

LECTURE NOTES
TITLE OF THE COURSE: NME - II – INTRODUCTION TO OFFICE
MANAGEMENT
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***** UNIT- I *****

MEANING OF OFFICE MANAGEMENT

Office management refers to the process of planning, organizing, guiding, communicating, directing, coordinating and controlling the activities of a group of people who are working to achieve business objectives efficiently and economically.

ELEMENTS OF OFFICE MANAGEMENT

Elements of office management are termed as pillars of a building. If pillar is strong, certainly, the building is also strong. Hence, efficient functioning of office management is based on the elements of office management. Following are the essential elements of office management.

1. Personnel

Office personnel are actually performing the office work. Generally, the selection and placement of office personnel is carried on by the office manager in small organization. In large organization, staffing is carried on by the human resource management department.

In both the case, the office work is to be performed by allocating the work to each individual according to their efficiency, guide the personnel to do the work

with the help of means available in an office within a specified time and control the activities of office personnel. The office manager has to do all these activities.

2. Means

Means refers to tools used to perform the office work. Means include pen, pencil, eraser, paper, ink, office forms, typewriter, computer, printer, calculator and the like. Adequate tools have been supplied in an office and put them to the most efficient and economical use for achieving objectives.

3. Environment

The nature of business determines the environment of an office. The various office works have to be carried on under a particular condition or environment. A working environment is created and maintained for the smooth performance of office work. It is the duty and responsibility of an office manager to bring suitable environment by adopting various procedures and practice.

4. Purpose

The office personnel must be aware of the purpose for which a particular work is carried on and the impact of such work on others' performance. The office manager teaches the purpose to office personal. If not so, the performance of office work does not bring the most efficient and economical use of office resources and achieve the objectives.

Seven Major Functions of Office Management

Office management is the profession where you are responsible for the design, implementation, evaluation and maintenance of work within an office or an organisation. The aim is to improve productivity and efficiency and people who undertake the roles have gone through an Office Management Course in order to [learn the seven major functions of office management.](#)

Planning

Planning is the first step in the process, as well as the first step in office management. It is the creation of a well-defined course for future actions and lays out what people within the office need to do. It creates stages or methods for people to follow to ensure consistency and improve productivity.

Staffing

Staffing is a function of management so in this context, it is about selection, recruitment, compensation and training of staff. It can also include areas such as promotion and retirement of staff and managers to ensure the right balance of staff is maintained.

Directing

Creating plans is one thing but you need to implement them and that means directing staff in what is required of them. This involves training as well as continued guidance to ensure that processes are understood and followed. It can also cover any systems in place to handle people who don't follow the processes.

Communicating

In order to direct people to follow processes laid out in the plan, communicating with staff is key. It is about building good human relations and understanding what staff need to, therefore, enable them to follow the office management plan. Clarity, integrity and the strategic use of information organisation are three key points that should be mastered within this skill.

Controlling

Controlling isn't about micro-managing but ensuring that the high-level plans are followed while allowing room for people to do things as they find best

within it. It can apply to the physical processes that are carried out, the computerised processes or even areas such as financial processes to ensure consistency. There should also be a firm basis in the principle of flexibility and the needs and nature of the office that are applied to any controlling actions.

Coordinating

Coordinating can be one of the trickier principles of office management – the need to coordinate within the team but also with other areas of the business to ensure everyone is working harmoniously. There are several key principles used to guide actions in this area including that of direct contact – reducing the red tape involved with processes and ensuring they are clear and easy to follow. Continuity is another principal – ensuring everyone is following the plan laid out.

Motivating

Motivating staff is definitely the hardest role of the office manager. There is self-motivation and external motivation and these both need to be used to achieve aims and goals. Keeping morale high while maintaining discipline is important and setting examples of subordinates should also be done – leading by example.

Conclusion

These seven major functions of office manager show that it is about more than simply getting the office to run smoothly. The aim to have a plan, ensure it is applied to consistently and to offer support to staff to help them do this.

****** END OF UNIT – I ******

UNIT-II

OFFICE ORGANIZATION, CHARACTERISTICS AND STEPS

Definition:

“Office management is an integral part of general management.

It refers to the process of **planning, organizing**, guiding, communicating, **directing, coordinating** and **controlling** the activities of a group of people who are working to achieve business objectives efficiently and economically.”

CHARACTERISTICS AND STEPS FUNCTIONS OF OFFICE MANAGEMENT

- **Objectives and Purpose.** The very **purpose** of any office organization is to avoid waste of time and duplication of work. ...
- Division of Work or Specialization. ...
- Principle of **Efficiency**. ...
- **Unity** of Command. ...
- Principle of Definiteness. ...
- Scalar Principle. ...
- Principle of Span of Management. ...
- Principle of **Authority**.

TYPES OF ORGANIZATIONS

There are several types of organizational structures, each of which work best for certain sizes or types of business.

- Flat Organizational Structure. ...
- Functional Organizational Structure. ...
- Product Organizational Structure. ...
- Geographical Organizational Structure. ...
- **Matrix** Organizational Structure.

FUNCTIONS OF AN OFFICE ADMINISTRATOR

Office Administrator

An Administrator provides office and administrative support to either a team or individual. This role is vital for the smooth-running of a business.

Duties may include fielding telephone calls, receiving and directing visitors, word processing, creating spreadsheets and presentations, and filing. Additionally, Administrators are often responsible for specific projects and tasks, as well as overseeing the work of junior staff.

Administrator job description duties and responsibilities

Extensive software skills, internet research abilities and strong communication skills are required. An Administrator job description may also have the title of Department Assistant, Coordinator or Personal Assistant. The job description should feature:

- Answering incoming calls; taking messages and re-directing calls as required
- Dealing with email enquiries
- Taking minutes

- Diary management and arranging appointments, booking meeting rooms and conference facilities
- Data entry (sales figures, property listings etc.)
- General office management such as ordering stationary
- Organising travel and accommodation for staff and customers
- Arranging both internal and external events
- Possibly maintaining the company social media accounts
- Providing administration support to Sales Reps, Property Managers and Senior Management
- Administrator job qualifications and requirements

Although an undergraduate degree isn't required for an Administrator role in every company, some employees do prefer to hire graduates. The following degrees would be valuable:

Administrators are required to use a variety of software packages including Microsoft Word, Outlook, PowerPoint and Excel. Aside from this, candidates will need to have excellent communication, organisational abilities and time management skills.

As Administrators are likely to be liaising with both internal and external stakeholders, it's important that the Administration job description includes being well-presented and maintaining a sense of professionalism at all times.

****** END OF UNIT – II ******

**** UNIT III ****

OFFICE RECORD MANAGEMENT

OFFICE RECORD MANAGEMENT – IMPORTANCE

What is Records Management?

- The systematic and administrative control of records throughout their life cycle to ensure efficiency and economy in their creation, use, handling, control, maintenance, and disposition.

What is a “Record”?

- **Records:** Recorded information, in any format, that allows an office to conduct business
 - This includes emails
 - Also *documents* business processes
- Value of Record determined by **content**, not format!

Records vs. Non-records

Not everything produced by an office is a record

- Duplicate Copies
- Drafts and Informal Notes
- Routing Slips
- Personal Correspondence

How do I tell the difference?

Do your records:

- Support or document a transaction?
- Document the formulation or execution of a policy, interpretation of a policy, or change of policy?
- Document Actions taken in response to an inquiry?

Records vs. Non-Records: Examples

- E-mail to contractor clarifying terms: **Record!**
- Memo notifying a subordinate of committee assignment: **Record!**
- Sender must retain as record; recipient may delete as appropriate
- Draft of a report: **Non-Record!**
- The final report will be a record, however

What is a “Record Series”?

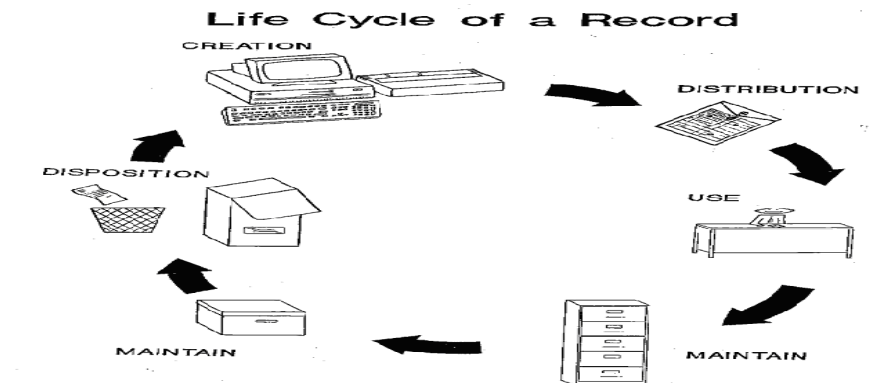
- A group of similar records that are arranged according to a filing system and that are related as the result of being created, received, or used in the same activity or function
- Copies of same record may belong to different series— determine which is original!
- Functional unit of Records Schedules

What is a Records Schedule?

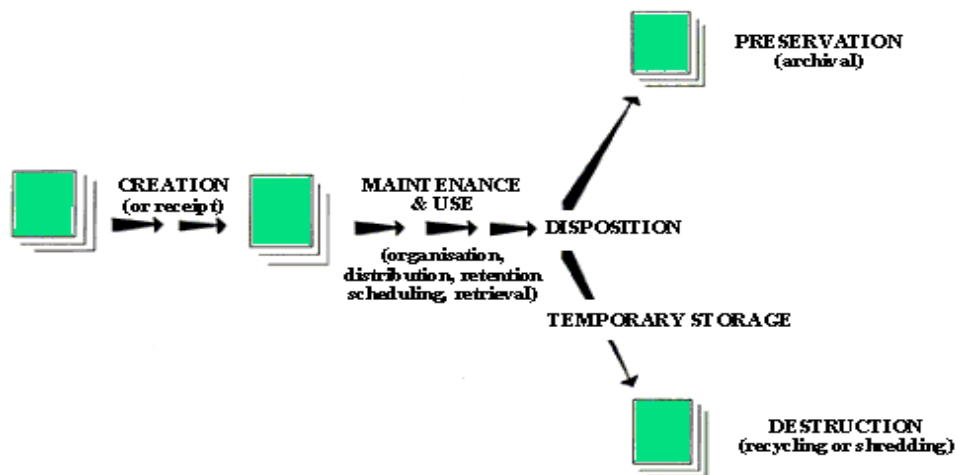
- Also known as **Records Retention/Disposition Authorization (RRDA)**

- Prescribes length of time to keep records in an office– this is known as the **Retention Period**
- Provides instructions for **disposition** (destroy or transfer)

THE RECORDS LIFE CYCLE



THE RECORDS LIFE CYCLE



LIFE CYCLE: CREATION AND USE

- Record is **created**
- Record is **organized into a record series**

- Group of similar records related by creator or function
- Record is **distributed** throughout office or **used**, as appropriate

LIFE CYCLE: RECORDS MAINTENANCE

- Records are **Filed** in office
- Inactive Records may be **Transferred to Off-site storage**
 - For records which must be retained, but which are of little/no archival value

FILING ESSENTIALS

A BRIEF NOTE ON FILING

- **Be Consistent**– File similar records in similar ways
- **Establish a system *early***—Alphabetic? Numeric? Chronological? Subject?
- **Keep track of dispositions**– Mark files by date and type
- **Keep records series separate**

CLASSIFICATION AND ARRANGEMENT OF FILES

The filing method under which **files** and folders are **arranged** in order of number is called numerical **classification**. All **files** and folders are given separate numbers. It is an indirect method of **classification** of filing. ... It includes name, address, phone number, subject and other information along with file number.

Files are used for storing the Information of the user. Generally for **arranging** all the **Files** directories or Folders are used. A Folder or Directory is also called as the Container of the **Files** in which many Sub directors and **Files** are Stored. So that **Files** System Specifies the **Arrangement** of the **Files** in the System.

THERE ARE 5 METHODS OF FILING:

- **Filing** by Subject/Category.
- **Filing** in Alphabetical order.
- **Filing** by Numbers/Numerical order.
- **Filing** by Places/Geographical order.
- **Filing** by Dates/Chronological order.

The classification levels are the degrees of specificity, with a file classification scheme usually having three major components:

- Broad, encompassing categories, called FUNCTIONS.
- Narrower subsets of each function, called ACTIVITIES.
- Yet narrower and more specific subsets of activities, called TRANSACTIONS.

LIFE CYCLE: DISPOSITION

Disposition: when records have reached the end of their useful life for a particular office.

TYPICALLY ONE OF THREE OPTIONS:

- **Destruction**
- **Confidential Destruction**
- **Permanent Archival Retention**
- Destruction of Records
- Between **95-98 percent of all records** should eventually be destroyed
- Disposition step for records with no enduring value
- **Confidential Destruction** is necessary when records contain sensitive information, such as student or personnel information

LITIGATION HOLDS

- An important exception to retention schedules!
- **Under litigation holds, NO RECORDS in that series may be destroyed for duration**
- Legal Affairs and/or Public Record Custodian will inform your office if a hold is placed

MODERN METHODS OF FILING – MODERN FILING DEVICES

- **Modern Filing System.**
- Horizontal **Filing System**: Horizontal **Filing system** is a **modern** type of **filing**. ...
- Flat **file**: A flat **file** is made of cardboard or thick paper. ...
- Arch Lever **File**: ...
- Advantage:
- Disadvantage:

- Vertical System of Filing:

ELECTRONIC RECORDS

<u>Electronic Record</u>	<u>Paper Analog</u>
E-mail message	Memo, typed letter
E-Form template	Form master copy
Museum accessions database	Accession card catalog
Student paper (e-mailed or D2L-submitted)	Student paper submitted in class or via mail
Instant message log	Memorandum of conversation

****** END OF UNIT – III ******

**** UNIT- IV ****

OFFICE COMMUNICATION

Office communication is the process of sharing knowledge and ideas between one person or group and another person or group within an organization both verbally and non-verbally. It is important to get the job done, as well as developing a sense of trust and increasing employee productivity.

Communication in the workplace is very **important** for companies to work efficiently and be productive. ... Employers who spend time and energy to create open **communication** lines will quickly create trust among employees, resulting in productivity, performance and overall morale.

FIVE TYPES OF COMMUNICATION

- Verbal Communication. Verbal communication occurs when we engage in speaking with others. ...
- **Non-Verbal** Communication. What we do while we speak often says more than the actual words. ...
- Written Communication. Whether it is an email, a memo, a report, a Facebook post, a Tweet, a contract, etc. ...
- Listening. ...
- Visual Communication.

COMMUNICATION SKILLS FOR WORKPLACE SUCCESS

- **Listening.** Being a good listener is one of the best ways to be a good communicator. ...
- Nonverbal Communication. Your **body language**, eye contact, hand gestures, and tone of voice all color the message you are trying to convey. ...
- Clarity and Concision. ...
- Friendliness. ...
- Confidence. ...
- Empathy. ...
- Open-Mindedness. ...
- **Respect.**

CORRESPONDENCE AND REPORT WRITING

TIPS AND TEMPLATES FOR EFFECTIVE CORRESPONDENCE!

- The first sentence should get right to the point. Do not ramble.
- Use short and concise sentences to express your ideas.
- This is a method of official communication so practice standard format and avoid slang.
- Tone is very important. ...
- Be aware of the audience.
- Edit, edit, edit.

- Keep your **report** concise – remember, people typically don't have much reading time. Keep your sentences short, clear and easy to read, with the minimum of jargon. If you **write** the way you speak, your readers may find it easier to grasp what you want to **communicate**. Break up your text with headings and subheadings.

"Legal **drafting**" can **mean** the preparation of any written legal document--a motion, a letter, a brief, a memo, or a contract. Lawyers and law teachers use the phrase in this way all the time: "**Draft** a brief" or "**draft** a letter." "Legal **drafting**" can **mean** the writing of binding legal text

In this way, a **report** is a formal **communication written** for a specific purpose. It includes a description of procedures followed by collection and analysis of data, their significance, the conclusions drawn from them, and recommendations, if required.

REPORT WRITING FORMAT

- Title Section – This includes the name of the author(s) and the date of **report preparation**.
- Summary – There needs to be a summary of the major points, conclusions, and recommendations. ...
- Introduction – The first page of the **report** needs to have an introduction. ...
- Body – This is the main section of the **report**.

MEANING OF OFFICE COMMUNICATION AND MAILING

- **Mail** may be described as any written **communication** which passes through the messenger, courier or the post **office**. There is need of continuous contacts with the customers, suppliers, branches, departments, banks, financial institutions, government agencies, non — government organization, and the like.
- Workplace **communication** is the process of exchanging information and ideas, both verbal and non-verbal between one person/group and another person/group within an organization. It includes e-mails, text messages, notes, calls, etc.
- **Office communication** is necessary to make contacts, understand the goals and objectives, share ideas, convey information, give instructions, and remove misunderstandings among the employees. ... It is a bridge that connects the employees and **management** of an organization

****** END OF UNIT – IV ******

**** UNIT- V ****

FORM LETTERS - MEANING, PRINCIPLES AND FACTORS TO BE CONSIDERED IN DESIGNING OFFICE FORMS

Form is very similar to the element of **design** shape. The difference is that the term is **form** is used in art work that has three dimensions instead of two as shapes. The three dimensions are length, width and depth. The seven elements are line, **color**, **value**, **shape**, form, **space**, and **texture**.

TYPES OF LETTERS

- Formal **Letters**.
- Informal **Letters**.
- Semi-formal **Letters**

SAMPLE LETTER FORMAT

1. Contact Information (Include your contact information unless you are **writing** on letterhead that already includes it.) Your Name. Your Address. ...
2. Date.
3. Contact Information (The person or company you are **writing** to) Name. Title. ...
4. Greeting (Salutation Examples)
5. Body of **Letter**.
6. Closing.

7. Signature.

8. Typed Signature

FACTORS TO BE CONSIDERED IN FORMS DESIGNING

Suitable for the Purpose: Easy clerical operation is the main purpose of **designing an office form**. ...

- Ease in Use: The **forms** should be designed that they are easy to use. ...
- Simple **Design**: Simple **form** facilitates the user in use and requires less time in completion.
- AESTHETICS. ...
- ERGONOMICS. ...
- MATERIALS. ...
- MANUFACTURE. ...
- MODULARITY. ...
- SUSTAINABILITY. ...
- PROTECTION. ...
- PACKAGING & ASSEMBLY.

TYPES OF REPORT WRITING

- Long **Report** and Short **Reports**: These **kinds of reports** are quite clear, as the name suggests. ...
- Internal and External **Reports**: ...

- Vertical and Lateral **Reports**: ...
- Periodic **Reports**: ...
- Formal and Informal **Reports**: ...
- Informational and Analytical **Reports**: ...
- Proposal **Reports**: ...
- Functional **Reports**:

It is a concise document based on research that typically analyses a situation and sometimes makes recommendations. **Types of reports** include memos, meeting minutes, expense **reports**, audit **reports**, closure **reports**, progress **reports**, justification **reports**, compliance **reports**, annual **reports**, and feasibility **reports**.

**** END OF UNIT – V ****

***** ALL THE BEST *****