nearby office with LAN, WAN connection and expose.

Students Activity:

- Learn the parts of computer and its functions.
- Create your own data in word file, excel. Submit hard copy of it.
- Create your own E-mail and communicate with your friends, teachers and family members. (Send Birthday wish, Teacher's day wish etc). Submit hard copy of it.
- Submit an assignment on Computer network with pictures.
- Present a seminar in the classroom about electronic data processing.
- Collect news paper cuttings about various cybercrimes and submit

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GLOSSARY

1	*Data Processing : Collection and manipulation of items of data to produce meaningful information.*
2	*Electronic Data Processing : Processing of data by a computer and its programs in an environment involving elect ronic communication.*
3	*Central Processing Unit : A central processing unit (CPU) is the electronic circuitry within a computer that carries out the instructions of a computer program by performing the basic arithmetic, logical, control and input/output (I/O) operations specified by the instructions.*
4	*Input : An input device sends information to a computer system for processing.*
5	*Output : An output device is any device used to send data from a computer to another device or user. It reproduces or displays the results of that processing.*
6	*Hardware : Computer hardware is the collection of all the parts than can be physically seen or touch.*
7	*Software : Software is a set of instructions for a computer to perform specific operation s.*
8	*Control unit : It tells the computer's memory, arithmetic/logic unit and input and output devices how to respond to a program's instructions.*
9	*Arithmetic logic unit : An arithmetic logic unit (ALU) is a digital circuit used to perform arithmetic and logic operations.*
10	*Internet : The Internet is the global system of interconnected computer networks that use the Internet protocol suite (TCP/IP) to link devices worldwide.*
11	*Intranet : A local or restricted communications network, especially a private network created using World Wide Web software.*
12	*Browser : A computer program with a graphical user interface for displaying HTML files used to navigate the World Wide Web.*
13	*E-mail : Electronic Mail (email or e-mail) is a method of exchanging messages between people using electronic devices.*
14	*www : World Wide Web (abbreviated WWW or the Web) is an information space where documents and other web resources are identified by Uniform Resource Locators (URLs), interlinked by hypertext links, and can be accessed via the Internet.*
15	*WIFI : A facility allowing computers, smartphones, or other devices to connect to the Internet or communicate with one another wirelessly within a particular area.*
16	*Bluetooth : Bluetooth is a wireless technology for exchanging data over short distances from fixed and mobile devices, and building personal area networks (PANs).*

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17	*USB Drive : A USB flash drive is a device used for data storage that includes a flash memory and an integrated Universal Serial Bus (USB) interface.*
18	*Computer Virus : A computer virus is a small software program that can spread from one computer system to another and cause interferences with computer operations.*
19	*Software piracy : Software piracy is the unauthorized copying, reproduction, use, or manufacture of software products.*

CHAPTER VII

OFFICE SYSTEMS AND PROCEDURES

Content:

Introduction – Meaning of Procedure – Definition - Benefits and Limitation of Procedure - Importance of Procedure - Flow of Work- Office Manual – Need - Types - Principles of Office Manual - Steps - Advantages and Disadvantages - Revision and Distribution of Office Manuals.

Learning Objectives

- To enable the student to understand the system and procedures followed in offices.

- To make the students to comprehend the flow of work in the office.

- To acquaint the students about the office manuals and its utility in the functioning of office.

Introduction:

An office has its own system to do office work. The volume of work of an office differs from one organization to another. The **main function of an office** is to receive, collect and transmit information to the departments, record keeping, typing and copying etc. The functions in the office are interrelated or independent. The interruption in the flow of work in one function will reflect on the other functions of office. To avoid this each function should be arranged in a systematic manner, the procedures for performing them should be clearly defined and the predetermined manuals must be kept ready.

Hence the smooth flow of work depends mainly on three factors such as systems, procedures and the manuals. System means a pre-planned approach to do the day to day work to achieve the desired objectives of an organization. Office procedures are the sequence of steps or operations in which activities are performed and office manuals are the summarized form of all the activities in the organization.

Office manager is a person who needs to take care of the organizational activities in day to day functioning of an office. Even in the absence of the superior he has to run the show without any setback. Hence it is necessary to learn about office system, procedure, preparation of manual and their impact on office work.

7.1.   Office Systems and Procedures:

7.1.1. Meaning of Office Systems:

Business undertakings have certain well –defined objectives. These objectives can be attained only when it is approached in a systematic way. Business itself is a system comprising of several sub-systems.

Marvin R.Gore remarked that business is a system that has its output goals and objectives and the business can be divided into small systems that vary according to the organization of the business.

George R.Terry says that each business has a number of sub-systems like production control system, marketing system, office system and so on. Thus, office system itself is a sub-system of the whole business.

Office systems are a continuation of several procedures integrated together in such a way as to attain the needed objectives. It is defined as a network of routines, which are designed and integrated to carry out office work. In other words Systems comprises of various interconnected routines.

7.1.2. Definition of System:

According to **Miltion Reitzfeld** "Success in business, government and non-profit venture is determined by the maximum utilization of people, information and resources. Such utilities can be achieved only through the development, installation and supervision of appropriate systems and procedure"

According to **Terry**," A system is a network of procedures which are integrated and designed to carry out the major activity".

According to **Littlefield**, A system may be defined as," a ground of interrelated and interdependent parts operating in sequence according to a predetermined plan in order to achieve a goal or a series of goals"

7.1.3. Principles of Office Systems:

Every office has its own systems. The systems are not identical in all offices. They vary with the type and size of business. However, whatever system is evolved, it should ensure maximum efficiency. Following are some of the important principles of office systems.

1. Good flow of work without bottlenecks should be ensured.

2. Unnecessary duplication of work and records should be avoided.

3. Movement of staff should be kept to a minimum.

4. Unnecessary writing would be avoided.

5. Best use of specialization should be made.

6. The amount of paper work should be the absolute minimum.

7. The principle of management by exception should be used.

8. Only a few exceptions to the functional procedure should be allowed.

9. Unnecessary checking should be avoided.

10. Possibilities to make best use of machines should be provided.

11. The system should be simple and easy to understand.

7.1.4. Meaning of Procedure:

The term procedure denotes a planned sequence of operations for handling recurring business transactions uniformly and consistently. Procedure is a routine, which has been planned in advance in order to handle recurring business operations uniformly step by step. It is a guide to management as to who should do, what, how, and when.

Some Organizations have a written record of systems and procedures; it may be in book form or loose-leaf form.

Fig. 7.1. Office Procedures

7.1.5. Definition:

According to **Charles O. Liberty** "Office procedures are a series of clerical acts organized under supervision to accomplish the purpose of the office"

Zane K. Quible has given the following definitions of system, procedure and method.

System: Interrelated procedure necessary to achieve a well defined goal.

Procedure: Related method necessary to complete a work process.

Method: Specific clerical or mechanical operations or activities.

To illustrate the system concept, a system designed for purchasing office supplies (purchasing system) is presented as:

Procedure 1: Select Sources of Supply:

Methods:

A. Fill out quotation form.

B. Send forms to prospective vendors

C. Obtain quotations from vendors.

D. catalogue respective quotations

Procedure 2: Order Supplies:

Methods:

A. Fill out purchase order

B. Send purchase order to vendor

Procedure: 3. Receive Supplies:

Methods:

A: Check order to verify quantity and acceptability

B.   Deliver supplies to appropriate departments.

C.   Notify accounts payable.

7.1.6. Importance of Systems and Procedures:

1. In the system concept a uniform procedure is followed for similar transaction, so it helps to reduce errors and waste motion of machine operations.

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2. The cost of performing routine office work is reduced.

3. Responsibility can be easily fixed.

4. Good office system and procedure helps in smooth running of office and help to reduce delay in work.

5. It helps for speedy despatch of work.

6. Systems & Procedure include internal checking; they assist in the prevention of fraud and have control on work.

7. Good system helps to maintain better Co-ordination between departments.

8. Helps the management to train the staff.

9. A good system will reduce the chance of error and improve the efficiency of the organization.

10. A good system will give instructions to employees what has to be done, when and where and gives information on the organization supporting various systems.

7.1.7. Benefits and Limitations of Systems and Procedures:

Benefits of Systems and Procedures:

Following are the benefits which may be obtained if suitable systems and procedure are derived in an office:

1. Errors in the smooth flow of office work can be easily eliminated.

2. Uniformity can be achieved and the duplication of various routines can be avoided.

3. Systems and routines help in training office personnel in the efficient performance of their work without supervisors.

4. Responsibility can be fixed for each employee.

5. Unnecessary operations are eliminated and so wastage of any nature can be controlled.

6. Office personnel can perform their jobs independently and with confidence.

7. Systems ensure better control of work. The possibility of fraud is eliminated.

8. Work efficiency in the office increases and unnecessary forms are eliminated. It reduces the cost of office operations.

9. Better co-ordination is possible through the introduction of a system.

Limitations of Systems and Procedures:

An office system does not work by itself. There are some limitations to its applications:

1. The efficiency of the system depends on planning. If the planning is not done properly the whole systems would fail.

2. Strict adherence to a system makes it inflexible and it may not work smoothly.

3. The system may not be useful when changes take place.

4. The efficiency of the system should be evaluated and decided by making a cost-benefit analysis of it. If the cost is more we cannot use that system.

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7.2 Flow of Work:

Fig. 7.2. Flow of work

Flow of work is concerned with the way work move along with one operation to another. It denotes the volume of work going through the rate at which it moves along and the smoothness of its passage.

The flow of work aims at greater efficiency in every office activity, so that costs are cut down and delays are eliminated. Flow of work is a problem to be solved by the managers.

Flow charts are prepared for the purpose to know whether the flow of work is ideal or there is scope for improvement. The following types of flow charts can be used for analysis

1. Office Layout Chart.

This chart analyses the flow of work of each part of office and eliminates waste motion & back tracking. In the chart, lines are drawn to indicate the movement of office forms and documents from operation to operation.
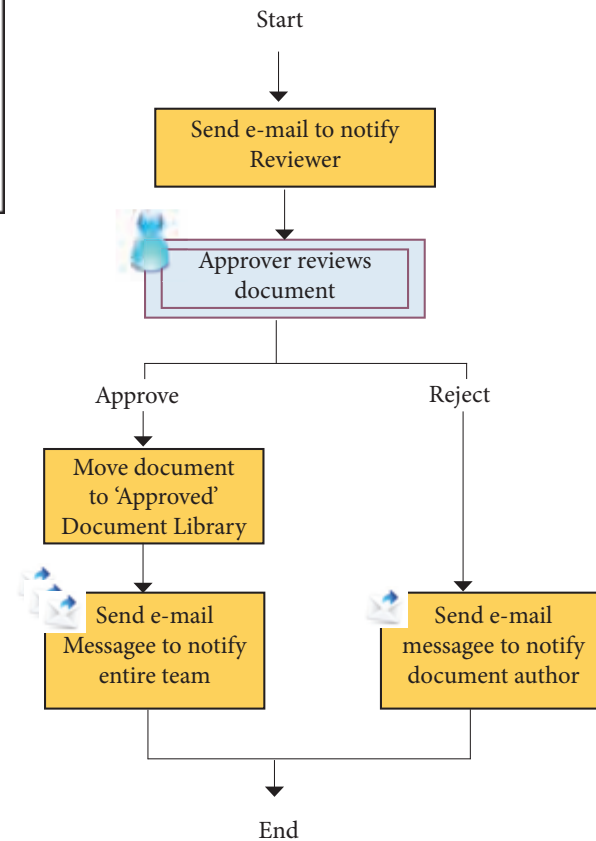
Fig. 7.3. Layout chart

2. Flow Process Chart:

Process chart is also known as work simplification chart. By using certain standard symbols, the chart shows the flow of work under a specific procedure. Presentation and reading is easy because the charts are more graphic with symbols.

It helps to simplify the work. These standard symbols have been developed by the American society of mechanical engineer, New York.

⇨ **_Transportation (Passing the work along or sending it to some other places)**

▭ **_Inspection (checking, comparing, or reviewing the work)**

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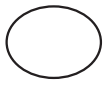
◯ **_Operation (doing the work like typing posting entry and etc.)**
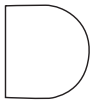
◗ **_Delay (delay due to interruptions, bottlenecks, changeover, etc)**

▽ **_Storage (Holding the work for any reason)**

3. Management Type Flow Chart:

Management type flow chart is fully illustrated chart and each operation or steps involved are described in short and descriptive sentence. The chart is written and read horizontally from left to right.

7.2.1. Straight-Line Flow of Work:

Smooth flow of work can be ensured by the use of straight-line flow of work method. This method is applicable for the factory as well as the office. It can be described as the method, in which the work flows, while progressing from one operation to another, it should follow a course approximating as nearly as may be possible in a straight line. In order to avoid the wastage of time, effort and delay in the flow of information, the work must always move forward and in a straight-line.

7.2.2. Benefits of Straight-Line Flow of Work:

The following are the list of benefits of Straight-line flow of work:

1. Greater Speed: The speed of work increases greatly, since the movement of work is over the least area.

2. Lesser Messenger Work: Since the work is flowing in a straight-line, the desks can be arranged in a straight-line, the distance between the different operations is small and the papers or files are passed over from one desk to another by the clerks is easy. It reduces the messenger work.

3. Less Loss of Papers: In this method, papers are rarely mislaid or lost as they are handled in a systematic manner.

4. Use of Conveyors: In certain organization conveyors are used to transfer the files from one place to another, such an arrangement helps to speed up the work.

5. Keeps Executives and Clerks at Their Desks: As the work moves in a straight-line, this method avoids moving here and there unnecessarily and makes the employees to sit in their chair to do the work.

7.2.3 Problems in Smooth Flow of Work:

Smooth flow of work faces number of problems, which must be tackled in order to improve the efficiency of office routine. It can be solved only by the managers. The problems are outlined below:

1. Unequal Flow of Work: The work in the office cannot be equal throughout the day, the week or the year. The work may be heavy on particular day in a week or it may be heavy during a particular period. For example, there may be greater incoming mails in the morning and on Mondays. The problem of unusual flow of work can be solved by collecting relevant statistics and their analysis.

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2. Interruptions to Work: The interruptions to work are internal or external. Internal interruption may be caused by lack of materials with which to work, information needed is not available or because of change of work through change of plan, etc. External interruptions to work may be caused by outsiders calling the employees and external telephone calls.

3. Unequal Times Needed for Different Operations: This is the major problem in the flow of work where, different operations of a job need different time to complete. For example, the sequence of operations for the first operation may require one minute, while the next may require three minutes.

4. Lack of Standard: Steady flow of work may also be affected, if the work to be done by an individual that can not equal to the standard fixed. In the absence of standard, some employees may over burden with heavy work while the others may have less work.

5. Lack of Planning and Scheduling: If the office manager does not plan and schedule the work before time, it is not possible to do the work quickly or not to do the work within the allotted time.

6. Faulty Layout: Steady flow of work may be affected if the layout of the office is not made according to a well-developed plan. Criss-crossing and back tracking procedure will affect the flow of work.

7.3. Office Manuals:

The office manual contains the details of the work to be performed in an office and other important particulars of the organization. It is the source of information, knowledge of which is essential for the performance of the work. It may be in the form of a book or booklet and contains the information which benefits the office staff. If Office employees are supplied with copies of office manual they do not have to approach their superiors again and again. Therefore, they do not interrupt the work of their superiors and there is no wastage of time to office employees (new entrants) as well as to executives (Superiors).

Fig. 7.4. Office Manual

Office manual is useful to the employees, especially new joined, to understand the work without any difficulty. The office manual contains the details of the whole office work such as standard practices, current practices, instructions and organizational policies in such a form that they are easily and readily available to the office personnel for reference and guidance.

7.3.1. Meaning of Office Manual:

An office manual means a handy form of book or booklet containing information relating to the policy, organization system, routines and procedures, methods and standards and the rules and regulations regarding employment.

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An office manual is prepared to help the employees know all relevant information regarding the organization, its set up i.e. structure and how he fits into it.

7.3.2. Definition of Office Manual:

According to **George R. Terry,** An office manual is a "written record of information and instructions which concern and can be used to guide the employee's efforts in an enterprise".

Also, an office manual has been defined as "a document disclosing the information about an organization, its set up, conditions of employment, and the established systems, routines, procedures, methods, standards, rules and regulations of an office operation."

7.3.3. Need for Office Manuals:

A large size organization has a number of branches or departments or sections or divisions. Thousands of employees are employed in large size organization. Hence it is very difficult to control the employees by the management. If instructions or guidelines are given in writing to the employees, the management can control the employees very easily and avoid misunderstanding of employees. Office manuals help the management and the employees in various ways.

1. Employees understand their position, duties and responsibilities in an Organization.

2. Employees understand their role in the achievement of office Objectives.

3. There is a possibility of maintaining good relations among the employees by themselves.

4. Both existing and new employees freed the management in getting the same information, explanations and instructions repeatedly.

5. The concerned employees are held responsible if the duties are not performed by them in a specified manner.

6. Delegation of authority can be enhanced throughout the organization set up without much difficulty.

7. Each employee can understand the extent of authority delegated to them.

8. New employees are getting training with the help of office manual by knowing policies, practices, systems, routines and procedures.

9. Office manual is imparting refresher training to existing employees.

7.3.4. Types of Office Manuals:

1. Policy Manual: Every organization has its own policy which is served as basic guide to action. The entire activities of an organization are fully guided by policy manual. A policy manual contains decision, resolutions and directions of the board of directors stating the policies of the company.

2. Organizational Manual: The organizational manual describes the organization structure. The duties and

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responsibilities of each employee in department wise or section wise or division wise are explained along with the line of authority and responsibilities connected with them. Each employee can understand the relationship with others. Sometimes, a separate manual is prepared for each department in case of multinational companies.

3. Administrative Practice Manual: Standard methods and procedures for effective performance of work are given in this manual. Separate methods and procedures are given for each department specifically, if needed. This manual also contains guidelines and instructions on education required to an employee and training to employees, format of correspondence and reports, and the inter-relationship of office employees.

4. Departmental Practice Manual: This manual deals with policy of the concerned department, methods and procedures followed in the concerned department. This type of manual is prepared for each department separately.

5. Mailing Manual: A mailing manual gives detailed instructions in all phases of handling both incoming and outgoing mail. The letter drafting procedure is also given in this manual.

6. Filing Manual: The names of the files to be maintained in an office are given in this manual. Besides, the preparation of title and its maintenance are also clearly discussed.

7. Rules and Regulations Manual: Rules and regulations are very much important to every office employee. Everybody should work according to the rules and regulations. Various types of leave are availed by the office employees. The number of such leave and their availing procedure are given in this manual.

8. Historical Manual: An employee should know something about his enterprise. This manual contains brief history of an enterprise. Name and address of the enterprise, founders, objectives for establishing such enterprise, circumstances under which the enterprise is established, capital required and contributed by the founders, registration, coverage of law etc are briefly discussed. This information is highly useful to new entrants in an office.

9. Multi-Purpose Manual or Hand Book: Some offices prefer to have a single manual instead of several manuals such as discussed above; If so, only relevant and important information are combined in the form of a hand book. In such a way, multi-purpose manual is prepared.

The information included in a manual of one office may not be the same of another office. In other words, the contents of a manual are according to the needs and preferences of the concerned office.

7.3.5. Principles of Office Manuals:

The following principles should be observed in preparing manuals:

1. Centralise all authority and responsibility for the office manual programme.

2. Write the level of the employees who is going to use the manual.

3. Prepare and revise the distribution list so that manuals are distributed among the employees without omission.

4. Use simple and direct Language.

5. The material should be arranged in simple manner without much complication

6. The matter should have proper cross referencing and indexing

7. Make use of charts and diagram

8. Revise manuals constantly and highlight changes.

9. Periodic audit should be carried out.

7.3.6. Steps in Preparation and Writing of Office Manuals:

A standard and an orderly procedure should be followed while preparing office manuals. If so, the prepared manual can ensure complete, accurate and comprehensive. The preparation is to be completed within a reasonable period of time. The following steps may be taken while preparing an office manual:

1. Assigning an Individual or Formation of a Committee: An individual is enough to prepare an office manual in small size organization. A committee has to be formed to prepare an office manual in case of large size organization. So, this formality is carried on according to the size of the organization.

2. Preparing the List of Subjects Covered: The responsible executives prepare the list of subjects to be covered in the preparation of office manual. List of subjects vary according to the type of manual preparation. The subjects and topics to be covered should be classified and arranged into logical headings and sub-headings.

3. Receiving Ideas and Suggestions: Ideas and suggestions have to be received from the managers of functional departments and supervisors as per the subjects covered. A time schedule is to be fixed for receiving ideas and suggestions.

4. Verification of Ideas and Suggestions: Received ideas and suggestions have to be tabled and verify the same. Irrelevant and impracticable ideas and suggestions have to be rejected with due care.

5. Classification and Arrangement of Information: The collected information and data have to be classified and arranged under each subject and write them up in subject-wise. The information and data included should be accurate and complete in all aspects.

6. Prepare a Draft Manual: A draft manual is prepared by considering the relevance of the concerned manual. A limited number of copies of such draft manual is typed or cyclostyled for circulation. A copy of draft manual is circulated among the office manager, functional manager, union representatives and top management executives for their criticism. Such criticism is used for the betterment of the preparation of office manual.

7. Revision of the Draft Manual: Suggestions and criticism have been incorporated in improving the manual by adding new points

or deleting some points. The style and standard of language can be improved by the process of revision of the draft manual. As for as possible, short sentences and words can be used. The language should be simple and direct.

8. Submission for Approval of Top Management: The revised manual has been placed before the top management for approval. Approval of top management is necessary before the production of the manual.

9. Mechanical Production of the Manual: Arrangement for the production of the manual should be made after the draft is approved by the top management. The type of production of manual is depending upon the number of copies required. Details regarding size, paper cover and binding should be considered before the actual production of manual. The manual should preferably be in a booklet form.

10. Distribution of Office Manual: Copies of office manual are distributed among the employees of an organization on need basis. A few copies are maintained as spare copies which will be used for the future reference and further revision of the manual.

7.3.7. Advantages of Office Manuals:

The advantages of Office Manuals are

1. It contains printed instructions and all the important decisions for the execution of the work, so the employees don't want explanation for the work again and again.

2. It gives readily available printed instruction about system, procedure and duties existing in the organization, so it is easy to train the employees.

3. In large organization which is having many branches, similar type or uniformity of activities can be performed if they have manual

4. The entire work of an office is brought together, studied, examined and incorporated in office manual, so that the activity having less importance can be eliminated.

5. It helps the executives to take decision promptly by referring instructions and policies contained in printed form.

6. When the rules and regulations are in the written format it is easy for the employees to get an idea about their responsibility, duties and authorities. It helps to improve good relation between the employees.

7. When the employees are transferred from one office to another office,with the help of manual they can start their work without delay.

7.3.8. Disadvantages of Office Manuals:

The disadvantages of Office Manuals are:

1. To keep the manual up-to-date is a difficult job

2. It is costly and time consuming process, so it is difficult to have manuals in small firms.

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3. If simple words are not used in manuals the employee reading can misinterpret it.

7.3.9. Revision and Distribution of Office Manuals:

Revision of Office Manuals: Manuals must be revised from time to time. It is necessary to keep them up to date. In revising manuals the following factors should kept in mind

1. The responsibility of revising manual is in the hands of the department that created it.

2. It is necessary to revise the manual as frequent as practicable

3. Where no provision has been made to revise manual and the responsibility of revising them is not fixed, manuals should be discarded.

7.3.10. Distribution of Office Manuals:

Office Manuals are useless unless they are properly distributed amongst employees for whom they are meant. In fact, it is they who would be responsible for carrying out the instructions and ideas given in the manuals. Organization manuals may be distributed only amongst the major executives and in rare cases amongst those with lesser responsibility. The different departmental practice manuals should be distributed to departments and employees directly affected by them.

Points to be Remembered:

- Systems: It is defined as a network of routines, which are designed and integrated to carry out office work. In other words Systems comprises of various interconnected routines.

- Procedures: The term procedure denotes a planned sequence of operations for handling recurring business transactions uniformly and consistently.

- Advantages of procedures includes Smooth flow of work, Uniformity, Help office Personnel in training, Economy in operation, Responsibility can be fixed, Handle job independently, Eliminate wastage, Better control and coordination.

- Office manual is a written record of information and instructions which concern and can be used to guide the employee's efforts in an enterprise.

- Types of Office Manual includes Policy Manual, Organizational Manual, Administrative Practice Manual, Departmental Practice Manual, Mailing Manual, Filing Manual, Rules and regulation Manual, Historical Manual, Hand book.

- Principles of office manuals: centralization, user specification, preparing distribution list, language, arrangement, indexing, pictorial representation, revision, audit.

- Limitation of procedure includes Depends on planning, Inflexible, Difficult to adopt changes, if cost is more it cannot be use.

- Flow of work is concerned with the way work move along with one operation to another.

- Straight line flow of work can be described as the method, in which the work flow, while progressing from one operation to another, it should follow a course approximating as nearly as may be possible in a straight line.

- Problems in flow of work: Unequal flow of work, Interruption of work, Unequal time required for different operations, Lack of standard, planning and scheduling.

Steps in preparation of office manuals includes.

- Assigning an individual or formation of committee.

- Preparing the list of subjects covered.

- Receiving ideas and suggestion

- Verifying ideas.

- Classification and arrangement of information.

- Prepare a draft manual.

- Revision.

- Approval of top management.

- Production of manual.

- Distribution.

- Revision and distribution of office manuals.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: (1 Marks)

1. Efficiency of the system can be evaluated by ------------------
   a) Cost benefit analysis   b) Statements
   c) Manual   d) Work

2. Internal interruption to flow of work in system is caused because of ---------------
   a) Telephone calls   b) Speed
   c) Lack of material/information   d) Distance

3. Office manual is in the form of ---------------
   a) Report   b) Diagrams
   c) Statement   d) Booklet

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4. The manual which describes the organization structure is -------------

a) Filing manual.   b) Mailing manual

c) Organizational manual   d) Structural manual

5. In large organizations manual is prepared by -----------------

a) Individual   b) Committee

c) Government   d) Manager

6. -------- provides the sequence of actions to provide any activity

a. Rule   b. Procedure

c. Policies   d. All the above

7. Every system is composed of a number of

a. Procedures   b. Objectives

c. Concepts   d. None of the above

8. -------- Refers to the ways in which work moves from one operation to another

a) Flow of work   b) Passage of work

c) Rules   d) All the above

9. The flow of work should be in a -------- direction

a) Forward direction   b) Backward direction

c) Upward   d) Downward

10. _____ is the guide book containing enough guidelines to perform the work

a) Departmental practice Manual   b) Policy Manual

c) Office Manual   d) All the above

Part - B

II. Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1. What is office system?

2. Define office procedure.

3. What is meant by flow of work?

4. What is office layout chart?

5. Explain the flow process chart.

6. What is straight line flow of work?

7. Explain the term Office manuals.

8. Define office manuals.

9. Consider you as a manager in an organization. What will you do to minimize delay and error in the smooth flow of work?

<center>**Part - C**</center>

III. Short answers:

Answer in one page. **(5 Marks)**

1. What is office system? What are its principles?

2. State the importance of systems and procedures.

3. Distinguish between system and procedure.

4. Office systems, procedures and methods are related items. Do you agree? Explain these terms with appropriate examples.

5. What is straight line flow of work? What are its benefits?

6. State the problems in smooth flow of work.

7. Discuss the need of work in office.

8. You are appointed as a manager for an organization where more than 1000 employees were employed, authority for preparing the manual was given to you, which type of manual will you prepare? Why?

<center>**Part - D**</center>

IV. Essay type questions:

Answer within three pages. **(10 Marks)**

1. Write a note on flow of work in office. State problems related to the smooth flow of work.

2. Explain the advantages and disadvantages of procedure.

3. Write the steps in the preparation of manuals.

4. Discuss the need for office manuals.

5. Explain the types of office manual.

6. What are the principles to be observed while preparing office manuals?

7. What are the merits and demerits of office manuals?

8. Why Systems and procedure are important in organization? Explain.

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Teachers Activity:

- Can show a chart regarding the formation of procedure, Types of manual.
- Power point presentation on office systems and procedures can be made.

Students Activity:

- An activity like students can be asked to stand in a straight line to pass an object and then ask to stand here and there and pass an object can be conducted to explain the flow of work.
- Can give assignment on office system, procedures and manuals.

References:

1. *Office management – V.Balachandran and V.Chandrasekaran*
2. *Office management- Dr.T.S.Devanarayanan and N.S. Ragunathan*
3. *Office management-Katherasan and Dr .Radha*
4. *Website : https//en.wikipedia. org/wiki/office-management*

GLOSSARY

1	*Authority-It is the official right of a manager to influence his subordinates. It accrues to a person by virtue of his official position alone.*
2	*Criticism- The expression of disapproval of someone or something on the basis of perceived fault or mistake.*
3	*Criss-Crossing- A criss-crossing pattern or design consists of lines crossing each other cost benefit analysis (CBA). It is a systematic process for calculating and comparing benefits and costs of a decision or project.*
4	*Committee - A committee is a group of person entrusted with a specific task. It comes with its finding in the form of report.*
5	*Decision making - It is the process of selecting one alternative from among a number of alternatives available. The need for decision- making arises when there are options.*
6	*Delegation - Delegation is the assignment of any responsibility or authority to another person to carry out the specific activity.*
7	*Duplication-The action or process of duplicating something an attempt to avoid unnecessary duplication of effort.*
8	*Objective-It is the end point or the destination point towards which the activities of enterprises are directed. It gives meaning and the focus of the activities of the concern responsibility.*

CHAPTER VIII

SECRETARIAL CORRESPONDENCE

Content:

Introduction - Kinds of secretaries- Functions of Secretaries- General Qualification of Secretaries - Business Letters- Meaning- Structure of Business letter- Types of Business Letters- Procedure for handling Inward Mail and Outward Mail - PIN Code - Postal Service - ISD – PBX – PABX - Postal information follow up email - Live Video Call - Auto Call Back Option Website.

Learning Objectives

- To understand the role of secretary in day-to –day activities of business.

- To highlight and motivate students to become Secretary to excel in their life.

- To understand the Qualification of Secretary, Right & Duties.

- To acquaint with the handling of secretarial correspondence

- To equip with various modern terms relating to secretarial correspondence.

Introduction:

With liberalization of the economy and globalization, the world has now become one single market. Due to this, the competition experienced by the business houses has also increased multifold. The organizations have to strive hard to create opportunities to survive & grow in this environment. Hence, there arises a need of individuals having specialized knowledge and skills in their respective fields. One of such specialized individual is known as "Secretary". Secretaries are being appointed by business firms, trade associations, sports clubs, co-operative societies, trade unions, government departments, non-profit associations etc. in order to look after day-to-day business matters.

In olden times, the king or emperor appointed a secretary or a personal assistant to only look after his routine work, such as, giving advice on critical matters, writing professional letters or maintaining secrecy on confidential matters. However, over the years the role of a secretary has changed considerably from being a personal secretary to an institutional secretary. His duties have changed from clerical level to ministerial level. He plays an important role in the business organization and works as a backbone for an organizational structure.

8.1. Meaning:

The word secretary is derived from the Latin word "Secretarius" which means a confidential writer or notary' He is a person entrusted with secrets. In earlier days the officer who conducts the correspondence of a King is called

Secretary. In modern times the duties and functions of a secretary is especially felt in the business world because of two reasons.

1. Size and growth of business.

2. Complexities of business operations.

The governing body of the organization may change (i.e.) director, chairman of the companies, ministers in the cabinet may come and go but the secretary has to run the show, and promote the growth of the organiasation.

Fig. 8.1. Secretary

8.2.Kinds of Secretaries:

On the basis of the nature and functions of secretaries, we classify them as follow:

1. **Ministry's or Department's Secretary:** Every Government Department has a secretary and he acts as the executive head of the department. Secretary is the person who implements the decision taken by the department heads' He has to advise the Ministers in certain matters. The important functions performed by him include administrative function, advisory function, formulation of policies etc. Usually I.A.S officers are appointed as secretary to top level executives in certain organizations.

2. **Private Secretary:** Private Secretary or personal secretary is a person appointed by a person in high position such as Ministers, senior doctors, lawyers, Accountants etc., whose work requires close attention and cannot afford to spent time for routine activities. He keeps the confidence of his master and he is the right hand man of his employer.

Do You Know?

Since the Renaissance until the late 19th century, men involved in the daily correspondence and the activities of the powerful had assumed the title of secretary. Then the functions of the secretary varied and they are titled as general secretary, administrative secretary etc. As such less influential posts became more feminine and common in the public and private sectors, so new name was coined to describe them as personal assistant.

In 1870, Sir Isaac Pitman founded a school where students could qualify as shorthand writers to "professional and commercial men". Originally, this school was only for male students. In the 1880s, with the invention of the typewriter, more women began to enter the field and during the upcoming years, especially since World War I, the role of secretary has been primarily associated with women. By the 1930s, fewer men were entering the field of secretaries.

3. **Secretary of an Association or a Club:** An association or a club is formed

to serve some common cause of its members, such as promoting art, science, music, sports, etc. The secretary of an association is generally elected from the members of the managing committee. Some association appoints whole time directors to look after the day-to-day activities. He acts as an agent and advisor to the managing committee.

4. Secretary of an Embassy: This is an official of an embassy or a diplomatic mission ranking next to the Ambassador. He is his country's representative in the country to which he is posted and acts as a link between his embassy and the Government of the country in which it is located. He has to perform administrative and executive functions, and project his country's image truly and faithfully.

5. Secretary of a Trade Union: Every trade union has a secretary. The functions of the secretary of a trade union vary with size and type of the union. He has to look after the functions of the union. He acts as a link between the trade union and the management.

6. Secretary of a Co-Operative Society: The chairman of the co-operative society is considered as the chief executive and the secretary manages the day-to-day administration of the society. The secretary of the co-operative society may be appointed on part time or full time basis depending on the size of work of the society. He wants to maintain proper records and registers and submit periodical statements to the Registrar of the co-operative societies.

7. Secretary of a Local Body: Corporations, municipal councils, District boards etc. usually appoint whole time secretary to look after their day-to-day affairs. The secretarial duties include office management, assisting to conduct meetings, recording the proceedings etc.

8. Secretary of a Company: The secretary of a company is the chief administrative officer of the company. Company secretary is a person who is a member of the Institute of company secretaries of India. He act on behalf of directors of the company and represents the company to outsiders. He has to conduct meeting and maintain minutes of the meeting.

8.2.1. Functions of a Secretary:

The functions of secretary depends upon the size and nature of organization he serves. The position of a secretary is that of an office executive. She/he also acts as a liaison officer, advisor to management, administrative assistant etc. His duties are as follows

1. Supervise, co-ordinate and control clerical work of the organization.

2. Selection, appointment and assignment of office work to the staff.

3. Maintanence office Discipline.

4. Writing and receiving letters on behalf of the management.

5. Keeping a record of important phone numbers.

6. Handling staff matters.

7. Acting as a link between management and staff.

    Maintaining public relations (i.e.) informing the public about the activities of the organization.

    The role of the secretary is to support the chairman in ensuring the smooth functioning of the managing committee. In summary, the secretary is responsible for proper meetings, preparing minutes of the meetings, and maintaining effective records and administration.

Do You Know?

In 1952, Mary Barrett, president of the National Secretaries Association, C. King Woodbridge, president of Dictaphone Corporation, and American businessman Harry F. Klemfuss created a special Secretary's Day holiday, to recognize the hard work of the staff in the office. The holiday caught on, and during the fourth week of April is now celebrated in offices all over the world. It has been renamed "Administrative Professional's Week" to highlight the increased responsibility of today's secretary and other administrative workers, and to avoid embarrassment to those who believe that "secretary" refers only to women or to unskilled workers.

8.3. General Qualification of the Secretaries:

Since secretaries may be required to perform a wide range of functions, they should possess necessary qualification to discharge their duties properly which include:

i.   **Sound General Education:** Every secretary should have a sound general education. A university degree is considered as a desirable academic qualification and a High school certificate is the minimum education required.

ii. **Proficiency in Language:** To be a successful secretary he should have good communication skill. He should have good command over English language and should possess sufficient skills in writing business letters, drafting reports, preparing notes, agenda, minutes of the meetings, etc.,

iii. **Wide General Knowledge:** A secretary must have general knowledge to handle the emergency situation without delay. It also helps him to understand the instruction given by his employer without delay.

iv. **Knowledge of Office Organization and Methods:** Secretary is considered as an administrative head of secretarial department. He should know to organize the activities of his department and also be familiar with the procedures to carry out the activities.

v.   **Knowledge of General Procedure of Meetings:** As he has to make arrangements for meetings, help the chairman in conducting meetings and record the proceedings of meeting. The secretary must know the general procedure to be followed in connection with meetings.

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vi. Personality: He must secure willing and harmonious co-operation with in the office staff for the smooth and efficient function of office work. A secretary must possess good personality to command and to gain the confidence from the subordinates.

8.4. Secretarial Correspondence:

Correspondence means communication through letter. Such communications may be between friends on matters of personal interest or between individuals, firms or companies on matters of trade and commerce.

Often all organizational communications are carried over by secretary through office. As being repository of information office has to receive and send communication of wide range. Further it is the responsibility of secretary to authorize and generate all kinds of business letters, memos, reports, circulars and send them to respective institutions in addition to the usual job of filing.

8.4.1. Meaning of Business Letters:

Business people have to communicate with the customers, the suppliers, the debtors, the creditors, the public authorities and the public at large as well as among themselves for the purpose of exchanging their views and of sending and receiving information. This is required to initiate, carry out and to conclude transactions. Most of these communications are made in the form of business letters.

A business letter is usually a letter from one company to another, or between such organizations and their customers, clients and other external parties. The overall style of letter depends on the relationship between the parties concerned.

The writer of the business letter usually aims at conveying to the recipient the message or information about trade or business in the absence of any personal contact. This object can be fulfilled only if the letter is clear, explicit and unambiguous in content because the recipient has only the written words to convey both the meaning and the feeling of the message.

8.4.2. Structure of Business Letter:

The structure of a business letter refers to the proper arrangement of the various parts of a business letter. The lay-out of business letters has been almost standardized in modern business practice. In order to ensure clarity and convenience, a business letter should consist of the following parts;

i.   The Heading

ii.   Date line

iii. Inside Address

iv.   Attention line

v.   Salutation or Greeting

vi.   Reference or subject line

vii. Body or Substance of the letter

   a) Introductory Paragraph

   b) Main Part

   c) Concluding or Closing Paragraph

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viii. Complementary close or subscription

ix. Signature

x. Identification initials.

xi. The Post-Script if any,

xii. Enclosure of reference, if any.

Format of Business Letter	
1.Letter	Maki Book Depot 37, Washington New York - 2456
2. Date line	June 30, 2012
3. Inside Address	Mr. Jhon Bush Chairman Department of Marketing HBUC, New York - 2567
4. Salutation	Dear Mr. Jhon Bush
5. Body of letter	....
6. Complimentary close	Sincerely, Mr. Michel
7. Signature Block	Managing Director Bg / Bp
8. Initials	
9. Enclosure Encl.	
10. Carbon Copy notation	CC: Principal, HBUC

8.4.3. Types of Business Letters:

Business Corres-pondence is extremely diverse. There is a variety of correspondence that a modern businessman has to deal with his business routine.

It is very difficult to classify the business letters to give an exhaustive list of the kinds of letter a businessman has to write because different situations call for different approaches. However, for the purpose of convenience business letters may be classified into following classes.

1. Letters of Inquiry and Reply

2. Offers and Acceptance

3. Order-their Execution and Cancellation

4. Claim, Complaints, and Settlements of Accounts.

5. Circular Letters

6. Letter relating to Agency

7. Status Enquiries

8. Collection Letters

9. Application for Situation

10. Letters of Recommendation and Letters of Credit.

11. Bank Correspondence

12. Letters Relating to Export and Import.

13. Insurance Correspondence

14. Letters to Editors.

15. Correspondence with Government Departments and Public Bodies.

16. Correspondence of a Company Secretary.

8.5. Procedure for Handling Inward Mail and Outward Mail:

8.5.1. Meaning of Mail:

The term "Mail" in the common parlance refers to written communication. It may be either received or sent out. A mail

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received is known as inward mail and a communication sent out is called as outward mail. As stated already, every business organization receives as well as sends a large number of mail every day.

8.5.2. Definitions:

George R. Terry rightly remarked that "it is doubtful that a modern office could exist without mail". The reason is obvious that every business house has to maintain close contact with the outside world. It should correspond to its customers, its own branches, departments, and various other institutions, government etc., the business firm grows; the volume of transactions will also grow.

8.5.3. Procedure for Mail Handling:

Fig. 8.2. Incoming Mail Handling Procedure

1. **Receiving the Mail:** Generally mails are received once or twice a day as delivered by the postman, when the volume of correspondence is large, a post box or post bag is hired in the post office, and an office peon is sent to collect the mail from the post office. Sometimes letters are received through the messengers of the offices. In the emerging scenario private courier services rendering very speed post service to the office.

2. **Sorting the Mail:** After the mail has been received in the mailing department, it should be sorted out before it is opened. It is easier to sort out sealed envelopes than different sized pieces of paper. Private letters of the employees may be sorted out at first than comparing to the business letters.

   Business Letters should be sorted out into three groups:

   a) Registered and unregistered letters or mail;

   b) Sealed and unsealed envelopes; and

   c) Confidential and urgent letters, private or personal, secret, and other official letters.

   Sorting of letters means grouping of letters on definite order. Sorted mail makes the delivery of letters convenient and quick.

3. **Opening the Mail:** Letters may be opened by hand or by letter opening machines. A paper knife is mostly used in offices to split open envelopes etc. If the number of letters is very large, a letter opening machine may be used with advantage. In small organisation letters are opened by the officer or head clerk. The following guidelines may be followed for opening the mail.

   a) The sorting and Opening of the mail should start atleast half an hour to one

hour before the opening time of the office.

b) The office manager should see to it that the work in the office start immediately after the opening of the mail, otherwise the time and money spent on an early opening of the mail would be wasted.

c) The staff is incharge for opening the mail should be fully conversant with the method of sorting and opening the mail. If possible, a mailing manual should be used in this regard.

d) After an envelope has been opened, it is necessary to remove the content from it. Empty envelopes should be fastened by a pin or clip or stapler.

4. Scrutiny of Contents: After the removal of the contents, it must be scrutinised to find out for whom and for which department, they are meant for. The sorting of letters has been done on a departmental basis at this stage. Before sending the mail to the concerned departments, the enclosures to the letters should be checked, compared and verified with the covering letter to find out whether they are in order or not. Occasionally, the enclosures may be a cheque, bank drafts, postal order or a valuable document. If any discrepancy or omission is found while scrutinising then the matter should be immediately brought to the notice of the mailroom supervisor. Letters in which certain previous references are given may be sent to the filing department from where the letters and the relevant files may be sent to the concerned department.

5. Stamping the Mail: After proper scrutiny is done, the date stamping of letter must be done. Sometimes the date and time of receipt would be stamped on the letter. For stamping of letters, a stamp is prepared which contains the serial number, the date of receipt and time of receipt if necessary. A references stamp is attached if the letters relate to numbers of departments. A design of specially design stamp is given below.

S.K. AKILA STATIONERY MART
NO ------------- DATE ---------------
RECEIVED ---------------------------
PACKED ------------------------------
REPLIED -----------------------------
FILED -------------------------------

Format of Stamp

6. Recording the Mail: After the stamping work, letters received are recorded in inward mail register or letters received book. Before recording of letters in the register, the contents are scrutinized properly so as to ensure the department to which it belongs. The inward mail register contains 1. Serial number 2. Date of receipt 3. Senders name and address 4. Nature of contents 5. Subject of the letter in brief 6. Remarks and initials of the officer with date.

A specimen of an Inward mail Register is given below:

Inward Mail Register

S.No	Date	Senders Name and Address	Subject	Contents	Department Referred	Date of reply	Initials
1.	2015 July 1	Black and Burn Co. Ltd., East Park Road, Calcutta	Order	Letter	Sales	July 5	✓
2.	2015 July 1	Sangeetha Co. Ltd., Mamal-lan Road, Kancheepu-ram.	Payment	Letter and Cheque	Account	July 7	✓

7. **Distributing the Mail:** This is the last step in the inward mailing routine. In this stage letters are handed over to the concerned departments. The letters are distributed through messengers or sometimes with the help of mechanical devices like conveyor-belt or pneumatic tube.

8. **Follow up Action:** Follow up action is very important because it is concerned with keeping track of mail. This stage makes an enquiry whether the letter is replied or not.

8.6. Procedure for Handling Outward Mail (or) Outgoing Mail:

OUTGOING MAIL PROCEDUDRES
Collect mail from out trays regularly
Check for signature
Prepare necessary envelopes
Check for and insert enclosures with letters
Sort into first class, second class and special delivery
Weight letters/packets heavier than standard postage
Apply appropriate postage stamp or franked impression
Enter postage used in Postages Book
Take to post office in separate catgories
Send fax messages
Check for signature
Print out fax report as proof of sending

Fig. 8.3. Outgoing Mail Procedures

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Handling of outgoing mail involves the following steps:

1. **Collecting of Letters:** Letters prepared in various departments should be sent to the despatch section as quickly as possible. In many business houses, different departmental letters should be typed, duly signed by the executive along with the addressed envelopes to the mailing department. The letters should be put in a tray labelled "Outgoing Mail".

2. **Sorting Out the Letters:** After the mail reaches the mailing room, they are sorted as to whether intended for internal or local delivery or to be sent to outside firms and individuals. At this stage, sorting is also necessary because sometimes there may be letter from different departments, addressed to the same firm or to the same individual. All such letters can be sent under one cover.

3. **Recording in the Outward Mail Register:** After sorting, the letters are entered in the mail register or peon book. The letters sent through post office alone are entered in the "Outgoing Mail Register". Letters to be sent through the office peon or messenger are recorded in the peon book. This register also serves as a record of postage expenses. Each letter is given a serial number as per the despatch book or peon book. The same serial number is also recorded on the register.

4. **Folding and Inserting:** After recording, the letters are folded and inserted into envelopes. Generally the addresses are typed on the envelope in the department itself and the envelopes are sent along

with the letter. The despatching clerk before inserting the letter into the cover should verify – (i) whether the address given on the letter agrees with the address typed on the envelope, and (ii) the number of enclosures are in agreement with the number specified in the letter. Envelopes can be addressed by machine where communications are regularly sent to the same addressee. For ensuring quick and prompt delivery, complete address along with pin code should be specified.

5. **Sealing:** The envelopes can be sealed with paste or gum. The envelopes and inland letters should be folded carefully and sealed with gum. When window envelopes are used, it should be checked whether the address is fully visible through the window.

6. **Stamping:** After sealing, the letter should be adequately stamped. The mailing clerk should have a thorough knowledge of the postage rates so that no more or less stamps can be affixed. If more stamps are affixed than needed, it will be a mere waste of money. On the other hand, if the value of the stamp is less than the actual rate, the recipient has to pay a fine, which will damage the reputation of the firm. For this purpose, the latest copy of Post and Telegraph Tariff Guides can be kept in the mailing department for reference. Franking machines are also used now-a- days.

7. **Posting or Delivering the Mail:** Posting the mail is the last step in the process of handling the outgoing mails. Office messengers can send letters to local addresses. Registered letters, V.P.P. should

be sent to the post office. In cases where "Certificate of Posting" is required, they should be sent to the post office along with the list of letters with the required stamp affixed on the list. This list may be pasted in the outgoing mail registers. Likewise, acknowledgements or receipts issued by the Post Office should also be pasted in the register.

8.7. PIN Code:

Pin code stands for Postal Index Number Code. Postal Index Number (PIN) or PIN Code is a 6 digit code of post office numbering used by India Post. This system was introduced on 15th August 1972 by Shriram Bhikaji Velankar, an additional Secretary in the Union Ministry of Communications, in order to make the process of delivering letters and parcels more efficient.

The system was aimed to simplify the manual sorting and delivery of mail by eliminating confusion over incorrect addresses, similar place names and different languages used by the public.
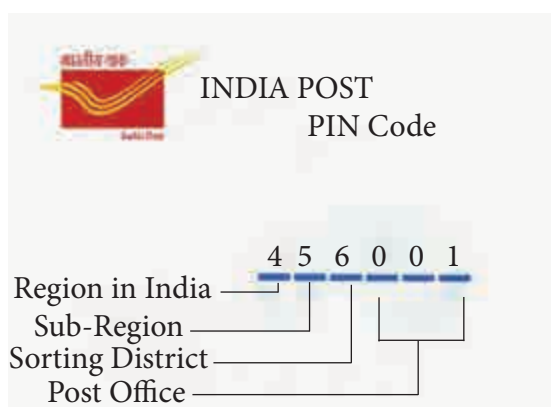
Fig. 8.4. PIN Code

8.8. Postal Services:

Post office plays a vital role in incoming and outgoing correspondence.

Some of the important services rendered by a post office are:

1. **Money Order:** All post offices provide remittance facilities to the public by means of money order. The money order form should be filled in within the name and address of the addressee, remittance and is to be presented to a post office along with the money and money order commission. The post office issues a receipt for the same.

2. **Postal Orders:** Postal orders are issued by post office as a part of their remittance service. These orders are issued in all denominations from fifty paise to rupees hundred. Commission is charged by the post office where they are issued. Payment can be made and received by the holder on presentation of the order at the mentioned post office in India. The postal order is valid for a period of six months from the last day of the month of the issue. During this period it can be presented for payment.

3. **Insured Post:** The currency note or Valuable documents can be sent through post office by using insured cover. The insured cover comprises documents. Currency notes must be sealed with an indicator for the amount for which the article is insured, both in words and figures must be mentioned. An Acknowledgement of delivery form is filled and submitted. The prescribed fee for insurance is required to be paid according to the value insured for.

4. **Mail and Telegraphic Transfer:** Mail transfer is an order to make payment, drawn by one branch of bank upon

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another branch and the order is sent by airmail post. If the order is sent by telegraph it is called telegraphic transfer.

5. **Letter Correspondence Service:** The most economical service rendered by the post office is that of a mail and parcel services. Ensuring prompt, regular and speedy postal services are vital functions to industry and commerce. Regular Postal services comprises of delivering letters, post cards, printed matters and parcels.

6. **Message Sending Facilities (Telegram, Telex, etc.,):** Post offices also provide facilities such as telephone, telex, telegram, etc., through which messages are sent throughout the world.

7. **Value Payable Post (VPP):** Business firms can avail facility to send articles to their customers and recover the value of the same. Only registered articles can be sent under VPP including letter, parcels, books, and newspapers etc., Post office collects the amount together with VPP commission from the addressee and remits the same to the sender.

8. **Speed Post:** Any urgent communication can be sent through speed post. This is one of the special services rendered by the post office. Important letters, valuable medicines, Demand draft (DD) are some of the items sent through speed post.

9. **Post Box:** The Post boxes are available for rent in all big post office with two keys. One remains with post master and other is handed over to the hirer. A number is allotted for each box. All letters which bear the box number shall be placed into the box. The hirer or the authorized person can go to the post office at any time during working hours and open the box and clear it.

10. **Post Bags:** Post bags are safer than post boxes. Under this arrangement, the post office supplies a bag with lock and duplicate key. The original key will be kept with the post master. All the postal articles addressed to the firm or the person will be placed inside the bag by the postal workers and locked. The messenger of the hirer can get the bag across the counter of the post office.

Do You Know?

Do you know the first modern postage stamp?

The first issued postage stamp began with Great Britain's Penny Post. On May 6, 1840, the British Penny Black Stamp was released on the Penny Black Stamp was engraved the profile of Queen Victoria's head, which remained on all British Stamps for the next sixty years. Rowland Hill created the first stamp.

8.9. Telecommunication Services:

8.9.1. The International Subscribers Dialing(ISD):

The International Subscribers Dialing (ISD) is the overseas equivalent of Subscribers Trunk Dialing (STD). A code number is given to each country. The country number, the area code number and the customer number are dialed to get the connection. Communication is possible throughout the world. Currently mobile

phones have made International Calls much easier and cheaper due to competition among service.

8.9.2. PBX (Private Branch Exchange):

A manually or automatically operated telephone facility that handles communications within an office, office building, or organization and that is connected to the public telephone network.

A PBX (Private Branch Exchange) is a telephone system within an enterprise that switches the calls between enterprises users on local lines while allowing all users to share a certain number of external phone lines. The main purpose of a PBX is to save the cost of requiring a line for each user to the telephone Company's central office.

The PBX is owned and operated by the enterprise rather than the telephone company (which may be a supplier or service provider, however). Private branch exchanges used analog technology originally. Today PBXs use digital technology (digital signals are converted to analog for outside calls on the local loop using plain old telephone service (POTS). Essentially a PBX is a telephone switch used by organizations and businesses. This device functions in the same manner as a traditional telephone switch board but is scaled down to accommodate business settings.

A PBX includes:

- Telephone Trunk (Multiple Phone) lines that terminate at the PBX.

- A Computer with memory that manages the switching of the calls within the PBX and in and out of it.

- The network of lines within the PBX

- A console or switch board for a human operator (optional).

Modern PBXs are built around a small computer, and some of them can be connected to a server for additional services such as call management, call detail reports, telemarketing etc.,
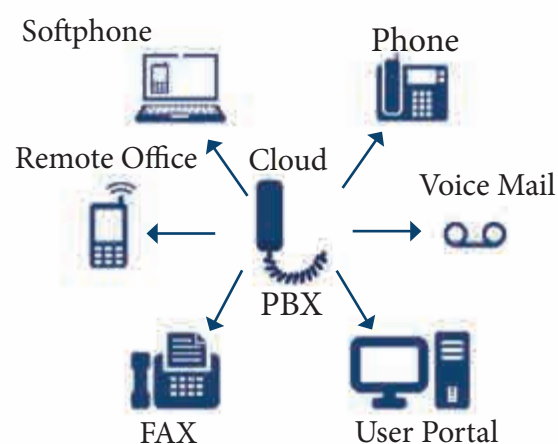
Fig. 8.5. Private Branch Exchange

The functions of a PBX are the following:

- Provide one single number that external callers can use to access all persons in a company.

- Distribute calls to employees in an answering team in an even way: using the Automatic Call Distribution (ACD) feature.

- Automatic call answering machine offers a menu of options from which a user can select to be directed to a specific extension or department.

- Allow the use of customized business greetings while answering calls.

- Provide system call management features.

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- Place external callers on hold while waiting for a requested person to answer, and playing music or customized commercial messages for the caller waiting.

- Record voice messages for any extension from an external caller.

- Transfer calls between internal extensions.

8.9.3. (PABX) Private Automatic Branch Exchange:

A Private automatic branch exchange (PABX) is an automatic telephone switching system within a private enterprise. Originally, such systems called Private Branch Exchanges (PBX) required the use of a live operator. Since almost all private branch exchanges today are automatic, the abbreviation "PBX" usually implies a "PABX".

Benefits of PABX Systems:

PABX systems also known as E PABX or PBX, are widely used nowadays offices, hotels, various industries where there is requirement of intra-office communication between departments or otherwise, PABX is a must. No modern office can be thought of without PABX.

There are many benefits for having a PABX in an office. The nature of benefits may vary from one industry to another. Lists of some benefits which may be applicable across any industries:

1. Sharing of Resources:

One of the major benefits of having PABX is sharing of telecom resources. Usually, any office which has few PSTN (Public Switched Telephone Network) lines needs to be shared among many people in the office. PABX systems help sharing those limited number of PSTN connections PABC has PSTN Connectivity at one end, and many extension lines at the other end, which are given to many persons, various rooms, and tables.

When outsiders can call up those PSTN numbers and reach many extensions directly or by the help of an operator. Employees can also make outgoing calls from his chain directly by accessing PSTN line from his extension or through an operator.

2. Internal Office Calls and Call Transferring:

PBX enables the employees to communicate with each other within the organizations. Previously, officials used a bell and used to kick around an office peon to call someone. Now with the invention of the PABX can call employee through intercom whenever needed.
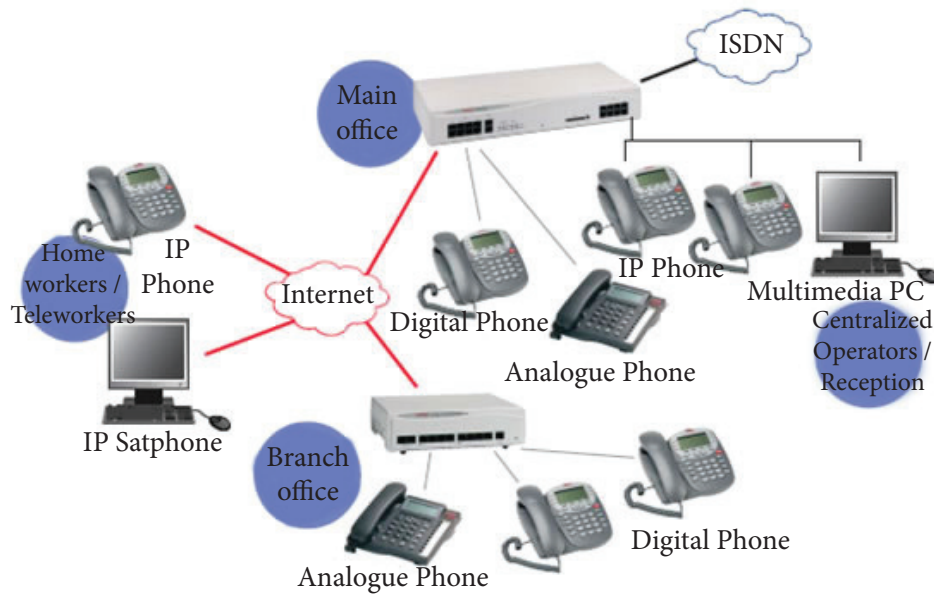
Fig. 8.6. Private Automatic Branch Exchange

8.10 E-Mail Services:

8.10.1 Post Information Follow Up e Mail:

Follow up action of email is very important because it is concerned with keeping track of mail. This makes an enquiry whether the letter is replied or not.

Specify multiple recipients in the To, CC or Bcc fields

Send you scheduled emails from a different email alias

Format your scheduled emails, add attachments, inline images and rich signatures in the mail
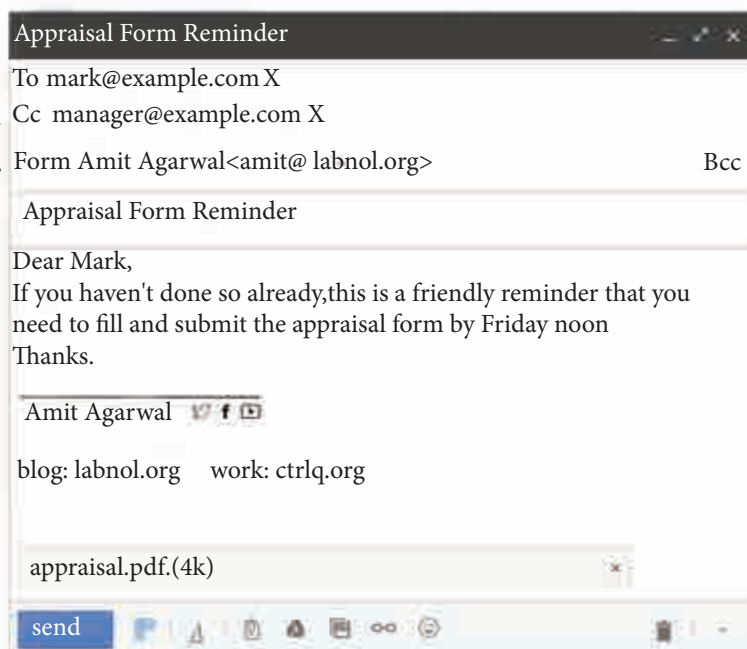
Fig. 8.7. E-mail

There are four primary objectives for a follow up e mail:

1. Need Information: Post Information follow up mail is sent to have a status update on a deal, or determines whether the job is assigned or not.

2. Request a meeting: A request for meeting can be forwarded to have discussion with the receiver of the mail.

3. Just to catch up: This mail is sent to get clear cut idea about the thoughts of the receiver or to receive feedback.

4. Say Thank you: This follow up message can be mailed to a particular person when he does favour to the company.

8.10.2. Live Video Call-Live Chat:

A video conference is a live, visual connection between two or more people residing in separate locations for the purpose of communication. Video conferencing provides transmission of static images, text, full motion video images and high-quality audio between multiple locations.

Consumer services-like Apple's Face Time, Google's Hang outs and Microsoft's Skype have made video conferencing ubiquitous on desktops and mobile devices that have an embedded camera. In the business world desktop video conferencing is a core component of unified communications applications and web conferencing services, while cloud based Virtual meeting room services

enable organizations to deploy video conferencing with minimal infrastructure investment.

8.10.3 Video Chat:

Video chat is an online face to face, visual communication performed with other Internet users by using a web cam and dedicated software.

The term stemmed from programmer that evolved from text based chats to incorporate two way video interactions. Video chat is usually used when Video based communication is incorporated. Video Chat is also known as Video Conferencing and Video Calling.

Although video chat mainly refers to point-to-point interaction, as with the case of Face Time and Skype, it can also be used for multi-point (one-to-many) interactions; one typical example is Google Hang outs.

Fig. 8.8. Video Conferencing and Video Calling

Benefits of Video Calling (Conferencing):

For business the tangible benefits of Video Conferencing include lower travel costs especially for employee training – and shortened project times as a result of

improved communications among team members.

The intangible benefits of video conferencing include more efficient meetings with the exchange of non-verbal communications and a stronger sense of community among business contacts, both within and between companies, as well as with customers. On a personal level, the face-to-face connection adds non-verbal communication to the exchange and allows participants to develop a strange sense of familiarity with individuals they may never actually meet in person.

8.10.4. Auto Call Back Up:

In telecommunication, an automatic callback is a computer telephony calling feature that permits a user, when encountering a busy condition or other condition where the called individual is unavailable, to instruct the system to retain the called number and to establish the call when there is an available line or when the called number is no longer busy. Automatic call back may be implemented in the terminal, in the telephone exchange, or shared between them. To activate the call back service, a call should be made to the local access number, let the phone ring once, and then hand up. This is a signal to the call back computer to call the speakers back and give them a dial tone on their local phone network.

8.10.5. Website:

A website is a collection of related web pages, including multimedia content, typically identified with a common domain name and published on atleast one web server. A website may be accessible via a public Internet Protocol (IP) network such as the internet, or a private local area network (LAN), by referencing a Uniform Resource Locator (URL) that identifies the site.

Websites can have many functions and can be used in various fashions; a website can be a personal website, a commercial website for a company, a Government website or a net profit organization website. Websites are typically dedicated to a particular topic or purpose, ranging from entertainment and social networking to provide news and education. All publicly accessible websites collectively constitute the worldwide web, while private websites such as a company's websites for its employees, and are typically a part of an internet.

Web pages, which are the building blocks of websites, are documents, typically composed in plain text interspersed with formatting instructions of Hypertext Markup Language (HTML, X HTML). They may incorporate elements from other websites with suitable markup anchors. Web pages are accessed and transported with the Hypertext Transfer Protocol (HTTP), which may optionally employ encryption (HTTP secure, HTTPs) to provide security and privacy for the user. The user's application, after a web browser, renders the page content according to its HTML, Markup instructions on to a display terminal.

Hyper linking between web pages conveys to the reader the site structure and

guides the navigation of the site, which often starts with a home page containing a directory of the site web content. Some websites require user registration or subscription to access content. Examples of subscription websites include many business sites, news websites, academic journal websites, gaming websites, file sharing websites, message boards, web based e mail, social networking websites, websites providing real-time stock market data, as well as sites providing various other services. As of 2017, end users can access websites on a range of devices, including desktop and laptop computers, tablet computers, smart phones and smart TVs.

Points to be Remembered:

- Secretary is a person whose job is to work for others.

- The word secretary is derived from the Latin word "Secretarius" which means a confidential writer or notary'.

- Types of secretary includes private secretary, secretary of association, secretary of co-operative, secretary of embassy, Secretary of government department, secretary of local body, secretary of trade union and company secretary.

- Secretary performs functions like managing, leading, motivating, staffing, maintaining records and discipline, filing, public relation function etc.

- Secretary should have sound knowledge in the field of education, law, tax, office management, accounting, failing, recording, staffing, organising etc.

- Secretarial correspondence includes communication by secretary both within and outside the organisation.

- A business letter is usually a letter from one company to another, or between such organizations and their customers, clients and other external parties.

- The term "Mail" in the common parlance refers to written communication. It may be either received or sent out.

- Procedure for receiving the inward mail includes steps like receiving the mail, sorting the mail, opening the mail, scrutiny of the content, stamping, recording, and distributing and follows up.

- Procedure for sending the outward mail includes the steps like collecting the letters, sorting, recording in outward mail register, folding and inserting, and sealing, stamping, delivery of mail.

- Postal Index Number (PIN) or PIN Code is a 6 digit code of post office numbering used by India Post to ease the process of handling mail.

- Postal services includes money order, postal order, telegraph, telex, insured post, VPP, post bags, post box etc.

- Telecommunication services includes, STD, ISD, PBX, PABX, Internal Call Transfer etc.

- Web services and E-mail services includes video call, video chat, auto call back up, follow up email etc.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1.   The person who conducts the correspondence on behalf of another person is called -------------------

   a. Manager   b. Secretary

   c. Minister   d. Writer

2.   The word secretary is derived from ------- Word which means secretaries.

   a. Latin   b. English

   c. French   d. Hindi

3.   Secretary for ------- is appointed for the promotion of Arts, science, music

   a. Association   b.Embassy

   c. Trade union   d.Company

4.   Company secretary is a person who is a member of ---------------------

   a. Indian Administrative Service

   b. Institute of Cost Works Accountant

   c. Institute of Chartered Accountant

   d. Institute of Company Secretaries of India

5.   A mail consists of -------------------

a. Written Communication   b. Oral Communication

c. Received Communication   d. None.

6.   It is doubtful that a modern office could exist without mail says ----------------.

a. Mary Parker Fallet.   b. Hendry Fayol

c. George R. Terry   d. F. W. Taylor

7.   It is the responsibility of the office manager to device ----------------------- handling system for both inward and outward mail.

a. Clear   b. Efficient

c. Good   d. None.

8.   Business letters should be sorted out into ------------------------------ groups.

a. 5 groups   b. 10 groups

c. 8 groups   d. 3 groups

9.   Postal Index Number Code (PIN) is a ----------------------------- digit of code.

a. 8   b. 6

c. 10   d. 12

10. The PIN code system was introduced on ----------------------------

a. 26th March 1955   b. 15th January 1982

c. 26th January 1950   d. 15th August 1972

11. The main purpose of a PBX is to save the ----------------------

a. Profit   b. Loss

c. Cost   d. None

12. A PABX is an automatic telephone switching system within a ------------------

a. Government organization   b. Outsiders

c. Employees   d. Private enterprise

13. Video Chat is also known as -----------------------

a. Video Conferencing and Video Calling

b. Video Calling

c. Conferencing Calling

d. All the above.

14. A Website may be accessible via a public ----------------------- network.

a. Social network　　　　　　　　　b. Internet Protocol

c. Documentation　　　　　　　　　d. All the above.

Part - B

II.　Very Short Answers:

Answer in Five lines.　　　　　　　　　　　　　　　　　**(3 Marks)**

1. Who is secretary?

2. List out the types of secretary.

3. Write short note on:

a. Private secretary

b. Secretary of a co-operative society

4. Write short note on:

a. Personal secretary

b. Secretary of trade union

5. What is meant by correspondence?

6. Why each letter is regarded as a silent Ambassador?

7. Name two types of mail.

8. Define mail.

9. List out the various types of business letters?

10. What is follow up action in mail?

11. What is Private Automatic Branch Exchange?

12. How does a PABX work?

13. What do you know about mail and telegraphic transfer?

14. What is Value Payable Post?

15. What is insured post?

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16.   What is automatic call back?

17.   Give meaning of Mail.

18.   Write a note on ISD.

19.   Write a short note on PIN Code.

20.   What is postal orders?

Part - C

III.   Short answers:

Answer in one page.   (5 Marks)

1.   Who is secretary? What are his functions?

2.   Write the importance of secretary in the modern business.

3.   Handling of the office mail is the life blood of a business enterprise. Explain?

4.   What is business letter? List out the various kinds of business letters?

5.   Write briefly about various telecommunication services?

6.   Write any five functions of a PBX.

7.   What are the four primary objectives for a follow up e mail?

8.   Write briefly about website.

9.   State briefly the various e-mail services?

10   What is PBX (Private Branch Exchange)? Explain it.

11.   What is PABX? What are the benefits of PABX systems?

12.   What does a Video Chat mean? Write about its benefits.

Part - D

IV.   Essay type questions:

Answer within three pages.   (10 Marks)

1.   Explain the kinds of secretary?

2.   State the qualification of the secretary?

3.   What is business letter? What are the contents of good business letters?

4.   Discuss the procedure for handling inward mail.

5.   Explain the various services rendered by post office?

6.   Write a short note on

        i.   Speed post

        ii.   Post bags

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iii.   Post box

iv.   Insured Post

v.   Money order.

7.   State the procedure for handling outward mail?

8.   Consider that you are appointed as a secretary in a Private concern. Discuss the various duties you have to do.

ACTIVITY

Teachers Activity:

- Must prepare charts on types of secretaries and their functions.
- Teach the students about the procedure for handling both inward and outward mail.
- Can take the students to nearby offices to show the workings of various telecommunication services.

Students Activity:

- Can be given assignments on modern mailing systems.
- Can be asked to browse through the net to learn about various web based services.

References:

1. Company Secretarial Practice By Kathirasen and Dr.Radha

2. Office Management ByDr. P.K. Ghosh

3. Office Management ByKathirasen and Dr.Radha

4. Business Communication ByUrmilaRai and S M Rai

5. Relevant web sites.

6. Company Law and secretarial practice-Dr.M.R. Sreenivasan

1	Ambassador : Ambassador is an accredited diplomat sent by a state as its permanent representativ in a foreign country.
2	Certificate of Posting : An official document from the post office, used to prove that you have mailed something on a particular date.
3	Circular : A letter or advertisement which is distributed to a large number of people.
4	Complementary Close : The words that conventionally come immediately before the signature of a letter and express the sender's regard for the receiver.
5	Confidential : Intended to be kept secret.
6	Conversant : Familiar with or knowledgeable about something.
7	Conveyor belt : A continuous moving band of fabric, rubber, or metal used for transporting objects from one place to another.
8	Encryption : The process of converting information or data into a code, especially to prevent unauthorized access.
9	Fasten : Close or do up securely.
10	Initial : Mark or sign (a document) with one's initials in order to authorize or validate it.
11	Intra office communication : Communication among the employees of the organisation.
12	Interspersed : To scatter here and there or place at intervals among other things.
13	Liaison Officer : He is a person who is employed to form a working relationship between two organizations to their mutual benefit.
14	Memos : A written message sent from one person or department to another within a company.
15	Pneumatic tube : Systems that propel cylindrical containers through networks of tubes by compressed air or by partial vacuum. They are used for transporting solid objects, as opposed to conventional pipelines, which transport fluids.
16	Post-Script : An additional remark at the end of a letter, after the signature and introduced by 'PS'.
17	Salutation : An official greetings used in a letter to address the person being written to.
18	Scenario : A postulated sequence or development of events.
19	Scrutiny : Critical observation or examination.
20	Sophisticated : (Of a machine, system, or technique) developed to a high degree of complexity.
21	Sort : Arrange systematically in groups; separate according to type.

22	*Subscription : An arrangement by which access is granted to an online service.*
23	*Telegram : A message sent by telegraph and then delivered in written or printed form.*
24	*Telex : An international system of telegraphy with printed messages transmitted and received by teleprintersusing the public telecommunications network.*
25	*Terminal : A device at which a user enters data or commands for a computer system and which displays the received output.*
26	*Transmission : The action or process of transmitting something or the state of being transmitted.*
27	*Ubiquitous : Present, appearing, or found everywhere.*

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CHAPTER IX

BANKING SERVICES

Content:

Introduction- Meaning – Definition - Types of Accounts / Deposits-Modern Banking Services - Procedure to open an Account - Different forms used by banks.

Learning Objectives

- To understand the procedure for opening bank account

- To familiarize with different forms used in bank.

- To know various deposits available in banks

Introduction:

Every country's economy normally divided into three sectors viz., Primary Sector; Secondary Sector and Tertiary Sector. Primary sector consist of agricultural and its allied activities; Secondary sector consist of Industrial and its allied activities and Tertiary sector consist of Service sector which includes banking services, education, transport, insurance, health, information technology etc. Among them banking service is very important which connects all services and taking them towards a common goal called profit making. Unless banking services are strong, contribution from other services may become useless.

Do You Know?

This history of banking began with the first prototype banks where the merchants of the world, who made grain loans to farmers and traders who carried goods between cities. This was around 2000 BC in Assyria and Sumeria

Business is mainly conducted to mobilize funds. All the business entities regardless of its nature and size of commercial activities, aims to gain profits out of its operations. To carry on its day to day operations it meets various routine expenses and at the same time earns income out of its operations. Many a times these expenses were paid and incomes were received through cheques via banks. In this connection banks plays vital role.

Therefore, soon after its establishment, it becomes mandatory for the business unit to open a bank account from one or more banks for easy financial dealing. The banks not only render financial support but also help the business men by giving credit guarantee to creditors, issuing letter of credit during import trade and conducting credit enquires in case of credit sales, making e-payments, electronic fund transfers, internet banking, mobile banking etc.

Most of these banking activities are carried through office. Therefore, the office manager should be aware of various facilities available and services offered by the banks for better and smooth functioning of office. Hence this chapter focuses upon banking services offered to a business unit.

9.1. Meaning:

The word "Bank" is derived from an Italian word "Banco" which means bench for keeping, lending and exchange of money or coins.

A bank is generally understood as an institution which provides fundamental banking services such as accepting deposits and providing loans.

The banking industry is facing a rapidly changing market, new technologies, economic uncertainties, strong competition and more demanding customers and the changing climate which lead to set of challenges which was never seen before. The banking is a customer oriented service industry. The customers may be an individual, organization or firms. Organization needs finance to run the business. Many of the organizations made their transactions through banks. They issue and receive cheques, and they use modern techniques such as NEFT,RTGS, and IMPS to transfer money. At the advent of information technology and communication system it offers variety of services like e-banking, mobile banking, ATM, internet banking, electronic fund transfers etc. to its customers and these services are made available at their door steps.

9.2. Definition:

According to **Prof.Kinley,** A bank is an establishment, which makes to individuals such advances of money as may be required and safely made, and to which individuals entrust money when not required by them for use."

"Banking is defined as accepting for the purpose of lending or investment of deposits of money from the public, repayable on demand or otherwise and withdraw able by cheque, draft, order or otherwise" –**The Banking Regulation Act,1949**

Do You Know?

- The first bank in the world was named as Bank of Venice, which was started in Venice, Italy in 1157

- The Bank of England was started in 1695 only for issuing currency notes.

- In India "Bank of Hindustan" was the first bank which was started in 1770.

- The General Bank of India was established in 1786.

- As of now, the State Bank of India is the oldest and largest bank in Indian banking movement, which was originated as bank of Calcutta in 1806 and renamed as Bank of Bengal in 1809.

In the words of **Prof.H.L.Hart,**"A banker is one who in the ordinary course of his business receives money. which he

repays by honouring cheques of persons from whom or on whose account he receives it".

In short any activities involved in accepting and safeguarding money owned by other individuals and entities, and then lending out this money in order to earn a profit is known as banking,

9.3. Types of Accounts/Deposits:

Every bank provides basic banking facilities to the customers such as opening of different types of accounts and keeping their savings in different types of deposits. Different types of accounts include Savings Account, Current Account and Term Deposit Account.

1. **Saving Accounts:** Savings accounts are meant for encouraging savings habit among the customers and also giving a protected environment to their savings. A nominal rate of interest is given to all savings account holders for their savings which is varying from one bank to another and calculated on daily balance method. Less number of cash withdrawals is allowed in savings accounts compared to current account.

2. **Current Accounts:** Current accounts are normally maintained by business people who are keeping their business earnings which are huge values and banks are not offering any interest to such current accounts. Numbers of withdrawals from current accounts are not restricted to current account

holders which is different from bank to bank.

3. **Term Deposits:** Term Deposits are maintained for the depositors who want to earn fixed return by way of interest, to keep their money in the banks for long duration and also meant for those who do not have urgent cash requirements. Term deposits are normally divided into short term deposits, medium term deposits and long term deposits. They are otherwise called Fixed Deposits kept for fixed term starting from 15 days to 60 months. The rate of interest on fixed deposits is also different from one bank to another. Nowadays, some banks are offering additional ½% more interest to senior citizens. If the deposit holders want to withdraw their deposits before the due date, they can withdraw them provided banks may charge penal interest from them. In India, maximum numbers of banks are conducting most of their banking business such as lending loans and advances out of funds mobilized from fixed deposits only.

4. **Recurring Deposits:** Recurring Deposits are other types of deposits which are also considered as a term deposits in which a fixed sum of money is regularly deposited at fixed interval but the same is allowed to withdraw on completion of the contracted period with attractive interest rates. If the depositor is failed to make the agreed amount in Recurring Deposit account, the banker may charge penalty at the time of making the consecutive deposit.

5. **Special Term Deposits:** This can be opened in the same way as the term deposit accounts. The interest on this account is compounded at quarterly intervals and the principal and interest are paid on maturity. The minimum and maximum period of deposits is normally 7 days to 120 months subject to change from one bank to another and the minimum amount of deposit is Rs.1000/- in multiple of Rs.100/-. The depositor can avail loan from this account upto 90% of the principal amount with accrued interest.

Fig. 9.1. Special Term Deposits

9.4. Modern Banking Services:

After Liberalization, Privatization and Globalization, there was a huge development taken place in the Indian banking scenario. All Indian banks were forced to compete with world banks that were permitted to open their branches in India. As a result, all banking customers were offered multiple and model banking products which are different from traditional and conventional banking system in India and these banking functions or mostly based on information technology.

Such modern banking services include new products such as Core Banking Solutions; No frills account; Demat accounts; Net Banking/ E-Banking; Mobile banking; Debit Card/ Credit cards; Automated Teller Machines (ATM); Insurance etc.

1. Core Banking Solution (CBS):

Core Banking Solution (CBS) is networking of branches, which enablesCustomers to operate their accounts, and avail banking services from any branch of the Bank on CBS network, regardless of where he maintains his account. The customer is no more the customer of a Branch. He becomes the Bank's Customer. Under this system all CBS branches are inter-connected with each other. Therefore, Customers of CBS branches can avail various banking facilities from any other CBS branch located anywhere in the world. This CBS helps the customers

- To make enquiries about the balance or debit or credit entries in the account.

- To obtain cash payment out of his account by tendering a cheque.

- To deposit a cheque for credit into his account.

- To deposit cash into the account.

- To deposit cheques/cash into account of some other person who has account in a CBS branch.

- To get the statement of account.

- To transfer funds from his account to some other account – his own or of

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third party, provided both accounts are in CBS branches.

- To obtain Demand Drafts or Banker's Cheques from any branch on CBS – amount shall be online debited to his account.

- Customers can continue to use ATMs and other Delivery Channels, which are also interfaced with CBS platform.

2. No Frills Accounts: These accounts are opened mostly in rural areas as a part of financial inclusion project encouraged by Reserve Bank of India. These accounts are opened by banks without the condition of maintaining minimum balance. No charge will be levied for non-operation/activation of inoperative basic savings bank accounts. No frill accounts are mainly aimed to take the banking facilities to the poor people in the unbanked rural areas and semi-urban areas.

Fig. 9.2. No Frills Account

3. Demat Accounts: These are maintained by banks for high value transactions which are maintained in electronic forms for dealing in shares and securities of the customers mostly dealing in Government Bonds.
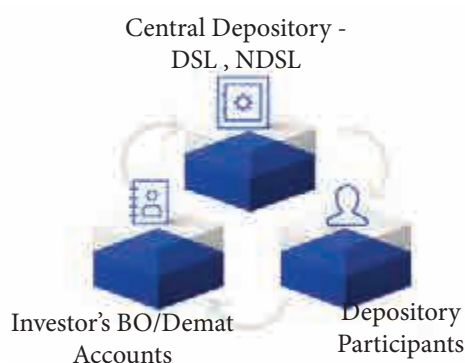
Fig. 9.3. Demat Account

4. **Net Banking:** This is the easy way of doing banking from the convenient place of the customer and avoids queue or delay. We can also check balance,transfer funds, pay bills, open fixed and recurring deposits etc. Each customer is given a unique user ID and password for the purpose of accessing internet banking. Electronic Banking is also known as Electronic fund Transfer. Electronic means to transfer funds from one account to other account by ways of NEFT, RTGS or IMPS.

NEFT- National Electronic Fund Transfer

RTGS- Real Time Gross Settlement

IMPS-Immediate Payment Service

Fig. 9.4. Net Banking

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5. **Mobile Banking:** Mobile Banking is a service provided by banks or other financial institution that allow their customers to do financial transaction using mobiles like smart phone or tablet. It is quick and simple way of banking. Mobile banking app helps to check the account balance, transfer funds, pay in bills etc.

Fig. 9.5. Mobile Banking

6. **Debit Card / Credit Card:** A debit card is a plastic payment card that can be used instead of cash when making purchases. It is similar to a creditcard, but unlike a credit card, the money depited directly from the user's bank account when performing a transaction. It is also known as a bank card, plastic card or check card.

In credit card, in the customer can perform the transaction upto a predefined limit, and pay them to the bank before a specified date.

Fig. 9.6. Debit Card / Credit Card

7. **ATM (Automatic Teller Machine):** This is an electronic device which helps the customers for withdrawal, deposits money, transfer fund etc, round the clock. For Availing the services of an ATM the customer need ATM card with PIN number (Personal identification number). It provides 24 x7 and 365 days a year service.

Fig. 9.7. ATM Machine

8. **Insurance:** Insurance is a means of protection from financial loss. It is an arrangement by which the company undertakes to provide a guarantee of compensation for specified loss, damages, illness, or death in return for payment of specified premium.   The largest insurance company in India is owned by government.

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Fig. 9.8. Insurance

Fig. 9.9. Safety Locker

Do You Know?

- Maharashtra has the highest number of ATM in the Country at the end of the financial year 2016 – 2017 according to Reserve Bank of India data.

- Banks helped by innovative in ATM Placements and Services. In 2004 the State Bank of India in Kochi launched a floating ATM on a ferry plying between the jetties of Ernakulum and Vypeen in the city's huge bay. SBI set up an ATM at leh,16,000 feet above sea level, primary for the benefit of armed forces.

9. **Lock-Box and Night Safe Services:** These services are provided by some banks. Lock-box helps the customers particularly the traders, to keep cheques and other remittances in a box for next day collection and certain entries should be passed. **Nightsafe service** is useful to the traders who receive large amount of money after the banking hours and who feel insecured at their premises.

9.5 Procedure for Opening Bank Accounts:

Today Banks have emerged as important financial institutions. Banks provide a safe environment and help us to manage our financial transactions. To avail professional banking service, it is mandatory for every individual to open a bank account. Opening a bank account is not a difficult task. To open a bank account we have to follow simple seven steps.

Fig. 9.10. Opening Bank Account

1. Decide the Type of Bank Account you want to Open:

There are several types of bank accounts such as Saving Account, Recurring Account, Fixed Deposit Account and Current Account. So the decision regarding

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the type of account to be opened must be taken.

2. Approach any Bank of Choice & Meet its Bank Officer:

Once the type of account is decided, the person should approach a convenient bank. He has to meet the bank officer regarding the opening of the account. The bank officer will provide a proposal form (Account Opening Form) to open bank account.

3. Fill up Bank Account Opening Form - Proposal Form:

The proposal form must be duly filled in all respects. Necessary details regarding name, address, occupation and other details must be filled in wherever required. Two or three specimen signatures are required on the specimen signature card. If the account is opened in joint names, then the form must be signed jointly. Now a days the banks ask the applicant to submit copies of his latest photograph for the purpose of his identification.

4. Give References for Opening your Bank Account:

The bank normally required references or introduction of the prospective account holder by any of the existing account holders for that type of account. The introducer introduces by signing his specimen signature in the column meant for the purpose The reference or introduction is required to safeguard the interest of the bank.

5. Submit Bank Account Opening Form and Documents:

The duly filled in proposal form must be submitted to the bank along with necessary documents. For e.g. in case of a joint stock company, the application form must accompany with the Board's resolution to open the account. Also certified copies of articles and memorandum of association must be produced. The requirements for opening account are:

1. Completed application form

2. Photos of the individuals opening the account

3. Initial deposit amount

4. Copy of Aaadhar Card, Voter ID card; ration Card, Driving License or passport as proof of address

5. Specimen signature card

6. Officer will verify your Bank Account Opening Form:

The bank officer verifies the proposal form. He checks whether the form is complete in all respects or not. The accompanying documents are verified. If the officer is satisfied, then he clears the proposal form.

7. Deposit Initial Amount in Newly Opened Bank Account:

After getting the proposal form cleared, the necessary amount is deposited in the bank. After depositing the initial money, the bank provides a pass book, a

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cheque book and pay in slip book in the case of savings account. In the case of fixed deposits, a fixed deposit receipt is issued. In the case of current account, a cheque book and a pay in slip book is issued. For recurring account, the pass book and a pay in slip book is issued.

9.6. Bank Pass Book (or) Bank Statement:

Bank Passbook or Bank Statement is a copy of the account of the customer as it appears in the bank's books. When a customer deposits money and cheques into his bank account or withdraws money, he records these transactions in the bank column of his cashbook immediately. Correspondingly, the bank records them in the customer's account maintained in its books. Then they are copied in a passbook and given to the customer. With the computerization of banking operations, bank statements (in lieu of passbook) are issued to the customers periodically.

Thus passbook is a record of the banking transactions of a customer with a bank. All entries made by a customer in his cashbook (bank column) must be entered by the bank in the passbook.

Format of a Bank Passbook or Bank Statement:

Name of the bank_____

Address of the bank_____

Account No._____

Customer Name:_____

Address of the customer._____

Fig. 9.11. Bank Pass Book

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9.7. Different Forms Used in Banks:

1. Deposit Challan

A deposit slip or challan is a form supplied by a bank for a depositor to deposit money in the bank.

Fig. 9.12. Deposit Challan

Let us understand the details to be filled up on the Bank Copy. Most of the same information is filled up on the left side also.

Circled No.	Details	Entry in the Above Slip
1	Name of the Bank's Branch	Erukkencherry
2	Date (of deposit)	02-01-2018
3	Paid in to the credit of (Nature of account)	SB(Savings Bank)
4	A/C Holders name	T. MANVEL RAJ
5	Amount of deposit in words	Two thousand only
6	A/C No(Account Number)	602243578
7	Amount of deposit in figures	2000 /-
8	Signature of Depositor	Signature
6	Cash/Cheque (The method of deposit)	Cash
9	Denomination (The break of amount in different currency notes)	500X4 =2000 Total Rs. 2000 /.

Note: Since authorization is not required for depositing money, anybody can deposit money to any account.

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2. Withdrawal Slips

A Withdrawal Slip is a written order to your bank instructing it to withdraw funds from the account. Withdrawal slips vary from bank to bank.A customer can withdraw cash using withdrawal silp only at their home branch.

Fig. 9.13. Withdrawal Slips

Circled No.	Details	Entry in the above slip
1	Name of the Account Holders	T.SHALINI RANI
2	Date (of withdrawal)	02-01-2018
3	Account Number in the Bank	32334576810
4	Amount of withdrawal in words	Two Thousand only
5	Amount of withdrawal in figures	2000 /-
6	Signature of Depositor	Signature(It should be as per specimen signature card given to the bank)

There are some restrictions on the use of withdrawal slip. They are:
1. Only the account holder can use this slip to withdraw the amount for himself.
2. This form cannot be used to make payment to others.
3. Account holder has to produce the pass book.

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Since withdrawal slip cannot be used to make payment to others, we use a form called cheque.

3. Cheque

The cheque is a negotiable instrument containing an order to a bank to pay a stated sum from the drawer's account, written on a specially printed form. It is signed by the drawer. It can be easily transferred through a mere hand delivery. There are three parties to the cheque-Drawer (maker of the cheque), Drawee (bank on which the cheque is drawn), Payee (to whom the amount of the cheque is payable).

Fig. 9.14. Cheque

Circled No.	Details	Entry in the Above Cheque
1	Pay (Name of the person who needs to be paid)	S.M.R. NISHOK TAAMAS
2	Date (Date on which the money is to be paid)	03-01-2018
3	Rupees (The amount to be paid in words)	One Thousand only
4	Rs. (The amount to be paid in Figures)	1000 /-
5	Signature of the person issuing cheque	Signature (It should be as per specimen signature card given to the bank)
6	Account Number of the person issuing cheque	32803898877

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7	Branch Name (The branch where the person who is signing the cheque is having the account)	State Bank of India (11715) KODUNGAIYUR, CHENNAI -600118
8	Cheque Number	655887
9	Mode of Payment	A/C Payee

4. Demand Draft

Demand Drafts is a pre-paid instrument, wherein bank by whom the DD has been made undertakes responsibility to make full payment. DD is valid for 6 months. Demand draft is accepted where the transfer of money is guaranteed. As most of the individuals make payments through the RTGS, NEFT, IMPS mechanism demand draft is losing it's place. But still application for job, examinations, admissions, services, high amount purchases etc. requires demand draft rather than cheques.
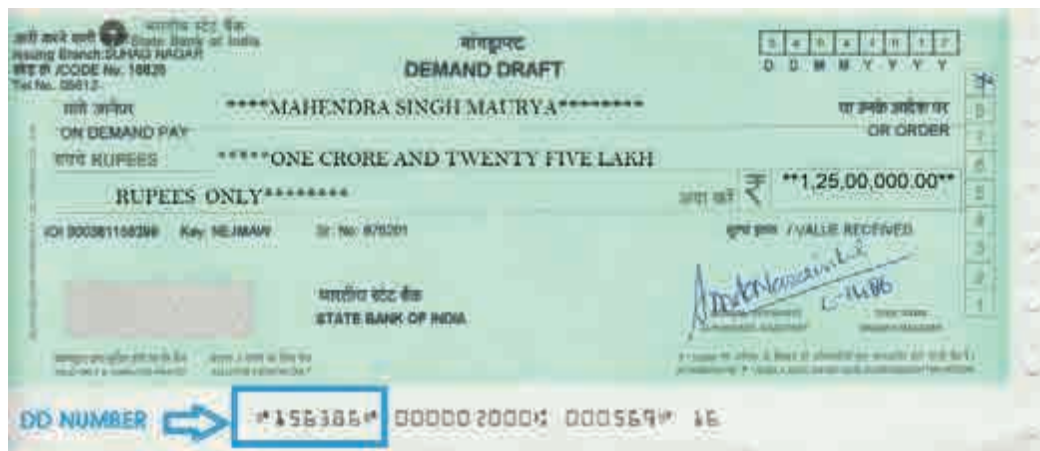
Fig.9.15. Demand Draft

Enclosed within the figure	Entry in the DD	Details
Black rectangle at the top left	SBM - Somwarpet	The branch of bank issuing the DD
Red Rectangle against 'ON DEMAND PAY'	FOODS LIMITED	The party which gets the amount specified in the DD

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Red circle at the top right corner	22/06/2006	Date of issue of DD (Validity period is six months)
Green Circle below the date	65000.00	The amount payable to the party
Green rectangle in the middle	Six – ten thousand Five – Thousands Zero – Hundreds Zero – tens Zero – units	Amount in words
Black circle at the bottom	SBM – Service Bangalore	The branch of bank which pays the amount
Blue rectangle next to Drawee branch	DD715693	Number of DD
Brown rectangle on the right	Signatures	Two signatures of the officers of branch issuing DD

5. Difference between Cheque and Demand Draft

Fig 9.16. Difference between Cheque and Demand Draft

9.8. Basis For Comparison:

S.No.	Content	Cheque	Demand Draft
1.	Meaning	Cheque is a negotiable instrument which contains an order to the bank, signed by the drawer, to pay a certain sum of money to a specified person.	Demand Draft is a negotiable instrument used for the transfer of money from one place to another.
2.	Payment	Payable either to order or to bearer	Always payable to order of a certain person
3.	Issuance	Cheque is issued by an individual.	Demand Draft is issued by a bank.
4.	Bank Charges	No charges are payable	Charges are paid based on the amount of the draft.
5.	Drawer	Customer of the bank.	Bank itself
6.	Parties Involved	Three Parties- Drawer, Drawee, Payee.	Three Parties- Drawer, Drawee, Payee.
7.	Dishonor of cheque & draft	Cheques can be dishonored due to insufficient balance or other similar reasons.	Drafts cannot be dishonored.

Points to be Remembered:

- Meaning- A bank is generally understood as an institution which provides fundamental banking services such as accepting deposits and providing loans.

- Definition-Any activities involved in accepting and safeguarding money owned by other individuals and entities, and then lending out this money in order to earn a profit".

- Types of deposit includes Saving deposit, Current deposit, Recurring deposit and Fixed deposit.

- Procedure for opening of bank account includes the following steps.

- Decide the Type of Bank Account you want to open.

- Approach any Bank of choice & meet its Bank Officer.

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- Fill up Bank Account Opening Form - Proposal Form.

- Give References for Opening your Bank Account.

- Submit Bank Account Opening Form and Documents.

- Officer will verify your Bank Account Opening Form.

- Deposit initial amount in newly opened Bank Accountant.

- Different forms used in Banks were Deposit challans, Withdrawal slips, Demand drafts.

- Bank pass book is a copy of accounts of customer as appears in bank's book.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1.   The interest on savings account is now fixed by ------------------

   a. RBI   b. By bank itself

   c. President   d. Governor

2.   When money is deposited for a fixed period it is called ---------------------

   a. Fixed deposit   b. Savings deposit

   c. Recurring deposit   d. Current deposit

3.   The primary function of the bank is ------------------------

   a. Accepting deposits

   b. Lending money

   c. Accepting Deposits and Lending money

   d. Receiving deposits

4.   A customer can withdraw cash using withdrawal silp only at their --------------

   a. Home Branch.   b. Other Banks

   c. Out of State   d. Out side the Country

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5. The account which is opened by bank without the condition of minimum balance ---------

a. Demat account　　　　　　b. Special term deposit

c. Savings acount　　　　　　d. No frill account

6. The electronic device which helps the customers for withdrawal, deposits money, transfer fund etc round the clock is ---------------------

a. Debit card　　　　　　　　b. Credit card

c. ATM　　　　　　　　　　　d. Computer

7. The largest Insurance company in India is owned by--------------------

a. Government　　　　　　　b. Public

c. Private　　　　　　　　　d. Companies

8. The form provided by the bank officer to open a bank accout is called -------------

a. Bank form　　　　　　　　b. Introducer form

c. Account opening form　　　d. Reference form

9. The word bank is derived from the Italian word Banco which means --------------

a. Money　　　　　　　　　　b. Chair

c. Desk　　　　　　　　　　　d. Bench.

Part - B

II.　Very Short Answers:

Answer in Five lines.　　　　　　　　　　　　　　　　**(3 Marks)**

1. What is a Bank?

2. Define Bank?

3. List the various types of deposits accepted by banks.

4. Write short note on Saving Bank Account.

5. Write some Modern Banking Services.

6. Give the meaning of Internet Banking.

7. What do you mean by ATM?

8. What do you mean by Credit Card?

9. What is Demand Draft?

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10. Write note on Demat Account.

11. What is Cheque?

12. Write short note on E-banking.

Part - C

III. Short answers:

Answer in one page. **(5 Marks)**

1. Explain the types of deposits.

2. Differentiate between cheques and demand draft.

3. State briefly the various forms used in banks.

4. What are the differences between fixed deposit Account and Savings Deposit Account?

5. What are the differences between fixed deposit Account and Current Deposit Account?

6. What are the differences between Savings Deposit Account and Current Account?

7. What is meant by withdrawal slip? Write the content of withdrawal slip?

8. If You have Rs.5000 in your hand and you have decided to deposit the money in a bank, What type of account will you open? Why?

Part - D

IV. Essay type questions:

Answer within three pages. **(10 Marks)**

1. Explain briefly the various modern banking services.

2. Write the procedure for opening an account.

ACTIVITY

Teachers Activity:

- Teacher can arrange for a guest lecture by inviting a bank manager
- Teacher can arrange a field trip to near by bank
- Teacher should disscuss how to open saving bank account
- Teacher should explain how to deposit and withdraw money from bank

Students Activity:

- Students should be asked to collect form for opening an account, various deposit forms from the bank and fill it.

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GLOSSARY

1	*A/C Payee crossing : A crossing on the face of a cheque which is a direction to the collecting banker to credit the amount to the payee's account.*
2	*ATM : Automatic Teller Machine. A facility for the customer to withdraw money from the machine using the card at any time on any day.*
3	*App : An application, especially as downloaded by a user to a mobile device.*

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4	Cheque : A bill of exchange drawn on a specified bank and not expressed to be payable otherwise than on demand.
5	Credit Card : A card given by the banker to his customers for purchasing goods and availing services on credit from shopkeepers.
6	Current Account : A running deposit account meant for the business class, where no interest is paid and withdrawal is allowed without notice.
7	Customer : The individual who purchase the goods or services from the merchant.
8	Demand Draft : It is an order by one bank to its branch for sending money.
9	E–banking : Banking services conducted from home, business , or on the road, instead of at location.
10	Fixed Deposit : A deposit kept for a specified term to earn interest.
11	Internet : A global system of inter connected computer networks that links computer users or over the world.
12	Network : It is a group of interconnected computers and associated peripheral devices connected by a communication channel, which is capable of sharing the resources and information among the users.
13	Payee : The person named in the instrument,to whom or to whose order the money is to be paid by the instrument directed.
14	Pay–in–slip : A challan used for a depositing cash or negotiable instrument into a bank account.
15	Recurring deposit : A stipulated sum of money deposited every month in a bank which is payable at the expiry of fifth period.
16	Smartphone : A mobile phone that performs many of the functions of a computer, typically having touch screen interface , internet access , and an operating system capable of running downloaded apps.
17	Tablet(tablet pc) : A tablet is a wireless , portable person computer with the touch screen interface. The tablet form factor is typically smaller than notebook computer , but larger than a smartphone.

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CHAPTER X

MEETING AND REPORT WRITING

Content:

Introduction – Meaning of Meetings- Definition-Documents to be prepared before and after the meetings- Notice-Agenda-Minutes-Report writing- Report-Meaning-Types of Reports - Lay out of the Report - Qualities of Good Report.

Learning Objectives

- To enable the students to understand the basic concepts related to various meetings conducted in business enterprises.

- To equip the students with the documents prepared before and after meetings

- To acquaint the students with writing of various reports.

Introduction:

Business entity is generally considered as artificial person which cannot work on its own. It must act through some human intermediary. In the absence of any human agency, no business could perform. Business is run by board of directors who are the elected representatives of all the other members. These board members meet at regular intervals to discuss policy matters and formulate strategies for implementation of such policies. All the other members meets together once in every year to discuss about the functioning of business. Especially in case of big organizations where all major decisions are taken in consensus with other members of the concern. In these connection meetings plays vital role.

Meetings are generally arranged by secretary. At times, office manager also acts as a secretary; it is his duty to make arrangement for meetings whenever required and also to submit the reports related to it to top management. Hence, this chapter trough's light on various concepts relating to meeting and report writing.

10.1.1. Meaning of Meeting:

A meeting is an interaction between people, held for the purpose of achieving a common goal through verbal communication, such as sharing information or reaching agreement about a new idea, a new opportunity, a problem, or to brainstorm something with an aim to take right decision.

It may occur face-to-face or virtually, as facilitated by communication technology such as a telephone, conference calls, a Skype conference call or a videoconference. Business organizations often hold meetings with an intention to increase efficiency and productivity.

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10.1.2. Definition:

One Merriam-Webster dictionary defines a meeting as "an act or process of coming together" - example an assembly for a common purpose.

According to Business Dictionary meeting is defined as "the formal and informal planned assembly of individuals called to discuss certain issues and problems and to take decisions." Formal meetings are held at definite time, at a definite place, and usually for a definite duration to follow an agreed agenda on the other hand informal meetings are conducted among friends without such formalities

Fig. 10.1. Corporate Meeting

Hence meeting is a face to face discussion i.e. both directly and virtually among the people, conducted with an intention to take productive decisions to achieve the goals of an organization. But all gatherings are not meetings i.e., gatherings like, sports, games or concerts, a parties or the company of friends and demonstrations cannot be considered as meetings

10.2. Documents to be Prepared Before and After Meetings:

An official meeting is supported by several written documents. For the smooth functioning of a meeting, supporting documents must be prepared carefully. Usually, they are prepared by the Secretary, in consultation with the chairman. In small business units these documents are prepared by office manager himself.

The most essential documents needed to be prepared in connection with meeting are Notice, Agenda and Minutes. Of these, Notice and Agenda are prepared before the meeting and Minutes is prepared after the completion of meeting.
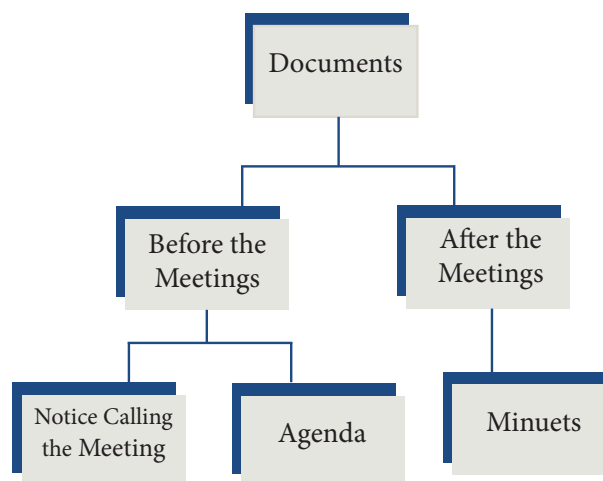
Fig. 10.2. Documents to be prepared before and after Meetings

Before the Meetings:

10.2.1. Notice Calling the Meeting:

When a meeting is to be conducted, a notice is required to be sent to all the members. A Notice is an intimation about the conduction of the meeting. Generally, it is typed or printed on the organizations' letterhead and issued under proper authority. Notice of the meeting must include the following content.

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- Durbar is a Hindi-Urdu word, equally common in all North Indian languages and many other South Asian languages. It was the term used for the place where Indian Kings and other rulers had their formal and informal meetings, i.e. in European context, equivalent to a Kings Court. It was later used in India and Nepal for a ruler's court or feudal levy as the latter came to be ruled and later administered by foreigners. A durbar may be either a feudal state council for administering the affairs of a princely state, or a purely ceremonial gathering, as in the time of the British Empire in India.

- The most famous Durbars belonged to Great Emperors and Kings. In the North, cities like Udaipur, Jaipur, Jodhpur, Jaiselmer, and Agra have palaces that adorn such magnificent halls. The Mughal Emperor Akbar had two halls; one for his ministers and the other for the general public. Usually Durbar halls are lavishly decorated with the best possible materials available at the time.

- In the south of India, the Mysore Palace had a number of such halls, especially the Peacock Hall, having colour tinted glasses imported from Belgium, which were used for marriage ceremonies. The Durbar Hall in the Khilawat Mubarak, in the city of Hyderabad, Andhra Pradesh, was the durbar hall of the Nizams of Hyderbad.

- Beneath the main Dome of the RastrapatiBhavan (Presidential Palace of India, today) is present the grand Durbar Hall, where many state functions, presided by the President of India, are held.

Emperor Shah Jahan and Prince Alamgir (Aurangzeb) in Mughal Court, 1650

1. The name of the organisation.

2. Day, date, and time.

3. Place of the meeting. i.e. the address and the specific room/hall

4. Purpose of the meeting and, if possible, the Agenda.

5. Date of circulation and conveners'/ secretary's signature

Public companies and many registered voluntary organisations use a legal form of notice for general body meetings. The notice is accompanied by the agenda for the present meeting and the minutes of the previous meeting. The notice of the meeting must be sent well in advance. Usually, at least seven days' notice should be given to all the members attending the meeting. If members are located at far away distances, a longer notice (i.e., at least 21 days' notice) should be given.

Example: 1. Notice Calling Board Meeting:

SUPER CEMENTS CORPORATION LTD

ANNASALAI

CHENNAI- 600 002

NOTICE OF BOARD MEETING

1St December 2017

Dear Sir/Madam,

Notice is hereby given that a meeting of the Board of the Company will be held at Registered Office of the Company on Friday, 8th Dec. 2017 at 10.a.m. Agenda for the meeting is enclosed. You are requested to make it convenient to attend the meeting.

Yours faithfully,

R.D. Babu

Secretary

Agenda of the Meeting:

Agenda of the Board meeting to be held on 8th Dec.2017 at 10 A.M. at the company's

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Registered Office.

1. Confirmation of the minutes of the meeting held on 3rd Nov. 2017.

2. Matters arising out of Minutes.

3. Opening of a Current account with the Bank of India, Triplicane, Chennai.

4. Placing orders for new machinery.

5. Consideration of the Report of Mr.R.Ramesh, Managing Director on his recent visit to Germany and his discussion with the technical collaborators.

6. Confirmation of the circular resolution dated 9th Nov. 2017.

7. Any other matters with the permission of the Chair.

8. The fixation of date and time for the next meeting of the Board.

Example: 2. Notice Calling Executive Committee Meeting:

<div align="center">

SEVEN HILLS CO-OPERATIVE SOCIETY

SUNDAR NAGAR, COIMBATORE

NOTICE OF MEETING

</div>

1St December 2017

Dear Sir/Madam,

The 44th meeting of the Executive Committee will be held at 8.00p.m. on Thursday, 21St December 2017 in Sanket Auditorium. The agenda is given below.

44.01 Confirmation of the Minutes of the previous meeting

44.02 Appointment of a new watchman

44.03 Celebration of Kojagiri

44.04 Donation for flood relief

44.05 Permission to sell Plant

<div align="center">172</div>

44.06 Defaulting members

44.07 Purchase of a generator

44.08 Any other matters with the permission of the Chair.

You are requested to attend the meeting.

(Mr. Rajan)

Executive Secretary

CC to all members.

10.2.2. Agenda:

Agenda means things to be done. It is also called as business or order of business to be discussed during the meeting. According to Rajendra Pal and Korlahalli, "Agenda is document that outlines the contents of a forth coming meet".

It is programme schedule of the meeting and prepared by convenor or secretary in consultation with chairperson and his approval and sent along with the notice of the meeting in order to enable the members to come prepare for discussion during the meeting. An agenda

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begins with the call to order meeting and ends with postponement of the meeting. It should cover the following.

1. Reading and approval of minutes of the last meet

2. Matters arising out of previous meet's minutes

3. Apologies from absent members.

4. Condolences if any

5. Urgent and non-controversial items

6. Matters requiring closer discussion and debates

7. Any new, on-the-spot items with the approval of the chairman

8. Date of next meeting

9. Vote of thanks to the chairman.

Example : 1. Agenda of Annual General Meeting:

SUYASH COOPERATIVE SOCIETY

PUNE

Agenda For The 44thAnnual General Meeting Dated 15.12.2017

1. To confirm minutes of 43rd meeting (1.11.2017), copy enclosed.

2. To sanction loans to eligible applicants (copies of applications to follow).

3. To review the working of Canteen Committee.

4. Presentation of annual reports.

5. Any other matter with the approval of the Chair.

6. Date of next meeting.

(D.J. Raj Kapoor)

Secretary

Example: 2 Agenda of Board Meeting:

ALLIED SALES CORPORATION

CHENNAI

Agenda of Board Meeting Dated 15th December 2017

1. Confirmation of the Minutes of the last meeting

2. Matters arising from the minutes

3. Financial irregularities in Dharwar branch

4. Reorganisation of work in Bengaluru branch

5. Any other business

6. Date of next meeting

(S.N. Mittal)

Secretary

Importance or necessities of Agenda:

The necessities or importances of agenda are follows:

a. As it is circulated in advance, it helps the member to come prepared for the meeting.

b. Since agenda has a set order, it help the chairperson to conduct the meeting smoothly.

c. It ensures that only matters relevant to that particular meeting are discussed.

d. It makes sure that every point is properly taken up for discussion.

e. Agenda facilitates the preparation of the minutes

After the Meeting:

10.2.3. Minutes:

Minutes is a record of the decisions taken at a formal meeting. All companies, statutory bodies, social organisations, associations and committees have to maintain a record of the meetings. As minutes are the official record of work done and decision taken at the meeting, it must be precise and clear. Once minutes are approved and signed, it can be even accepted by the court of law as evidence of the proceedings of meeting.

The main objective of minutes is to record, concisely and accurately, the essential work done at a meeting. The minutes of companies and statutory bodies are written in formal style.

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Other organisations may write minutes in informal style. It should contain the following details.

1. The name of the organisation.
2. Day, date, time and place
3. Number in order (e.g. 33rd meeting of …….)
4. Names of chairperson and secretary
5. Names of members present
6. Names of the members absent.
7. Attendees by special invitation, e.g. auditor, caterer, banker, etc.,
8. Record of the transactions.
9. Signature of the secretary after approval of minutes by the chairman.

Archana Literary Society, New Delhi Minutes of Meeting dated 1St August 1999	
Place and Time Meeting	Releasing of President Dr. Mansha khan at A-12 Connaught Circus, 3.10 p.m.
Roll Call	Members present Dr. Mansha Khan (Chairman) Mrs. Padma Raut Col. Devrajan (Secretary) Ms. Dinawaz Kantawala Mr. Bharatendu Jain Mr. Prabhat Kumar Khatri Mr. Amrit Bose Mrs. Amrita Bose
Members Absent:	Dr. Rajan Chhabra
Approval of Minutes of the Last Meeting	The minutes of the meeting dated 25th june were read by the secretary and confirmed.
Treasurer's Report	The treasurer Mr. B. Jain, circulated his report of the earnings and outgoings of the fete held on 10th July, which was accepted.
Briefing for All- India Poetry Meet	The President Dr Mansha khan briefed the members about their roles in the forth coming All India Poetry Meet at the Red.

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Induction of New Members	The membership applications of four applicants- Dr. D.K. Dawani Ms. Snehlata Sharma Mr.L.K. Gosai and Mrs. Geeta Harivanshi were accepted. The application of Prof. F.F. Guha was held in abeyance owing to invalid recommendation.
Sub-committee for Publication Unit	A sub-committee of three members - Mr. Devrajan Mr. Amrit Bose Mrs. Amrita Bose was set up for launching a publication unit.
Data of Next Meeting	The next meeting was schedule for 15th September.
	Col. Devrajan Secretary

Meaning of E-form:

e- form is a electronic paper document generated from the computer. many companys are in the problem of reviewing their office documentation and ways of converting their use of data, forms and other paper based processes to electronic or digital online processes.

Some of e- forms used in connection with meetings or stated below:

E-Forms to be Filed for Filing ROC Return

S.No.	Name of E-form	Purpose of E-form	Applicability on Company
1.	Form ADT-1	Appointment of Auditor	Private Company, Public Limited Companies, Listed Company, One Person Company
2.	Form AOC-4 and Form AOC-4 CFS (in case of Consolidated financial statements)	Filing of Annual Accounts	Private Company, Public Limited Companies, One Person Company

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3.	Form AOC-4 (XBRL)	Filing of Annual Accounts in XBRL mode	Listed companies in India and their Indian subsidiaries (or) a public company With paid up capital >= 5 crores (or) With turnover>=100 crores
4.	Form MGT-7	Filing of Annual Return	Private Company, Public Limited Companies, Listed Company, One Person Company
5.	Form CRA-4	Filing of Cost Audit Report	Companies prescribed as per The Companies (Cost records and Audit Rules), 2014 amended from time to time.
6.	Form MGT-14	Filing of resolutions with MCA regarding Board Report and Annual Accounts	Public Companies and Listed Companies (Exempted for private companies)

Do You Know?

- An employee, on an average, spends two years of life attending work meetings.
- 37-45 % of Employees' spend their time in meetings.
- 42% of meetings are unproductive according to a Wharton study.
- 50% of time meetings are wasted according to a Hardvard study.
- 25% of meetings happen out of habit rather than need.
- Agenda items take up 53% of the scheduled time.

10.3. REPORT WRITING:

Every organisation has a routine practice of reporting on the progress and the status of different activities for taking sound business decisions.

Reports may be written by an individual or an organized body,e.g. a Committee or Sub- committee or Board of Inquiry, at regular intervals either on usual routine or on special occasions after a special inquiry conducted by them as per the directions of their superiors.

Reports are often submitted by the managers, secretaries, accountants, chief executives

and experts in certain fields are often required to submit reports on important issues like decline in sales, the suitability of some premises, the reorganisation of office, the chances of variation in profits, the desirability of setting up a new branch, etc.

10.3.1. Meaning of Report:

A report is a logical presentation of facts and information. It is self-explanatory statement which provides information to management for decision making and follows up actions. Report is a systematic presentation of established facts about a specific event/subject and is a summary of findings and recommendations about a particular matter/problem.

10.3.2. Definition:

According to **Oxford English Dictionary** a report is defined as "an account given on a particular matter, especially in the form of an official document, after thorough investigation or consideration by an appointed person or body". Example "the chairman's annual report".

10.3.3. Types of Report:

Reports may be 1. Routine Reports 2. Special Reports 3.Formal Reports and 4. Informal Reports.

1.   Routine Reports:

Routine reports are prepared periodically by filling the printed forms, to convey information about the progress or status of work. They are submitted at regular intervals or soon after the completion of the task. Following are routine reports.

a)   **Progress Report:**   This report gives information about the progress of a project or a task which is in the process of being completed, such as construction of a building or manufacture of products.

b)   **Inspection Report:** It is submitted as soon as inspection is carried out. It is necessary for finding out any irregularities or changes from standard practice, in day-to-day work. Example internal audit report submitted by an internal auditor.

c)   **Performance Appraisal:** It is meant for measuring and recording the performance of an employee. Every supervisor has to fill an assessment report for each of the subordinates annually to evaluate the performance of individual employees. It also gives feedback to the employees on their performance.

d)   **Periodical Report:** This is prepared by departmental heads at regular intervals on the working of a section or a department to measure the efficient functioning of each department.

2.   Special Reports:

Special reports are prepared when a special situation or problem arises. An individual or a committee of persons, who have knowledge and understanding in the field, is appointed to investigate and study a specific problem, collect relevant information, and make suggestions to help the management for decision making. Following are some of the special reports prepared in the organisation.

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a) **First information Report (F.I.R.):**This report is required when there are sudden accidents occurs like fire accident, building collapse, robbery etc. It is prepared by the person in charge on the spot, and submitted to higher authorities for their deliberation. For example report prepared by the branch manager about fire accident occurs in branch office to Regional Office or Head Office for immediate action. The report has to give all the information which is available immediately after the incident occurs such as nature of loss, extent of destruction, time of accident etc.,

b) **Investigation Report:** It is prepared after making a thorough inquiry on some specific situations. An investigation is made when there is a problem and the management needs to find out the causes of the problem, and also the suggestions for solving it. Example, reports on falling sales, declining deposits in a bank, many customer complaints, losses in a branch, etc.,

c) **Feasibility or Survey Report:** This report is prepared when an organisation intends to launch a new product in the market, introduce a new service, or make any major changes that may affect the company's customers.

d) **Project Report:** This is written after the initial survey has been completed on the research project. It describes the proposal as project to be completed in future by showing the cash flow and expected results. It is used for planning and also for convincing others, especially

sanctioning and funding authorities like government departments and banks.

3. **Formal Reports:**

A formal report is prepared in the prescribed or standard form and is presented according to the established procedure and through the proper channel. Reports submitted by officials or committees of organised bodies (e.g., Companies, Co-operative Societies, Local Bodies, etc.) are usually formal reports. It may be Statutory Report or Non-statutory Report.

(a) **Statutory Report:** Statutory report is one which is prepared by secretary or directory or auditor under the provisions of specific law. E.g., Auditors Report, Directors Report, Inspection committee Report Etc.,

(b) **Non-Statutory Report:** Non- statutory reports are those which are not required under the provisions of any law, but have to be prepared to help top managers for the efficient control and organisations of the business.

4. **Informal Reports:**

Informal reports, on the other hand, do not follow any prescribed form or procedure. It is usually takes the form of a person-to person communication and may even be set up in the letter form.

10.3.4 . Layout Of Report:

Lay out of the report deals with arrangement and presentation of information in the report. The main

purpose of report is to help the receiver to identify the facts relating to the subject under study, draw his own conclusions and take suitable action based on the conclusions and recommendations. In order to achieve its purpose the report must not only be clear, concise and logical but must also be drafted according to a recognised form and arrangement.

It is however, difficult to lay down a specific set of rules for preparation of reports. Except statutory report, the nature, length and style of a report must vary with the circumstances of the case. Following are the general arrangements of content in case of formal and special reports.

a) **The Heading or Title:** A report must always have a title indicating the subject of the study, the period and the location of the study. A long report has a full title page which gives the title, the name of the person who assigned the report and the name of the person or group who prepared the report, with month and year of submission. In a short report the title appears at the top of the first page, before the text of the report.

b) **Table of Contents:** Table of contents is a list of chapters or topics contained in the report. The serial number, title and page mark of each topic is given.

c) **Body of the Report:** It is a main part of the report and is made up of the following sub-section, sub-headings or sub-titles. The body is divided into the following parts:

i) **Introduction:** It contains the terms of reference and the subject of study. Here the writer analyses the problem chosen by him in the light of the terms of reference and the relevant circumstances.

ii) **Development or Findings:** In this part the writer presents the facts and data collected with reference to his study along with the outcome of his study. The data collected may include charts, graphs and statistical tables from other published reports and presented in an organised form with heading and sub-heading for better understanding of the reader.

iii) **Conclusions or Recommendations:** In this portion the writer draws up some definite conclusions on the basis of the facts and data presented after considering all aspects of the problem in hand. He then puts forward some strong suggestions or recommendations of his own.

iv) **Appendix:** It is supplementary material given at the end of the report. This may be a copy of a questionnaire used, or plans of buildings, maps or other materials which is referred to in the body of the report.

v) **References and Bibliography:** In case of long reports, the reporter had to conduct an extensive research for the preparation of the report. Under such studies, it is practice to add a list of references and bibliography just after the appendix to indicate the sources from which the writer has drawn his materials for the report.

vi) **Index:** Index comprises of contents of the report and usually added after the bibliography. It is generally found in long reports.

vii) **Summary:** It contains the essence of findings and recommendations of the report and usually appended to facilitate its consideration by the person or superior body to whom it is submitted.

viii) **Signature:** All reports should be dated and signed. If it is prepared by a committee or sub-committee and the report is common, it should be signed by the chairman. If it is prepared by an individual, it has to be signed by the reporter.

10.3.5 Quality of the Good Report:

A lot of reports are written daily. Some of them are intended to document the progress of some activities i.e., feasibility reports, investigation reports, some of the reports are for monitoring purposes, some are evaluation reports but it is clear that all the reports have some objective and purpose behind it. That objective and purpose can only be achieved if a report has following features or characteristics:

1. **Precise:** The purpose of the report should be clearly defined. Precision of a report provides the unity to the report and makes it a valuable document for best usage.

2. **Accuracy of Facts:** Information contained in a report must be based on accurate fact. Since decisions are taken on the basis of reported information,

any inaccurate information or statistics will lead to wrong decision. It will cause delay in achieving the organizational goal.

3. **Relevancy:** The facts presented in a report should be relevant. Irrelevant facts make a report confusing and likely to mislead decision making.

4. **Reader-Oriented:** A report is read by various stake holders. A good report is always reader oriented. Reader's knowledge and level of understanding should be considered while writing the report. If the report is reader-friendly, it is easy to read, remember and act on it.

5. **Simple Language:** A report should be written in a simple language, avoiding jargons and technical words for easy and clear understanding. The message of a good report should be self-explanatory.

6. **Conciseness:** A report should be brief and not be very long. Lengthy reports affect the reader's interest. Rather it means that a good report is one that transmits maximum information with minimum words and completes in all respects.

7. **Grammatically Accurate:** A good report should be free from grammatical errors. Any faulty construction of a sentence may make its meaning different to the reader's mind and sometimes it may become confusing or ambiguous.

8. **Unbiased:** Recommendations made at the end of a report should be impartial and objective. It shall not be biased with

the personal feelings of the reporter. They should come as logical conclusion for investigation and analysis.

9. **Clarity:** Clarity depends on proper arrangement of facts. A good report is absolutely clear. Reporter should make its purpose clear, define its sources, state its findings and finally make necessary recommendation. Clarity of

facts enhances the quality of the report.

10. **Attractive:** A good report needs an attractive presentation. Structure, content, language, typing and presentation style should be well designed to make a good impression in the mind of its reader.

Points to be Remembered:

- Meeting is face to face interaction between people.

- Documents to be filed before the meeting includes Notice and Agenda and after the meeting include Minutes.

- Notice is intimation about the conduction of the meeting.

- Agenda is Programme schedule of the meeting.

- Minutes deals with matters discuss during the meetings.

- e-form is aelectronic paper document generated from the computer.

- Report is a logical presentation of facts and information.

- Report may be Formal or Informal and Routine or Specific.

- Lay out of the report deals with arrangement and presentation of information in the report.

- A good report should be precise, simple, accurate, relevant, unbiased, clear and free from grammatical errors.

Part - A

RJG411

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1. Face to face discussion between people is called as -------------

   a. Meeting   b. Observation

   c. Interview   d. None

2. A document intimating the date, time and place of the meeting is called ----------------

   a. Agenda   b. Notice

   c. Report   d. Minutes.

3. Notice should be given to all the members' atleast------------ days before the meeting.

   a. 10   b. 15

   c. 7   d. 20

4. --------------- is the programme schedule of the meeting.

   a. Report   b. Notice

   c. Minutes   d. Agenda

5. Agenda is prepared by ------------ in consultation with chairperson.

   a. Secretary   b. Director

   c. General Manager   d. None.

6. ------------------is a electronic paper document generated from the computer.

   a. Report   b. e-form

   c. Invoice   d. Notice.

7. ------------ is a logical presentation of facts.

   a. Agenda   b. Minutes

   c. Report   d. e-form

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8. A Report on day-today- activities is called ------------

a. Formal Report   b. Special Report

c. Routine Report   d. Informal Report.

9. Report on performance of an employee is known as -----------------.

a. Progress Report   b. Inspection Report

c. Periodical Report   d. Performance   Appraisal Report.

10. ---------------- is a report prepared after specific investigation.

a. Special Report   b. Statutory Report

c. Routine Report   d. Formal Report.

11. A report submitted on sudden accidents in a company is ---------------.

a. Survey Report   b. Investigation Report

c. First Information Report   d. Project Report.

12. A report on new product (or) new service is called ---------------.

a. Project Report   b. Survey Report

c. FIR   d. Investigation Report.

13. Arrangement and presentation of information in a report is called-------------.

a. Quality   b. Feasibility

c. Layout   d. None.

Part - B

II.   Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1. Define Meeting.
2. What is Meeting?
3. What is formal Meeting?
4. Write note on Notice calling meeting.
5. State the contents of notice calling the meeting.
6. Define Agenda.
7. Write briefly about Minutes.
8. Name few e-forms relating to meeting.

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9.   What is report?

10.   Define Report.

11.   Explain Routine Report.

12.   What is Special Report?

13.   Write note on formal and informal report.

14.   What is statutory report?

15.   Explain the term FIR.

16.   What is Survey Report?

17.   Write briefly about Statutory report.

18.   What is layout of Report?

Part - C

III.   Short answers:

Answer in one page.   **(5 Marks)**

1.   What is Notice calling the meeting? What are its Contents?

2.   What is Agenda? What are its contents?

3.   State various e-forms generally used in office in relation to meetings.

4.   What is Minutes? What are its contents?

5.   Explain briefly the various types of Routine Reports.

6.   What is Special Report? What are its types?

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1.   Explain briefly various documents to be prepared in relation to meeting.

2.   Discuss briefly the various types of Reports.

3.   Explain the components of layout of Report.

4.   State qualities of Good Report.

Teachers Activity:

- Teacher should guide the student in preparing Notice, Agenda, and Minutes on mock meetings and Model Reports.

Students Activity:

- Students can be asked to draft Agenda and Minutes and download various e-forms used in relation to meetings.

- Students can be instructed to prepare Model Report on day-to-day Business activities.

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GLOSSARY

1	Agenda : A list of items to be discussed at a formal meeting.
2	Apology : A regretful acknowledgement of an offence or failure.
3	Appendix : A section or table of subsidiary matter at the end of a book or document.
4	Bias : Prejudice for or against one person or group, especially in a way considered to be unfair.
5	Bibliography : A list of the books of a specific author or publisher, or on a specific subject.
6	Brainstorming : A group problem-solving technique in which members spontaneously share ideas.
7	Chairman : A person chosen to preside over a meeting.
8	Collapse : An instance of a structure falling down or giving way.

9	Concise : Giving a lot of information clearly and in a few words; brief but comprehensive.
10	Condolences : An expression of sympathy, especially on the occasion of the death of a person's relative.
11	Consensus : A general agreement.
12	Consultation : The action or process of formally seeking advice.
13	Controversial : Giving rise or likely to give rise to public disagreement.
14	Convenor : Caller of meeting.
15	Demonstration : An act of showing that something exists or is true by giving proof or evidence.
16	Evaluation : Making of a judgement about the amount, number, or value of something; Assessment.
17	Feasibility : Capable of being done.
18	Gatherings : An assembly or meeting, especially one held for a specific purpose.
19	Index : An alphabetical list of names, subjects, etc. with reference to the pages on which they are mentioned.
20	Inquiry : An official investigation.
21	Intermediary : A person who acts as a mediator.
22	Intimation : The action of making something known, especially in an indirect way.
23	Investigation : A formal inquiry or systematic study.
24	Jargons : Special words or expressions used by a professionals that are difficult for others to understand.
25	Launch : Start or set in motion (an activity or enterprise).
26	Meetings : An assembly of people for a particular purpose, especially for formal discussion.
27	Minutes : A short note on discussions of meeting.
28	Monitor : Observing a process or activity to check that it is carried out fairly in an official capacity.
29	Precise : Exactness and accuracy of expression or detail.
30	Statutory Bodies : An organization with the authority to check that the activities of an organization are legal.
31	Strategies : A plan of action designed to achieve a long-term or overall aim.
32	Supplementary : Completing or enhancing something.
33	Virtual : Practical, near, essential, implied.
34	Vital : Absolutely necessary; Essential.
35	Voluntary : The operation of unforced choice: A wilful or Deliberate act.

Content:

Introduction – Definition of Public Relation – Importance of Public Relation - Role of Public Relation- Public Relation Manager - Function of Public Relation Manager – Qualities of Public Relation Manager – Qualifications of public relation Manager.

Learning Objectives

- To know the various modern office procedures relating to Public Relations.

- To know the definition of corporate public relation.

- To gain information about public relation manager.

Introduction:

An organization is a social institution. Its functioning depends mainly on the stakeholders. The practice of maintaining a healthy relationship between organization and its public/employees/investors/partners is called public relations. Public relation activities ensure the correct flow of information between the organization and its public also called its target audience. It promotes goodwill and communication between the organization and stakeholders.

Regardless of how effective an organization is, it doesn't have the desired impact if the public and consumers are not aware of the business's brand, successes or contributions. A public relations campaign educates and informs people about the contributions of the organization, enhances its brand recognition and makes it more relevant in the public eye.

11.1. Definitions:

The chartered Institute of Public Relation, London defines Public relation as "The planned and sustained effort to establish and maintain good will and mutual understanding between an organization and its public".

According to the **Public Relations Society of America** "Public relation helps an organization and its public to adapt mutually to each other. Public relation is an organization effort to win the co-operation of group of people. Public relation help an organization to effectively interact and communicate with their key public".

"Public relations is the attempt by information, persuasion, and adjustment to engineer public support for an activity, cause, movement or institution" – **Edward L. Bernays (1891-1995)**

"Public relation is the management function which evaluates public attitudes, identifies the policies and procedure of an

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individual or an organization with public interest and executes a programme of action to earn understanding and acceptances". – **Denny Griswold.**

This indicates to us about the mutual adaptation and the organization's interest in public co-operation.

Do You Know?

- The establishment of the "Publicity Bureau" in 1900 as the start of the modern public relations (PR) profession. Of course, there were many early forms of public influence and communications management in history.

- Basil Clarke is considered the founder of the public relations profession in Britain with his establishment of Editorial Services in 1924.

- Propaganda was used by both sides to rally domestic support and demonize enemies during the First World War.

- PR activists entered the private sector in the 1920s. Public relations became established first in the US by Ivy Lee or Edward Bernays, then spread internationally.

- Many American companies with PR departments spread the practice to Europe after 1948 when they created European subsidiaries as a result of the Marshall plan.

11.2. Importance of Public Relations:

1. Enhancing Media Relations:

Public Relations create editorial contacts, disburse news releases and emerge as a top news source by offering guest posts, editorials and engage in media forums. Publicity plays a crucial role in media relations.

2.Improved Relations with Employees:

Public Relations through newsletters, meetings, events, and programme help the management to speak with internal audience in an excellent way to display their commitment to do the right thing.

3. Better Engagement with Community:

It is essential that an enterprise strengthens relations in the domestic market by linking collaboration with local groups, joining charitable endeavours, spending funds on causes and projects that prove beneficial for the community. When a start-up understands the relevance of building community relations, it helps in enhancing visibility and positioning of the brand.

4. Improving Ties with Industry:

Every business, irrespective of its size, should join industry associations and take part in industry initiated events and work in preferred business arena to push their visibility. Emerging as a known name helps in expanding credibility among colleagues and audiences.

5. Strengthening Ties with Government Bodies/Officials:

Public relation helps the enterprise to have favourable relationships and tie-ups with the key government officials.

6. Crisis management:

Any negative news about the enterprise may hamper its image. One of the essential benefits of Public Relation is its ability to manage crisis situations and resolve complex issues effectively.

11.3. Benefits of Public Relations:

Public Relations offer the following benefits.

1. Innovation:

Through public relations initiative, business innovations can attract attentions of investors and potential business partners. Regular forms of communication by way of news articles, public presentations, and service on expert industry panels establish a small business's place in their industry's spotlight. This positive perception can help improve overall effectiveness by demonstrating the company's ongoing successes.

2. Charitable Work:

When the general public is aware of business's charitable contributions and community support, it can make it more interested in patronizing the business. For example, a public relations outreach effort that notifies the community about cash donation to a local school paints the business as a good corporate citizen. This can help elevate an image of trust and respect, which can translate to a better overall perception of a company.

3. Economic Impact:

Regularpublicity of a company's earnings, job creation and overall economic impact can help establish it as an important part of a city's economic engine. For example, releasing quarterly employment figures or contributing to economic development reports is an effective way to show the benefit the company brings to the community. This can raise awareness of the importance of the organization and better position for expansion funding and business-to-business opportunities, and even make it be seen as a viable employer.

4. Internal Perceptions:

Internal public relations campaigns have the potential to boost staff morale, improve communications and motivate employees. Public relations efforts that keep all employees in the loop about company activities and strategic plans and invite feedback can get significant buy-in from employees. This can make them more supportive to the company's efforts and more effective in performing their jobs.

11.4. Role of Public Relation – Internal and External:

The corporate image is not earned overnight. It is a long drawn process based on several factors form good policy in the interest of public to better customer service. Good image is always over a period, public relations with its persuasive techniques and messages must endeavour the reach

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to all the public, the employees, customer, or union leaders, regulatory government bodies and the media who have the most accurate possible corporate image.

Public relations can play a vital role to build the reputation of a company based on its vision, mission, goals and performance. Public relations practice the discipline concerned with the reputation of an organization (or products, services or individuals) with the aim of earning, understanding and support.

Corporate public relations programme either for internal publics or for external publics must be based on a strategic planning to reach all segments of public with good deeds. As a part of integrated public relations communication, various media and tactics have to be used to achieve the following communication objectives:

1. Awareness of the company

2. Customer needs and services.

3. Corporate image and reputation

4. Stake holders reputation.

Fig. 11.1. Public Relations

11.5. Public Relation Manager:

Good managers are not born but made. They are fashioned by experience of business, education, training and the relative of the work place. A public Relation Manager is the spokesperson of an organization.He may also be called as public relations specialist or public information officer. As he crafts positive public images for the organization that employ him by gaining favourable media coverage, he is also considered as Media Specialist. .

The general principles of management are applicable to public relations discipline also.

Fig. 11.2. Public Relation Manager

11.6. Functions of Public Relation Office:

The job profile of a public relations manager are not clearly defined as approved by CEO. However, there are some public relations departments which have clear cut functions.

The 10 key tasks that public relations managers will do as follows.

1. **Planning:** Endlessly the public relations professionals plan, determine the objectives and needs, priorities,

desirable ends, targets for the public relations messages, time frame and cost, etc., with their focus on the importance of ethics. Public relations personnel have often taken the lead in the establishment of code of conduct, ethics in many areas of national and international business and industry. Therefore planning is the first task of a public relations manager.

2. **Managing:** Public relations are a strategic management function. Public relations managers should be able to administer the overall Public relations Programme to ensure that it runs on time, within budget, and ends up with a successful record of achievement. It is important to recognize the need to hone up management skills as much as to develop the operational public relations skills.

3. **Maintaining Relations:** Public relations manager should maintain relationship with journalists, technical experts, politicians, academics, opinion formers of one sort and another, with the employees, customers of the organization concerned, with charitable institutions, community leaders and so on. All Public relations communications should be to some agreed and identified purpose which helps to achieve the overall objectives in due course.

4. **Organizing:** Public relation managers arrange for conferences, annual general meeting, press tours, anniversary celebration, and also organize events related to media and image building. Hence organizing is considered as prime responsibility of public relations managers.

5. **Writing:** They write news releases, newsletters, letters of all sorts, to groups which include opinion formers and journalists. They write reports, speeches, copy of booklets, posters, radio and television scripts, trade paper articles, magazine articles letter to the editor, etc. They become sometimes ghost writers for clients CEOs.

6. **Editing:** They not only write but also edit inhouse journals, newsletters, reports to shareholders, and letters written by their peers. Editing of corporate publication is an important task of public relations managers.

7. **Production:** Writing and editing is an aspect while productions are another area. Public relations professionals have the responsibility for welding together many aspects of communication involving the use of print, photography, design, art, audio and video materials, so that these are created into communication tools which are needed to transmit the messages relevant to the job. Production of folders house of journals, posters, films, audio visuals is the job of public relations professionals.

8. **Public Speaking:** Public speaking is an essential quality for public relations managers. They speak at meetings, presentations, press conferences, in front of television cameras, on radio shows, at private and public function of one sort or another. Public relations practitioners therefore, adopt interpersonal media and spoken words for effective communication.

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9. **Gathering of Information:** The main job of public relations practitioners is gathering of intelligence information; and they have to be good at it. He is the source of organizational information which has to be gathered, stored and disseminated.

10. **Training:** As part of training, public relation managers have to create PR conscious in every employee of the company. Public relations for non-public relations people have to be organized to educate them. Organizing in-house public relations training is the responsibilities of PR managers.

11.7. Qualities of Public Relation Manager:

The qualities of Public relation manager are given below:

a) Self-realisation.

b) Integrity coupled with ability to get along with all kind of people.

c) Ability to use imagination in designing public relations programmes.

d) Ability to advice management and interpret organizational environment.

e) Genuine interest in people around and patience.

f) Positive mindset and ability to face challenges unfaced.

g) Inspiring leadership qualities and role model.

h) Empathy and responsiveness to the problems of people.

i) Lifelong learning process.

j) Ethical and Spiritual values.

11.8 Qualifications of Public Relation Manager:

No set qualifications are required to become a Public Relation manager, but most of the managers tend to have a degree. There are few specific Public Relation degree courses available, and entry to the profession is generally open to all graduates. However, as this is one of the most popular careers, knowledge in the following field may be particularly helpful:

• Business/Management;

• Communication and Media studies;

• English and creative writing;

• Marketing;

• Politics;

• Social Sciences.

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Points to be Remembered:

- Public relations.
- Definitions "Public Relations is a combination of philosophy, sociology, economics, language, psychology, journalism, communication and knowledge in other relevant field into a system of human understanding". Herbert. M. BAUS.
- Role of Public Relation.
- Public Relation Manager.
- Functions of PR. Manager.
1. Planning
2. Managing
3. Maintaining Relation
4. Organizing
5. Writing
6. Editing
7. Production
8. Public Speaking
9. Gathering of information
10. Training
- Qualities of PR Manager.
- Qualifications of PR Manager.

Evaluation

Part - A

OBJECTIVE TYPES:

I. Choose the correct answer: **(1 Marks)**

1. ------------------ is an organization effort to win the co-operation of groups of people.

   a) Publicity
   b) Public relations
   c) Advertising
   d) None of the above.

2. Public relations is often used as a synonym for --------------------------

   a) Publicity
   b) Media
   c) Information
   d) Press releases.

3. The corporate image is not earned --------------------------

   a) One month
   b) Within short period
   c) Long drawn process
   d) None of the above

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4. Public relations can play a vital role to build the ------------------------ of the company.

    a)   Awareness of   b)   Production

    c)   Culture   d)   Reputation of a company.

5. Public speaking is an essential quality for public relation---------------------------

    a)   Auditor   b)   Officer

    c)   Manager   d)   Secretary.

Part - B

II.   Very Short Answers:

Answer in Five lines.   **(3 Marks)**

1. Define public relations. (PR)

2. What are the four communication objectives?

3. Who is public relation manager?

4. What is public relation?

Part - C

III.   Short answers:

Answer in one page.   **(5 Marks)**

1. What are the qualities of public relation manager?

2. State the qualifications of public manager.

3. What are the benefits of public relations?

4. State the importance of public relations.

Part - D

IV.   Essay type questions:

Answer within three pages.   **(10 Marks)**

1. State briefly the role of public relations.

2. What is public relation? What are its benefits?

3. Define public relations. Explain the importance of public relations.

4. Explain functions of a Public Relation Manager.

5.   Who is public relation manager? What are his qualities?

ACTIVITY

Teachers Activity:

- Arrange role play among students.

- Discuss the strories of successful Public Relation Manager in the classroom

Students Activity:

- Prepare charts on modern office procedures related to public relations.

- Submit assignments on the role of public relation manager.

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2. www.managementstudyguide.com/importance-of-public-relations-experts.html

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4. https://study.com/articles/Public_Relations_Officer_Job_Duties_and_Requirements.html

GLOSSARY

1	Arena : A level area surrounded by seating, in which sports, entertainments, and other public events are held.
2	Campaign : An organized course of action to achieve a goal.
3	Collaboration : Team work toward a common end: coaction, cooperation, synergy.
4	Endeavour : A purposeful or industrious undertaking / An attempt to achieve a goal.
5	Enhance : Intensify, increase, or further improve the quality, value, or extent of.
6	Ethics : Moral principles that govern a person's behaviour or the conducting of an activity.
7	Goodwill : Reputation of the company.
8	Hamper : A restraint that confines or restricts freedom.
9	Morale : The confidence, enthusiasm, and discipline of a person or group at a particular time.

10	Patronize : Treat with an apparent kindness which betrays a feeling of superiority.
11	Perception : The way in which something is regarded, understood, or interpreted.
12	Persuasion : The action or process of persuading someone or of being persuaded to do or believe something.
13	Stakeholder : A person such as an employee, customer, or citizen who is involved with an organization, society, etc. and therefore has responsibilities towards it and an interest in its success.
14	Statt-up : The act of founding or establishing: constitution, creation, establishment.
15	Sustain : Cause to continue for an extended period or without interruption.
16	Tactics : An action or strategy carefully planned to achieve a specific end.

Office Management and Secretaryship

Marks : 90

Duration : 2. 30 hrs.

PART – A

Answer all the questions: Marks : 15

I. Choose the best Answer:

1. ------------------------ is the one of administrative function of an office.

    a) Receiving information   b) Arranging information

    c) Recording information   d) Planning and Organising

2. An office manager is ------------------------ of an office.

    a) Director   b) Supervisor

    c) Secretary   d) Administrative head.

3. --------------------------- provide satellite communication, video teleconferences for inter- company use.

    a) Automation office   b) Several modern office

    c) Traditional office   d) Back office.

4. ---------------------------- is usually allotted to the top executives of the organization.

    a) Open office   b) Private office

    c) Modular office   d) Cubicles

5. What are the raw materials needed for an office work?

    a) Stationery   b) Typewriters

    c) Office forms   d) Paper fasteners.

6. The ------------------------ stage deals with preserving valuable documents and doing away with unnecessary expired documents.

    a) Storage stage   b) Creative stage

    c) Disposal stage   d) retrieval stage.

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7. ------------------------------- is a private network that is connected within an organization.

a) Internet   b) e-mail

c) Website   d) Intranet.

8. Office Manual is in the form of ----------------------------------.

a) Report   b) Diagrams

c) Circular   d) Booklet.

9. Postal Index Number Code (PIN) is a ---------------------------- digit of code.

a) 8   b) 6   c) 10   d) 12

10. The interest on Savings account is now fixed by--------------------------

a) RBI   b) By bank itself

c) President   d) Governor.

11. ------------------------ is a logical presentation of facts.

a) Agenda   b) Minutes

c) Report   d) e-form

12. Public relations is often used as a synonym for ------------------------.

a) Publicity   b) Media

c) Information   d) Press releases.

13. Automation increases the ----------------------------.

a) Productivity   b) Sales

c) Purchases   d) Turn over.

14. ----------------------------- can be described as the core of records managements.

a) Indexing   b) Filing

c) Record Keeping   d) Storage.

15. An -------------------------- is an extension of credit from lending institution when an account reaches zero.

a) Loan   b) Cash credit

c) Overdraft   d) Cash Receiving.

PART – B

II. **Answer any TEN of the following in brief: (Note: Question No. 27 is Compulsory)** **Marks: 10x3 = 30**

16. Define Modern Office.

17. Write a short note on e-Payment.

18. What is meant by Office accommodation?

19. What is the form sets?

20. What is meant by subject-wise classifications?

21. List out few basic internet terms.

22. What is meant by flow of work?

23. Name two types of mail.

24. Define Bank.

25. What is meeting?

26. Who is Public Relation Manager?

27. What are the classifications of Modern equipments used in office?

28. What are the documents to be prepared before and after meetings?

PART - C

III. **Answer any FIVE of the following questions: (Note: Question No. 34 is Compulsory)** **Marks: 5 x 5 = 25**

29. Explain the various types of office.

30. What are the objectives of Automation?

31. Differentiate Open office and Private office.

32. What is Vertical filing? Bring out the merits and demerits of this method.

33. Write briefly about Video call.

34. What is Agenda? What are its contents?

35. What are the qualities of public relation manager?

IV. **Answer all questions:** **Marks: 2x10= 20**

36. Elaborate the functions of Modern office in detail.

(or)

What are the factors to be considered in forms designing? Explain it in detail.

37. What is data processing? Describe various modes of data processing.

(or)

Write down the procedure for opening the bank account.

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