BED 411

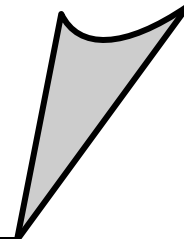**Corporate Administration and Secretarial Practice**

Course Developer: Inegbedion, Juliet O.
School of Education
National Open University of Nigeria,
Lagos.

Course Writer: Dr. E. A. Aromolaran
School of Science and Vocational Teacher Education
Yaba College of Technology,
Yaba, Lagos.

Course Editor: Prof. L. E. Ekpenyong
Faculty of Education,
University of Benin,
Benin

Course Coordinator: Inegbedion, Juliet O.
School of Education
National Open University of Nigeria,
Lagos.

INTRODUCTION

BED 411 – Corporate Administration and Secretarial Practice is a 2 credit and course designed to expose you into the concept of administration and secretarial practice. The knowledge acquired would lead to proficiency in corporate administration, secretarial practice and record management.

What you will learn in this course?

In this course, you will be exposed to corporate administration, secretarial practice and record management.

Course Aims

The aims of this course are directed toward preparing:

1. Individuals who would be able to teach corporate administration, secretarial practice and record management at the secondary school levels and;
2. Graduates who would be able to impact the skills acquire in corporate administration and secretarial practice into the general society through workshops, seminars, in-house training and other forms of disseminating information.

Course Objectives

At the end of this course, you should be able to:
*   understand the principles of corporate administration
*   discuss secretarial practice
*   manage records effectively

Working through this course

To gain maximum proficiency required, you must work through all the 15 units. You should ensure that you master a unit of study before proceeding to the next unit. Where references are made to previous units, try to refer to such reference sources.

Course Materials

This course material consists of:

1.   A course guide;

2. The main text and is broken down into three modules and 15 study units
3. Textbooks
4. Microsoft Office 2007
5. Electronic text
6. An assignment file

Study Units

This course material contains three modules and fifteen study units as follows:

Module 1: Corporate Administration

Unit 1:   Corporate Administration: Meaning and Reasons
            for corporate decline
Unit 2:   General Office Administration
Unit 3:   Organizational Structure in the office
Unit 4:   Office Personnel and Equipment

Module 2: The Secretary

Unit 1:   Secretarial Practice
Unit 2:   The Role of a Secretary
Unit 3:   Secretarial Ethics and Human Relations
Unit 4:   The Secretary and People Management
Unit 5:   Managing Meetings
Unit 6:   Managing Conferences

Module 3: Record Management

Unit 1:   Record Management: Meaning, Need
            for record management, types, classifications
            and its importance.
Unit 2:   Handling Confidential Documents
Unit 3:   Methods of Creating Information
Unit 4:   Filing and indexing
Unit 5:   Preserving Records

References and Further Readings

Every study unit contain a list of references and further reading. Do not hesitate to consult them if need be.

The Assignment File

The assignment file contains all the Tutor Marked Assignments including BED 212. Do your assignments and you must submit to your tutor for marking. The marks you obtain from these assignments will count in the final score you will obtain in this course.

The Presentation Schedule

The Presentation Schedule included in your course material gives you important dates for the completion of Tutor Marked Assignments and tutorial attendance. Remember, you are required to submit all your assignments by the due date. You should guard against falling behind in your work.

Assessment

Your assessment will be based on Tutor Marked Assignments (TMAs) and final examination which you will write at the end of the course.

Tutor Marked Assignment (TMA)

In addition to working through all the TMAs in your course material, four TMAs would be sent to you in the assignment file. The four TMAs must be answered and submitted for assessment. The four assignments would be marked and the best three would be selected which will constitute the 30% of your final grade.

Final Examination and Grading

At the end of the course, you will write a final examination which will constitute 70% of your final grade. In the examination which shall last for two hours, you will be requested to answer three questions out of at least five.

Course Marking Scheme

This table shows how the actual course marking is broken down

Assessment	Marks
Assignments	Four assignments, best three marks of the four count at 30% of course marks
Final Examination	70% of overall course marks
Total	100% of course marks

How to Get the Most from this Course

In distance teaming, the study units replace the university lectures. This is one of the great advantages of distance teaming; you can read and work through specially designed study materials at your own pace, and at a time and place that suits you best. Think of it as reading the lecture instead of listening to the lecturer. In the same way a lecturer might give you some reading to do, the study units tell you when to read, and which are your text materials or set books. You are provided exercises to do at appropriate points, just as a lecturer might give you an in-class exercise.

Each of the study units follows a common format. The first item is an introduction to the subject matter of the unit, and how a particular unit is integrated with the other units and the course as a whole. Next to this is a set of learning objectives. These objectives let you know what you should be able to do by the time you have completed the unit. These learning objectives are meant to guide your study. The moment a unit is finished, you must go back and check whether you have achieved the objectives. If you make this a habit, then you will significantly improve your chances of passing the course. The main body of the unit guides you through the required reading from other sources. This will usually be either from your set books or from a reading section. The following is a practical strategy for working through this course. If you run into any trouble, telephone your tutor. Remember that your tutor's job is to help you. When you need assistance, do not hesitate to call and ask your tutor to provide it.

In addition, do the following:

1. Read this Course Guide thoroughly, it is your first assignment.

2. Organise a Study Schedule. Design a "Course Overview" to guide you through the Course. Note the time you are expected to spend on each unit and how the assignments relate to the units. Important information, e.g. details of your tutorials, and the date of the first day of the semester is available from the study centre. You need to gather all the information into one place, such as your diary or a wall calendar. Decide on a method and write in your own dates and schedule of work for each unit.

3. Once you have created your own study schedule, do everything to stay faithful to it. The major reason students fail is that they get behind with their course work. If you get into difficulty with your schedule, please, let your tutor know before it is tool late for help.

4. Turn to Unit 1, and read the introduction and the objectives for the unit.

5. Assemble the study materials. You will need your set books and the unit you are studying at any point in time.

6. Work through the unit. As you work through it, you will know what sources to consult for further information.

7. Keep in touch with your study centre as up-to-date course information will be continuously available there.

8. Well before the relevant due dates (about 4 weeks before due dates), keep in mind that you will learn a lot by doing the assignments carefully. They have been designed to help you meet the objectives of the course and therefore will help you pass the examination. Submit all assignments not later than the due date.

9. Review the objectives for each study unit to confirm that you have achieved them. If you feel unsure about any of the objectives, review the study materials or consult your tutor.

10.	When you are confident that you have achieved a unit's objectives, you can start on the next unit. Proceed unit by unit through the course and try to pace your study so that you keep yourself on schedule.

11.	When you have submitted an assignment to your tutor for marking, do not wait for its return before starting on the next unit. Keep to your schedule. When the assignment is returned, pay particular attention to your tutor's comments, both on the tutor-marked assignment form and on the ordinary assignments.

12.	After completing the last unit, review the course and prepare yourself for the final examination. Check that you have achieved the unit objectives (listed at the beginning of each unit) and the course objectives (listed in the Course Guide).

13.	Finally, ensure that you practice on the personal computer as prescribed to gain the maximum proficiency required.

Tutor and Tutorials

The dates, times and locations of these Tutorials will be made available to you, together with the name, telephone number and address of your Tutor. Each assignment will be marked by your tutor. Pay close attention to the comments your tutor might make on your assignments as these will help in your progress. Make sure that assignments reach your tutor on or before the due date.

Your tutorials are important; therefore try not to skip any. It is an opportunity to meet your tutor and your fellow students. It is also an opportunity to get the help of your tutor and discuss any difficulties you might encounter when reading.

SUMMARY

This course will equip you with the basic skills you require to become competent in corporate administration and secretarial practice.

Wishing you good luck as you read through this course.

Main Text

TABLE OF CONTENTS

Module 1: Corporate Administration

Unit 1 Corporate Administration: Meaning, Reason for Corporate Decline

1.0   Introduction
2.0   Objectives
3.0   Main Content
3.1   Meaning of Corporate Administration
3.2   Reasons for Corporate Decline
3.3   Symptoms of Bad Corporate Administration
3.4   Basic Solutions to Bad Corporate Administration
3.5   Self Assessment
4.0   Conclusion
5.0   Summary
6.0   Tutor Marked Assignment
7.0   References/Further Readings

1.0   INTRODUCTION

Unit 1: This unit introduces you to Corporate Administration. In this unit, you will learn about the meaning of corporate administration, reasons for corporate decline, symptoms of bad management and basic solutions to bad in corporate administration.

2.0   OBJECTIVES

On completion of this unit, you should be able to:
- Define corporate administration
- State the reasons for corporate decline
- Identify symptoms of bad corporate administration
- Proffer solutions to bad corporate administration

3.0   MAIN CONTENT

3.1   **Meaning of Corporate Administration**
Corporate administration refers to the social process of management in controlling the organizational functions of planning, controlling, leading and actuating. It refers to the management concept of harnessing the six

basic resources of man/woman, materials, methods, machines, money and markets to achieve organizational objectives.
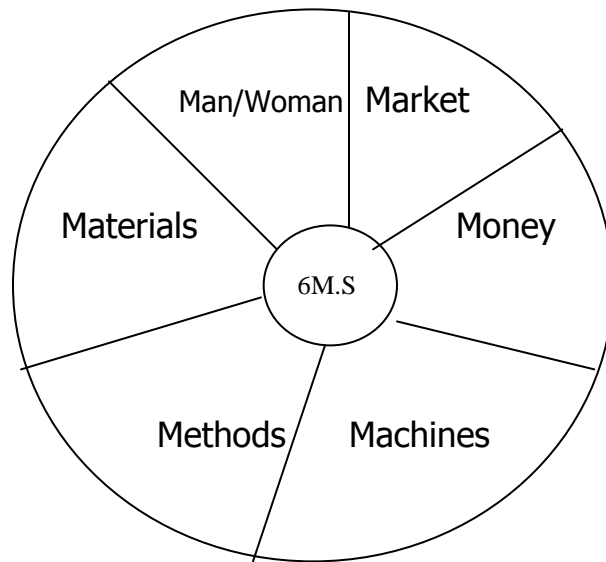

Fig. 1.1 Harnessing 6M's in Achieving Organizational Objectives through Corporate Administration.

Fig. 1.1. Illustrates the use corporate administration in achieving organizational objectives.

Having understood the meaning of corporate administration, we shall discuss the reasons for corporate decline.

3.2 Reasons for Corporate Decline

Deficiency arises in corporate administration when the six basic resources (explained above) are not meaningfully utilized. However there are several other reasons for corporate decline. We shall discuss these one after the other as follows:

Azika (2000) identifies the following as reasons for corporate decline.

- Impact of Change Consequent upon the environment, population and tastes.
- Economic change as is being witnessed globally, as exemplified by courtesy economic the present melt-down.

- Competitive change as in the merger of two competitors, low cost of production, new range of products by competitors etc.
- Government regulations such as harsh economic policies could also encourage corporate decline.
- Incompetency, narrow vision and organizational politics may encourage corporate decline in any organization.
- There are other reasons for corporate decline such as job-centred management, i.e. an autocratic leader who would not tolerate people he perceives might displace him.

Now that we know the reasons for ineffective corporate administration, we shall discuss the symptoms of bad corporate administration.

3.3 Symptoms of Bad Corporate Administration
Asika (2004) lists the symptoms bad corporate administration as:

- Failure to keep pace with changes as they occur in the course of production.
- Failure of operating controls in budgeting, producing, tying responsibility accounting to manager at every level of management.
- Over-expansion of business activities and over-diversification of products to the extent that the management cannot cope.
- Over-borrowing to finance business expansion without thinking of the effect on the revenue of the organisation.
- Embarking on the project that could not be managed by the organisation due to lack of the six basic resources.

3.4 Basic Solutions to Bad Corporate Administration.
Any corporate administration that lacks the six basic resources is likely to suffer decline as discussed above. However, there are antidotes for such a decline as follows.

- The management weakness which was the resultant effect of the decline should be corrected. "Putting a round peg in a round hole" will do the magic.
- Management should make the product competitive through an appropriate turn-around that will encourage awareness of the benefits to be derived through the use of such products.
- Economic policies of the government should also wear 'human face'. That is, liberalization of the economy to attract the production of more goods at reduced costs of production.

3.5 **Self Assessment**

1. Explain the term corporate administration, with an appropriate illustration.
2. State the reasons for corporate decline.

1. Corporate administration refers to the governance of any organisation at the top level by harnessing the six basic resources to achieve organizational objectives. (The diagram must be drawn here)
2. The following are the reasons for corporate decline:
   - Environmental change
   - Economic change
   - Competitive change
   - Governmental factor
   - Management incompetency

4.0 CONCLUSION

In conclusion, with good governance, most of the reasons for decline in corporate administration would be abated. With the appropriate harnessing of the six basic resources of man, materials, methods, machines, money and markets, there will be an effective corporate administration.

5.0 SUMMARY

In this unit, we have discussed corporate administration, the reasons for corporate decline, symptoms of bad corporate administration and the basic turn-around strategies in corporate administration.

6.0 TUTOR MARKED ASSIGNMENT

1. Define Corporate Administration

2. State any FOUR reasons for Corporate decline

3. Identify any THREE symptoms of bad corporate administration.

4. Suggest any THREE solutions to bad corporate administration.

7.0 REFERENCES / FURTHER READINGS

Aromolaran, E. A. (2008). *Office Administration and Management*. Ijebuode: Alamsek Press, Pp. 15-16.

Aromolaran, E. A. (2000). *Fundamentals of Management. Lagos*: BVL Print Technologies, Pp. 45-47.

Asika, N. (2004). *Business Organisation and Management.* Lagos: Mukugamu & Brothers Enterprises. pp 40-45

Craine, D. D. (1982). Personnel: *The Management of Human Resources*. California: Kent Publishing Co., Pp. 10-18.

Terry, G. R. & Franklin, S. G. (1982). *Principles of Management.* Illinois: Richard D. Irwin, Inc., Pp. 15-20.

Unit 2: General Office Administration

Contents

1.0   INTRODUCTION

The unit you are about to study is centred general office administration. In it, you will study the meaning and functions of an office, importance of an office and office environment.

2.0   OBJECTIVES

By the time you have studied this unit, you should be able to:
- define an office
- list the functions of an office
- describe office environments

3.0   MAIN CONTENT

3.1   **Meaning of an Office**

An office is a place where the daily clerical and administrative activities of an establishment are executed. If properly organized, an office will contribute to the attainment of organizational objectives.

3.1.1 **Functions of an Office**

The functions of an office include:

- Receiving Information:
  People come or contact the office daily, either in writing, person or through other forms of communication requesting for information about the organisation.

- Recording Information:
  Information received is properly recorded for further actions and further references. The office records business transactions, personnel data, stock purchased, and other relevant information for the smooth operation of the organisation. Information might be recorded manually by filing such document or through any automated means such as computer or re-writable compact disk.

- Giving Information:
  Organisations supply information to those who desire it at the appropriate time. Members of staff can also request for certain information to enable them carry out their official duties. Government agencies may require information by law about certain organizations. Consumers too may want to have information about goods produced or services rendered by an organisation. It is incumbent upon the organisation to supply such information as and when required.

- Arranging and Processing Information:
  Information obtained from various sources and recorded must be sorted out and processed. Records must, therefore be properly stored for easy retrieval. Various files can be created on the computer, stored by various means such as diskette, magnetic tape, etc to facilitate being processed.

- Safeguarding Organizations Information and Assets
  This is necessary to prevent wrong people having access to information stored. Information should be stored in safe places and in an error-proof means such as iron and sheet safes, fire-proof

safes or through automated means discussed above. Inventories must be taken to cross-check the level of safety and order.

3.1.2 Role of a Secretary as an Office Manager

The secretary is an indispensable administrator that binds the office and the staff together. She is the link between the staff and of management. She monitors the business environment through her subordinates and contemporaries for the smooth-running of the establishment. In addition, she disseminates information obtained. Her role is equally significant in the areas of management in planning, organising, staffing, communicating and reporting etc. she routinely performs ceremonial functions of attending to guests and representing her organisation at social and business engagements. She is constantly on the alert to device new methods of improving staff performance and self adaptation to the changing condition of business environment. Because of the significant role which she plays, she is expected to have a strength of character and should be fair and firm in the decision making process. She is expected to have a comprehensive knowledge of her organization.

3.2 Importance of an Office to an Organisation

The office, as the pivot on which the day-to-day activities of any organisation rotates is very important. Records must be kept, information must be retrieved and processed; the assets of an organisation must be safeguarded. All these functions make the office very significant to any organisation.

It is, therefore, important for the management that conditions for suitable for office environment are strictly adhered to. These conditions shall be discussed under office environment.

3.3 Office Environment
Office environment refers to the office structure, buildings, furniture fittings and conditions under which members of staff work in the office. The office environment should be managed in such a way that sufficient office space is provided and fully utilized. Environmental factors such cleanliness, temperature, lighting, noise control and sanitary conveniences should be taken into consideration. The laws guiding the standard requirements on accommodation should be considered in determining office environment.

3.3.1 Conditions Suitable for Office Environment

Whitehead (1982) identifies the following as conditions suitable for office environment.

- Adequacy of the office environment in terms of space required by each worker;
- Conducive office environment in compliance with the Health and Safety at Work Act 1974 and Offices Act 1963 which clearly spelt out the following conditions for office environment:
  - cleanliness of the office environment;
  - avoidance of overcrowding;
  - normal office temperature at $16^{o}C$ ($60.8^{o}F$);
  - provision of adequate ventilation;
  - adequacy of clean and suitable sanitary convenience;
  - provision of adequate drinking water;
  - provision of working clothings for factory worker;
  - adequate fire fighting kits in every office;
  - provision of First Aid Boxes.

There are other conditions suitable for office environment such as:
- free communication and work flow.
- provision of telephone, electricity, banking facilities and postal services;
- provision of adequate security and privacy of staff

3.4 Self Assessment

Now that we have discuss general office administration, you should be able to define the term office administration, discuss the functions of an office and describe the role of a secretary as an office manager. You should also be able to appreciate the importance of an office to the organisation. You should make an effort to explain the conditions suitable for an office environment.

4.0 CONCLUSION

An office is a place where the clerical and administrative activities of an organisation are carried out. The functions of an office will enable office

personnel play their role effectively. A conducive office environment is a unit for the attainment of organizational objectives.

5.0   SUMMARY

We have defined an office as a place of where clerical and administrative activities of an organization are carried out. The definition relates to the functions of an office. We also discussed the importance of an office. We described the office environment and conditions suitable for an office environment.

6.0   TUTOR-MARKED ASSIGNMENT

1.   Define General Office Administration
2.   List any THREE functions of an office
3.   Why is the office important to any organisation
4.   List any THREE conditions suitable for office environment

7.0   REFERENCES/FURTHER READING

Aromolaran, E. A. (2008). *Office Administration and Management*. Ijebu Ode: Alamsek Press, pp 1-10.

Aromolaran, E. A. (2009). *Contemporary Issues in Office Technology and Management*. Lagos: Holy Productions Limited; pp 1-6.

Aromolaran, E. A. (2009). *Introduction to Office Practice and Technology*. Lagos: Holy Productions Ltd; pp 1-5.

Odiagbe, J. M. (1988). *Administrative Office Management.* Ilorin: Nato Publicity and Printing Co. pp. 5-12.

Whitehead, G. (1982). *Office Practice Made Simple*. London: Heinemann; pp. 40-50.

Unit 3: Organizational Structure in the Office

 Contents

1.0   Introduction
2.0   Objectives
3.0   Main Content
3.1   Meaning of Organization
3.2   Structures of an organization
3.3   Types of Organization
3.4   Self Assessment
4.0   Conclusion
5.0   Summary
6.0   Tutor-Marked Assessment
7.0   References/Further Readings

1.0   INTRODUCTION

This unit will introduce you to organisation and its structure. It will also teach you the types of organisation and centralized/decentralized organisation.

2.0   OBJECTIVES

At the end of this unit, you should be able to:
- define organisation
- itemize the structure of an organisation
- discuss the types of organization

3.0   MAIN CONTENT

3.1   **Meaning of Organisation**

Organization refers to the formal grouping of people in the office with a common set of objectives. The activities of such people are coordinated to achieve the organization's objectives.

3.2   Structures of an Organization

The structures involve: the division of work;
The facilities available and the workforce;
The structures involve:
- setting attainable objectives at every level of management;
- establishing positions into related tasks;
- preparing job specifications for appointment training and development
- preparing organogram depicting various positions of the structure

3.3   Types of Organisations

There are line, line and staff, functional, matrix and committee type orgnaisations.

3.3.1 Line Organisation

This is the oldest form of organization. It follows a specific chain of command. The military formation is an example of line organisation.

Advantages

It has the following advantages;
- easy to form
- easy to take decisions
- encourages direct chain of command
- discourages bureaucracy

Disadvantages

It is disadvantages are:
- a rigid form of organisation
- not good for specialization

3.3.2 Line and Staff Organisation

This is an organisation in which specialists and generalists work together. Jobs are carried out on the functional basis by unit, department by department.

Advantages

- This type of organisation encourages division of labour
- It is the most popular form of organisation
- It increases communication and reduces conflict
- It is easy to understand and practice because every member of staff knows what to do.

Disadvantages

It is a threat to the survival of an organisation because the specialists may be too powerful to control.
- there is the tendency to over work staff
- it encourages buck-passing if advice given is unsuccessful

3.3.3 Functional Organization

It is a transitional form of organization between line and line and staff. It provides for specialized skills at the supervisory level.

Advantages

- It promotes efficiency among staff at the various levels of management
- It encourages specialization.

Disadvantages

- It carries the use of specialist too far.
- It kills initiative since staff must follow institutions to the letter.
- Coordinating the functions of the various work under the same function at head could be difficult.

3.3.4 Matrix Organization

It is a form of organization created to solve complex organizational problems.

Advantages

- combination of skilled, experienced and specialist staff for special projects.
- accountability and greater participation of many people in the decision making process.

Disadvantages

- Buck-passing is encourage if decision taken is unfavourable
- Expensive to maintain

3.3.5 Committee – Type Organization

It is a formally – constituted group formed to carry out specific functions. There are adhoc, standing and executive committees.

Adhoc Committee – set up to accomplish a task. It ceases to exist as soon as it is able to accomplish its task.

Advantages

It encourages many experts to influence a decision. Such decisions taken are less personal and are jointly taken. It also encourages team work.

Disadvantages

However, it slows the pace of decision making due to time spent on arguments rather than actions. It is also expensive to maintain standing committees – It is a permanent committee.

It makes recommendations for the approval of the executive committee.

Executive committee – set up to advise management on crucial issues. It makes policies for the management to implement.

3.4 Self Assessment

We have just discussed the structures of an organization. You should be able to define organization, discuss the organizational structure and types of organisation.

4.0 CONCLUSION

Organization is very essential for the administrative procedure in the office. The structure is very important at every level of management for the purpose of workers' efficiency.

5.0 SUMMARY

Organization is the formal grouping of workers with a common set of objectives whose activities are coordinated with a view to achieving specific goals. The structures involve the division of work, facilities available and the work force, we also discuss the types of organisation to include the line, line and staff, functional, matrix and committee type.

6.0   TUTOR-MARKED ASSIGNMENT

1.   Define organisation
2.   Describe the organizational structure
3.   List the types of organisation that you know

7.0   REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2008). Office Administration and Management. Ijebu-Ode: Alamsek Press; pp. 26-32.

Aromolaran, E. A. (2009). Introduction to Office Practice and Technology. Lagos: Holy Productions Ltd, pp. 22-29.

Craine, D. P. (1982). Personnel: The Management of Human Resources. California: Kent Publishing Co., pp. 150-158.

Keeling, B. L., Kallaus, N. F. & Neuner, J. J.W (1978). Administrative Office Management. Ohio: South-Western Publishing Co., pp. 60-69.

Terry, G. R. & Franklin, S. G. (1982). Principles of Management. Illinois: Richard D. Irwin, Inc., pp. 75-95.

Unit 4: Office Personnel and Equipment

Content

1.0   INTRODUCTION

This unit will teach you some important office personnel and the equipment used in the office.

2.0   OBJECTIVES

At the end of this unit, you should be able to:
- describe the office personnel
- list some office equipment

3.0   MAIN CONTENT

3.1   **Office Personnel**

Office personnel refers to the officers in the office performing administrative functions in order to achieve organizational objectives some of the officers include general manager, managers accountant, cashier, maintenance manager secretary.

3.1.1 *General Manager*

The general manager is the overall boss in any organization. He oversees all other staff. he ensures that the policies of the organisation are executed to achieve the organizational objectives. He is also the link between the Board of Directors and staff within the organisation.

3.1.2 *Managers*

They are the next officers to the general manager in the organizations structure. The managers are in charge of various units such as production, administration, purchasing and finance.

The Production Manager: is in charge of the factory's power and plants. He coordinates the activities of the factory workers in order to ensure a hitch-free production processes. He ensures that all factory workers perform at the optimum level. The administrative manager is in charge of the recruitment, training, development and welfare/discipline of workers. He also coordinates the workers with the assistance of unit heads such as sectional managers.

The Purchasing Manager: Is in charge of the procurement of all items of the organisation. He is assisted by other members of staff in his unit such as the purchasing officers, etc. He ensures that stock does not go below the buffer level – i.e. the minimum level at which the stock should not go below before replenishment.

The Finance Manager; is in charge of all financial transactions of any organisation. He ensures that records of all financial transactions fo the organization are properly kept. He is assisted by many other officers of the organisation such as accountants, auditors and clerical staff. He ensues adequate care of both capital and revenue expenditure of the organization.

The cashier ensures proper handling of cash payments of the organisation. This position requires dedication, honestly and knowledge of book keeping and accounts.

The maintenance manager is in charge of the equipment of the organisation. he is called, "Director of Works" in some organization. He takes care of the equipment of the organisation and ensures proper maintenance of such equipment.

The secretary is the life-blood of any organization. He is regarded as "office manager" because he is the link between the general manager and office staff. He manages the boss,, office, contemporaries, subordinates and customers in the office.

The security personnel ensures adequate security of staff, offices, lives and property within the organisation. There are other senior and lower cadres of staff in the office who assist senior office personnel discussed above for the smooth-running of office activities. These include deputy and assistant managers, formen, clerical staff and factory workers.

Qualifications of Managers

For a person to be appointed as a manager in the office, he must posses a bachelor degree in his discipline from a recognized university or have an equivalent qualification. Such a person should also belong to a professional association in his discipline. To be able to rise to the level of a manager or general manager, such an officer must have acquired some years of experience performing similar routine in his discipline.

Attributes of a Manager

- He must possess the mastery of expected skills in his discipline
- He should be dedicated and loyal to the organisation.
- He must possess good strength of character i.e. not being a weakling.
- He must possess good health
- He should be above board in the knowledge of the products of the organisation.

3.2 Office Equipment

Office equipment refers to the machines used for the efficiency of workers in the office. Office equipment free workers from many of the routines and time-consuming tasks done manually.

3.2.1 Types of Office Equipment

These are categorized into three accounting, secretarial, and general.

Accounting Machines

They are either operated manually or electrically. Accounting machines are used for posting the ledger cards, writing cheques, receipts and preparing the payroll. Some accounting machines are calculators, electronic calculators, adding machines other basic accounting machines are book-keeping, electronic billing, and electronic alpha-numeric accounting machines.

Secretarial Machines

They are machines used for secretarial office routine. They include typewriters, franking, reprographic machines. Others are Dictaphone, automatic time-and-date stamping machines envelope sealing machine, jogger, shredder, etc.

Typewriters are either manually or electrically operated. Franking machine is used to print stamp impression on envelopes without the use of adhesive stamps. Reprographic machines are either photocopier, spirit or ink duplicating machines. Chief executives make use of Dictaphone to dictate messages for secretaries to type on either computer or typewriter. The automatic time and data stamping machine is used to print the impression of the time and date of receipt on office correspondence. The envelope sealing machine moisturizes the flap of envelope before sealing it. The jogger is used to collate papers before binding. A shredder is used to destroy unused office document into unreadable forms.

General Office Machines

These are generally used in the office. They include computers, fax, offset litho and laminating machines. Computer processes data and it is most commonly used in offices. There are desktop laptop and series of other forms of computers in offices today. The fax or facsimile facilitates the dissemination of information and diagrams over telephone wires through facsimile telegraphy. Documents are scanned by a beam of light and an identical image is reproduced on the other fax machine operated by another subscriber at the other end. The offset litho is more of printing machine. It is good for producing staff magazine, inter-office memoranda, etc. The laminating machine is used for protecting documents against moisture, dirt, creasing and tampering by the use of cellophane. This is done through the heat process. The machine seals the document automatically for durability.

3.3   **Self Assessment**

We have just discussed office personnel and equipment. You should be able to discuss office personnel such as general manager, managers; deputy and assistant managers and other categories discussed. In addition, you should be able to list and describe the office equipment discussed.

4.0   CONCLUSION

Office personnel are very essential for the smooth-running of an organization. It is equally important for office personnel to be able to manipulate office equipment. This will enable them perform their onerous tasks in achieving organizational objectives.

5.0   SUMMARY

Office personnel are officers performing various functions in an office in order to achieve organizational objectives. Office equipment are the various machines and tools that facilitate the tasks which would have been done manually through the use of electrically operated equipment.

6.0   TUTOR-MARKED ASSIGNMENT

1.   Define office personnel
2.   Define office equipment
3.   List any THREE office personnel and TWO office equipment
4.   List any THREE attributes of a manager.

7.0   REFERENCES/SUGGESTED READINGS

Aromolaran, E. A. (2008). Office Administration and Management Ijebu-Ode: Alamsek Press; pp. 26-49.

Aromolaran, E. A. (2009). Introduction to Office Practice & Technology. Lagos: Holy Productions Ltd, 111-133.

Harrison, J. 91975). Secretarial Duties. London: Pitman Publishing Limited; pp. 124-131.

Keeling, B. L., Kallams, N. F. & Neumer, J. J. W. (1978). Administrative Office Management. Ohio: South-Western Publishing Co., pp. 100-150.

Terry, G. R. & Franklin, S. G. (1982). Principles of Management. Illinois:

Richard, D. Irwin Inc., pp. 180-220.

Module 2: The Secretary

Unit 1:   Secretarial Practice

Contents

1.0   Introduction
2.0   Objectives
3.0   Main Content
3.1   Meaning of Secretarial Practice
3.2   Training
3.3   Qualifications of a Secretary
3.4   Qualities of a Secretary in an information technology era
3.5   Self Assessment
4.0   Conclusion
5.0   Summary
6.0   Tutor Marked Assignment
7.0   References/Further Reading

1.0   INTRODUCTION

We have just concluded the introductory unit to the Course - Corporate Administration. Remember that the course is "Corporate Administration and Secretarial Practice. In this unit 2, we shall discuss secretarial practice, training of secretaries with their qualifications and qualities.

2.0   OBJECTIVES

By the time we have concluded this unit 2, you should be able to:
- explain the term, 'secretarial practice'
- describe the categories of secretaries
- explain the qualifications of secretaries
- list the qualities of secretaries in an information technology era

3.0   MAIN CONTENT

3.1   **Meaning of Secretarial Practice**

Several authors have described secretarial practice as an extension of secretarial duties. It involves the activities of serving top executive such as performing ceremonial functions on behalf of the executing secretarial routines and a host of others. We shall discuss the functions of the secretary further in latter chapters.

3.2   Categories and Training and Qualifications

There are various categories of training available for secretaries. For the purpose of this unit, we shall limit the categories to monolingual and bi-lingual secretaries.

3.2.1 Monolingual Secretary

This category of secretaries is commonly found in an English-speaking (Anglophone) business environments. This category also falls into the following sub-topics.

- Company secretary
- Personal secretary
- Confidential secretary
- Medical secretary

3.2.1.1   Company Secretaries

This category may be referred to as legal secretary who may not necessarily have to know how to type or write shorthand. He represents his boss organisation on legal matters. He also acts as the link between the shareholders and the company.

3.2.1.1a Qualifications of a Company Secretary

For a person to be referred to as a company secretary, he should possess the following qualifications.

- Bachelor of Law (LL.B) from any recognized university and must have been called to the Bar (BL), having attended the Law School in Nigeria.
- The Chartered Institute of Professional Secretaries, London prepares chartered secretaries on private basis with its representatives all over the world.

- Professional qualification from the Chartered Institute of Secretaries, London also qualifies an individual as a company secretary.

Qualities of a Company Secretary

- A person called 'Company Secretary', by virtue of his position, is expected to be of impeccable character.
- He should be able to keep the company's secrets secret.
- He should be knowledgeable about business and legal environments such as the Stock Exchange Market and relevant laws governing the conduct and practice of companies and allied matters.
- He must be very honest and dynamic
- He should be in good command of English Language.

3.2.1.2 Personal Secretaries

Personal secretaries combine her experience in secretarial skills of typewriting and shorthand with office routine procedures. It is a high position which a confidential secretary aspires to reach in her career. There are personal secretary I and II positions, the personal secretary I being the higher position.

3.2.1.2a Training and Qualifications

- Personal secretaries I & II are either trained privately in a recognized institute, Polytechnic or University offering either Business Education (secretarial option) or Secretarial Administration.
- Such prospective secretaries must possess the Higher National Diploma in secretarial studies or Bachelor of science degree in Business Education from a recognized Polytechnic or University respectively.
- She must have spent the minimum number of years required as a confidential secretary before she can be promoted to the level of personal secretary.

3.2.1.3a Confidential Secretaries

This category of secretaries ranges from confidential secretaries I to IV: We shall discuss them in order of seniority.

3.2.1.3.1 Confidential Secretary I

This category refers to a secretary who combines the skills in typewriting and shorthand with office routine.
Training and Qualification

- She is a trained secretary in either a recognized Polytechnic or University or a recognized private institute such as the Pitman Examinations Institute of London with 60/120 words per minute in typewriting and shorthand respectively.
- She must have spent a minimum of three years as confidential secretary II to qualify for confidential secretary I grade level.
- She must possess the bachelor of science degree in either secretarial administration or business education (office option) from a recognized university.
- Possession of higher national diploma in Office Technology and management or secretarial administration/studies from any accredited Polytechnic is also acceptable.

However, such a secretary must have spent the minimum number of three years as confidential secretary II before she could be promoted to the position of confidential secretary I, subject to the availability of vacancy at this level and satisfactory performance of her duties.

3.2.1.3.2 Confidential Secretary II

A secretary in this category is expected to possess both the training and qualification of a confidential secretary I above. The only difference is the years of experience. She is directly qualified as confidential secretary II upon graduation from the University or Polytechnic with a bachelor's degree or higher national diploma in secretarial administration/studies (minimum of second class lower or lower credit).

3.2.1.3.3 Confidential Secretary III

A confidential secretary III is either trained on the job from any recognized private institute or Polytechnic with 50/100 words per minute in typewriting and shorthand respectively. In addition, a holder of National Diploma in Secretarial Studies is directly qualified as confidential secretary III.

3.2.1.3.4 Confidential Secretary IV

A holder of Group Certificate of the West African Examinations Council, or Pitman Institute of London or Royal Society of Arts, London or other recognized Group Certificate in typewriting (35/40 wpm) and shorthand (80 wpm), office practice, secretarial duties, etc is qualified as Confidential Secretary IV.

3.2.1.4   Medical Secretary

In addition to the attainment of various speeds in typewriting and shorthand and various qualifications stated above, a medical secretary is expected to be vast in office procedures skills and medical terminologies, records management, accounting procedures relevant to medical profession. Certificate courses in Biology, Physiology, Chemistry and Psychology are essential.

3.3   Bilingual Secretaries

There are very few Polytechnics offering courses in Bilingual Secretaryship in Nigeria at present. These include Yaba College of Technology, Lagos and Federal Polytechnic Offa. The bilingual secretaries are in high demand by multi-national companies with overseas operations.

3.3.1 Training and Qualifications

As stated earlier, they are at the moment being trained at the Polytechnics and some private institutes such as Alliance Francaise. At the end of the two-year programme, successful candidates are awarded higher national diploma in bilingual secretaryship.

3.4   Qualities of a Secretary in an Information Technology Era

In addition to the professional qualifications and training discussed earlier, a competent secretary-whether legal or confidential, is expected to possess the following qualities:

- Possession of good command of English Language, mastery of secretarial skills and office routine.
- Keeping herself abreast of the challenges of secretarial profession.
- A good secretary must dress properly to the office.
- She should be healthy to enable her cope with the demands of her job.
- A good secretary must be knowledgeable about her organisation.

- She should be able to produce accurate proceedings of meetings and events in her organisation.

3.4 **Self Assessment**

We have just concluded unit 2 secretarial practice. You should be able to explain the term, secretarial practice. In addition, you should be able to list the categories of secretaries with their training and qualifications. Do not forget to master the qualities of secretaries whether monolingual or bilingual.

4.0 CONCLUSION

Secretaries are vital office personnel for the survival of any organisation. they cannot be displaced by office automation because of the role which they play for the smooth-running of any organisation. However, in the era of office technology, they should keep abreast of the latest equipment in the information and communication technology era.

5.0 SUMMARY

We have defined secretarial practice as an extension of secretarial duties, to include the functions of secretaries serving top executives. In addition, we have listed and discussed the training and qualifications of various categories of secretaries in the office. Efforts were made to highlight the qualities of top secretaries in information technology era.

6.0 TUTOR MARKED ASSIGNMENT
1. Define Secretarial Practice
2. List any THREE categories of secretaries that you know.
3. How can one become a Legal or company secretary.
4. List any THREE Qualities of a confidential secretary.

7.0 REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2009). *Contemporary Issues in Office Technology & Management*. Lagos: Holy Productions Ltd; pp. 143-165.

Aromolaran, E. A. (1998). *Law and Practice of Meetings*. Lagos: Dedun Educational Books: pp. 35-39.

Fasanmi, E. A. (2008). *Secretarial Duties*. Lagos: Touchstone Ltd; pp 4-20.

ICSA (1997). *The Chartered Secretary and Administrator*. Lagos:
Integrated Press Ltd; pp. 5-13.

Whitehead, G. (1982). *Office Practice Made Simple*. London: Heinemann;
pp. 10-20.

Unit 2:   The Role of a Secretary

Contents

1.0   Introduction

2.0   Objectives

3.0   Main Content

    3.1   Traditional Role

    3.2   Modern Role

    3.3   Secretary's Role

        3.3.1 Before Meeting

        3.3.2 During Meeting

        3.3.3 After Meeting

4.0   Conclusion

5.0   Summary

6.0   Tutor-Marked Assignment

7.0   References/Further Readings

1.0   INTRODUCTION

We have partially discussed the role of a secretary as an office manager in unit 3. We shall now fully discuss her role to include the traditional, modern; her role before, during and after meetings in unit 4.

2.0   By the time you complete this unit 4, you should be able to:
- describe the traditional and modern role of a secretary
- discuss the role of a secretary
    - before
    - during
    - after meetings

3.0   MAIN CONTENT

3.1   Traditional Role of a Secretary

Among the traditional roles of the secretary are:
- arranging the office for the smooth-flow of work
- taking notes from the boss and transcribing such notes into mailable form.
- keeping the diary of events to enable her remind her boss;
- arranging files and various information into appropriate headings:
- taking minutes and producing it at meetings;
- attending to callers-whether or not on appointment;
- processing information manually for the boss
- making and answering phones on behalf of her boss.

3.2   The Modern Roles of a Secretary

The modern roles of the secretary refers to new roles in an automated office. Correspondence is no more processed in the automated office. There are some sophisticated office equipment such as the facsimile machine that can scan and send diagrams simultaneously to the recipients; shredder that can destroy documents into unreadable form or computer that can produce as many original copies of documents as the boss wants. It is, therefore, important for the secretary to be able to manipulate numerous office equipment in the automated office.

In addition, she should acquire more in depth knowledge and application of communication skills. Her ability to use automated office equipment such as computer in processing information will stand her in good stead in the performance of her onerous office tasks.

The secretary participates in decision-making process by advising her boss and managing the boss, staff and visitors. Other modern role of the secretary are:
- representing the boss at some important engagements;
- obtaining corporate facts that would have been difficult or impossible for her boss to obtain;

- learning about the business and customers for the benefit of her organisation.

Having discussed the traditional and modern roles of the secretary, we shall now discuss the role of a secretary before, during and after meetings.

3.3   Role of a Secretary Before Meetings

The secretary prepares the notice and agenda and distributes to members in compliance with the rules and regulations governing the conduct of the meetings. The notice indicates the title, date, venue and time for the meeting while the agenda is the list of items slated for discussion at the meeting. It is the duty of the secretary to:
- arrange a suitable venue for the meeting;
- circulate previous minutes of meeting;
- receive letters of apology from members who will not be able to attend the meeting;
- provide the chairman with necessary information needed, and;
- prepare the attendance register prior to the meeting;

The secretary should also arrange for tea break and lunch if the meeting duration will be long.

3.4   Role of the Secretary during the meeting

It is now assumed that the meeting has started and the chairman has called the meting to order. The secretary has her role to play during the meeting.
- she supplies the members with stationery and puts the attendance register near the entrance to enable members sign as they arrive the venue of the meeting.
- she ensures that sitting arrangement is suitable, with the chairman sitting at the head of the table.
- the secretary reads minutes of previous meeting and also records proceedings of the current meeting.
- she assists chairman and members who require some information during the meeting:
- it is the secretary who leaves the venue of the meeting last to ensure that nothing is forgotten and putting the venue of the meeting in order.

3.5   Role of the Secretary after the Meeting

A successful meeting does not end with convening it. There are some efforts to be made by individuals to sustain it. The secretary plays a significant role in sustaining a successful meeting.

- she returns all materials and documents used at the meeting to the office for safe-keeping.
- the draft of the minutes is prepared for chairman's vetting.
- she prepares the final copies of the minutes for circulation to members after the approval of the chairman.
- all the pending issues must be attended to before the next meeting. This will enable the secretary to report back to members at the next meeting.

3.6 **Self Assessment**

You have just finished with unit 4: Role of Secretary. Try and list any FIVE (each) of the traditional and modern role of the secretary. In addition, list any three (each) of the role of secretary before, during and after the meeting.

4.0 CONCLUSION

It is obvious that, with the significant role played by the secretary in the office and at meetings, she remains an indispensable administrator in the office. It is therefore, important for her to prepare herself for the 'paperless office' – i.e. the automated office.

5.0 SUMMARY

We have discussed the traditional and modern roles of the secretary in unit 4. Efforts have been made to discuss the roles of secretary before, during and after meetings.

6.0 TUTOR-MARKED ASSIGNMENT

1. List any Five Traditional Roles of the Secretary
2. Discuss any Four Modern Roles of a Secretary
3. Itemise any Four roles of a Secretary before the meeting and Discuss any THREE (each) of her roles during and after the meeting respectively.

7.0   REFERENCES/FURTHER READINGS

Agbionu, U. (2002). *Secretarial Administration*. Lagos: Topline Investment Ltd. pp. 157-161.

Akinola, C. I. (1999). *Office Administration for Managers and Secretaries*. Lagos: Visual Plus Ventures; pp. 18-25.

Aromolaran, E. A. (1999). *Law and Practice of Meetings:* Lagos: Dedun Educational Books, pp. 36-40.

Fasanmi, E. A. (2002). *Secretarial Duties.* Lagos: Touchstone Ltd; pp. 15-25.

Onasanya, S. A. B (1988). *The Effective Secretary.* Ibadan: Longman Nig. Ltd., pp 3-4

Unit 3:   Secretarial Ethics and Human Relations

Content

1.0   Introduction

2.0   Objectives

3.0   Main Content

3.1   Meaning of Secretarial Ethics

3.2   Meaning of Human Relations

3.3   Secretaries Ethics in the office

3.4   Principles of Human Relations between the Secretary and the boss.

3.5   Self Assessment

4.0   Conclusion

5.0   Summary

6.0   Tutor-Marked Assignment

7.0   References/Further Readings

1.0   INTRODUCTION

This is the last unit (unit 5) of module 3. In this unit, you will be taught secretarial ethics and human relations.

2.0   OBJECTIVES

At the end of this unit, you should be able to:

- define secretarial ethics
- explain human relations
- discuss the principles of human relations
- stress the needs for cordial relationship between the secretary and her boss.

3.0   MAIN CONTENT

3.1   **Meaning of Secretarial Ethics**

Secretarial Ethics refers to desirable behaviour of secretaries in the office. Anything short of this type of behaviour is an undesirable behaviour. For example, lateness to the office or leakage of official secrets is regarded as an undesirable behaviour against secretarial ethics.

3.2   **Meaning of Human Relations**

Human relations stresses the need for office workers to interact in order to easily achieve organizational objectives. It is the relationship which subsists between one person and another; or a group of persons within a locality, a work place or social setting. Getting along with others, needs appearance, good grooming and comportment are some of the ingredients of good human relations.

3.3   **Secretarial Ethics**

Aromolaran (2008) lists the following as secretarial ethics:
- Treating subordinates, contemporaries and super-ordinates with mutual respect.
- Being impartial, open-minded and fair in dealing with staff on equal basis.
- Creating the enthusiasm and desire to work for the establishment.
- Maintenance of good human relations with workers by empathizing with them in time of distress.
- Dressing properly for the office
- Working extra time and keeping "office secrets" secret.

The Civil Service Handbook (1997) cited in Aromolaran (2009) states some of the following as code of ethics for secretarial staff.
- Discipline and strict adherence to rules and regulations.
- Being loyal to the organisation
- Politeness to subordinates, contemporaries and super-ordinates.
- Tactfulness by staff in their day-to-day activities in the office.
- Avoidance of delay in executing schedules

- Avoidance of dirty environment.
- Cultivating the habit of helping others on either official or domestic problems.
- Serving impartially and showing kindness to those who deserve it whether known or unknown.

3.4 Principles of Human Relations

The following principles of human relations will assist office workers, especially, the secretary in achieving personal and organizational goals.
- Doing to others what we would we wish others to do to us.
- Being a good listeners while information is being disseminated to us.
- Avoidance of unnecessary interruption and argument while discussing with people.
- Avoidance of prejudice, especially, when dealing with people.
- Cultivating the values of effective communication i.e. being understood as we wish the encoder to understand and getting the appropriate feed back.
- Demonstrating the expected public relations and interpersonal relationship will endear the secretary to the workers and visitors to the establishment.

3.5 Need for Cordial Relations between the secretary and her chief

The secretary is the link between her chief and the office workers. Any disagreement between the two (secretary and the boss) will affect the whole organisation. This is why the secretary is regarded as the "life-blood" of he organization.

In addition, a good secretary, according to Fasanmi (2002) must know her chief very well, act, think and react to people both within and outside the company. Hence, she should comport herself and maintain cordial relationship with everybody.

The slogan, "customers are always right", is very proper in managing the office. Without clients patronizing the office, there will be no means by which the boss can pay the secretary. It is, therefore, imperative that the secretary should be able to provide simple basic solutions to customers' needs.

The secretary who is experienced in office routine should establish rapport with her boss. She should also establish a good working rapport with him to enable her discuss issues and problems with the boss. A good secretary should also not be too rigid in her approach to duties. In the process of practicing human relation skills of the secretary, should maximize output by minimizing time spent on her boss's numerous schedules. This will encourage the boss in having good working relationship with her.

3.5   Self Assessment

1.   Define secretarial ethics
2.   List any THREE secretarial ethics
3.   Define human relations
4.   What is an undesirable work habit?

1.   Secretarial ethics refer to the expected behaviour of secretaries in the office. For example, giving a helping hand to other office workers.

2.   Any three secretarial ethics include:
   • Treating office workers with respect
   • Keeping office secrets' secret.
   • Dressing properly for the office

3. Human relation is the relationship subsisting between one person and another, between a group of persons within a locality or work place.

4. Undesirable work habits are those anti-social behaviour among office personnel which affect the achievement of personal or organizational goals. Such anti social behaviour also affects human relations in the office.

4.0   CONCLUSION

Human relations is very desirable for the achievement of personal and organizational goals. Office workers should imbibe the culture of good human relations with good human relations, the secretary will relieve her boss of some busy schedules. They (boss and secretary) will be able to maintain good working relationship in the office.

5.0   SUMMARY

You have been taught secretarial ethics and human relations in this unit. You have also been taught the principles of human relations and the needs for cordial relations between the secretary and the boss.

6.0   TUTOR-MARKED ASSIGNMENT

1.   What do you understand by secretarial ethics?

2.   List any THREE principles of human relations?

3.   List any THREE secretarial ethics that you know?

4.   Why should the secretary and her boss maintain cordial relations?

7.0   REFERENCES/FURTHER READINGS

Akinola, C. I. (1999). *Office Administration for Managers and Secretaries*. Lagos: Vision Plus Ventures: pp. 160-163.

Aromolaran, E. A. (2009). *Introduction to Office Practice & Technology.* Lagos: Holy Productions Ltd., pp. 13-14.

Aromolaran, E. A. (2008). *Office Administration and Management.* Ijebu Ode: Alamsek Press; pp. 117-121.

Fasanmi, E. A. (2002). *Secretarial Duties*. Lagos: Touchstone Books; pp. 97-102.

Nwakanobi, E. I. (1998). *Office Administration.* Lagos: B.Z. Commercial Press; pp. 15-25.

Unit 4:   The Secretary and People Management

Contents

1.0   INTRODUCTION

The secretary is very important for the survival of any organisation. You must have noticed that, in every one of the four units we have discussed, the secretary is always mentioned. In this unit, you will learn about the secretary and how she manages people within the office setting.

2.0   OBJECTIVES

At the end of this unit, you should be able to:

- explain the term, 'people management'
- discuss the means by which the secretary manages the boss, contemporaries, subordinates and customers.

3.0 MAIN CONTENT

3.1 Meaning of People Management

People Management is one of the important roles of the secretary in any organisation. In managing the people, there are certain factors to be considered by the secretary such as:
- viewing others as professionals in their own rights;
- contributing to the wider aspects of work and relieving a lot of pressure from others;
- listening to others' points of view and not being self-centred;
- handling the boss effectively when boss he is away.

In managing people, the areas of such management should be defined to avoid confusion and time wasting. These include:
- the office
- the boss
- contemporaries
- subordinates
- customers

3.2 Managing the Office

Managing the office is a fundamental function of the secretary. She coordinates both human and material resources. It is also the responsibility of the secretary to monitor the office environment through her subordinates. The secretary should therefore, should constantly be on the alert to device new means of improving staff performance and adapting to the changing conditions of the automated office environment.

3.3 Managing the Boss

The secretary manages the boss in the following areas:
- Diary and Appointments to enable her remind the boss of future events and schedules.
- Meetings and Conferences. The secretary is expected to assist the boss in organizing meetings and conferences.

- She is to assist the boss in the management of his time because of his tight schedules.
- The boss as a human being is pre-occupied with myriads of problems – both official and unofficial. The secretary should be able to manage the psychological disposition of the boss.
- The privacy of the boss is known by the secretary. She should be a reliable office staff that the boss could confide in keeping a calendar of schedules and constantly reminding the boss of such schedules is another area of managing the boss by the secretary.
- Even though the secretary is not necessarily a banker, she should be able to manage the finances of her boss. This requires honesty and reliability.
- When the boss is away, the secretary should be able to keep the office active and assist whoever acts for the boss.
- Manage the office of the boss in the areas of telephone, correspondence, files, meetings, visitors, miscellaneous.

3.4 Managing Contemporaries

Managing the subordinates is as important as managing the contemporaries; if not more important. This is because the subordinates are usually the majority in the workforce. She should, therefore, be a leader and not the boss. The opinions of the subordinates must be respected. The secretary should empathise with the subordinates in order to get the best from them.

Target setting for the subordinates would also assist the secretary in managing them. The use of upward communication (subordinates – contemporaries – superordinates – the boss) and informal group communication will assist in managing the subordinates.

3.5 Managing Customers

The slogan, "customers are always right" is very proper in the management of customers by the secretary. It is when there are customers that the office can thrive. This calls for the secretary to be tactful in dealing with customers she has to cultivate good grooming, telephone manners, pleasant smile of dealing with people and the ability to listen and solve customers' problems. It is also expected that the secretary will listen and handle customers' complaints effectively and intelligently, even when the customers are not satisfied.

3.6 **Self Assessment**

You will observe that we have discussed the secretary and how she could manage people in the office. You should now be able to identify the people she could manage such as the boss, her contemporaries, subordinates and the customers. Now, list the areas of managing each category of people in the office, especially the boss.

4.0 CONCLUSION

An understanding of the means of managing the people by the secretary in the office is very important for the survival of any organisation. The content of this unit has taught you the means of managing the office, the boss, contemporaries, subordinates and customers by the secretary. You will learn about managing records in the units that follow.

5.0 SUMMARY

This unit has taught you the means of managing people in the office. Notable among what you learnt in this unit include:
- managing the office
- managing the boss
- managing contemporaries
- managing subordinates
- managing customers

6.0 TUTOR-MARKED ASSIGNMENT
1. What is People Management?
2. List and FIVE areas in which the secretary should manage the boss.
3. The slogan, "customers are always right" is very important for the survival of any establishment. Justify this statement.
4. To manage the subordinates, what should the secretary do?

7.0 REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2009). *Contemporary Issues in Office Technology and Management*. Lagos: Holy Productions Ltd., pp. 1-15.

Aromolaran, E. A. (2000). *Fundamentals of Management*. Lagos: BVL Print Technologies; pp. 97-108.

Griffin, R. W. (1984). *Management. Boston*: Houghton Miffin Co., pp. 24-48.

Perry, G. R. & Franklin, S. G. (1998). *Principles of Management*. Illinois: Richard D. Irwin Inc. pp. 1-15.

Trewatha, R. L. & Newport, M. G. (1982). *Management Texas*: Business Publications Inc., pp. 50-55.

Unit 5:   Managing Meetings

Contents

1.0   Introduction

2.0   Objectives

3.0   Main Content

3.1   Meaning of Meeting

3.2   Types of Meetings

3.3   Attributes of a valid meeting

3.4   Achieving good results at meetings

3.5   Importance of Meetings

3.6   Self Assessment

4.0   Conclusion

5.0   Summary

6.0   Tutor-Marked Assignment

7.0   References/Further Readings

1.0   INTRODUCTION

The unit 3 of module 3 you are about to study is an planning meetings. In it, you will be taught the meaning of meeting, types and attributes of a valid meeting; how to achieve good results at meetings. The importance of meeting will also be taught.

2.0   OBJECTIVES

By the time you have studied this unit, you should be able to:
- define meeting

- discuss the types of meetings
- list the attributes of a valid meeting
- understand how to achieve good results at meetings
- understand the importance of meetings

3.0 MAIN CONTENT

3.1 Meaning of Meeting

An association of two or more people coming together for a lawful purpose is meeting. This connotes that any association of two or more people which is detrimental to the peace, progress and unity of any environment such as strike or riot is hot regarded as meeting. It is regarded as unlawful assembly.

3.2 Types of Meetings

The companies and Allied Matters Decree (Act) 1990 dwells much on the types of meetings as statutory, annual general meeting, extra ordinary general meeting, board meeting, class meeting and committee meeting.

3.2.1 Statutory Meeting

Section 211 (1) of the Companies and Allied Matters Decree (CAMD) 1990 defines statutory meeting as the first meeting of a company limited by share or guarantee and having a share capital.

It is held not later than six month from the date of its incorporation. A company is limited by share if the liability of its members is limited to the number of shares allotted.

3.2.2 Annual General Meeting

According to section 213 (1) of CAMD 1990, it is the meeting which must be held by every private or public company at least, once, in every calendar year but not more than 15 months (i.e. three months of grace plus the twelve calendar months which is one year). Its significance is to appraise the successes or failures of the company with a view to determining the next line of action.

3.2.3 Extra-Ordinary General Meeting

This is a general meeting, other than annual general meeting of a company, according to section 215 (2) of CAMD 1990. It may be convened

by the directors on the requisition of the holders of at least, one tenth of such paid-up capital of the company.

3.2.4 Board Meeting

This is the meeting of the board of directors of a company. The directors are responsible for managing the company and deciding on its policy matters.

3.2.5 Shareholders Meeting

It is the meeting of holders of different categories of shares within a company, such as ordinary shareholders or preference share-holders. The ordinary shareholders are entitled to the remaining dividends after the preference shareholders must have received fixed rate of dividends.

3.2.6 Committee Meetings

These are various committee of the company appointed to carry out vital decisions on behalf of the company. There are Ad Hoc committee, sub-committee, joint committee, standing committee and executive committee.

3.2.6.1 Ad Hoc Committee

This is set up for a specific purpose. It ceases to exist as soon as it accomplishes the task for which it was set up.

3.2.6.2 Sub-Committee

It is formed from the main committee when it is obvious that experts are needed to carry out certain assignment that may take the main committee more time to accomplish.

3.2.6.3 Joint Committee

It is a combination of two or more committees set up to clarify certain issues, and where the efforts of various committee are needed.

3.2.6.4 Standing Committee

This is more or less a permanent committee set up to deal with routine matters – finance and general purpose committee.

3.2.6.5 **Executive Committee**

This carries out executive functions. It forms and formulate policies for the management of the company.

3.3 **Attributes of a Valid Meeting**

For a meeting to be valid, it must possess the following attributes.

- It must be properly conveyed. That is, notice inviting members should be sent in time to contain the purposes, venue, date and time of the meeting.
- The meeting must be properly constituted. The officials in the meeting must be properly elected and the prescribed quorum must be present and maintained. A quorum is the maximum number of members that must be present throughout the duration of the meeting.
- The meeting should be properly held in accordance with the rules and regulations governing the conduct of the meeting.

3.4 **Achieving Good Results at the Meeting**

Terry and Frankling (1982) suggest the following on achieving good results at the meeting:

- Do not call meeting on issues which the chairman could resolve or issues which a series of telephone calls to individuals will serve.
- Let the purpose of the meeting be clearly indicated to all bonafide members.
- Encourage equal and full participation by members.
- Listen attentively and make eye contacts when discussing, in order to get all members involved.
- Telephone calls should not be allowed in the meeting room while in session.
- Minutes of the meeting must be produced and distributed among members.

3.5 **Importance of Meetings**

Meetings are importance for the following reasons.

- They are a source of permanent records for decisions taken from time to time.

- They serves as for a for disseminating information to members and the public about the activities of the establishment.
- Meetings dispel rumours and anxiety among members.
- Activities of staff would be coordinated if effective meetings are encouraged.

3.6 **Self Assessment**

1. Define the term meeting
2. State the importance of section 211 of CAMD 1990
3. List the types of meeting that you know
4. List any TWO importance of meetings that you know.

1. Meeting is an association of two or more people coming together for a lawful purpose. Any gathering of more than two people not for a lawful purpose is regarded as unlawful assembly.

2. Section 211 (1) of CAMD 1990 is about statutory meeting – the first meeting of a company limited by share or guarantee.

3. Types of Meetings are
   - Statutory Meetings
   - Annual General Meetings
   - Extra-ordinary General Meeting
   - Board Meetings
   - Committee Meetings

4. Two importance of meeting are:
   - A source of permanent records for decisions taken
   - It serves as forum for disseminating information to members and the public about the activities of the establishment.

4.0 CONCLUSION

In conclusion, meetings serve as a vital source of permanent records in any establishment. It is even mandatory by law, that establishments should hold meetings regularly. Committee meetings are equally important in solving knotty problems because of the expertise of members of such committees.

5.0 SUMMARY

We have discussed the meaning of meetings in this unit. The unit has also taught you the types of meetings, attributes of a valid meeting; achieving good results in the meeting; and the importance of meetings to any organization.

6.0   TUTOR-MARKED ASSIGNMENT

1.   List any TWO attributes of a valid meeting
2.   Explain any two types of meetings that you know.
3.   "To achieve good results at a meeting, certain steps should be taken". Explain with any THREE points.
4.   Why is section 215 (2) of CAMD important.

7.0   REFERENCES/FURTHER READING

Aromolaran, E. A. (1998). *Law and Practice of Meetings.* Lagos: Dedun Educational Books, pp. 1-12.

Corporate Affairs Commission (1990). *Companies and Allied Matters Decree.* Lagos: Government Press Limited, pp. 15-50.

Denyer, J. C. & Shaws, J. (1982). *Office Management.* London: MacDonald & Evans; pp. 50-55.

Federal Republic of Nigeria (1979). *Nigerian Constitution.* Lagos: Government Press Ltd., pp

Terry, G. R. & Franklin, S. G. (1982). *Principles of Management.* Illinois: Richard D. Irwin, Inc. pp. 60-120.

Unit 6:   Managing Conferences

Contents

1.0   INTRODUCTION

You have been taught, 'planning meetings' in unit 3 of this module. You will now be taught, 'planning conferences' in unit 4. You will also be taught the management of conference to ensure success of such conferences.

2.0   OBJECTIVES

By the time you have studied this unit, you should be able to:
- plan conference
- discuss pre-conference, conference and post conference periods

3.0   MAIN CONTENT

3.1 Planning the Conference

A conference is an important activity in learning more about contemporary issues in the global world. The secretary has important roles to play before, during and after the conference. Conference periods are divided into three – pre-conference, conference and post-conference periods. A conference that is well planned will surely disseminating information.

3.2 Pre-Conference Period

As stated earlier, the secretary has a great role to play with the chief executive of such an organisation. The chief executive with the secretary, may hold series of meetings with members of management to determine the need for a conference such as:
- topics for discussion
- type of conference in brainstorming, training, problem solving? Etc

A conference leader should also be appointed such a leader is expected to possess the following attributes:

- ability to think quickly and clearly
- possession of a sense of good humour
- possession of an analytical ability

During the pre-conference period, the following should be done:

- Topic areas for discussion
- Notice of the conference including date, time, place, topics for discussion, theme and sub-themes etc.
- Preparation of physical facilities such the venue, visual aid, lecture materials and stationery.
- Confirmation of hotel booking and rooms for prospective participants.
- Feeding arrangement with tea break
- Confirmation of visits to places of interest
- The committee in charge of the proposed conference should also visit the conference hall to ensure the readiness of logistics.

3.3 Conference Period

The committee chairman in charge of the conference with the secretary should note the following:

- Early arrival of committee members to the venue of the conference.
- Registration of participants and getting them seated.
- Recording the proceedings of the conference
- Time management by the Chairman of each session.
- Provision of regular supply of electricity within the conference environment.
- Getting communiqué/resolutions ready for the participants' adoption.

3.4 **Post Conference Period**

It is now assumed that the conference has been successfully held. However, it is not over until the objectives of the conference have been achieved consequently, the following should be done.

- The conference should be evaluated by the planner to determine its success or otherwise.
- Reports should be distributed to participants.
- All unused documents should be returned to the office.
- Resolutions should be drafted for board's approval.
- The final copy of such resolutions should be given to participate and for follow-up actions.
- Transportation should be arranged for participants.

3.5 **Self Assessment**

We have just discussed, 'planning the meeting. You should now, assess yourself by attempting the following question.

1. In planning the conference, list the stages of the conference.
2. List any three roles of the conference planning committee during the pre-conference period.

4.0   CONCLUSION

For a success conference, the three-step plan of pre-conference, conference and post-conference should be thoroughly planned. A conference that is well run and democratically arranged will serve as a veritable communication tool for disseminating information.

5.0 SUMMARY

A conference is a very important gathering for in deliberating on contemporary issues. We have discussed in this unit, pre-conference, conference, and post-conference periods. Efforts were made in reiterating the importance of conference planning committee for a successful conference hosting of any conference.

6.0 TUTOR-MARKED ASSIGNMENT

1. What should be the role of a conference planning committee during the pre-conference period?

2. List the three stage plan for hosting a conference.

3. List any three roles of the chairman during the conference session.

4. In a logical sequence, discuss the activities of the conference planning committee after the conference.

7.0 REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2009). *Contemporary Issues in Office Technology & Management*. Lagos: Holy Productions Ltd., pp. 130-133.

Aromolaran, E. A. (2000). *Fundamentals of Management*. Lagos: BVL Print Technologies, pp. 105-108.

Aromolaran, E. A. (1999). *Law and Practice of Meetings*. Lagos: Dedun Educational Books; pp. 4-10.

Terry, G.R. & Franklin, S. G. (1982). *Principles of Management Illinois.* Richard, D. Irwin Inc. p. 100-105.

Module 3: Records Management

Unit 1: Records Management: Meaning, Needs for Record Management, Types, Classifications and Importance

Contents

1.0   INTRODUCTION

We are about to proceed to module 2 of the Course Corporate Administration and Secretarial Practice. This module comprises five units where you will learn about records management, filing and indexing,

preserving records, the registry and confidential documents. In this unit, we shall discuss records management.

2.0   OBJECTIVES

By the time you have studied this unit, you should be able to:
- define records management
- state the needs for records management
- describe the types of records
- classify records
- list the importance of records

3.0   MAIN CONTENT

3.1   **Meaning of Records Management**

Records management is the process by which the records of any organisation are maintained, kept, retrieved, analysed and processed. The success of any organisation depends on the efficiency of its records management.

3.2   **Needs for Records Management**

The following are some of the needs for records management.

- There is the need to provide accurate and timely information for various executives within an organization as and when needed.
- An office needs to develop and maintain an efficient system for creating, storing, retrieving, retaining and disposing information Records management seeks to facilitate the process.
- An office must preserve documents and safeguard organizational assets and records as required by law through an efficient records management.
- Easy location of documents and records will be made possible through an efficient records management system.
- There is the need to make comparison between performances at different times. Records management provides a major is the only source through which such a comparison could be made.

3.3   **Types of Records**

The types of records being kept vary from one organization to another. However, certain documents exist no matter the types of any organization.

3.3.1 **Application File:** Which is separated according to grade level, qualification, appointable/non-appointable and other information about staff within an organization.

3.3.2 **Attendance Record**: This shows for every employee, coded absences – whether or not reported, excused or unexcused, leave of absence, etc.

3.3.3 **Staff Appraisal Record**: This is usually filled by staff at the end of every year. It is also being referred to as APER (Annual Performance Evaluation Report) form. This is used to determine staff productivity, promotability or otherwise training required, etc.

3.3.4 **Promotion File**: contains the list of promotable staff; due date for promotion and position to which staff are promotable.

3.3.5 **Insurance Record**: contains information on insurance policies by the management on behalf of staff; designation; next-of-kin; premium and other information needed for the insurance coverage.

3.3.6 **Staff Discipline Record**: contains information on staff discipline, nature of indiscipline and appropriate sanctions taken.

3.3.7 **Staff Development and Training**: contains information about various development and training programmes planned or organized for various categories of staff.

3.3.8 **Annual Leave, Casual Sick Leave Record**: contains information on the number of annual, casual or sick leave entitled to by every member of staff and the number of leave periods taken by each staff. The list of records is exhaustible. Records are being kept for departmental meeting, general correspondence, staff welfare, briefs, etc.

3.4   **Classification of Records**

Records are classified as secret, top secret and restricted.

- Secret Records are vital and security to any organisation, the disclosure of which may embarrass the organization.

- Top secret records are not to be disclosed to unauthorized officials as such disclosure may cause an irreparable damage to the organisation.
- Restricted records are not to be discussed or removed by any person from the restricted file. Password may be used if a computer system or any mechanical device is being used.

3.5 Importance of Records Management: Records management is important for the following reasons.

- A good evidence of any transaction or event.
- The law requires every organisation to manage records.
- Records serve as invaluable historical interest for the establishment or researchers.
- For an effective information management, records must be kept.
- Records serve as a proof that something was agreed to.
- It is good for safeguarding information and assets of any organisation.

3.5 Self Assessment

Now that you have completed this unit, you should be able to define records management and state the needs for records management. Moreover, you should be able to describe many vital records being kept in any organisation. Also, classify records and list the importance of records.

4.0 CONCLUSION

In conclusion, records are vital for the successful administration of any organisation. Efforts should be made in maintaining efficient and effective records. Easy retrieval of information will be made possible through proper records management.

5.0 SUMMARY

We have discussed records management as the process of maintaining the records of any organisation. We have also discussed the needs for records management. We also classified documents into secret, top secret and restricted. Types of records were identified before we discussed the importance of records management.

6.0 TUTOR-MARKED ASSIGNMENT

1. What is records management?
2. Into how many categories could you classify records? List them.
3. Why do we manage records
4. List any THREE importance of records management

7.0 REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2009). *Introduction to Office Practice & Technology*. Lagos: Holy Productions Ltd, pp. 43-49.

Aromolaran, E. A. (2008). *Office Administration & Management*. Ijebu-Ode: Alamsek Press, pp. 59-70.

Keeling, B. L. & Kallaus, N.F & Neuner, J.J.W. (1978). *Administrative Office Management*: Ohio: South-Western Publishing Co., Pp. 50-58.

Odiagbe, J.M. (1988). *Administrative Office Management*. Ilorin; Nato Publicity & Printing Co., pp. 40-60.

National Board for Technical Education (1989). *Curriculum and Course Specifications*. Kaduna: Atman Ltd., pp. 10-15.

Unit 2:   Handling Confidential Documents

Contents

1.0   INTRODUCTION

We have discussed records management, filing and indexing and preservation of records through manual and automated means in units 1, 2 and 3 of module 2. It is, therefore, important to discuss confidential documents, their classifications and steps in handling and recording in coming and outgoing mails in unit 4.

2.0   OBJECTIVES

When you have diligently studied this unit, you should be able to:
- define confidential documents
- classify confidential documents
- prioritize confidential documents
- describe the procedures for handling in coming and outgoing mails
- list the qualities of staff handling confidential documents

3.0   MAIN CONTENT

3.1   Meaning of Confidential Documents

Confidential documents refer to correspondence or information to which only authorized persons should have access. Examples of confidential documents are personal letters, secret, top secret or restricted documents.

3.2   Classifications of Confidential Documents

3.2.1 Secret Documents:

Vital documents which have elements of security to an organisation. The disclosure of such documents may embarrass the organisation concerned e.g. leakage of examination questions.

3.2.2 Top Secret Documents:

Not to be disclosed to unauthorized persons. The disclosure may cause irreparable damage – e.g. list of ambassadors' designate.

3.2.3 Restricted/Classified Documents:

Vital information that should not be discussed by any person or removed from the restricted file – e.g. military information.

3.3   Priority Classifications of Confidential Documents

Confidential documents are priorized by colours and marks to show their degrees of importance or urgency. They are classified as follows:
- xxx – Immediate or at once.
  Red colour is used for this to indicate that it must be attended to immediately or at one. This takes procedures over all other priority markings.

- xx – Today. That is, it should not be left overnight without being attended to Green colour is being used to denote the priority classification.
- x – Urgent. That is, it should be treated before any unclassified documents. Blue colour is being used to denote the priority classification.

3.4   Procedure for Handling Incoming and Outgoing Mails

3.4.1 Incoming Mails

The following are the procedure for handling in coming mails:
- The mail must be received first and foremost.
- Such mail should be sorted as classified/classified, registered/unregistered, personal, sealed and unsealed envelops.
- Opening of envelopes should follow the sorting General mail is not classified as above.
- Letters being that are opened should be stamped
- Record mail in the in coming mail register as illustrated below.

Incoming Mail Register

Date	Sender	Types of Mails				Destination of Recipient
		Classified	Unclassified	Registered	Others	

- For any correspondence to be treated by more than one officer;

  - Photocopy the correspondence for the number of officials to treat the document, or
  - make use of mail inward circulation slip (with the names of the officers who will treat the document listed) as follows:-

S/NO	Official	Signature
1.	Dr. Adesewa, Purchasing Manager	
2.	Mrs. Aderonke- Sales Manager	
3.	Mr. Akinola, Financial Accountant	
4.	Mr. Adejola, Marketing Manager	
5.	Miss. Akan Tolu – Public Relations Manager	
6.	Mrs. Laide Adedayo – Company Secretary	

- Envelopes of all correspondence treated should be kept for three days for reference purposes.

3.4.2 **Outgoing Mails**

The following should be done for handling outgoing mails.

- There should be a centralized location for collecting outgoing mails.
- Set specific time for collection mails from various departments.
- Record outgoing mails in the outgoing mails register as follows:-

Outgoing Mails Register

Date	Name/Address of Recipient and Details of Correspondence	Classification	Stamp used	Signature

- Fold letters and insert into the envelope. Ensure visibility of name/address if window envelope is used.

- Use franking machine in place of adhesive stamps if large volumes of are envelopes being used. (A franking machine may be hired from the post office to print stamp impression on the envelopes in various denominations set on the franking machine's metre).

- Post all unregistered letters through post office boxes. Registered letters are handed over at the post office desk where certificate of posting would be issued.

3.5 Qualities of Staff Handling Confidential Documents

The following are the qualities of staff handling confidential documents.

- Honesty should be the watchword.
- Staff handling confidential documents should be healthy.
- Such staff should be painstaking in dealing with staff.
- They should be neat and able to keep secrets.

3.6 Self Assessment

We have discussed confidential documents extensively in this unit. You should be able to explain various classifications and priority classifications of documents. In addition try to explain the procedure for handling in incoming and outgoing mails. Now state any five qualities of staff handling confidential documents.

4.0 CONCLUSION

Handling confidential documents is very important for the survival of every organisation. For this reason, effort should be geared towards effective handling of incoming and outgoing correspondence.

5.0 SUMMARY

This unit took you through handling confidential documents. You also learnt the priority classification of documents.

The unit taught you the procedures for handling incoming and outgoing mails. The qualities of staff handling confidential documents were also discussed.

6.0 TUTOR-MARKED ASSIGNMENT

1. What are Confidential Documents?
2. Distinguish between the classification and priority classification of documents.
3. List any THREE procedures for handling incoming mail.
4. List any 5 qualities of staff handling confidential documents.

7.0   REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2008). *Office Administration and Management*. Ijebu Ode: Alamsek Press; 71-75.

Nwakanobi, E. I. (1998). Office Administration. Lagos B.3 Commercial Press; Pp. 41-46.

Odiagbe, J. M. (1994). *Modern Office and Secretarial Administration*. Lagos: Summit Publishing Enterprises; pp. 20-25.

Ojoye, S. O. (2000). *Modern Office Management.* Lagos: St. George Consultants; pp. 40-45.

Onasanya, S.A.B. (1990). *The Effective Secretary*. Lagos: Longman Nig. Ltd., pp. 50-55.

Unit 3: Methods of Creating Information

Contents

1.0   INTRODUCTION

You are about to be introduced and taught the various methods of creating information. This unit shall discuss some important methods.

2.0   OBJECTIVES

By the time you have studied this unit, you should be able to
- list and discuss the various methods of creating information
- discuss the various methods listed.

3.0   MAIN CONTENT

3.1   **Introduction**

Information is very vital for the survival of any organisation. It is equally important for the achievement of the organizational objectives. Some of

the various means by which information can be created are business letters, memos, minutes, reports and telephones.

Business Letters

Letters can afford an organisation the opportunity to make or mar its reputation. Good command of words is very important in writing letters.

Layout of Business Letter

Establishments have their official letter-headed papers with the name, address, telephone, reference and date.

Recipient's Address: The proposed recipient of the letter. This begins from the left margin.

Attention Line: If the writer wants a specific officer of the recipient's organisation to attend to a portion (the body) of the letter, the attention line is necessary.

Salutation: Courtesy is reflected by salutation such as Dear Sir, etc.

Subject Heading: This reflects the purpose and content of the letter.

Body: In this portion the writer explains the importance of the letter, usually in paragraphs.

Complimentary Close; This comes at the end of the main body of the letter and expressed with words such as yours faithfully, etc.

Signature/Designation; To make the letter official, it must be signed by the writer with his designation.

Enclosure: This is necessary, only if the writer encloses some items in the envelope.

SPECIMEN

XYZ Company Limited
20, Aladelola Street
Alaafia, Irepodun State.

Ref.   Date

The Manager,
Providence Publishing Company,
Ibadan.

Dear Sir,

<u>Remittance of Cheque for Goods Supplied</u>

We hereby acknowledge receipt, of 50 copies of your textbook, 'Office Administration and Management.

We therefore remit a Topmost Bank Cheque No 00205 for the sum of N500,000, for the books supplied.

Please acknowledge receipt.

Yours faithfully,
XYZ Company Ltd.

Mrs. Olu Ayomide
Finance Manager

A well written business letter will establish a permanent record that could be used for reference. It could also save the organisation the time spent in traveling to another location seeking for information. In addition, routine business matters can be completed easily through letter guides.

The organisation projects a good organisation if the letter is clear and concise, courteous and friendly, attractive and neat, efficient and accurate.

Memo: This is referred to as Internal Memorandum. It is used within an organization to ease communication problem. If properly written, memo prevents distortion of facts and misunderstanding emanating from oral communication.

It is unique for the following reasons:
- No salutation or complimentary close.
- It is usually brief and straight to the point.

SPECIMEN

MEMO

From: To:

Reference: Date:

Subject Movement of files

Please note that, with effect from 4th October, 2009,movement of files is restricted to the Administrative Office. Permission of the Administrative Manager must be sought before files are carried out of the Administrative Building.

Signed:
J. J. Omoluabi

Minutes

Minutes refer to the record of proceedings at meetings. It is required by law that minutes of meetings be kept by every organisation. If properly kept, it could also sieve as reference materials for all decisions taken by the organisation. It is usually written in past tense and reported speech. It is also impersonal.

The layout of minutes includes the following:
- The heading
- Attendance
- Reading and adoption of previous minutes
- Matters arising from the minutes
- Correspondence and apologies
- Business of the meeting
- Any other business
- Date of next meeting
- Chairman's signature with that of the secretary.

Report: It is a document which provides an account of an event witnessed or examined, or of conclusions, recommendations from facts or circumstances which have been investigated (C.T. Agbesanwa, 1997).

An accurate, authentic and brief report gives the organisation the opportunity to have a point of reference from time to time. An accurate

report also makes specific information a matter of record, fixes responsibility confirming a decision reached, an agreement of a policy agreed to by concerned individuals.

Uses of Reports: Reports and used to
- investigate or carry out research
- persuade through the logical of its arguments and the strength of its substantiating data.
- evaluate and compare two or more variables
- appraise a situationi and sort out the variables
- appraise a situation and sort out the factors affecting it through conclusions and recommendations for specific course of action
- urge a specific course of action.

Layout of Report

- Letter of introduction
- Title page
- Table of Contents
- Summary
- The body indicating introduction, discussions, conclusions and recommendations
- signature of the writer(s)

The Telephone: Is the easiest form of creating information when oral communication in involved. It is the easiest means of maintaining efficient and effective communication. However, no permanent record may be maintained through this form of information creation.

3.3 Self Assessment

Now that you have been taught the various methods of creating information, list any FIVE methods of creating information.

4.0 CONCLUSION

Information is vital for the survival of any organization. Accurate and timely information gives the organisation an opportunity to project its image and point of reference on decisions already taken.

5.0 SUMMARY

Information creation is one of the vital roles of an office. Various methods of creating information have been discussed to include business letters, memos, reports, minutes, and telephone.

6.0   TUTOR-MARKED ASSIGNMENT

1.   Why is the creation of information?
2.   List any THREE methods of creating information?
3.   Describe any two methods of creating information?
4.   Why should the minutes of a meeting be taken?

7.0   REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2000). Fundamentals of Management. Lagos: BVL Print
        Technologies; pp. 125-130.

Aromolaran, E. A. (2009). Contemporary Issues in Office Technology and
        Management. Lagos: Holy Productions Ltd, pp. 73-84.

Aromolaran, E. A. (1999). Law and Practice of Meetings. Lagos: Dedun
        Educational Books; pp. 22-27.

Spencer, D. D. (1981). Introduction to Information Processing. Columbus;
        Charles E. Merrill Publishing Co., pp. 695-700.

Terry, G. R. & Franklin, S. G. (1982). Principles of Management. Illinois:
        Richard D. Irwin, pp. 250-280.

Unit 4:   Filing and Indexing

Contents

1.0   INTRODUCTION

We have just discussed records management in unit 1 of module 2. Although there is a relationship between records management and filing

and indexing, they do not serve the same purpose. In this unit, we will distinguish between records management and filing and indexing.

2.0   OBJECTIVES

By the end of this unit, you should be able to:
  ❖ distinguish between filing and indexing
  ❖ state the reasons for filing and indexing
  ❖ list the essentials of filing
  ❖ describe filing systems with their advantages and disadvantages
  ❖ list the procedure for filing and indexing

3.0   MAIN CONTENT

3.1   **Meanings of Filing and Indexing**

Filing is a systematic record keeping. The commonest method of safeguarding important information and record is filing. For filing to be effective therefore, there should be an established and functional system of filing within an organisation.

Indexing is an aid to filing information which ensures easy location of files. Johnson and Kallus (1978) describe indexing as a means of locating stored records. Steer (!985) cited in Agbionu (2002) describes indexing further as a means of locating information and is therefore an essential part of most office filing systems.

3.2   **Reasons for Filing and Indexing**

It is necessary to file records:
  • to provide accurate and timely information for executives within an organisation;
  • to develop and maintain an efficient system for creating, storing, retrieving, retaining and disposing information;
  • to preserve documents and safeguard records;
  • to facilitate easy location of documents and
  • to assist the management in the decision-making process.

In indexing, it is equally necessary for keeping employees' records, catalogues of books, records of assets and investments, accounts of stocks, specimen signature of account holders in banks.

3.3   **Essentials of Filing**

For any filing system to be regarded as good, it must be simple, easily accessible; economical; suitable for needs of an organisation it should give room for expansion and be easily adaptable to future changes.

3.4 Filing Systems

Filing systems include alphabetical, numerical, alpha-numerical, geographical, subject and chronological. For the sake of clarity, we shall discuss them one by one with their advantages and disadvantages.

3.4.1 Alphabetical Filing System

In alphabetical filing system, papers and documents are sorted according to the letters of the alphabets – a, b, c, d…………….

3.4.1.2 Advantages of Alphabetical Filing System

This system of filing is simple to understand and operate. In addition, it can be expanded always to suit the need of the establishment. Staff can also put in and retrieve documents as and when required. The filing system is not too expensive to maintain.

3.4.1.3 Disadvantages of Alphabetical Filing System

It takes time to locate files if used by large organizations. It is also not easy to determine spaces required for filing in advance. If names are not correctly spelt, it can lead to misplacement of records. Identical names can also lead to misfiling.

3.4.2 Numerical Filing System

In numerical filing system, documents are filed according to numbers such as 1, 2, 3, 4…………. That is, each document is allotted a number on the file and an index system is maintained to correct the document to the given number.

3.4.2.1 Advantages of Numerical Filing System

It is very easy to expand filing of records in the numerical filing system. The filing system is also accurate if carefully operated. It is flexible and can be combined with alphabetical system to form the alpha-numerical filing system.

3.4.3 Alpha-Numerical Filing System

Alpha-numerical filing system is the combination of alphabetical and numerical filing systems. Files are arranged in alphabetical order but are numbered within the alphabets – e.g. A1, A2, A3 etc.

3.4.3.1 Advantages of Alpha-Numerical Filing System

This system of filing is useful during the codification of documents. Codification is a reference list which enhances the utilization of filing system. It is also adaptable to more than one filing system.

3.4.3.1 Disadvantage

Its main disadvantage is that the user needs to understand more than one filing system.

3.4.4 Geographical Filing System

Documents are filed in accordance with the geographical location in this type of filing system – i.e. state, town etc, alphabetically.

3.4.4.1 Advantages

It is easy to locate files in this type of filing system. The users can also the system if he understands the geographical location. Files are les bulky because they are classified geographically.

3.4.4.2 Disadvantage

This system of filing is useful only for large businesses.

3.4.5 Subject Filing

Documents are filed under subject heading alphabetically in the subject filing system. The title should be kept simple to achieve the best result in the subject filing system.

3.4.5.1 Advantages

The filing system facilitates expansion and makes sub-division of records possible. Referencing is possible when the subject is known.

3.4.5.2 **Disadvantages**

It will be difficult to classify records when such records fall under several subjects such as debtors, creditors etc within a specific location. Referencing may be difficult when records are not listed under one heading-this may slow the process of filing. The use of separate index may also make the subject filing wasteful in terms of time and energy.

3.4.6 **Chronological Filing System**

In chronological filing system, documents are filed in a time sequence and date order. The most recent document are placed on top for easy reference.

3.4.6.1 **Advantages**

This system of filing is easy to understand and operate. It is also useful in knowing time sequence of records.

3.4.6.2 **Disadvantages**

Only large businesses can use this system of filing. In addition, it could lead to mis-filing if documents are not properly filed as and when received.

3.5 **Procedure for Filing**

The following are the procedure for filing.
- file records neatly and systematically
- perforate papers, documents and arrange in the appropriate files.
- file papers in chronological sequence.
- avoid bulky files.
- protect files from water, fire, dust, dirt, humidity and hazards.
- do not detach or extract documents without records
- keep up to-date records of files movement.
- maintain an efficient cross-referencing systems
- always keep filing cabinet securely locked when not in use.
- dispose "dead" files accordingly.
- fill in the absent file card whenever a file is removed from the cabinet.

3.6 **Procedures for Indexing**

The following are the procedure for indexing.
- ensure that surname comes first
- arrange surname in alphabetical order
- surnames with initials should come before surnames with full names
- use surnames before titles as the first unit.
- write out names in the normal order when two names are identical – e.g. Kunle (Jnr)
  Kunle (Snr)

3.7 **Self Assessment**

1.   Distinguish between filing and indexing
2.   List any TWO systems of filing
3.   List any three procedures for filing

4.0   CONCLUSION

Filing and indexing are very essential for protecting organizational assets and information. It is therefore incumbent on the organisation to adopt the simplest system of filing. This unit has taught you and prepared you well for choosing the best system of filing.

5.0   SUMMARY

This unit took you through the meanings of filing and indexing. You learnt the reasons for filing and indexing, essentials of filing. The unit also taught you the various filing systems. The procedures for filing and indexing were discussed.

6.0   TUTOR-MARKED ASSIGNMENT

1.   Why should an organisation file documents?
2.   List any three attributes of a good filing system
3.   Describe any two filing systems
4.   List any three procedures for indexing document.

7.0   REFERENCES/FURTHER READINGS

Agbionu, C. U. (2002). *Secretarial Administration.* Lagos: Topline Investments Ltd; pp. 117-129.

Aromolaran, E. A. (2008). *Office Administration and Management.* Ijebu-ode: Alamsek Press; pp. 63-60.

Johnson, M. & Kallams, F. (1978). *Records Management*. Ohio: South-Western Publishing Co. Ltd, pp. 116-129.

Onasanya, S. A. B. (1990). *The Effective Secretary.* Lagos: Longman Group (F.E.) Ltd, pp. 96-118.

Unit 5:   Preserving Records

Contents

1.0   Introduction

2.0   Objectives

3.0   Main Content

3.1   Reasons for Preserving Records

3.2   Means of Preserving Records

3.1.1 Manual Means

3.1.2 Self Assessment

4.0   Conclusion

5.0   Summary

6.0   Tutor Marked Assignment

7.0   References/Further Readings

1.0   INTRODUCTION

In units 1 and 2 of module 2, you have been taught records management, filing and indexing. With the knowledge which you have gained while studying these two units, you should not find it difficult to understand unit 3 which discusses the preservation of records.

2.0   OBJECTIVES

At the end of studying this unit, you should be able to:

- understand the reasons for preserving records
- describe both the manual and automated means of preserving records.

3.0   MAIN CONTENT

Onasanya (1990) identifies the means of preserving records through filing, indexing and micro-filing. The main function of a good secretary therefore, is the preservation of records. It is also necessary to device appropriate measure in ensuring the safety of records.

3.1   Preservation through Manual Means

The following measures are desirable in preserving records through manual means.
- durable file jackets are useful for storing and preserving records;
- provision of strong rooms for the safe-keeping of restricted and secret documents.
- provision of steel cabinets for safekeeping of major office files and correspondence.
- provision of fire-proof safes for handling sensitive items such as cheques, cash and their valuables.
- keeping away vital records from business premises by utilizing the services of private vault agency.

3.2   Preservation through Automated Means

There are various automated means by which records could be preserved. Spencer (1980) describes the following as various automated means by which records are preserved.
- Magnetic Drum – used to record data to be used repeatedly during any job involving mathematical programming.
- Virtual Storage – expands primary memory beyond its physical limitation by means of additions secondary storage capacity and the use of paging.
- Magnetic Tape – used as a medium for representing information. Also being used in typesetting in the computer as an auxiliary storage.

- Floppy Diskette – used in preserving records through a low-cost storage facility on the computer. There are single and double sided density floppy diskettes.
- Computer – has the capacity to store and recall information instantly.
- Micro-film – a storage device for important documents meant for keeps for a long time. The miniature copies of documents are made on 8mm, 16mm or 35mm films. The film can be viewed through a scanner whenever the information being stored is required.
- Micro-fiche – a sheet of film upon which the images of computer output may be recorded.
- Paper Tape – a continuous strip of paper into which data are recorded as a series of holes along its length, such data are subsequently read by a paper tape reader by sensing the pattern of holes which represent the coded data.

There are other various means of preserving records either manually or through automated means. For instance, the use of "password" on the computer is desirable where more than one person will have access to the computer system.

It is incumbent on every organization to make use of any suitable and convenient means of preserving its records.

3.3.   Self Assessment

You have just been taught manual and automated means of preserving records. You should therefore be able to describe the manual and automated means of preserving records.

4.0   CONCLUSION

Preserving records through manual and automated means are important is the function of an office – safeguarding organizational information and asset will be meaningful. What you have learnt in this unit will enable you to do that.

5.0   SUMMARY

In this unit, you have learnt that office records could be preserved through manual and automated means. It is hoped that what you have learnt in this unit will adequately enable you to preserve records.

6.0 TUTOR-MARKED ASSIGNMENT

1. Which of the means in this unit do you consider more suitable in preserving records?
2. List any THREE manual means of preserving records.
3. Describe any THREE means of preserving records in the modern way.

7.0 REFERENCES/FURTHER READINGS

Aromolaran, E. A. (2009). *Introduction to Office Practice and Technology*. Lagos: Holy Productions Ltd; pp. 49-52.

Fasanmi, E. A. (2002). *Secretarial Duties.* Lagos: Touchstone Ltd; pp. 25-50.

Onasanya, S. A. B. (1990). *The Effective Secretary.* Lagos: Longman Group (FE) Ltd; pp. 96-98.

Spencer, D. D. (1980). *Introduction to Information Processing Columbus*: Charles E. Merrill Publishing Co., pp/ 174-271.

Course Code

Course Code: BED 411

Course Title: CORPORATE ADMINISTRATION AND SECRETARIAL
                  PRACTICE

Course Developer: E. A. Aromolaran, Ph.D
                  School of Science & Vocational
                  Teacher Education
                  Yaba College of Technology
                  Yaba – Lagos.

Course Writer: E. A. Aromolaran, Ph.D
                  School of Science & Vocational
                  Teacher Education
                  Yaba College of Technology
                  Yaba – Lagos.

Course Editor: L. E. Ekpeyong, Ph.D
                  Department of Vocational Education
                  Faculty of Education
                  University of Benin
                  Benin City.

INTRODUCTION

BED 212 – Computer Application in Business is a 2 credit unit course designed to train you for the use of personal computer in the world of business. The knowledge gained in this course would lead to proficiency in electronic business management. As a business educator in training, it is advised that you study each unit carefully to ensure you gain the desired skills required in electronic business management.

What you will Learn in this Course

In this course you will be exposed to the business environment, the use of Microsoft Word in business, Microsoft Excel in business and other computer applications in business.

Course Aims

The aims of this course are directed towards preparing:

1. citizens who would be able to teach electronic business management at the secondary school levels, and
2. graduates who would be able to impact the skills of electronic management into the general society through workshops, seminars, and in-house training.

Course Objectives

At the end of this course, you should be able to:

*   identify various business documents maximally,
*   create electronic business documents with minimal errors,
*   manage business data effectively, and
*   manage business data efficiently.

Working through this Course

To gain the maximum proficiency required in this course, you must work through all the study units. Starting from module 1, unit 1 to module 4, unit 4. Ensure you master a unit of study before proceeding to the next

unit. Where references are made to previous taught courses or elsewhere, you should endeavour to visit reference soruces.

INTRODUCTION

BED 411 – Corporate Administration and Secretarial Practice is a 2 credit and course designed to expose you into the concept of administration and secretarial practice. The knowledge acquired would lead to proficiency in corporate administration, secretarial practice and record management.

What you will learn in this course?

In this course, you will be exposed to corporate administration, secretarial practice and record management.

Course Aims

The aims of this course are directed toward preparing:

1. Individuals who would be able to teach corporate administration, secretarial practice and record management at the secondary school levels and;
2. Graduates who would be able to impact the skills acquire in corporate administration and secretarial practice into the general society through workshops, seminars, in-house training and other forms of disseminating information.

Course Objectives

At the end of this course, you should be able to:
*   understand the principles of corporate administration
*   discuss secretarial practice
*   manage records effectively

Working through this course

To gain maximum proficiency required, you must work through all the 15 units. You should ensure that you master a unit of study before proceeding to the next unit. Where references are made to previous units, try to refer to such reference sources.

Course Materials

This course material consists of:

1. A course guide;
2. The main text and is broken down into three modules and 15 study units
3. Textbooks
4. Microsoft Office 2007
5. Electronic text
6. An assignment file

Study Units

This course material contains three modules and fifteen study units as follows:

Module 1: Corporate Administration

Unit 1: Corporate Administration: Meaning and Reasons
for corporate decline
Unit 2: General Office Administration
Unit 3: Organizational Structure in the office
Unit 4: Office Personnel and Equipment

Module 2: The Secretary

Unit 1: Secretarial Practice
Unit 2: The Role of a Secretary
Unit 3: Secretarial Ethics and Human Relations
Unit 4: The Secretary and People Management
Unit 5: Managing Meetings
Unit 6: Managing Conferences

Module 3: Record Management

Unit 1: Record Management: Meaning, Need
for record management, types, classifications
and its importance.
Unit 2: Handling Confidential Documents
Unit 3: Methods of Creating Information

Unit 4:   Filing and indexing
Unit 5:   Preserving Records

References and Further Readings

Every study unit contain a list of references and further reading. Do not hesitate to consult them if need be.

The Assignment File

The assignment file contains all the Tutor Marked Assignments including BED 212. Do your assignments and you must submit to your tutor for marking. The marks you obtain from these assignments will count in the final score you will obtain in this course.

The Presentation Schedule

The Presentation Schedule included in your course material gives you important dates for the completion of Tutor Marked Assignments and tutorial attendance. Remember, you are required to submit all your assignments by the due date. You should guard against falling behind in your work.

Assessment

Your assessment will be based on Tutor Marked Assignments (TMAs) and final examination which you will write at the end of the course.

Tutor Marked Assignment (TMA)

In addition to working through all the TMAs in your course material, four TMAs would be sent to you in the assignment file. The four TMAs must be answered and submitted for assessment. The four assignments would be marked and the best three would be selected which will constitute the 30% of your final grade.

Final Examination and Grading

At the end of the course, you will write a final examination which will constitute 70% of your final grade. In the examination which shall last for two hours, you will be requested to answer three questions out of at least five.

Course Marking Scheme

This table shows how the actual course marking is broken down

Assessment	Marks
Assignments	Four assignments, best three marks of the four count at 30% of course marks
Final Examination	70% of overall course marks
Total	100% of course marks

How to Get the Most from this Course

In distance teaming, the study units replace the university lectures. This is one of the great advantages of distance teaming; you can read and work through specially designed study materials at your own pace, and at a time and place that suits you best. Think of it as reading the lecture instead of listening to the lecturer. In the same way a lecturer might give you some reading to do, the study units tell you when to read, and which are your text materials or set books. You are provided exercises to do at appropriate points, just as a lecturer might give you an in-class exercise.

Each of the study units follows a common format. The first item is an introduction to the subject matter of the unit, and how a particular unit is integrated with the other units and the course as a whole. Next to this is a set of learning objectives. These objectives let you know what you should be able to do by the time you have completed the unit. These learning objectives are meant to guide your study. The moment a unit is finished, you must go back and check whether you have achieved the objectives. If you make this a habit, then you will significantly improve your chances of passing the course. The main body of the unit guides you through the required reading from other sources. This will usually be either from your set books or from a reading section. The following is a practical strategy for working through this course. If you run into any trouble, telephone your tutor. Remember that your tutor's job is to help you. When you need assistance, do not hesitate to call and ask your tutor to provide it.

In addition, do the following:

1. Read this Course Guide thoroughly, it is your first assignment.

2. Organise a Study Schedule. Design a "Course Overview" to guide you through the Course. Note the time you are expected to spend on each unit and how the assignments relate to the units. Important information, e.g. details of your tutorials, and the date of the first day of the semester is available from the study centre. You need to gather all the information into one place, such as your diary or a wall calendar. Decide on a method and write in your own dates and schedule of work for each unit.

3. Once you have created your own study schedule, do everything to stay faithful to it. The major reason students fail is that they get behind with their course work. If you get into difficulty with your schedule, please, let your tutor know before it is tool late for help.

4. Turn to Unit 1, and read the introduction and the objectives for the unit.

5. Assemble the study materials. You will need your set books and the unit you are studying at any point in time.

6. Work through the unit. As you work through it, you will know what sources to consult for further information.

7. Keep in touch with your study centre as up-to-date course information will be continuously available there.

8. Well before the relevant due dates (about 4 weeks before due dates), keep in mind that you will learn a lot by doing the assignments carefully. They have been designed to help you meet the objectives of the course and therefore will help you pass the examination. Submit all assignments not later than the due date.

9. Review the objectives for each study unit to confirm that you have achieved them. If you feel unsure about any of the objectives, review the study materials or consult your tutor.

10. When you are confident that you have achieved a unit's objectives, you can start on the next unit. Proceed unit by unit through the course and try to pace your study so that you keep yourself on schedule.

11. When you have submitted an assignment to your tutor for marking, do not wait for its return before starting on the next unit. Keep to your schedule. When the assignment is returned, pay particular attention to your tutor's comments, both on the tutor-marked assignment form and on the ordinary assignments.

12. After completing the last unit, review the course and prepare yourself for the final examination. Check that you have achieved the unit objectives (listed at the beginning of each unit) and the course objectives (listed in the Course Guide).

13. Finally, ensure that you practice on the personal computer as prescribed to gain the maximum proficiency required.

Tutor and Tutorials

The dates, times and locations of these Tutorials will be made available to you, together with the name, telephone number and address of your Tutor. Each assignment will be marked by your tutor. Pay close attention to the comments your tutor might make on your assignments as these will help in your progress. Make sure that assignments reach your tutor on or before the due date.

Your tutorials are important; therefore try not to skip any. It is an opportunity to meet your tutor and your fellow students. It is also an opportunity to get the help of your tutor and discuss any difficulties you might encounter when reading.

SUMMARY

This course will equip you with the basic skills you require to become competent in corporate administration and secretarial practice.

Wishing you good luck as you read through this course.