



**CERTIFICATE IN  
EXECUTIVE SECRETARYSHIP**

**MODULE LEARNING GUIDE**

**FOR**

**SECRETARIAL PROCEDURES  
*SUBJECT CODE: CES 105***

## Version 1: JANUARY 2007

### 1) INTRODUCTION

Secretarial Procedures serves to introduce to students the basic elements of office procedures and of understanding the roles and responsibilities of a secretary in the office. The students will also obtain knowledge and skills of general office practices and procedures.

### 2) AIMS

This module is designed to provide the learner with the rudiments of office practices and procedures in a business environment especially for those who are to be trained to work in an administrative and secretarial role that demands good secretarial practices.

### 3) LEARNING OUTCOMES

**At the completion of this completion, students will be able to:**

- a) Understand the organizational structure and her roles and responsibilities in the organization
- b) Be familiar with health and safety rules and regulations and to assist in ensuring confidentiality and security of information
- c) Be familiar with the telecommunication system in the office and be able to use the system effectively and efficiently
- d) Be able to handle incoming and outgoing mail
- e) Be familiar with the systems and procedures concerning stationery, stock, purchase and sales of goods.
- f) Improve filing efficiency
- g) Be able to prepare travel arrangements for business trips.

### 4) AUDIENCE AND PRE-REQUISITES

This module does not require students to have any formal understanding of the elements of Office Practices and Procedures.

### 5) OVERVIEW OF THE MODULE

This module will cover the following areas:

- Career Development
- Health and Safety in the office, I & II
- Telecommunication Media, I & II
- Systems and Procedures - Mail Handling
- Systems and Procedures – Stationery and Stock
- Systems and Procedures – Purchase and Sales of Goods
- Filing – System and classification
- Filing – process and equipment
- Travel Arrangements
- Meetings

**6) INSTRUCTIONAL PLAN and RESOURCES**

The base source of material is *Secretarial Duties* by John Harrison –10<sup>th</sup> Edition

**Class Teaching Schedule**

<b>Week</b>	<b>Lecture</b>	<b>Tutorial/ Activities</b>
1	Career Development	<ul style="list-style-type: none"> <li>Describe the concept of an office and an organization explaining the position of a secretary</li> <li>Describe the recruitment expectations and how to apply for a vacancy</li> <li>Identify what is important when being interviewed.</li> <li>Draw up a draft Contract of Employment</li> <li>Draw up an Induction programme for new staff</li> <li>Conduct a mock interview</li> </ul>
2	Health, Safety and Security in the Office - 1	<ul style="list-style-type: none"> <li>Identify the main types of accidents that occur in an office</li> <li>Identify causes of accidents and how to prevent them</li> <li>Take a tour of the premises and count the no. of fire-extinguishers in the college and the no. of fire exits</li> <li>Explain how to use the fire extinguisher and to organise a Talk by a Safety Officer.</li> <li>Organise a Fire Drill</li> <li>Prepare Health And Safety posters</li> </ul>
3	Health, Safety and Security in the Office - 11	<ul style="list-style-type: none"> <li>Take a tour of the premises and look out of health and safety hazards and write a memo to the Principal highlighting your findings.</li> <li>Form 2 groups and each group to present of various ways of achieving confidentiality in the office</li> </ul>
4	Telecommunication Media 1	<ul style="list-style-type: none"> <li>Show the various telecommunication media available in the office such as telephone, fax, email, phone answering machine, videoconferencing, PA System.</li> <li>Give instructions how to use each one and show them as well</li> <li>Teach how to take down messages and what should be included.</li> </ul>
5	Telecommunication Media 11	<ul style="list-style-type: none"> <li>Students to bring to class various brochures and advertisements on telecommunication media now available in the market.</li> <li>Discuss what are phone cards, telephone cards and show students what these are and how to use them.</li> </ul>
6	Systems and Procedures – Mail Handling	<ul style="list-style-type: none"> <li>Obtain some envelopes and papers and prepare a workstation where mail is prepared to be sent off to the post office keeping in mind the various steps</li> <li>Students to bring to class various brochures and advertisements on postal equipment now available in the market.</li> <li>A trip to the post office to see how mail is handled or obtain brochures on postal services</li> </ul>
7	Systems and Procedures – Stationery and Stock	<ul style="list-style-type: none"> <li>Draw out samples of stationery stock cards and requisition forms</li> <li>Explain about ordering and handling and issuing of stock and stationery.</li> <li>Prepare a list of all the stationery items that a secretary would have to order for her office.</li> </ul>

8	Systems and Procedures – Purchase and Sale of Goods	<ul style="list-style-type: none"> <li>To explain the processes involved in business transactions.</li> <li>Give local examples, simple so that they can understand</li> <li>Show them the various documents used in business transactions</li> </ul>
9	Filing – System and Classification	<ul style="list-style-type: none"> <li>Discuss the various types of files that are used and the types of filing systems available.</li> <li>Show students a filing cabinet with drawers, filing on shelves and any other type of filing.</li> <li>Explain how to do filing and the various methods of filing.</li> </ul>
10	Filing – Process and Equipment	<ul style="list-style-type: none"> <li>Explain and show the various filing and indexing equipment</li> </ul>
11	Travel Arrangement	<ul style="list-style-type: none"> <li>Discuss the modes available for business trips.</li> <li>How to get information to book flights, hire cars, book train tickets and other books including hotel reservation</li> <li>Ask students to go on line and make flight reservations.</li> </ul>
12	Travel Arrangement	<ul style="list-style-type: none"> <li>Students to take them to a travel agent's office and obtain sample brochures for overseas trips, itineraries and ticket prices.</li> <li>Prepare an itinerary for a travel trip locally and abroad and state what other information needs to be included</li> </ul>
13	Organizing Meetings	<ul style="list-style-type: none"> <li>Discuss the various types of documents involved in meetings.</li> <li>Discuss arrangements before, during and after meetings.</li> <li>Illustrate the content of notices, agendas and the minutes.</li> </ul>
14	Organizing Meetings	<ul style="list-style-type: none"> <li>Students to cut out from newspapers the various notices of meetings and discuss them in class</li> <li>Visit to a board room .Practice arranging a room for a meeting with the name cards.</li> <li>A mock meeting may be held to help students understand the atmosphere of a typical meeting.</li> <li>Minutes of meeting are to be taken by some students.</li> </ul>

## 7) ASSESSMENT REQUIREMENTS

### 7.1 AIM

The aim of the assessment is to identify formal practices and procedures for assessing and appraising the performance of students in order that those judgments and decisions can be reached concerning:

- The progression of participants through the programme.
- How well participants have met the programme learning outcomes through the combination of the individual module learning outcomes.
- The provision of feedback information to participants concerning their performance and how they adhered to the generic assessment criteria and the module-specific assessment criteria.

### 7.2 ASSESSMENT INSTRUMENTS:

The following is an outline of the various assessment instruments for this module:

**7.2.1 Examinations (50%)**

❖	Section A - Objective Questions (20Q x 1%)	20 %
❖	Section B - Short Answer Questions (5Q x 4%)	20 %
❖	Section C - Essay type Questions (3Q/5Q x 20%)	60 %
	<b>Total</b>	<b>100 %</b>

Final Examination is included in this module. It seeks to determine participants' individual effectiveness in responding to specific questions under time-constrained invigilated conditions. The examination may take above form:

A closed book examination requesting participants to demonstrate their knowledge and critical analysis skills in responding to specific questions based over the said module.

Examinations test retained knowledge and understanding and the student's ability to address questions and problems under examination conditions and time constraints. This process simulates conditions under which managers invariably have to work - assessing what is needed, identifying options, establishing priorities, making decisions and communicating - all under pressure. Examinations also ensure that the student has to produce original work, which cannot benefit from outside help. The examination process is valued by employers as it assures them that students on the program are thoroughly assessed on their own merits and cannot achieve a pass based largely on the work of others.

**7.2.3 GROUP PROJECT & PRESENTATIONS (20% - 1/3Q)**

This module is assessed in the form of group project as the module requires the students to demonstrate team work and co-ordinated efforts to complete the assigned task.

As part of the assessment, a presentation (individually or in groups) on the Group Project will be required and the marking criteria are enclosed. Students must be provided with the assessment / marking criteria prior to being assessed

**7.2.4 MID-TERM ASSESSMENT (15%) (Section a: 1% x 10Q; Section b: 2% x 5Q; Section C: 10% x 1/3Q)**

A mid-term assessment which is a theory-based examination is held to assesses candidates' ability to recall and apply theory and understanding, requiring responses to a range of structured questions.

**7.2.5 ASSIGNMENT (1 X 15%)**

This practical assessment is to test the understanding of topics covered between Weeks 1 – 4 and allows to student to do carry out minimal research.

**7.3 ASSESSMENT TIMELINES**

Individual Assignment	:	Due in Week 6
Mid-Term Exam	:	Due in Week 8
Group Project	:	Due in Week 10
Presentation of Project	:	Due in Week 11
Final Examination	:	Due in Week 14

<b>LEARNING SUGGESTIONS AND GUIDELINES</b>
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**WEEK 1**

**Over the week of lecture and tutorial, the focus will be on the following:**

- The concept of an office and an organization
- What are the expectations of the employers when recruiting staff
- How to apply for a job and how to attend an interview
- What is a contract of employment and its importance
- To understanding what is induction and training

**Learning outcomes to be attained:**

- Understanding the functions of an office
- Gaining knowledge on interview techniques
- Understanding the importance of a Contract of Employment
- Understanding the importance role of a secretary in an office

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	1	1-9

**WEEK 2**

**Over the week of lecture and tutorial, the focus will be on the following:**

- To introduce Health and Safety at Work
- Explain the duties of employer and employee in this aspect
- Understand what legislation exists in our country in regard to Health and Safety
- Explain and identify the various Government Departments that are involved with regards to Health and Safety
- Identify causes of accidents and how to prevent them.
- Know who to call in case of an accident
- Explain the importance of security of confidential documents.

**Learning outcomes to be attained:**

- Understand the importance of Health and Safety
- Be able to take steps to take in case of an accident
- Be able to take preventive measures to take to avoid accidents in the office
- Understand the security of important or confidential documents

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	1	209-222

**WEEK 3**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Identify the Importance of safeguarding confidentiality of information
- Understanding the secretary's responsibilities on office safety and security
- Guidelines for security of valuables
- Security of buildings
- Security of data and information

**Learning outcomes to be attained:**

- To understand how to safeguard information
- Be aware of the Safety of buildings and security of data

**Readings and preparation to be undertaken by the student :****Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	4.2	223-227

**WEEK 4****Over the week of lecture and tutorial, the focus will be on the following:**

- Introduce common types of telecommunication media.
- Discuss the uses, advantages and disadvantages of the above.
- Introduce the telephone system and the different types

**Learning outcomes to be attained:**

- Be aware of the various telecommunication media
- Understand the advantages of one over the other
- Know the guidelines to use the telephone when taking/giving messages
- Be aware of the points to remember when making a telephone call
- Aware of how to make overseas phone calls

**Readings and preparation to be undertaken by the student :****Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	2.6	103-109

**WEEK 5**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Explain various telephone features and services.
- Techniques of operating a switchboard and other types of telephones.
- Factor to keep in mind when dialing international calls.

**Learning outcomes to be attained:**

- Understanding the workings of a switchboard.
- Being aware of the types and features of the various telecommunication system.
- Knowing various telephone services.
- Understanding the sources of information on telephone services.

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	2.6	110-128

**WEEK 6**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Mailing procedures and equipment used
- Outgoing mail – procedures
- Equipment used in mailing
- Recording keeping of incoming and outgoing mail
- International postal authorities

**Learning outcomes to be attained:**

- Knowing how to open and distribute incoming mail.
- Being able to maintain a record for outgoing mail.
- Being aware of the types of equipment used in both of these operations
- Being able to Keep records

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	2.3	43-73

**WEEK 7**

**Over the week of lecture and tutorial, the focus will be on the following:**

- To understand the purpose of stock control
- Stock control processes
- Stationery stock control card and requisition forms and their uses
- Identifying furniture used in the office

**Learning outcomes to be attained:**

- Understanding the importance of stock control.
- Being aware of the importance of stationery – purchase and control
- Considering process involved in controlling of stock and stationery

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	7.1	266-276

**WEEK 8**

**Over the week of lecture and tutorial, the focus will be on the following:**

- The various business documents used in purchase and sale of goods.
- To draft simple business documents

**Learning outcomes to be attained:**

- The importance of documents when buying and selling
- Identifying the various documents and their purpose/use

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	3.2	149-166

**WEEK 9**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Filing as important function in the office.
- Filing systems used in offices
- Methods of classification available
- Guidelines for the various filing systems

**Learning outcomes to be attained:**

- Understanding the importance of Filing.
- Differentiating between departmental filing centralized filing
- Understanding how to file and how to retrieve documents
- Identifying the best methods of filing and why
- How to devise a filing system
- Being able to describe the various types of filing system

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	2.5	74-82

**WEEK 10**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Cross referencing
- File absent cards/out guides
- Various types of storing information/documents
- Indexing and their uses

**Learning outcomes to be attained:**

- Understanding what is cross referencing
- Understand indexing uses
- Understanding the various ways of storing information.

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	2.5	83-102

**WEEK 11 & 12**

**Over the week of lecture and tutorial, the focus will be on the following:**

- The purpose of an itinerary
- Arranging travel and accommodation
- Uses of reference books and where to get relevant information
- Preparing the itinerary
- Deciding who should get copies of the itinerary and why

**Learning outcomes to be attained:**

- Understanding how to prepare an itinerary and the information that should go into an itinerary
- Identifying where to get information
- Knowing who to contact when booking flights and making hotel reservations
- Identifying the importance of reference books and maps

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	10	325-337

**WEEK 13 & 14**

**Over the week of lecture and tutorial, the focus will be on the following:**

- Organizing meetings
- The various committees / Types of meetings
- The documents involved in a meeting
- Preparation before during and after a meeting
- Preparing Minutes

**Learning outcomes to be attained:**

- How to organize a meeting
- What documents to prepare for a meeting
- How to take down minutes
- Preparation of the various documents for a meeting

**Readings and preparation to be undertaken by the student :**

**Text book:**

	Chapter	Pages
Secretarial Duties by John Harrison –10 <sup>th</sup> Edition	9.1	307-323

**WEEK 15**

<b>FINAL EXAM</b>
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