

THE OFFICE PRACTICE

The office is place, room or building set aside for clerical, communications and administrative functions.

It comprises of departments whereby various officers are responsible for different functions. It acts as a centre of communication in that incoming, outgoing and internal communication take place within the office. The clerical activities involved in the office include; receiving recording, sorting, processing, distributing and storing information

Administration

This is the management of affairs of an organization. It involves achieve to set goals and objectives.

Office Administration

This is the planning and coordination of activities of an enterprise so as to achieve the set goals and objectives. It involves; ensuring that policies and procedures are followed as so to improve efficiency and reduce costs.

Office Management

This is a planning, directing, coordinating and controlling functions of the activities of the office. It involves supervising and screening for complete and quality work.

FUNCTIONS OF THE OFFICE

There are certain benefits that are accrued by an organization once an office has been set up. However the purpose of the office has to be considered before it is set up.

- To direct and coordinate the organized work
- To aid in the implementation of the organization policies
- To prepare and maintain records for the organization
- To ensure efficiency at the place of work.
- To act as a centre of communication.

Functions of an office can be divided into 2 main categories: -

- (a) Clerical / basic / routine functions
- (b) Administrative functions

Clerical / Basic / Routine Functions

1. Receiving information

This is received through letters, telephone calls. E-mails, fax or visitors.

2. Recording information

Information is recorded so that it can be acted upon by the respective officers. The information may be stationery or for managerial functions.

3. Sorting Information

Personal information is initially sorted into personal or official. Personal information should be handed to the addresses while official information is sorted according to the respective departments.

4. Distributing information

Once information has been sorted out, it is distributed to the respective addresses and departments. Incoming telephone calls are forwarded to the respective extensions.

5. Sending information

All correspondence out of the organization is channeled through the office. It may be routine in nature or special.

6. Preparing and Processing Information

Information must be prepared and arranged in a manner that is valuable to management and other stakeholders. In some aspects like accounting qualified personnel must be employed to prepare and handle the information.

7. Storing Information

Information received and prepared by the organization must be retained for future reference. The records are maintained through proper filing systems since they may be required incase a dispute arises in future

Administration Functions

These are carried out by management.

1. Controlling and safeguarding company asset.

An asset is any property owned by a business that is used to generate income. The management formulates systems and policies concerning assets book some assets are prone to misuse. These entails maintaining an asset register. The administration can also set up controls for the use and movement of assets.

2. Personnel Functions

Staffing and training of the officer personnel is the responsibility of the personnel manager. He recruits and places them in different jobs in the office. The staff must be properly motivated so as to achieve best performance.

3. Developing and implementing Policies and Procedures

A policy is a declaration that is binding to all employees of an organization.

A procedure is a requirement for developing and implementing office policies and procedures.

4. Forms Design and Control

A form is a pre-printed document containing blank spaces to be filled. Due to the sensitivity of some forms their use should be controlled.

5. Selecting Office Appliances

It is the responsibility of a purchasing manager to select the office equipment and furniture. Equipment purchased must be suitable for the purpose.

6. Preparation of budgets and Forecasts

A budget is the plan expenditure and income of an organization. These budgets are prepared to work as a guide on the spending of the organization is the responsibility of the management to ensure that attainable budgets are drawn.

7. Preparation of Financial and Cost Accounts

The main objective if a business is to generate revenue and make profit.

To ensure profit maximization cost must be managed and sales increased. The profitability of an organization will be ascertained by the preparation of financial accounts.

OFFICE PERSONNEL

1. Officer Manager / Supervisor

This is the person who guides, co-ordinates, directs and motivates the employees in order to achieve the desired objective of the organization.

He coordinates all the activities of the employees to achieve the set objectives.

Types of Managers

(a) Line Managers

This is a person who has risen through the ranks to become a manager. His authority flows in a straight line from top to bottom. It may / may not be a qualified specialist.

(b) Functional / Staff Managers

This manager is put in charge of a particular function e.g. auditing, research, engineering etc. He has technical specialization in that area.

Qualities of a Good Manager

1. Loyalty – He should be loyal to the organization and committed to his work.
2. Smart appearance: He should always look smart appearance.
3. Sound judgment: He should be capable of making good decisions and handling difficult matter.
4. Diplomatic: He should be polite and able to convince the customers and employees tactfully.
5. Impartial: He should not take sides or favour some parties.
6. Good Leadership skills: He should be able to manage and motivate workers.
7. Well organized: He should be able to organize his department in order to meet the organization's objectives.
8. Strong character: Confident and firm when making decisions.
9. Time conscious: Set a good example by being punctual and not wasting time.
10. Forward looking / future oriented: should be able to plan for the future of department.
11. Good etiquette: Should have good manners
12. Good tempered: Should be able to control his temper

Duties and Responsibilities of an office Manager

a) Top Management

1. Implementing plans and policies made by top management
2. Evaluating the performance of his employees and recommending them for transfers, promotion, training etc.
3. Communicating the needs of his employees to the top management

b) His Work

1. Organizing work by preparing timetables and duty rosters.
2. Controlling his departments by setting up an internal control system.
3. Creating a conducive work environment e.g. safety and security.
4. Staffing: Ensures his department has qualified staff.
5. Planning – He plans for the department by preparing budgets and new systems for doing work.
6. Coordinating – Ensures that all departmental activities are well coordinated.

c) Employees

1. Motivating workers by paying them well and developing good relationships
2. Providing training through workshops and similar
3. Provides confidential counseling services to his employees.
4. Assigning duties to his employees by delegating work.

5. Settling disputes and resolving conflicts among employees

d) The Office Secretary

This is the person who administrative and typing work for her boss she is also his personal assistant and acts on his behalf in his absence.

Qualities / Attributes

1. Professional skills ie should be trained in secretarial work.
2. Well organized – should be able to organize the office and the boss's schedule
3. Polite / Diplomatic
4. Time conscious
5. Loyalty
6. Smart appearance
7. Discreet – Should be able to keep company secrets and make simple decision
8. Pleasant personality ie should be sociable with a sense of humor.
9. Adaptable – should be ready to work at any time in different situation.
10. Knowledge – should be well informed about the organization and its activities.
11. Good communication skills – should possess excellent speaking and writing skills.

Responsibilities

1. Attends meetings and records minutes
2. Receives dictation from her boss and types documents.
3. Orders stationery for her boss and for the typist.
4. Supervises typist and messengers.
5. Organises travelling arrangements and activities for the boss.
6. Makes appointments for visitors who need to see the boss.
7. Organizes her office and that of the manager
8. Undertakes filing of confidential work.
9. Makes simple decisions on behalf of her boss.
10. Receives telephone calls and transfers them to her boss.
11. Makes telephone calls on behalf of manager.
12. Maintains the executive diary by noting down important engagements

OFFICE MANAGER

This is the person who is involved with mailing and delivery services

Qualities

1. Loyalty
2. Time conscious
3. Honest and trustworthy

4. Smart and well groomed at all times
5. Good office etiquette i.e. good manners
6. Discreet ie able to keep secrets and make simple decisions.
7. Knowledgeable about the company and its activities.
8. Good geographical knowledge
9. Sober and alert at all times.
10. Physically fit at all times.
11. Obedient and cooperative when given instructions.
12. Well organized and able to prioritise his work.
13. Eloquent i.e. have a good speaking style.

Responsibilities

1. Collecting letters from the post office.
2. Posting letters
3. Distributing mail to different departments.
4. Collecting mail from different departments for dispatch.
5. Distribution of internal mail (memos) to different departments
6. Records mail for dispatch before delivering it.
7. Escorts visitors to different offices.
8. Assists in making tea for officers.
9. Assists in keeping the office clean.
10. Assists in photocopying and duplication of documents.
11. Assists the receptionist.
12. Runs small errands like paying bills.

MANAGEMENT OF OFFICE PERSONNEL

This is the process of planning, organizing, controlling, coordinating and directing the activities of personnel.

Key Function of personnel Management

1. Planning – this is done through policies and procedures
2. Coordinating – This is where different activities are coordinated to achieve company objectives.
3. Controlling – This is where the manager monitors personnel to ensure that work is being done properly.
4. Organizing – Work is organized using timetables
5. Directing – This is where instructions are given to execute work.
6. Evaluating – This is where the manager assess the work of employees to check if they are performing according to the set standards.

Specific Functions in Personnel Management

1. Proper allocation of duties and delegation of work to the right people.
2. Proper definition of duties by preparing a job description.
3. Motivation of workers by rewarding them for good work.
4. Effective communications through regular meetings.
5. Promoting good industrial relations between workers and management.
6. Providing a conducive working environment for employees.
7. Providing confidential counseling and resolving conflict among employees

OFFICE ORGANIZATION

An organization is a group of people who work together to achieve a common objective.

Features of an Organization

1. Unity of objectives
All employees should have a common objective
2. Division of work: There should be a fair distribution of work and specialization.
3. Plurality of persons: This means that it should consist of a group of people working together.
4. Chain of command: Each employee should know who he reports to.
5. Effective Communication and coordination: He should have a well-coordinated communication system
6. Levels / hierarchy of authority / responsibility: The organization should have different levels of authority.

Importance of a well-organized office

1. It facilitates effective administration because it provides a good framework of operating business.
2. It provides optimum use of resources without wastage or idleness i.e. efficiency.
3. It enhances specialization of employees who are assigned duties in their area of talent.
4. It boosts the morale of workers because their needs are well catered for.
5. It encourages good industrial relations between employees and management.
6. There is effective communication with employees and clients
7. Effective coordination of activities to achieve company goals.

8. Promotes overall productivity. Efficiency is where work is done speedily with maximum accuracy and neatness to provide high quality output.

Symptoms of Poor Office Organisation

1. Poor industrial relations between workers and management
2. Delays and wastage of time.
3. Poor quality of work due to lack of coordination
4. Low morale of workers because their needs are not being met.
5. Misuse and mismanagement of resources e.g. money, labour and equipment due to poor leadership.
6. Unequal distribution of work due to poor delegation
7. Low profits /huge losses due to inefficiency.
8. Corruption and theft due to fraud and lack of control.
9. Poor communication among workers and management.
10. Stress in the office due to poor working conditions.
11. Poor office environment e.g. untidiness and uncleanliness
12. Others include: - Duplication
 - Clerical errors
 - Unqualified staff
 - Lack of clear objectives

Steps involved in –re-organising an office

1. Obtain an organization chart. If not available create one.
2. Obtain the job description of each worker. If not available, list down the tasks performed by each worker by interviewing them.
3. From the job description, analyse the duties that each worker performs e.g. time taken, degree of difficulty, documents needed etc.
4. Identify the organizational faults from the organization chart e.g. unequal distribution of work. Lack of clear authority, poor delegation of work, over employment etc.
5. Review the company objectives and assess if the activities and jobs are meeting the objectives.
6. Consider alternative ways of re-organising the office e.g. reducing the number of workers or introducing machines.
7. Make recommendations to management for approval.
8. Implement the changes by preparing a new organizational chart and job description.
9. Communicate to the workers and conduct training where necessary – this reduce resistance to change.
10. Review and evaluate to assess if the new policies are effective.

ORGANIZATION STRUCTURE

This defines the flow of authority in an organization from top to bottom. It also describes the various functions and departments of an organization.

Principles of good Organization Structure

1. Unity of objectives
The employees of an organization should have a common objective
2. Equal distribution of work
There should be a fair distribution of work
3. Plurality of persons
Should consists of a group of people working together.
4. Chain of command
Each employee should know whom to report to
5. Clear lines of communication
The company should have a well-coordinated communication system
6. Clear lines of authority
There should be clear line of authority from top to bottom
7. Span of control
There shouldn't be too many workers under one manager because it would be difficult to manage and supervise them.
8. Well defined responsibilities
Each worker should know his responsibilities clearly.
9. Principle of unity of command
Each worker should have one immediate boss. There is confusion and divided loyalty in a case where a worker has 2 or more bosses.
10. Principle of organization
This means work should only be given to those who are qualified to do it.
11. Authority should be related to responsibility i.e. if a person is made a manager he should be given the power and authority to make decisions.

THE ORGANIZATION CHART

This is a visual / diagrammatic representation of the organization structure of a company. It clearly shows the following features: -

1. Lines of authority
2. Lines of communication
3. Relationship between line and function staff
4. Chain of command

Types of Organization Charts

1. Vertical chart
2. Horizontal chart
3. Circular / spherical / concentric chart

Vertical Chart

This shows the organization structure in the form of pyramid
The lines of command proceed from top to bottom in vertical manner

Circular Chart

Also known as spherical / concentric chart. The levels of responsibility and authority flow from the centre of the sphere outwards.

Types of Organization Structure

The organization structure may either be tall / flat

(a) Tall organization structure

- (i) This is characterized by a narrow span of management but with many levels of authority from top to bottom.
- (ii) It is commonly found in large organizations.

(b) Flat Organization

- (i) This is characterized by a wide span of control and very few levels of authority meaning that one manager may be incharge of many employees or departments.
- (ii) It is commonly found in small organization.

Functions of an organization chart

1. Shows the complete picture of the organization structure at a glance
2. Clearly shows the levels of authority from top to bottom.

3. Clearly shows the communication lines in an organization i.e. upward, downward and horizontal.
4. Clearly shows the chain of command i.e. who reports to who.
5. Clearly shows the relationship between line and function staff.
6. Clearly shows the grades and job groups of employees e.g. personnel officer I, II, III etc.
7. Normally used in restructuring the company in case of organizational changes.
8. Shows the responsibility of each worker.

Advantages of Organization Chart

1. It makes it easy to understand the organization structure at a glance.
2. It is normally used for training and induction of new employees because it is easily understood.
3. Improves internal communication because communication lines are well defined.
4. It minimizes organizational conflicts because everyone knows their responsibilities.
5. It facilitates job grading and setting of salary scales.
6. Assists in organization and Methods department to develop more efficient methods of working in the organization.
7. It assists visitors and outsiders to know how an organization is structured.
8. It allows organizational weakness to be easily identified and rectified.

Disadvantages

1. It shows only limited information about a company eg it does not reveal actual salaries, benefits and other information.
2. Those people at the bottom of the chart may feel demoralized ie inferiority complex.
3. It is rigid and inflexible ie does not respond quickly to organizational changes .
4. May lead to misunderstanding in terms of status e.g. 2 people with the same qualification may appear at different levels in the organization chart.
5. Shows only the formal relationship in an organization but not the informal one.
6. It dilutes team spirit among employees due to the separation of different department.
7. It is expensive to keep preparing new organization charts to accommodate organizational changes.

REF. NOV. 95 Q. 4 & NOV. 2004 Q 2

Forms of organization Structures

1. Line structure
2. Staff / function
3. Line and staff
4. Organization by committee

1. Line Organization / Military

This is a traditional method where authority and responsibility flow in a straight line from top to bottom. Each department is independent and autonomous and it's headed by a line manager who may / may not be a qualified specialist. This is because he has risen through the ranks to become a manager.

Advantages

1. Easy to understand and operate the system.
2. Easy supervision because the manager is in full control of his department.
3. There are clear cut lines of authority and responsibility which is well understood by the workers.
4. There is delegation of work from manager to his employees.
5. Decision making is fast and easy because the manager does not have to consult other managers.
6. Line managers are in direct control and coordination of departments without interference from outside.
7. Each member of staff within the department, clearly understands his status and responsibility as well as the status of others therefore reducing conflict.

Disadvantages

1. Due to lack of expert manages, decisions may be poor.
2. Encourages dictatorship and autocratic leadership of managers.
3. Success / Failure of department depend entirely on the manager and a wrong decision may cause the collapse of a department.
4. It encourages empire building i.e. when the manager retires a vacuum us created which may cause confusion in the company.
5. There is lack of communication and coordination between departments because each department is independent.
6. The system is rigid and inflexible to organizational changes.
7. Due to the independence of each department, employees may not get exposed to other work and this hinders job development.
8. The goals and objectives of the department are usually considered first before organization goals.

2. Staff / Function Organization

Under this system, the organization is divided into specific functions and experts are appointed to manage or advise that function. Such an expert can also advise other departments. This include; auditors, engineers and O & M consultants

Advantages

1. Encourages specialization of work because employees can specialize in various functions.
2. High quality decision making because the managers are experts.
3. Flexible and responds quickly to change.
4. Better communication and coordination between departments due to the advice of managers.
5. Employees are motivated because they are working under more professional leadership.
6. Better training of employees which improves the quality of work.

Disadvantages

1. The principle of the unity of command is violated because a worker may have two bosses.
2. Authority and responsibilities are not well defined and this may cause confusion and duplication of work.
3. It is difficult to supervise and control departments because there are no clear lines of authority.
4. Expensive because function managers require very high salaries.
5. In case of failure in the department, it is difficult to know who is to blame ie there is lack of accountability.
6. Decision-making takes long.

3. Line and staff Organization

Also known as matrix organization structure. This is where line and staff organization are combined to get benefits of both systems.

Advantages

1. A good training ground for employees because they can learn from both the line and staff managers.
2. Encourages specialization and division of work.
3. High quality decision-making due to consultation between line and staff managers.
4. Effective coordination and communication between line and staff departments.
5. Encourages efficiency and high quality of work.
6. Reasonable flexible to organizational changes.

Disadvantages

1. Decision making can be slow due to consultation.
2. Causes confusion to workers who report to 2 bosses.
3. Activities of a line manager may be hindered due to interference by the staff managers.

4. May cause friction and conflict between line and staff managers which may spread to junior workers.
5. Expensive for the company to hire staff managers.
6. Difficult to assign blame in case of failure ie lack of accountability

4. Organization by Committee

A committee is a group of people within an organization who are assigned to perform a specific task e.g. a finance committee / safety committee. A committee may be permanent/temporary/ad-hoc.

Advantages

1. Promotes excellent communication between staff and management.
2. Provides a good advisory function to management.
3. Promotes good and democratic decision-making due to exchange of ideas by members
4. Promotes team work and unity in the organization because each department has a representative.
5. Allows line and staff managers to concentrate on running their departments to promote smooth flow of work.
6. In case of any failure, the committee takes full responsibility.
7. A good training ground for managers who aspire to reach a higher level of management.

Disadvantages

1. Expensive to manage a committee e.g. paying sitting allowance for every meeting.
2. Decision making is slow due to many meetings.
3. Decision making may be unrealistic because the members are not experts.
4. Chairman of the committee has a lot of power to cast the votes in a certain direction.
5. There may be conflict between committee members which may affect relationships
6. No individual accountability.

REF: May 2005 Q. 5

OFFICE ENVIRONMENT

1. This refers to the surroundings of an office.
2. Location is the general geographical situation of the office.
3. Site refers to specific plot/building where the office is situated ie one location can have several sites.
4. The environment may be external/internal.
5. The study of internal environment is referred to as ergonomics. It considers how office environment can improve the performance of workers.

Office Location

The following factors should be considered when selecting the location of an office

1. Security – should be situated where security is provided for employees, customers and assets.
2. Accessibility – should be easy to reach the office.
3. Good communication network e.g. telephone and internet
4. Access to auxiliary services like banks, post office etc.
5. Access to social amenities like shops, hospitals, schools, restaurants
6. Cost of rent – should be affordable.
7. Cost of rates and tax – should be affordable for the office.
8. Space should be adequate for office activities and for future expansion
9. Reduced noise – should be located away from noisy places to enhance concentration of workers.
10. Physical facilities – should be located where there are facilities like proper ventilation, lighting, sanitation etc.
11. Access to the market – should be close to its customers.
12. Availability of skilled labour – should be at a place where labour is accessible such as urban centres.
13. Access to utilities like power and water
14. Additional facilities like parking space.

The next step is to consider the ownership of the premises. It may be:

1. Freehold ownership
2. Leasehold occupation
3. Rental occupation

Freehold Ownership

This is where the organization owns the premises either through buying / construction

Advantages

1. Savings in terms of rent which the owner does not have to pay
2. Owner has freedom to design or modify the layout of the premises without interference.
3. It is a wise investment for the future because the owner makes long term savings
4. There is more performance of location
5. Suitability ie a company can obtain premises that is suitable for its activities.
6. More revenue because the company can sublet part of the premises.
7. The premise is an asset. It makes the business more stable and can be used as security to obtain loan.
8. Privacy – there is no interference from outsiders.
9. It's more prestigious than rental or leasehold occupation.

Disadvantages

1. Expensive in terms of construction or purchasing
2. Expensive in terms of rates or tax.
3. Expensive in terms of maintenance and repair
4. Expensive in terms of insurance to cover all risks of the building
5. The owner may experience disputes with tenants.
6. There is a degree of inflexibility because the owner cannot change from one office to another.

Leasing or renting a building

This is when the tenant known as the lease hires a building from a landlord known as a leaser.

Advantages

1. Savings in terms of rates and tax.
2. Savings in terms of maintenance and repair of the building.
3. Money is saved from building or purchasing the office.
4. The tenant does not require very high capital to start business.
5. No problem of disputes with tenants.
6. There is more flexibility if the tenant intends to move.
7. The tenant does not have to pay insurance for the building.

Disadvantages

1. High cost of rent payable every month
2. Restriction by landlord in modifying the office.
3. There is lack of performance because the landlord may terminate the lease agreement.
4. Lack of privacy due to the presence of other tenants.
5. The office may be unsuitable in meeting the special needs of the organization.
6. The landlord may restrict the tenant from subletting hence no extra income.

Town or Upcountry Offices

The next step for the manager is to decide whether to locate the office in town or out of town.

1. Town or Urban office

This is located in the CBD

Advantages

1. Access to good transport services
2. Access to social amenities like schools, restaurants
3. Access to good communication network

4. Access to customers
5. Access to skilled labour
6. Good security due to police patrols
7. Access to suppliers and distributes have reducing transport cast.
8. Access to utilities like water and power supply.
9. Good provision of physical facilities like street lights
10. Prestigious.
11. Close contract with similar businesses which creates concentration of customers

Disadvantages

1. Noise pollution due to traffic, construction.
2. Air pollution due to the presence of many industries
3. Traffic congestion hence delays
4. High cost of rent
5. High cost of land rates and tax
6. Insecurity due to riots and criminal activities.
7. Congestion of offices within the town hence no room for expansion.
8. Unhealthy competition from rival businesses.
9. High cost of salaries for workers in town.
10. Lack of privacy due to congestion.
11. Possibility of spread of infectious diseases due to poor sanitation

REF. May 2005 Q. 3

2. Out of Town Offices

These may be sub-urban or upcountry offices.

Advantages

1. Less noise which enhances the concentration of workers.
2. Less pollution from industries
3. Less competition from similar businesses
4. Lower cost of rates and tax.
5. Lower cost rent
6. Less congestion due to less population density
7. Availability of space for future expansion
8. Availability of cheap labour
9. Less traffic jams hence not much delay
10. More security due to fewer chances of riots and reduced criminal activities.
11. Lower rates of infectious diseases due to better sanitation.
12. Better access to raw materials.

13. Some peri-urban locations are more prestigious than urban centres e.g. an office in Karen

Disadvantages

1. Poor transport network eg roads.
2. Lack of access to communication network.
3. No access to auxiliary services e.g. banks, post office etc.
4. Lack of access to social amenities.
5. Lack of access to public utilities like water and power.
6. Lack of access to public services like street lights.
7. Inaccessibility to police patrols and private security firms which may lead to insecurity.
8. Difficult to access skilled labour.
9. Lack of access to market.
10. May be difficult to access suppliers and distributors which increases transport cost.
11. Some upcountry locations may not be prestigious.

How to allocate Rooms within an Office

After acquiring the building, the manager has to decide how to allocate the rooms within an office for the smooth flow of work.

1. Reception Office
Should be located at the front entrance for access to visitors and security purposes
2. Offices with heavy machinery
These should be located on the ground floor for easy movement of machines
3. Offices doing similar jobs
They should be located next to each other to enhance coordination.
4. Washrooms / cloak rooms
This should be located with easy access to all the offices.
5. Conference room
Should be located at the back of the office where there is minimum disturbance.
6. Chief Executive office
Should be located in quiet place next to the conference room.
7. Offices with noisy Machines

Should be put in an isolated location away from other offices to enhance the concentration of employees.

8. High security offices e.g. cash office

Should be located at the back of the office with extra security reinforcement

9. Secretary's office

Should be next to manager / boss

10. Drawing room

Should be on the top floor where there is natural light

11. Centralized offices

E.g filing room, typing pool, reprography room etc should be in a central location to serve all user departments.

OFFICE LAYOUT PLANNING

This refers to the arrangement of furniture, equipment and other physical components of an office in order to promote efficiency and comfort of workers.

Principles of good office Layout (Factors to consider)

1. Wide gang ways – there should be the provision of wide gang ways to facilitate easy movement of staff.
2. Pleasant appearance – The office should look attractive and well decorated.
3. Economy in floor space utilization – floor space should not be wasted.
4. Easy flow of work – Departments/offices staff doing similar work should be located next to each other.
5. Access to machines and Equipment – Machines should be kept with easy reach of workers.
6. Neatness and tidiness – There should be no destruction of floor or gangways to hinder movement.
7. Effective lighting - There should be adequate light – both natural and artificial
8. Ventilation and heating – there should be adequate ventilation – natural e.g. doors, vent and artificial like fans and air conditioner.
9. Flexibility – should cater for future changes.
10. Hygiene – layout provide easy cleaning of the office.
11. Proper management of desks and chairs – this promotes smooth flow of work and communication.
12. Easy supervision – the layout should facilitate easy supervision

13. Safety and security – The arrangement should protect the safety and security of workers assets and information.

REF. NOV 2002 Q. 2

Importance/Benefits of good office layout

This considers how office layout influences the performance of works.

1. Allows easy supervision because the supervisor can monitor the workers.
2. Promotes smooth flow of work and easy communication because people performing similar tasks are seated together.
3. An attractive office provides a good image to visitors and prestige for the workers
4. A well planned office promotes the comfort and well-being of workers.
5. A lean office promotes the health of workers and reduces chances of accidents.
6. Promotes the safety and security of employees.
7. Enhances the efficient use of machines and equipment because they are available to workers
8. Reduces the cost of lighting and ventilation due to the use of natural facilities
9. Promotes economy in the use of office space.
10. Enhances the concentration of workers by reducing noise and disturbance.
11. Promotes efficiency and productivity of workers.

Physical components of an office

The manager should ensure that there is a conducive working environment by providing physical components e.g. lighting, heating, ventilation, sanitation etc.

1. Lighting

Office work requires a great deal of accuracy and therefore proper lighting is important because it promotes accuracy and reduces eye-strain. There should be natural well as artificial.

Importance of Good Lighting

1. Reduces eye strain and fatigue of workers.
2. Reduces clerical errors in the office.
3. Reduces accidents in the office.
4. Enhances the mood and boosts the morale of workers.
5. Promotes the comfort and well-being of workers.
6. Enhances easy communication and smooth flow of work.
7. Creates a pleasant and good working environment
8. Enhances efficiency and productivity of workers.

How to improve lighting and Reduce Light glare

1. Use of tinted windows
2. Use of curtains on the windows
3. Spacing of the light bulb.
4. Buying bulbs with the correct voltage and having a dimmer switch.
5. Use of lamp shades.

Factors to consider when selecting a Lighting System.

REF NOV. 2004 Q. 5

1. Sufficiency
The light should not be too strong / dim.
2. Efficiency
It should provide enough lights at an affordable cost.
3. Durability
The light bulbs should be long lasting
4. Light ventilation
It should be possible to adjust the brightness using a dimmer switch.
5. The walls should be painted using a light shade to maximize the reflection of light.
However, avoid shiny walls.
6. Furniture
Should have a light finish but not too high to cause light glare.
7. Stationery
Avoid using dark coloured stationery because it absorbs too much light and causes eye strain.
8. Alternative sources of light
The office should provide alternative source of light such as using generators or back up power supply.
9. Availability of space
This will determine the number of light bulbs to be installed in the office
10. Diffusion of Light
Light should be diffused to avoid flare e.g. by use of lamp shades and tinted windows.

11. Attractive appearance – Lighting system should give the office an attractive and pleasant appearance.

Noise Control

It is important to control noise in order to enhance concentration of workers noise may be;

- i. Internal – This includes noisy machines, telephones, idle chatter from worker etc.
- ii. External – Comes from the surroundings of office e.g from traffic, construction & from outsiders especially, if located along a busy street.

How to Minimize Internal Noise REF. NOV. 2005 Q. 3a

1. Strict supervision of workers to avoid idle chatter. This can be reinforced using notices.
2. Use of carpets to reduce noise from the involvement of workers.
3. Use of wing doors or rubber lining to help avoid the banging of doors.
4. Use of light indicators or buzzers on the telephone to avoid noise from ringing telephones.
5. Use of rubber lining under furniture and machines to reduce noise.
6. Use of sound absorbent materials on the walls and ceilings such as softwoods and cardboards.
7. Isolation of noisy machines.

How to reduce External Noise.

1. Locating the office away from noisy places.
2. Constructing the building using sound absorbent materials e.g. softwood, tiles etc.
3. By drawing curtains on the windows
4. By putting a fence around the building
5. Planting of trees around the building
6. By partially closing the window or using double blazer windows
7. Use of masking ie a way of blocking loud noise from outside by playing soft music.

Cleanliness & Sanitation

This includes the following activities;

1. Cleaning the office daily
2. Continuous cleaning of the washrooms
3. Removal of rubbish
4. General maintenance and repair in the office

Benefits of Good Hygiene

1. Reduces the spread of infectious diseases
2. Enhances the efficiency and productivity of the workers
3. Reduces accidents in the office because obstructions are cleared away

4. Employees are comfortable and motivated to work.
5. Gives the office a pleasant look and prestige
6. Regular cleaning of machines promotes their durability

Ventilation

This refers to the circulation of air at the correct temperature & humidity. This is provided through doors, windows, vents, fans and air conditioners.

The manager should ensure that rooms are not crowded and smoking should be discouraged.

Benefits of a well-ventilated office

1. Reduces the spread of infectious diseases.
2. Improves productivity and performance of workers
3. Improves comfort and well-being of workers
4. Reduces fatigue and enables workers to be active
5. Enhances the concentration of workers

DECORATION (DÉCOR)

Most employees spend a lot of their time in the office and therefore it should be attractive and well decorated by the use of curtains, carpets, indoor plants and paintings.

Benefits of Good Décor

1. Makes the office look prestigious
2. Reduces boredom and monotony of work in the place of work (office)
3. Improves the mental attitude of workers and enables them to concentrate
4. Enhances the mood of workers and avoids depression
5. Use of carpets & curtain reduce noise.
6. Creates a pleasant working environment
7. Improves efficiency and productivity.

Temperature

1. The office manager should ensure that the office is neither too hot nor too cold as this may lead to fatigue & discomfort and ill-health.
2. Temperature can be regulated through natural ventilation, heaters and air conditioners

Benefits of Good Temperature

1. Enhances the good health workers
2. Reduces fatigue and exhaustion of workers
3. Enhances concentration of workers.
4. Promotes the comfort and well-being of workers.

5. Improves efficiency and productivity

OFFICE FURNITURE

It is important for the manager to provide suitable high quality furniture to enhance the comfort and safety as well as performance of workers and security of documents.

Types of Furniture

1. General Purpose furniture

It is normally used by junior staff members. Can be used for a variety of tasks and is also known as multi-purpose furniture

2. Special Purpose

It is used for the specialized needs of workers e.g. (swivel chair) secretarial and computer

3. Executive Furniture

These are normally used by managers and supervisors. They are larger than normal, are of high quality and very comfortable e.g swivel chair and executive desk.

4. Built in

Are permanently attached to walls or floor e.g. benches, wall units (shells). Are space saving but flexible to change

5. Modular

This is specially designed furniture with connecting parts which can be used together or used as separate parts to suit the needs of company. It can be dismantled and re-assembled.

Factors to consider when buying office furniture

1. Cost –should be affordable
2. Size – should be space saving ie not occupy too much space.
3. Suitability – should suit the purpose for which it was intended
4. Durability – should be long lasting
5. Quality and finish – should be of good quality and have good finish.
6. Attractive appearance – should look pleasant and prestigious.
7. Comfort – should ensure comfort and well-being of workers.
8. Hygiene – should be easy to clean
9. Weight / portability – should be easy to carry around
10. Design – should be right colour, shape, size etc.
11. Fire resistance – should not catch fire easily. In case of a fire outbreak should be able to resist – e.g. steel furniture.
12. Safety and security – should be safe to use. Avoid sharp edges

What are the benefits of using metal furniture in the office?

1. They are fire resistant thus safe for storing documents.
2. They are durable and can be used for a long period.
3. They are easy to clean hence hygiene.
4. They have a high quality and good finish because of the materials they are made of.
5. Are multi-purpose since they can be used for storing many office document.
6. Maintenance cost are lower compared to wooden furniture.
7. They are safe and secure since they are strong and cabinets are lockable.
8. Economy of space since most are modular.
9. Protection against insects thus documents are safe.
10. Good for conserving wood for environmental purposes.
11. They do not shrink, crack or warp.
12. Portability – Easy to carry around especially steel furniture.

OFFICE LAYOUT

This refers to the nature or the types of offices created within an organization. The types include;

1. Open Plan
2. Closed / Private/Partitioned
3. Landscape
4. Modified
5. Workstation

1. Closed Plan

Also known as fully partitioned or private office layout.

This is where the offices are subdivided into small rooms that are connected by corridors. Each room is meant for one employee and has a separate lockable door. They are most common in private companies as well as government offices.

Advantages

1. Private and confidential – suitable for work of a sensitive nature e.g. personnel and finance records.
2. Noise reduction especially from ringing telephones and chatting among office staff.
3. Prestigious – it improves the status of employees and thus boosts their morale which in the long run improves efficiency.
4. Transmission of contagious and infectious diseases is reduced in closed layout.
5. Safe and secure – closed layout offers greater security to office equipment and documents because the doors are lockable. This reduces petty theft and pilferage.
6. Authority is differentiated and maintained more easily

7. Enables maximum concentration of employees which increases productivity because there is minimum disturbance and distraction caused by movement.
8. Have a personal atmosphere i.e. individuals can decorate their offices to suit their taste.

Disadvantages

1. Not flexible for modification especially where the partitioning is in concrete.
2. Hinders effective internal communication.
3. Does not allow for easy flow of work.
4. Supervision is not easy especially where work requires close monitoring.
5. Increases movement of staff as they move from one office to another.
6. Expensive to set up.
7. Space is wasted due to partitioning.
8. More office machines and equipment are required unlike open layout where they can be shared.
9. Private offices may be advised by officers in charge e.g. doing personal work or illegal activities.

2. Open Office Layout

This is where the office layout is open and free of any partitioning. Instead of dividing offices into small rooms, it is kept as one large room from where employees work.

Advantages

1. Maximum utilization of space hence economical.
2. There is effective internal communication.
3. Effective supervision.
4. Easy to set up.
5. Reduced movement of staff.
6. Easy flow of work as compared to closed.
7. Office machines can be shared i.e. maximum utilization.
8. Common services can be shared e.g. lighting, telephone, air conditioning etc.
9. Employees feel equally rated because of the sitting arrangement and this boosts their morale. It reduces the level of inferiority and superiority.

Disadvantages

1. Increases the level of noise especially where machines are put together in one room.
2. Increases the level of conflicts in the office.
3. Lack of privacy and confidentiality.
4. A lot of distraction that reduces the concentration of employees.
5. May create an impersonal atmosphere that may demotivate employees.
6. Reduces the status of seniors.
7. Spread / transmission of contagious diseases is high.

8. Office security is compromised – There are chances of petty theft and pilferage

3. Landscaped Layout

Office landscaping is the introduction of green plants and flowers in the office to reduce its openness. Also known as office panorama.

Features

1. Carpeted floors
2. Decorative curtains on windows
3. Wall paintings and hangings
4. Green plants
5. High quality furniture
6. Air conditioners

Advantages

1. Prestigious and pleasing to the eyes.
2. Tidy and gives a serious business environment.
3. Motivates because of the carpeted floor.

Disadvantages

1. Expensive to set up due to the carpets and indoor plants.
2. Occupies a lot of space.
3. A lot of distraction of employees due to movement from one place to another
4. Lack of privacy and confidentiality.

4. Workstation Layout

This is where the office is subdivided into small working stations meant for one employee. It is a closed layout with small lockable rooms, however, this partitioning is half high so that from a sitting position one is hidden but while standing, one has a full view of the other part of the office.

Advantages

1. Easy supervision
2. Security – reduces risk of theft and pilferage.
3. Facilities can be shared.
4. Easy flow of work.
5. Easy communication

Disadvantages

1. Lack of privacy

2. Expensive to maintain equipment as well as partition
3. Uneconomical in terms of space.
4. Noisy
5. Encourages a lot of movement from one partition to another.

5. Modified Layout

- This seeks to consolidate the advantages of both open and closed layout while avoiding their disadvantages.
- It is a closed layout but the partitioning is done using glass so that from one office, it is possible to see what is going on in their offices without necessarily hearing what is being said.
- This layout is suitable for firms whose employees work individually without the need for consultations.

Advantages

1. Confidentiality is enhanced.
2. Security – office machines and equipment are secured.
3. Reduces noise.
4. It is healthy.

Disadvantages

1. Expensive due to the use of glass.
2. Uneconomical in partitioning
3. Increases movement.
4. Does not allow easy flow of work.

SAFETY AND SECURITY

It is the responsibility of the manager to provide a safe and secure environment so as to avoid circumstances like accidents, fraud, etc.

Office Safety

Types of safety hazards

1. Physical causes of accidents

1. Slippery floors
2. Obstructions on the gangways and floor
3. Uncleanliness
4. Poor arrangement of furniture and equipment.

2. Accidents due to Mechanical Causes

1. Defective machines
2. Unguarded moving parts of a machine.
3. Exposed electrical wires.

3. Physiological Causes

1. Fatigue
2. Disabilities
3. Poor health
4. Lack of fitness

4. Psychological Causes

1. Stress
2. Emotional instability
3. Stimulants i.e drug abuse
4. Carelessness
5. Mental disability

Safety Measures that a Manager can provide

1. Providing a safe working place
 - a) Providing wide gangways without obstructions
 - b) Fittings lights on the staircase
 - c) Installing rails on the staircase
 - d) Provision of non-slippery floors.
 - e) Providing adequate ventilation and lighting in the office
 - f) Reducing congestion in the office.
2. Safeguarding hazardous machines
 - a) Guarding the moving part of machines.
 - b) Regular maintenance and repair of machines.
 - c) Insulation of electric cables.
 - d) Ensuring that machines are operated by qualified people.
 - e) Ensuring that machines are switched off after use.
 - f) Ensuring proper arrangement of machines in the office to avoid accidents.
 - g) Ensuring that machines have warning signs if they are hazardous or defective.
 - h) Ensuring that machines are used for the right purpose.
 - i) Providing manuals to machine operators.
 - j) Providing training to users.
 - k) Right control to monitor access of machines and their use.

3. Provision of safety clothing for workers.
These include; overalls, aprons, gloves, goggles, ear muffers, helmets, gumboots, nose/dust masks, etc.
4. Provision of a first-aid kit
5. Ensuring cleanliness of the office.
To reduce the spread of diseases and to remove obstructions on the floor and gangways.
6. Safety education for workers.
This is done using the following;
 - a) Safety rules and regulations
 - b) Regular seminars and workshops on safety
 - c) First Aid training
 - d) Regular fire drills.
7. Promoting safety consciousness of workers.
This is done with the use of safety warnings, notices and safety campaigns.
8. Isolation of hazardous material
These include: flammable items, explosives etc.
They should be in a special store which is well ventilated.
9. Fire precautions
The manager should take the following measures to prevent fire accidents;
 - i. Installation of fire alarms and smoke detectors
 - ii. Having a no smoking policy or providing ash trays in the office.
 - iii. Isolation of flammable items which should be kept in well ventilated store
 - iv. Insulation of electrical cables. Provision of firefighting equipment e.g. fire extinguishers and ensuring that they are regularly serviced.
 - v. Providing an emergency door and ensuring that it does not have any obstructions.
 - vi. Educating staff about fire hazards using notices.
 - vii. Conducting regular fire drills which prepare staff to be ready in case of an accident.
 - viii. Avoiding overloading the sockets with electrical gadgets.
 - ix. Careful monitoring and tight supervision of workers to avoid fire accidents due to careless activities. These includes; enforcing security to avoid arson.

What to do in case of a fire (fire drill procedure)

1. Shout fire!!
2. Raise the fire alarm
3. Switch off the main power supply

4. Call the fire brigade and ambulance.
5. Release the fire extinguisher to put off the fire.
6. All workers should leave the building calmly using the fire exit. Never use the lift or windows.
7. No worker should be allowed to collect personal belongings
8. There should be a fire marshal on each floor to assist in evacuation of workers and putting out the fire.
9. All employees should assemble outside at a designated place and the manager should do a headcount.
10. Conduct first aid where necessary.
11. Investigate the cause of the fire accident.

Outline the issues to be considered when developing a safety program

1. All accidents should be thoroughly investigated to ensure that they are not repeated.
2. All accidents prevention procedures should be reviewed and updated regularly.
3. Providing safety rules and regulations in writing for all staff.
4. Selecting new employees carefully to avoid unskilled and unstable people.
5. Provision of safety uniforms and tools and ensuring they are used.
6. Provision of a first aid kit and medical facilities for the employees.
7. Safeguarding of hazardous machines.
8. Providing staff training and safety awareness programs
9. Providing insurance cover to protect employees against fire.
10. Providing a safe working environment.

OFFICE SECURITY

Types of Security Risks

1. Failing to check visitors carefully including their briefcases.
2. Failing to check staff when they arrive/leave the office.
3. Allowing unauthorized people into the office.
4. Unguarded entrances and exists.
5. Having too many workers with access to the cash box and safe.
6. Leakage of confidential information by employees
7. Lack of control over the keys to the stores.
8. The continuous threat of terrorism.
9. Sabotage by employees
10. Computer fraud or hacking by employees and outsiders.

Security Measures that a Manage can take

1. Safeguarding the premises
 - a) Employing security guards.
 - b) Installing security alarm systems including electrical fences
 - c) Keeping the doors and windows locked after work
2. Checking of visitors
 - a) Ask the visitors to sign the visitors book.
 - b) Checking the visitors briefcase if he has any.
 - c) Giving visitors a visitors badge which they should wear while at the premises
3. Checking of staff (staff security)
 - a) Recruiting employees by asking for a certificate of good conduct
 - b) Checking of staff on arrival and departure
 - c) Taking photographs of employees and issuing them with company ID cards
4. Security of Information
 - a) All confidential mail should be handled by senior managers only.
 - b) The telephones should be fitted with security devices to avoid illegal tapping of phones.
 - c) Secret access passwords should be used by computer operator
 - d) Using lockable cabinets for filing.
 - e) Having a backup of all important information.
5. Security of cash
 - a) Avoid keeping a lot of petty cash in the office
 - b) The keys to the cash box and safe should be in the hands of one cashier and senior manager.
 - c) Daily banking of cash should be done using security companies.
 - d) All cash records should be regularly audited to avoid fraud.
 - e) One cashier should be responsible for the petty cash box and should avoid making irregular payments to workers.

OFFICE RECEPTION

This office is located at the front entrance and is the first point of contact with customers and should therefore look impressive.

Importance of a Reception

1. Attracts visitors and customers because it is well decorated.
2. It gives the company a good image and reputation.
3. It saves the customer's time by giving them the right information or guiding them to the right officer.

4. It serves as a security check.

Layout of a Reception Office

This refers to the facilities provided in the caption office.

1. Lounge

This is where visitors sit when they are waiting to be attended to. The seats should be comfortable and decent.

2. Telephone

The receptionist uses this to communicate to employees on behalf of customers i.e. it is used for internal and external communication.

3. Flowers and Decorations

These give the reception an attractive appearance.

4. Visitors Register

This is for noting down the visitors details for security purposes.

5. Computer

This is for doing typing work while attending to customers.

6. Diary / Appointment Book

This is used for booking appointments.

7. Reading Material – Includes a company newsletter, journal, brochures, catalogue etc.

8. Calendar and wall clock

This is used for making appointments and keeping of records.

9. Telephone Directory

This shows the telephone number and addresses of clients and other companies.

10. Internal Telephone Directory

It contains telephone numbers of branch officers and extensions of departments.

11. Year planner

This is also known as calendar of events. It is a schedule for the activities of the year and the receptionist uses it while making appointments.

12. Message pad/Book

This is for recording messages from the visitors

Other facilities

These include washrooms, pay phones, water dispensers, vending machines etc.

The Receptionist

This is the person in charge of the reception office. She is the agent of the company to the visitors and should therefore present a good image of the company.

Qualities

1. Smart appearance – Should be good looking, well dressed and groomed and should have an identification badge.
2. Good qualification – should be trained as a receptionist and telephone operator
3. Good etiquette – should be well mannered.
4. Discreet – should be able to keep the company's secrets
5. Time conscious – should never waste customer's time or leave the reception unattended.
6. Friendly / sociable personality – especially when dealing with visitors.
7. Polite and diplomatic – should have diplomacy skills.
8. Good memory – should remember important and frequent visitors, officer's extension numbers and their offices.
9. Loyal, honesty and committed to her work.
10. Knowledgeable – about the company's products and activities.
11. Good communication skills – should have excellent speaking style.

Duties of a Receptionist

1. Receiving and welcoming visitors
2. Registering visitors using the callers registers.
3. Assisting in the typing of letters and other documents
4. Receiving and recording messages from visitors
5. Receiving telephone calls and transferring them to other departments.
6. Distributing reading material to visitors.
7. Supervising messengers and asking them to escort visitors to the respective offices.
8. Making appointment for visitor using the diary.
9. Handling enquiries from customers and ensuring that their needs are met.
10. Making calls on behalf of officers.
11. Assisting security by ensuring that unauthorized people do not enter the office.
12. Receiving hand delivered mail from other companies.

RECEPTION PROCEDURES

These are the rules to be followed when attending to visitors.

1. Welcome the visitor with a smile and greet him politely.
2. Enquire politely about his name and how you can be of assistance then try and solve his problem as quickly as possible.
3. Ask the visitor to sign the callers register and give him a badge.
4. If he needs to see an officer, ask if he has an appointment.
5. Offer the visitor a seat at the lounge.
6. Call the officer concerned and inform him about the visitor.
7. If the officer is available, ask the messenger to escort the visitor to his office.
8. If the officer is unavailable or unwilling, ask the visitor to leave a message.
9. If the visitor wishes to make an appointment, record it in the diary.
10. When the visitor is departing find out if he was attended to and wish him a good day.

How to deal with: -

(a) Unexpected Visitor

1. Welcome the visitor
2. Enquire how you can assist him.
3. Find out if they have an appointment.
4. If not ask him to book an appointment and record it in the diary.
5. Wish them a good day.

(b) Visitors having an emergency

1. Welcome the visitor
2. Enquire how you can be of assistance
3. Direct him to the relevant officer immediately
4. If necessary, call the emergency service
5. Apologise to the other visitors on the queue.

(c) Unwanted Visitors

Such visitors should be discouraged because they could be a security risk.

1. Enquire about the purpose of the visit
2. If no purpose, politely ask them to leave.
3. Ask the messenger to enquire about his purpose again if he insists on sitting at lounge.
4. If he refuses to leave, call security to throw him out.

Challenges of the Reception Office and how they can be overcome

1. Receiving of too many visitors

Since the reception is the entry point into the office, it is a very busy area. There should be an adequate number of staff to deal with the visitors. Some periods may be busier than others and management should be keen to regulate the number of staff at different seasons.

2. Receiving of too many phone calls

This could be internal or external calls.

There should be an adequate number of staff or the use of automated answering machines.

3. Inadequate Material

Some receptions are too busy such that running out of stationery is common. Care should be taken to avoid misuse, misplacement or theft of material

Measures should be taken to constantly replenish supplies at intervals during the day.

4. Insufficient waiting bay

The waiting bay / resting area may be too small.

An immediate remedy is to try and attend to the visitors promptly so that they are not kept waiting.

5. Idlers

To curb idlers walking in and out deploy security staff to vet them at the entrance.

Discourage people sitting around aimlessly by ensuring that there is not too much unutilized space.

Visitors should be encouraged to record their details and purpose for visiting and if possible must produce identification documents.

6. Boredom

Good customer service begins at the reception. Ensure that each visitor is attended to as soon as they arrive. Another measure is to provide reading material at the lounge.

7. Unnecessary Delays

Good customer service should ensure that visitors are not kept waiting unnecessarily. In case of predicted delays, keep the visitors updated. Encourage visitors to leave messages in case it is not possible for them to be attended to.

8. Hostile visitors

The receptionist should be polite and diplomatic but if the visitor is persistently hostile, security should be called.

Centralisation of Office functions

This is where common office are provided in a central office that is located in central place e.g. filing registry, mail room or dispatch office, centralized typing pool and centralized reprographic office (photocopying and duplication).

Advantages

- (a) Economy in the use of office equipment and machinery.
- (b) Equal distribution of work which reduces the need for overtime.
- (c) Encourages specialization as qualified people are employed.
- (d) There is uniformity of work i.e. tasks are done in a standardized way.
- (e) There is economy in staffing because fewer workers are required in a centralized office.
- (f) There is no duplication of work i.e. every department performing similar tasks.
- (g) It is easier to cater for staff absenteeism because work is distributed among the present staff.
- (h) Easy supervision – It is easier to monitor the workers.
- (i) Easy training of new workers as they can learn from each other.
- (j) Better communication and smooth flow of work because people performing similar tasks sit together.
- (k) Job flexibility is possible due to job rotation as employees can be given other jobs within the department.
- (l) Better control of office resources and records because they can be closely monitored.

Disadvantages

- (a) Too much movement from one department to another trying to locate the centralised office.
- (b) Unsuitable for confidential work because there is no privacy.
- (c) There is no accountability in case of a mistake.
- (d) There is the possibility of misplacement of records due to a high volume of records in a central office.
- (e) There are delays i.e. it takes a lot of time to extract records in a central office.
- (f) High cost of messengers who are needed to distribute work to user departments.
- (g) Due to uniform procedures, there is lack of flexibility in the way work is done.
- (h) High risk of loss for the company in case of a disaster like fire.
- (i) Noise disturbance from noisy machines.
- (j) Inconvenience to the user departments because it does not enter for special needs.
- (k) Lack of exposure to other departments and senior executives which may hinder job development.
- (l) Boredom and monotony since workers perform the same tasks everyday.

Factors to Consider when Deciding to Centralize Office Services.

1. Cost of operating a centralized office i.e. machines, salary etc.
2. Volume of work. For a service to be centralized it has to have a high volume of work.
3. Space available to create a centralized office.
4. Nature of work e.g. filing, mailing, typing, reprography etc.
5. Amount of training needed to operate the office.
6. Need for tight control over information and resources.
7. Need for close supervision which should be centralized always.
8. Need for confidentiality – confidential records should be decentralized.
9. Company policy regarding centralization and the organization structure
10. Effects on staff – morale, efficiency and accuracy.

Decentralisation / Departmentation

This is where each department provides its own services like filing, typing etc.

Advantages

1. Suitable for work of a confidential nature
2. No delays in retrieving information.
3. There is spreading of risks in case of disaster.
4. Minimizes movement of workers from one office to another.
5. More accountability in case of mistakes.
6. Less noise as compared to a centralized office.
7. It reduces boredom and monotony of work due to a variety of tasks.
8. There is economy in the use of messengers since work does not have to be distributed.
9. It allows each department to cater for its specialised needs.
10. There is an opportunity to exploit new talents because employees are exposed to different tasks.
11. It improves the person's contacts with other workers and executives.

Disadvantages

1. Uneconomical in the use of machines and equipment.
2. There is duplication of work.
3. It is difficult to supervise because each worker has different tasks.
4. Hinders smooth flow of work because people doing similar tasks are not located together.
5. Difficult to train new workers.
6. Hinders specialization.
7. No uniformity of work and this hinders efficiency.
8. Difficult to handle staff absenteeism.

9. Uneconomical in staffing because each department will require staff like; typist, filing clerk etc.
10. Lack of flexibility in terms of job rotation.
11. Unequal distribution of work leading to overtime work.

CENTRALISED SERVICES

Centralised Typing Pool

Factors to consider when establishing a centralized typing pool

- (a) Space available to accommodate many typist.
- (b) Availability of skilled labour.
- (c) Volume of typing work to be done.
- (d) Cost of purchasing the computer.
- (e) Nature of documents to be typed i.e. should not be confidential.
- (f) Training required for typist.
- (g) Amount of noise disturbance which may justify the need for the typing pool so as to isolate noise.
- (h) Need for tight control of the use of machines.
- (i) Need for tight supervision of typist.
- (j) Company policy and organization for typing work.

Advantages

1. Specialization of typing work.
2. Economy in the use of typing machines.
3. Easy supervision of typist.
4. Uniform work is produced.
5. Equal distribution of typing work.
6. It is a good training ground for typist.
7. No duplication of work.
8. Absenteeism of typist is catered for.
9. Flexibility of job rotation in a typing pool.
10. Good communication and smooth flow of documents because typist are seated together.

Disadvantages

1. It is unsuitable for confidential documents.
2. It is costly to hire messengers to distribute the work.
3. No accountability in case of typing errors.
4. There is noise disturbance due to concentration of typists and machines in one room.
5. There is high risk of loss in case of a disaster.

6. There is no opportunity to exploit new talents.
7. It does not cater for specialized needs of the organization.
8. There is lack of contact between typists and executives.
9. There is a possibility of misplacement of typing records in the typing pool.
10. There might be delays in typing work.

Responsibilities of a typing pool supervisor

1. She receives typing work from other departments.
2. Distributes typing work equally among the typist.
3. Ensures that typing is done efficiently and promptly i.e. no delays.
4. She checks for typing errors and corrects them.
5. Ensures that computers are well maintained and taken care of.
6. Provides typing material and stationery to the typist.
7. Supervises and maintains discipline among typists.
8. Keeps record of typing work.
9. Training of new typist.

Centralised Filing Registry

This is a central place where all the files of the organization are kept.

Advantages

1. No duplication of files.
2. Good control over the movement of files with the use of outguides /registers.
3. Economy in terms of filing equipment.
4. There is equal distribution of filing work.
5. Uniform filing procedures are used and this helps to standardize filing.
6. There is grouping of related files together for ease of reference.
7. There is economy in staffing because only a few filing clerks are required.
8. Absenteeism of filing clerks can easily be catered for.
9. Easy training for new filing clerks.
10. There is ease of cross reference because different records are found in the same room.
11. There is easy supervision of filing clerks.

Disadvantages

1. Unsuitable for confidential files.
2. High risks in case of disaster.
3. There are delays in retrieving documents due to a large number of records.
4. High cost of hiring messengers to distribute filing records.
5. Too much movement between offices
6. Boredom and monotony of work.

7. Inflexible filing procedures.
8. No accountability in case of mistakes.
9. It does not meet the special filing needs of other departments.
10. There is no opportunity to exploit new talents hence no job replacement.

MAILING SERVICES

This is where mail is received and dispatched using a central mail room registry. Mail can be classified into three namely:

1. Incoming mail
2. Outgoing mail
3. Internal mail (memorandum)

Incoming Mail

This is correspondence coming into the organization and can be classified as

- (a) Personal / private / confidential

These should never be opened.

- (b) Official / General

These can be opened at the central mail room.

General Rules for handling incoming Mail

1. All incoming mails should be collected and opened at the start of business so that urgent matters can be handled quickly.
2. All envelopes should be opened from top to bottom using a letter opener.
3. After opening the letters, the content should be given to the supervisor for checking.
4. All personal and confidential mail should never be opened, but if opened by mistake the clerk should indicate open by: then indicate his name, then reseal the envelope.
5. If the letter contains remittance e.g. cheques, money order, bank draft etc they should be recorded and given to the accountant for banking.
6. All official incoming letters should be date stamped.
7. Never throw away envelopes for the following reasons:
 - (a) There may be some hidden enclosures in the envelope
 - (b) They may be needed for future reference.
 - (c) They can be recycled for internal mail.

Procedures for handling incoming mail (Specific Rules)

1. Collection – The messenger should collect mail from the post office on a regular basis. Hand delivered mail is received by receptionist.

2. Receiving mail – All mail is delivered to the central mail registry.
3. Initial sorting – Incoming mail should be sorted according to personal or official.
4. Opening of mail – Official mail should be opened in the presence of a supervisor using a letter opener.
5. Unfolding of mail – The contents of the envelop should be unfolded and clipped tag with the envelop.
6. Checking the content – The contents should be read in order to find out the purpose of the letter and the relevant departments to deal with it.
7. Recording the letter – Incoming mail should be recorded using an incoming mail register.
8. Date stamping – official mail should be stamped to indicate the date of receipt.
9. Dealing with remittances – Cheques, money orders, bank drafts etc should be recorded and given to the accountant for banking.
10. Final stamping – All mail should be sorted according to departments and kept in the respective distribution trays.
NB: urgent mail should be distributed immediately
11. Distribution – All departmental mail should be distributed by the messenger. Mail requiring the attention of several officers can be distributed through: -
 - i. Photocopying
 - ii. Use of a circulation slip.

However, the second method is time consuming.

Outgoing Mails

This is where mail is dispatched to other companies by post or hand delivery.

General Rules for Outgoing Mail

1. The collection time and point should be communicated to all user departments.
2. All registered mail should be marked at the top right hand of the envelop. This is a guaranteed delivery by the post office at a special fee.
3. All outgoing mail should be recorded using an outgoing mail register.
4. No employee is allowed to dispatch personal mail using the company postage stamp.
5. The mail clerk should ensure that all outgoing mail is checked for signatures, proper address and the required enclosures.
6. All letters have to be weighed in order to determine the postage value.
7. Outgoing mail can be classified as : -
 - (i) Express mail (first class mail)
 - (ii) Ordinary mail (surface mail)
 - (iii) Air mail
 - (iv) Hand delivered mail

Procedure for Handling Outgoing Mail

1. All departments should be notified about the collection time and point of mail for dispatch.
2. All registered mail should be marked at the top of the envelop. This is because there is an extra fee and the post office guarantees delivery of the letter.
3. Checking – This should be done to ensure that the letter is signed and has the right enclosures.
4. Recording of mail – All outgoing must be recorded in the outgoing mail register.
5. Folding of letters – These should be done neatly. Large companies use a letter folding machine.
6. Inserting letters into envelopes – If using window envelopes, letters should be inserted so that only the address appears on the window.
7. Sealing of envelopes – Use glue or tape or a letter sealing machine.
8. Sorting mail – This is according to the various categories e.g. express, air mail, surface mail, hand delivery etc.
9. Weighing – This is done so as to determine the correct stamp value.
10. Fixing of stamps – This is done using loose stamps or franking machines.
11. Dispatch – This is where a messenger delivers mail to the post office or hand delivered mail to other companies.

MAIL ROOM EQUIPMENT

1. Stapler
2. Letter opener
3. Letter opening machines
4. Letter folding machines
5. Weighing machine
6. Date stamp
7. Shredding machine
8. Collating machine
9. Addressing machine
10. Franking machine

Shredding Machine

- (a) This is used for destroying unwanted paper.
- (b) It is convenient for destroying confidential records, since they are cut into tiny pieces that cannot be read. Shredded paper can be recycled into packaging materials for parcels.
- (c) It is time and labour saving.

Collating Machine

This arranges documents according to page numbers.

Addressing Machine

- (a) This is used for printing addresses on envelopes. One can use a computer which has a data base or mailing lists of addresses.
- (b) One can use a printing machine by preparing a plate for such addresses.
- (c) This machine can also print company letter heads, pay slips and cartridge.

Advantages

1. High speed of printing addresses.
2. Labour saving hence reducing fatigue.
3. They are accurate.
4. It is adoptable – Can be used for printing letter heads and other documents.
5. They promote uniformity of work.
6. They give a presentable and business like appearance on the envelope.
7. The machine can sort addresses alphabetically.

Disadvantages

1. Expensive to purchase and maintain
2. Dependent on electric power hence subject to power failure.
3. Requires a trained operator.
4. It is noisy.
5. It is impossible to rectify (correct) a mistake on the printing plate.
6. There is a high cost of complimentary materials and equipment e.g. the printing plate.
7. Subject to frequent breakdowns.
8. Redundancy – It creates unemployment of workers.

Franking Machine

- (a) This is used for printing the design / impression of a postage stamp on the envelope.
- (b) It also prints the date of postage and advertising slogan.
- (c) The postage value is set on the machine at the post office after paying the corresponding amount.
- (d) It has accounting meter which gives the total stamp value and the remaining balance.

Features of a Good Franking machine

1. Date change control
There is an indicator that asks you to set a new date each time you switch on the machine.
2. Warning light

This goes on when the credit goes low and when high value postage is used in case of an error.

3. Departmental analysis report

This shows the postage cost of each department.

Advantages

1. It is time saving since it can print hundreds of letters in a minute.
2. It is labour saving since there is no need to stick the stamps.
3. Security of stamps – There is no risk of losing stamps.
4. Easy to operate i.e. does not require much training.
5. It is multipurpose because it can print other messages like advertising slogan.
6. It is a good accounting control because it shows how much has been used in terms of postage.
7. Enhances efficiency and productivity in the mail room.
8. It is portable and convenient to carry around.
9. It is accurate.

Disadvantages

1. Expensive to purchase and maintain.
2. It requires skilled labour.
3. It is subject to power failure and frequent breakdowns.
4. Causes redundancy of workers.
5. In case of errors, it is costly because it cannot be reversed.
6. Delays may be caused if the operator is unavailable or the machine breaks down.
7. Franked letters have to be taken physically to the post office – rather than posting them directly and is therefore slower.
8. The company still requires to keep loose stamps for urgent mails.

FILING AND RECORDS MANAGEMENT

Filing

- This is the process of classifying, arranging and sharing records so that they can be retrieved as quickly as possible.
- Documents are stored in files or folders. The files and folders can be stored in cabinets or shelves as well as drawers.
- Documents can be stored in soft copy in computers or micro film.

Importance of filing

1. To promote the safety and protection of documents.
2. To ensure that records are available for future reference.
3. To promote neatness in record keeping.
4. To enhance security of information.
5. To make sure that records are quickly accessible when required.

General Rules for Filing

1. All records should be authorized for filing by having an F sign "file" stamp from the supervisor.
2. File daily to ensure that records are upto date.
3. File neatly to preserve the documents.
4. Ensure that records are punched at the right place i.e at the middle of margin.
5. Avoid using bulky files i.e. if it is full close it and open a new one.
6. Avoid removing records from a file but if necessary use an outguide (this is a card that shows the details of the person who borrowed the record and should be inserted where the record is removed).
7. If a whole file is removed from the shelf, there should be an "absent marked" to indicate where the file has been taken.
8. Always ensure that the filing cabinet is locked for security purposes.
9. Label all the files clearly for easy identification.
10. File correctly to avoid misplacement of records.

Identify the steps to be followed in planning for a filing system

1. Determine the period of storage. All the records must be listed and in consultation with departmental heads, their period of storage should be determined.
2. Acquiring storage space
Get the space required and plan for its layout.
3. Plan the storage arrangement
The office manager should decide upon the storage arrangement on the basis of use of the document and the users.
4. Location
The manager should consider the time available for locating a record and then decide on the appropriate location.
5. Equipment needs

The manager should consider the equipment necessary. The right quantity and type should be bought.

6. Protection of documents

Safety of the documents should be considered to ensure they are well protected.

7. System of classification

An appropriate classification system should be put in place.

8. Training of staff.

Trained staff should be available to operate the system

9. Cost effectiveness

Consider the cost of the filing in relation to the value of the documents.

10. Security – to avoid theft and lack of confidentiality.

Measures to put in place to ensure proper control and handling of filed documents

1. Use of charge out system

This is the use of registers and outguides. They contain the details of the borrower's name, content of the file, department and date when the file was borrowed.

2. Limiting access to cabinets and files to only the authorised personnel.

3. Indicate the time limit for staying with a particular file.

4. In case of a misplaced file, a resume is kept. This describes the contents of the previous paper and what actually happened to cause the paper loss.

5. Having a follow-up system – The card method can be used to act as a reminder.

6. Transferring inactive records and maintaining only the active ones. Guide cards should be used to direct users on reference.

7. Recording of incoming mails.

8. Indicating the document folio number.

9. Using lockable cabinets.

FILING METHODS

This refers to the different ways in which files can be stored.

1. Horizontal Method

This is where documents are kept in a flat position on top of each other mostly using shelves.

Advantages

1. It is space saving
2. It is easy to operate
3. It is cheap to operate
4. It maximizes the safety and protection of documents.
5. It is convenient and suitable for documents like certificates, maps, etc.
6. It saves on the cost of using suspension folders.

Disadvantages

1. It is difficult to remove a document from the bottom of the heap and they might get damaged.
2. It is difficult to return / replace a document in its original position.
3. It is difficult to retrieve a document because the system is “blind” i.e since you cannot see the label. This causes delays.
4. There is limited space for expansion.

2. Vertical Filing Method

This is a system where files are kept in an upright position lying on their spines. The labels appear on the top edge of the file for easy identification. A vertical filing cabinet is used.

Advantages

1. It is easy to identify files because labels can be seen clearly.
2. It is economical because spring files can be used and they are cheap.
3. The files are safe and secure because the cabinets are lockable.
4. A cabinet can accommodate many files.
5. It is quick and easy to operate.

Disadvantages

1. It causes fatigue when opening the drawers.
2. It utilizes a lot of space because it requires extra room for opening the drawers.
3. Only one person can operate the cabinet at a time.
4. The filing cabinets are expensive especially the metal ones.

3. Suspension Filing

This is similar to vertical filing, however, the filing cabinets have “packets” into which the files are suspended so that the spine of the file does not touch the bottom of the cabinet and this helps to preserve the files.

4. Lateral Filing Method

This is a method whereby files are placed side by side with their spines facing out. This method uses lateral filing cabinets or shelves.

Advantages

1. Economy in the use of floor space because the shelves do not have drawers.
2. Easy identification because the labels are on the spine and are therefore clearly visible.
3. Easy retrieval and replacement of files in their correct position.
4. The shelves can accommodate many files and it is therefore convenient for large companies.
5. Many people can operate the system at the same time.
6. There is no fatigue since there are no drawers.
7. It is flexible in terms of expansion because the shelves can be extended towards the ceiling.

Disadvantages

1. Lateral filing cabinets are expensive.
2. Lack of safety and security because the files are exposed to thieves and dust.
3. It is difficult to obtain files that are in a high position and it may lead to accidents.

Principles/Characteristics of a Good Filing System

These are the essential of a good filing system

1. Economy – The system should be affordable to operate
2. Compactness – The system should use as little space as possible
3. Simplicity - Should be easy to understand and operate
4. Accessibility - Should be easy to access and retrieve the files.
5. Flexibility - The system should be capable of future expansion
6. According - Records should be filed accurately to avoid misplacement of records.
7. Classification - Records should be categorized and grouped in an organized manner.
8. Suitability - The system should suit the special needs of the organization.
9. Upto-date - Files should contain up to date records.
10. Safety and security - The system should provide maximum protection and security of documents.
11. Cross reference - A good system should have a cross reference which guides the user on where to find a particular record.
12. Out guides - There should be control by use of register to show where borrowed files have been taken.

FILING CLASSIFICATION SYSTEMS

This is where records are grouped according to different title or sections. These may be;

- a) Alphabetical classification
- b) Numerical classification
- c) Alpha – numerical classification
- d) Geographical classification
- e) Subject classification
- f) Chronological classification

A. ALPHABETICAL CLASSIFICATION

This is a method where files are arranged according to the letters of the alphabet i.e. A-Z order.

1. It is simple to understand as it does not require specialized knowledge.
2. No separate index is required ie it is self-indexing.
3. It enables direct filing as one does not need to refer to an index.
4. It is flexible in that it can be used alongside other methods.
5. There is a wider application because the method can be used to classify a wide range of information.

Disadvantages

1. Some letters are more widely used e.g. OW this may lead to some files being more bulky than others.
2. It has limited usage / capacity since the alphabet has on 26 letters.
3. It is difficult to estimate space requirements for different letters of the alphabet
4. The person filing must have a thorough knowledge of filing rules

Rules for Alphabetical Filing

(a) Personal Names

People's names are filed according to their surnames. If the surname and the first name are same use the middle name or initials.

1. Harun Muriithi Mbaya
2. Mary Waithera Kariuki
3. Mercy Anzemo Onacha
4. Alex Ndung'u Mutitu
5. Daniel Okoth Nyaoke

Is file as: -

1. Kariuki Mary Waithera
2. Mbaya Harun Muriithi
3. Mutitu Alex Ndungu
4. Nyaoke Daniel Okoth
5. Onacha Mercy Anzemo

- (b) File short names/fewer names before long names/many names i.e “nothing comes before something” thus a surname standing alone comes before the same surname with a middle name or first name or even an initial e.g.

Odhiambo A
Odhiambo
Odhiambo Alfred M
Odhiambo Alfred Mutoyo
Odhiambo Alfred

Odhiambo
Odhiambo A
Odhiambo Alfred
Odhiambo Alfred M
Odhiambo Alfred Mutoyo

- (c) Titles, decorations and degrees are ignored and are put at the end in brackets e.g

Miss Carol Chebet Togom
Mr. Joseph Oloo Oliech
Rev. Simon Muniu Karanja
Professor Jane Wangari Maathai
Bishop Dr. Margaret Wanjiru K.

K Margaet Wanjiru (Bishop Dr.)
Karanja Simon Muniu (Rev.)
Maathai Jane Wangari (Professor)
Oliech Joseph Oloo (Mr.)
Togom Joseph Chebet (Miss)

- (d) A surname prefix is considered as part of the surname

1. Simon Chebi Ki-Koech
2. John William Ole-Ntimama
3. Osama Bin-Laden
4. Joel Torotich Arap-Samoei

Is filed as

1. Arap-Samoei joel Torotich
2. Bin-Laden Osama

3. Ki-Koech Simon Chebii
4. Ole Ntimama John William

(e) A Hyphenated name has the hyphen ignored and the name treated as one eg.

1. Elizabeth Wambui Mugo – Otieno
2. Sally chebet Birgen – Karanja
3. Mira Muhammed – Karimi
4. Yvonne Sanaipei – Dirkir – Nyakundi

Is filed as

1. Birgen Karanja Sally Chebet
2. Dikir Nyakundi Yvonne Sanaipei
3. Mugo Otieno Elizabeth Wambui
4. Muhammed Karimi Mira

(f) The prefix st. is considered as saint and filed as though written in ful and is always considered first e.g.

1. Catholic Church of st. Claire
2. St. Mary's School
3. St. Francis Academy
4. St. James Hospital

Is filed as

1. Saint Claire Catholic Church
2. Saint Francis academy
3. Saint James Hospital
4. Saint Mary's School

(g) Articles i.e. a, the, an etc as well as conjunctions and prepositions are ignored when filing. When "the" is the first word in the name, it is usually written at the end

- e.g. i) The Stanley
ii) The Modern cleaning Company

is filed as : -

- i) Modern Cleaning Company (The)
- ii) Stanley (The)

(h) I. Companies with personal names are filed under the surname e.g.

- i. R.L. Shah and Company Ltd.
- ii. Otieno Stationers

iii. P.J. Karani Consultant

Is filed as: -

- i. Karani P.J. Consultants
- ii. Otieno Stationers
- iii. Shah R.L. and Company Ltd.

II. If a company has several names, the name listed first as the surname is considered first.

- E.g.
- i) Messrs Mesamali, Lati and Otieno Advocates
 - ii) Wairimu and Njonjo Auctioneers
 - iii) Kebati, Mokuia and Muia Contractors

is filed as

- i) Keebati, Mokuia and Muia Contractors
- ii) Mesamali, Lati and Otieno Advocates (Messrs)
- iii) Wairimu and Njonjo Auctioneers
- iv)

(i) Numbers in a company or Associations name are treated as though written in full. E.g.

- i. 10th Parklands club
- ii. 4th Ngong Avenue Hospital
- iii. 680 Hotel
- iv. 489 Supermarket
- v. 20th century Plaza

Is filed as: -

- i. Four Eighty Nine Supermarket
- ii. Fourth Ngong Avenue Hospital
- iii. Six Eighty Hotel
- iv. Tenth Parklands Club

(j) Government departments and Ministries are filed under the key words E.g.

- i. Ministry of Health
- ii. Department of Social Services
- iii. Ministry of Tourism
- iv. Department of Defence

Is filed as: -

- v. Defence Department

- vi. Health Ministry
- vii. Social Services Department
- viii. Tourism Ministry

Arrange the following groups of names in their correct alphabetical order for filing and explain the rule which applies to each group.

- (i) Mary Kamau, J.K. Keino, Wanjiru Mutiso
Kamau Mary, keino J.K., Mutiso Wanjiku – Personal names according to surnames
- (ii) Sir. Alfred Onyango, Rev. James Njoroge, Lady Lucy Kiprono
Kiprono Lucy (Lady), Njoroge James (Rev.), Onyango Alfred (Sir) – titles are ignored and are put at the end in brackets.
- (iii) Vasco Da Gama, Peter De Troat
Da Gama Vasco, De Troat Peter – A surname prefix is considered [part of the surname.
- (iv) James Juma, Juma James, S.R. Juma, J.R. Juma
Juma, James Juma, J.R. Juma, James S.R. Juma – Short names are filed before short ones.
- (v) 20th Century, 10th Anniversary, 680 Hotel, 3rd Parklands Avenue – Six Eighty Hotel, Tenth Anniversary, Third Parkland Avenue, Twentieth Century – Numbers are treated as though written in full.
- (vi) The metal Welding and works Ltd, The Metal Box Co. Ltd.
Metal Box Co. Ltd (The), Metal Welding and Works Ltd (The) – When the is the first word in the name, it is usually written at the end.
- (vii) St. Mary's School, Saint Paul's Serminary, St Paul's Hospital
Saint Mary's School, Saint Paul's Hospital, Saint Paul's Seminary – The prefix st. is considered as saint and filed as those written in full and is always considered first.

B. NUMERICAL CLASSIFICATION

This is a system where filing is done according to numbers or a numerical code as illustrated below.

001 – Accounts

002 – Human Resources

003 – Production

Advantages

1. It is flexible for future expansion i.e. unlimited expansion

2. It is suitable for large companies that have many customers and employees
3. It is easy to locate and identify records if the index is clear.
4. It is possible to add new records.
5. It is suitable and convenient for filing documents that have serial numbers
6. The file number can be quoted as the file reference when writing official mail.

Disadvantages

1. It requires a separate index which is expensive and time consuming to prepare.
2. There may be delays when filing or retrieving records as one has to refer to the index.
3. It requires training on how to use the index.
4. There might be misfiling due to the error of transposition e.g. where 102 is read and filed as 201

C. ALPHA-NUMERICAL CLASSIFICATIONS

Under this system, alphabets and numerals are combined so that each class has an alphabetic title and No.

This system is suitable for large organisations where neither the alphabet nor numerical classification is adequate.

Advantages

1. This system accommodates more records i.e. has a larger capacity than alphabetical and numerical.
2. Allows for better reference than the two methods combined.
3. Reduces confusion found in either method.

Disadvantages

1. It is complicated and requires qualified personnel.
2. It forces the organization to adopt a centralized filing system even when the organization is small.

D. GEOGRAPHICAL CLASSIFICATION

This is where files are classified according to geographical location e.g. zone, town, country etc. It is also known as geographical by alphabet because the locations are sorted alphabetically.

Advantages

1. Easy to use as long as the location is well known.
2. Direct filing is possible (without indexing).
3. Suitable for organisations with branches in different locations.

4. It is possible to group records under a geographical location.
5. Each location can have a backup in case of a disaster.
6. Facilitates easy identification and location of documents.

Disadvantages

1. They may be errors if the clerk has poor geographical knowledge.
2. If the origin is not indicated, there may be misfiling.
3. It may require an index which is expensive

E. SUBJECT CLASSIFICATION

Records are classified according to a particular subject or their origin.
Records may also be sorted alphabetically.

Advantages

1. Ease of reference due to grouping of files under one subject.
2. Easy to operate and does not require training.
3. Allows direct filing i.e. no indexing because the subject is known.
4. Flexibility of expansion i.e. it is possible to add a new file.

Disadvantages

1. Unsuitable for filing miscellaneous records which means that it has to be opened. If the clerk places documents in this file accidentally, there may be misfiling.
2. It may be necessary to prepare a separate index showing a list of different subjects which may be expensive.
3. Misfiling can occur if the subject is not well known.
4. Unsuitable for companies with a huge number of files.

F. CHRONOLOGICAL FILING

Records are classified according to dates received with the most recent record appearing at the top.

Advantages

1. Easy to operate i.e. does not require much training.
2. Direct filing is possible i.e. without indexing.
3. Easy to use especially for documents on which a date is indicated.

4. The system can be applied in other filing systems e.g. alphabetical, subject, geographical etc.
5. Allows grouping of records under specific dates.
6. It is a convenient method for opening and closing files.

Disadvantages

1. It may cause misfiling if the date is not indicated.
2. It is inconvenient for organizations that have a large number of files.
3. It causes delays and inconveniences when retrieving old files.

List the factors that should be considered when making a decision on an appropriate system of classifying office documents.

1. Cost – The company should choose a system that is affordable.
2. Accessibility and ease of reference – The system should allow quick access to records.
3. Availability of space – The system chosen should not take up too much space.
4. Flexibility – The system should be capable of future expansion.
5. Volume of records – If the volume is high numerical system is appropriate.
6. Ease of use – It should be easy to operate and understand.
7. Nature of records e.g. invoices, certificate etc.
8. Availability of skilled labour to operate the system.
9. The training required to operate the system.
10. Suitability of the filing system depending on the filing equipment available.
11. Safety / security of records – This will determine the type of equipment used.
12. Level of technology available in the office.

INDEXING OF RECORDS

An index is a separate list of records under different classifications for ease of reference and retrieval.

Importance

1. It guides the user on where to get a record.
2. It allows fast and easy access to records.
3. It avoids misfiling of records.
4. It acts as a guide to the filing clerks and provides training to new clerks/users.

Types of Indices

1. Page Index

This is a booklet containing a list of records (like the one found in textbooks)

Advantages

1. It is cheap to prepare.
2. It is time saving
3. Pages are not easily lost because they are clipped or stapled together.

Disadvantages

1. Difficult in adding new records to the index.
2. It is untidy to remove unwanted records since they may have to be cancelled out.
3. Unsuitable for large companies.

2. Loose Vertical Card Index

This is where loose cards are kept vertically inside a box or drawer.

Advantages

1. It is cheap to operate
2. It is time saving to operate
3. It is easy to add new records
4. It is easy to remove unwanted records
5. It is flexible for future expansion.

Disadvantages

1. The system is “blind” i.e. the labels of cards are not visible.
2. The cards are subject to wear and tear.
3. The cards may get lost.
4. Time consuming to flip through the cards.

3. Visible Card Index

This is where index cards are filed in a binder so that they overlap in such a way that the labels are visible.

Advantages

1. It is easy to identify cards since the labels are visible.
2. It is easy to add a new card or remove an unwanted one
3. One can make correction on a card without removing it from the binder
4. Cards do not easily get lost.

Disadvantages

1. Limited space for expansion
2. The cards are subject to wear and tear.

4. Strip Index

This is where records are typed on a strip of adhesive paper which is then stuck onto the page of a book or file

Advantages

1. Unlimited space for expansion
2. Easy to add new records and remove unwanted ones.
3. Easy to read the labels on the strip of paper. Identification tags / strips may be in different colours.
4. The records are not easily lost.

Disadvantages

1. There is the extra cost of adhesive paper.

5. Rotary Index

This is a type of cylinder or drum onto which cards are inserted vertically. It can be rotated for ease of reference.

Advantages

1. It is space saving since it can fit on a desk.
2. It has the capacity to fit many cards.
3. It is easy to add new cards and remove unwanted ones.
4. There is easy identification and quick reference because the labels can be seen.

Disadvantages

1. The equipment is expensive.
2. Cards are subject to wear and tear.
3. Cards can easily be get lost.

6. Punched card Index / Computerized Index

A punched card index has a series of holes which are punched and each hole represents some information. It is used on the computer. Currently a simple computer data base is used.

Advantages

1. There is unlimited space for expansion
2. Accuracy of information

3. It is space saving
4. It is easy to add and remove records
5. There is quick access and identification of records.

Disadvantages

1. High cost of purchasing and maintaining equipment.
2. High training cost.
3. Requires skilled operators.
4. Subject to the problem of power failure and equipment breakdown.

Micro-Filming

This is where a document is photographed and reduced to a micro-size which cannot be read with the naked eye. The film is stored using a cartridge or roll of film or plastic envelopes.

Micro film records can only be read using a micro-film reader.

The system is commonly used in libraries, Museums and Archives etc where important data is stored in large volumes.

Advantages

1. Space saving because records are reduced to a micro size.
2. Economy in the use of filing cabinets
3. It is more permanent than paper which is subject to wear and tear
4. It is less bulky and therefore cheaper to transport.
5. It reduces paperwork and economises on stationery
6. There is security of information as the record cannot be read with the naked eye.
7. There is quick access and identification of records
8. It promotes the safety and protection of valuable documents e.g. certificates, title deeds etc.
9. Documents can be enlarged and a hard copy produced.
10. The system is compatible with other equipment e.g. printers and computers.

Disadvantages

1. The equipment is expensive with a high maintenance cost.
2. Documents cannot be read with the naked eye and therefore a microfilm reader is required.
3. It requires skilled operators.
4. It is subject to power failure and equipment breakdown.
5. There may be delays in retrieving records if they are many since the system does not have an index.
6. The film is sensitive to light, dust and humidity ie it is easily destroyed.

7. The loss of the film can cause the company a great loss of document.
8. It is impossible to correct mistakes on the microfilm.
9. Films can become illegible due to poor processing.
10. The process of developing films takes a long time.
11. There is a high cost of processing as well as complimentary equipment e.g. camera and document reader.

RECORDS MANAGEMENT

This refers to the administration and management of records for future reference.

Purposes of Maintaining Record

1. For future reference – It ensures that records are available for the future.
2. Evidence i.e. they can be used as legal evidence.
3. Planning and budgeting – Past records are required when planning for the future.
4. Evaluating performance – Records indicate if a company is doing well or not.
5. Legal requirement – the law requires that certain documents are maintained for a certain period of time e.g. document of title.
6. Settlement of disputes – The manager needs to refer to records when settling dispute.
7. General reference – Records can be used for general correspondence.
8. Comparison purposes – Records can be used to compare difference business units or departments.
9. Cross reference i.e. records can be used as a cross reference to other related materials
10. Policy and decision making.

Principle of Good Record Management

1. Principle of verification
Records should be maintained in order to verify the accuracy of transaction.
2. Principle of justification
Records should be maintained only for a justified period, otherwise, they should be destroyed.
3. Principle of classification
Records should be classified according to name, number, location etc.
4. Principle of Elasticity (Flexibility)
Records should be capable of future expansion.

5. Principle of information
Records should be maintained in a manner that ensures utmost secrecy.
6. Reasonable cost
The cost of maintain records should be minimal
7. Up-to-date
The records maintained should provide current information.

Factors to consider in Retention of Records

1. Importance / Effectiveness of a record
To what extent will the company be affected if a record is destroyed
2. Need for future reference – Any document that may be required in the future should be retained.
3. Need for legal reference – Any document that can be used as legal evidence should be maintained.
4. Cost of storage i.e. the cost of holding records in the organization.
5. Legal requirement – the law requires that certain documents should be retained or even displayed within the business premises.
6. Volume of records – if the volume is low, there is no need to destroy them.
7. Frequency of reference – Records required on a regular basis should be retained.
8. Nature if documents e.g. receipts, certificates, pay slips etc.
9. Existence of duplicate records – One copy should be destroyed.
10. Company policy regarding retention of records.

TELEPHONE SWITCHBOARD

This contains a number of direct lines which can be connected to extensions.

Types of Telephone Systems

1. Direct Lines

These are used for making calls directly to the concerned recipient. They are normally connected to the National Telephone Network

2. Extensions

These are telephone units used for internal communication ie inter-departmental communication.

Advantages of using Telephone

1. Speed – Information is communicated very fast.
2. There is immediate feedback ie one can get an instant reply.
3. It is cost effective for short duration calls.
4. Accessibility – It is easy to reach the user at any time any place.
5. Convenience – One can make a call without the need to leave the house.
6. Multipurpose – Phones can be used to perform other functions eg being connected to the internet, fax, telex etc.
7. Compatibility with other equipment e.g computer.
8. Easy to use.
9. It generally enhances communication.

Disadvantages

1. It is expensive to purchase and install.
2. High communication cost especially over long distances or long duration calls.
3. Lack of evidence – Telephone conversation cannot be recognized in a court of law unless recorded.
4. Lack of privacy ie it is unsuitable for confidential messages.
5. Lack of visual contact – Body language, diagrams, pictures and other documents cannot be transmitted over the phone.
6. Lack of interpersonal contact between the sender and receiver when communicating.
7. Lack of clarity – There may be interruptions due to network failure or congestion.
8. It is subject to breakdown.
9. Misuse by employees which cost the organization a lot of money.

How to control Telephone Use

1. Use of secret code numbers to access the telephone.
2. Charging users for telephone calls.
3. Introduction of payphones in the office or prepaid calling cards.
4. Through the switchboard operator control.
5. Automatic records of calls made.

Types of Telephone Switchboards

1. PBX – Private Branch Exchange

1. Also known as intercom service
2. This is a private telephone exchange owned by a company to communicate with its department.
3. It is not supported by the National Telephone Network and can therefore not be used for making or receiving external calls.
4. Normally found in large companies, Railway stations, airports.

Advantages

1. It enhances internal communication.
2. Confidential matters relating to the organization can be discussed.
3. Can be used in remote places not covered by the national telephone network.

Disadvantages

1. Expensive to purchase and install.
2. Relies on power and is therefore subject to power failure.
3. Does not support external calls.

2. PMBX

This is a small switchboard which is operated manually

Features

1. Incoming and outgoing calls are routed (directed) by the switchboard operator.
2. It can only support a few direct lines
3. External and extension calls have to be routed through the telephone operator.
4. The switchboard operator has full control of the system.

Advantages

1. Reduces misuse of the telephone since the switchboard operator has full control.
2. Time saving because the operator can control the duration of calls.
3. A good method of monitoring, recording and controlling telephone expenditure

Disadvantages

1. Lack of privacy because all call have to go through the operator.
2. Delays when waiting for the operator to make a call.
3. Unsuitable for organisations that require many telephone lines.
4. Hinders internal communication because external to extension calls are not direct.
5. There is no direct link between the caller and recipient because the operator has to connect them.
6. The operator can get overworked.

3. PABX – Private Automatic Branch Exchange

This is a large automatic switchboard which contains several telephone lines and also provides the following services: -

1. Direct calls can be made without going through the switchboard operator.
2. Extensions can communicate directly to each other.
3. The switchboard can connect to extension.

Advantages

1. Confidential calls can be made using direct lines.
2. No delays as one can make a direct call externally and internally.
3. Promotes internal communications because extensions can connect directly to each other.
4. Direct calls can be received and made even in the absence of the switchboard operator hence reducing her workload.
5. It has an automatic meter which records the numbers dialed and this is a good accounting control.

Disadvantages

1. The system is expensive to purchase and maintain.
2. Subject to misuse due to the direct lines.
3. They system relies on power which may cause communication breakdown in case of power failure.
4. High telephone costs due to lack of telephone operator control.

Components of a Modern switchboard

1. The main switchboard unit
This is for receiving / making calls and connecting to extensions.
2. Telephone headset
This is for allowing the operator to use the phone handsfree.
3. Telephone hand set
This is for receiving and making telephone calls
4. Answering machine
This is used for receiving messages when the operator is out

Telephone Switchboard Operator

Qualities

1. Should be professionally trained as switchboard operator and receptionist.
2. Loyal and committed to her work.
3. Polite and diplomatic
4. Knowledgeable concerning the activities if the organization.
5. Time conscious – She should be punctual and should not waste time.
6. Sociable with a friendly personality.
7. Self-control ie should control her temper.

8. Tolerance ie should be able to sit for long hours without complaining.
9. Eloquent – Should have excellent speaking style (fluent speech and good grammar).
10. Well organized in her work and able to keep accurate records.
11. Discreet – Should keep secrets and be able to make simple decisions.
12. Good memory especially regarding important and frequent callers.

Responsibilities / Roles

1. Operating a switchboard quickly and efficiently.
2. Receiving incoming calls with telephone enquiries.
3. Connecting incoming calls to different extensions.
4. Making outgoing calls on behalf of employees.
5. Making references to the telephone directory quickly and accurately.
6. Making a record of calls made.
7. Checking for faults on the telephone switchboard, recording and reporting them
8. Receiving telephone messages on behalf of employees who are not available.
9. She keeps the telephone switchboard clean and well maintained at all times.
10. Performs the duties of a receptionist.

Telephone Operating Procedures

1. Opening Procedure

- (a) Switch on the telephone switchboard.
- (b) Check for messages on the answering machine and record them.
- (c) Wipe the switchboard with a dry cloth.
- (d) Check for telephone faults.

2. Receiving Incoming

- (a) Be prepared by having a pen and message pad ready.
- (b) Receive calls by picking up the handset on the 1st of 2nd ring
- (c) Identify yourself as follows:
 - (i) For direct calls, identify the company and greet the caller politely.
 - (ii) For extension calls, identify your department and greet the caller politely “Accounts, Good morning.”
- (d) Enquire politely how you can be of assistance to the caller and give the correct information.
- (e) If the caller wishes to be connected to another extension ask his name politely.
- (f) Request the caller to hold the line and dial the correct extension number
- (g) Inform the extension about the call.
- (h) If the call is accepted, connect the caller without delay.

- (i) If the call is rejected or the recipient is unavailable, ask the caller to leave a message.
- (j) Record the message on the message pad and deliver it immediately.
- (k) If the extension is busy, inform the caller promptly to avoid frustrating him.

3. Calls from Extensions

- (a) Greet the extension user politely.
- (b) Identify yourself by saying “switchboard, Good morning.”
- (c) Ask the caller for the number he required to call.
- (d) Note down the number and inform the caller that you will call them back.

4. Making Outgoing Calls

- (a) If the number is not known, find the correct number from the directory.
- (b) Dial the number correctly to avoid the cost of making a wrong call.
- (c) Confirm that you have called the correct company and politely request for the required extension number.
- (d) When the extension user of the other company replies, identify yourself and ask them to hold on for your caller.
- (e) Connect the extension user to the originator of the call.
- (f) Cancel the number from your list of calls to be made.
- (g) If the number is engaged or the recipient is unavailable inform the caller promptly.
- (h) Try again after a few minutes.

5. Closing Procedure

- (a) Switch off the telephone switchboard.
- (b) Switch on the answering machine or night extension i.e. the direct line for receiving calls at night.
- (c) Disconnect the hand and head from the switchboard and lock them away.
- (d) Cover the switchboard with a dust cover.

6. Keeping record

- (a) Have a record of all telephone calls made during the day.
- (b) Classify them according to local, trunk and international.
- (c) Keep a record of telephone faults showing the date and time of notifying the technician

Procedure for Writing Messages

1. All messages should be put in writing and not committed to memory.
2. Write down the name of the person to receive the message.
3. Write down the name, company name, telephone and extension number of the caller.
4. Note down the action required by ticking the relevant box on the message pad e.g.

<input type="checkbox"/> Called	<input checked="" type="checkbox"/> Telephoned	<input type="checkbox"/> Please call	<input type="checkbox"/> will call again
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5. Write a brief message and deliver it to the recipient as soon as possible.

EQUIPMENT AND FACILITIES USED BY A SWITCHBOARD OPERATOR

1. Telephone switchboard
This is for receiving incoming calls and connecting them to extensions. It is also used for making outgoing calls.
2. Hand set / head set
These are the telephone receiving devices
3. Register
This is for recording outgoing calls
4. Internal telephone directory
This contains extension numbers of departments as well as numbers to the branch offices
5. External telephone directory
This contains numbers of individuals and other companies.
6. Fax directory
This contains the fax numbers of other companies
7. Business directory / yellow pages
This contains commercial telephone numbers classified according to the type of industry. It shows a list of addresses and telephone numbers.

Equipment / Facilities used by a telephone operator

1. Telephone switchboard
2. Handset / head set
3. Register

Other devices used for Communication

1. Answering Machine

This is a recording device connected to the switchboard for the purpose of receiving telephone messages even when the office is closed.

All calls are diverted to the answering machine and there is a recorded voice asking the caller to leave a message.

When the user returns, he plays back the machine to get his messages

Advantages

1. Calls can be received even when the office is closed.
2. Important messages can be recorded and action taken.
3. It enhances internal and external communication.
4. It reduces paperwork and clerical errors.
5. It reduces the workload of the telephone operator.

Disadvantages

1. The equipment is expensive
2. Unsuitable for confidential messages.
3. Subject to power failure and equipment breakdown.
4. There is no direct contact between the sender and receiver.
5. Feedback is not immediate.

2. Voice Mail

This is an automatic digital answering machine to which calls are diverted when the user is unavailable.

It has a recorded voice which requests the caller to record his message.

It is stored digitally into the voice mail box.

The user retrieves his message by dialing a special number.

Advantages

1. Calls can be received when the office is closed.
2. Convenient and fast because the user can retrieve the message from any location.
3. Enhances internal and external communication
4. Suitable for confidential messages due to the use of secret access numbers.
5. Reduces paperwork and clerical errors.
6. Reduces the workload of the telephone operator.

Disadvantages

1. Lack of direct contact between the caller and receiver.
2. Subject to network failure.
3. Lack of immediate feedback
4. The caller is frustrated because he is charged for the call.

3. Radio Pager

This is a portable communication device that operates using radio waves.

The user is signaled when the pager makes a beeping or vibrates.

It has a small screen for text messages, however, one cannot make or receive voice calls.

Normally used by emergency staff e.g. doctors and other service providers.

4. Radio Calls

This is a telephone network that operates using radio waves.

It is a portable device which can or receive calls anywhere i.e. land, sea or air.

It is normally used by police, fire brigade, ships, airways, railways etc.

It requires a high frequency radio and a powerful transmitter.

Advantages

1. It enhances internal and external communication.
2. Direct calls can be received.
3. The user is accessible at any time and place.
4. It is convenient and easy to carry around.
5. There is instant feedback.

Disadvantages

1. Unsuitable for confidential messages.
2. Equipment is expensive.
3. It is not connected to the National Telephone Network i.e. cannot make calls to other companies.
4. Subject to network failure and bad weather.

5. Cell phones / Mobile Phone

This is a portable telephone which uses digital network to communicate.

It has a computerized SIM card (subscriber identification Module) which allows the user to perform the following tasks.

1. Making and receiving calls
2. Sending and receiving text messages.
3. Storage of telephone numbers / phone book
4. Voice mail service
5. Connection to the internet
6. Electronic diary with alarm.

Advantages

1. High speed of communication.
2. Direct calls can be made.
3. Instant feedback.
4. Enhances internal and external communication.
5. The user is accessible at any time or place.
6. It is portable and easy to carry around.
7. Text messages can be sent and received which is cheap and convenient.

8. It has memory for storing telephone numbers and other details.

Disadvantages

1. Expensive to purchase with a high service fee.
2. Subject to network failure.
3. Easily lost or stolen.
4. Subject to low battery and equipment breakdown.
5. Health hazards from radiation.

6. Fax (Facsimile transfer)

- This is an electronic method of sending messages.
- The fax machine has a copier connected to the telephone.
- The original document is inserted into the machine face down and an exact copy is transmitted to the recipients fax machine after dialing their fax number.

Advantages

1. High speed of communication
2. Easy to use without much training.
3. Flexible i.e. one can send letter, diagrams, photos etc.
4. Messages can be received even when the office is closed.

Disadvantages

1. The equipment is expensive.
2. Message may be unclear due to network failure.
3. Subject to power failure and equipment breakdown.
4. Unsuitable for confidential messages due to exposure.
5. The print fades after a few days and is then not therefore for future reference

7. Telex / teleprinter

- This is an electronic method of sending messages using a teleprinter.
- The teleprinter has a keyboard and is connected to a telephone.
- The user dials a telex number and types the message which is printed out on both the senders and receivers teleprinter.

Advantages

1. High communication speed
2. Instant feedback if recipient is available.
3. Enhances internal and external communication.
4. Message can be stored for future reference.
5. Messages can be received even when the office is closed.

6. The same message can be sent to different destinations.

Disadvantages

1. Require a skilled operator
2. Subject to typing errors.
3. Subject to network failure
4. Subject to the equipment breakdown and power failure
5. The equipment is expensive with a high service fee.

8. E-Mail (Electronic Mail)

This is an electronic method of sending messages using the internet

In order to send and receive mail, one requires:

1. Computer
2. Telephone line
3. Modem (makes the computer compatible with the telephone).
4. E-mail address (username)
5. Secret access password.

To send a message one logs into his email account and composes a text message.

To send pictures, photos and other documents one needs to scan them and send them as an attachment.

To receive a message one accesses the inbox where the messages are stored.

Advantages

1. High communication speed.
2. Low communication cost.
3. A hard copy may be printed and filed for future reference.
4. One message may be sent to many destinations at no extra cost.
5. It is suitable for confidential messages due to the secret password.
6. There is unlimited space for storage and is therefore suitable even for detailed messages.

Disadvantages

1. Requires expensive equipment and high installation cost.
2. Requires one to be computer literate.
3. There is the possibility of security problems due illegal access (hacking).
4. Subject to power failure and equipment breakdown.
5. One cannot send pictures and photos without a scanner which is expensive.

TELECONFERENCING

This is used by three or more people at different locations to hold a telephone meeting. The user dials the National Telephone Network (Telkom) and requests to be connected to a telephone conferencing line.

Advantages

1. Saves time and travelling expenses to attend meetings.
2. Feedback is immediate.

Disadvantages

1. The service is expensive.
2. It is difficult to chair such a meeting.
3. There is no visual contact between the participants.
4. There may be a problem of network failure.

VIDEO CONFERENCING

This is where three or more people can have a telephone discussion where a video camera is connected to each phone.

This allows participants to view watch other on a video screen e.g. CNN.

Advantages

1. Saves time and travelling cost.
2. Easy and cheap to arrange for meetings.
3. There is visual contact between the participants.

Disadvantages

1. Difficult to chair such a meeting
2. Affected by the problem of network failure and equipment breakdown.
3. Equipment is expensive.
4. Communication costs are high.

VIDEO TELEPHONE

This is when two people are communicating on a telephone and a video camera is attached hence they can view each other on a screen.

Advantages

1. There is visual contact between the participants ie the caller and receiver.
2. Equipment is portable and can be used in remote locations.
3. Allows direct communication between caller and receiver.

4. Enhances internal and external communication.

Disadvantages

- a) It is very expensive.
- b) There is no physical contact.
- c) It is subject to network failure and equipment breakdown.

SERVICES PROVIDED BY A MODERN (DIGITAL) SWITCHBOARD EXCHANGE

1. Switchboard

Used to connect to extensions.

2. It can connect extension calls to other extensions i.e. allows them to communicate directly with each other.
3. Local calls can be made i.e. within the same town.
4. Trunk calls can be made i.e. to another town using STD (subscriber Trunk Dialing).
5. International calls can be made.
6. Alarm calls. This is where the operator is instructed to wake you up by calling at a specific time until you pick up the phone.
7. ADC call – Advice on duration and cost.
This is when the telephone operator advises the user of the duration and charge after a call has been made.
8. Reverse charge call
This is when the recipient is charged for the call plus an extra fee. Before connecting the call, the recipient must agree to accept the charges.
9. Fixed time call
This is when the operator is instructed to make a call at a specific time at an extra cost and the user is guaranteed connection.
10. Emergency calls
These are free of charge and are made to the police, fire brigade, ambulance etc.

STATIONERY CONTROL

- Stationery refers to all the office-e supplies like pens, paper, envelops, pins, staples etc.
- These are also referred to as office consumables.
- Stationery is essential for the smooth running of the office activities.

Stationery Levels

It is Important for the manager to control the quantity of stationery in the store in order to avoid: -

- (i) Overstocking.
- (ii) Under stocking

This leads to shortages and stock outs which interfere with the office operations

1. Maximum Level

This refers to the largest quantity of stock that should be maintained in the store at any given time and should not go beyond this level as there may be problem like high storage costs and others.

2. Minimum Level

This refers to the lowest quantity that should be maintained in the store at any given time. Stationery should not fall below this level as it may lead to shortages.

3. Reorder Level

This is the level at which the store keeper should start placing an order for more stationery taking into consideration, the lead time (delay time i.e. between placing the order and the delivery time).

Factors Affecting stock Level / Quantity

1. User Demand / consumption rate

The higher the demand, the more quantity required.

2. Cost of storage ie the cost of hold such an item in the store

The higher the cost, the lower the quantity.

3. Cost of items

The higher the cost, the lower the quantity kept in the store

4. Nature of items

If the items are perishable, they should be maintained at minimum level.

5. Lead time

This refers to the time it takes to receive a delivery. The longer the period taken, the more the quantity to be maintained.

6. Distance between supplier and the company

The longer the distance, the more the stock.

7. Availability of items in the market

If not readily available, maximum stock should be maintained.

8. Budget
If funds are available to buy stock.
9. Safety and security for the items in the store
If the risk is high, minimum quantities should be maintained.
10. Availability of space
If space is not adequate, minimum level should be maintained.
11. Company policy regarding stock levels.

Procurement Methods

This refers to the various ways in which stationery can be purchased.

There are four main methods, namely; -

- a) Quotation
- b) Tenders
- c) Through salesmen
- d) Direct procurement

1. By Quotation

This is normally used for credit purchases of normal situation items like pens, paper etc.

Procedure

1. The purchasing manager makes a request for quotation by sending an inquiry to several suppliers. The suppliers send a price list of the items quoted.
2. The buyer selects the best quotation depending on price, quality, terms of payment, discounts etc.
3. A purchase order is prepared.

2. By Tender

- A tender is a written commitment by the supplier to provide goods and services at a specific price, quantity and quality.
- It is normally used for high value contracts worth thousands / millions of shillings
- Tenders are opened by the tendering committee which selects the best tender according to price, quantity and quality.
- After this a purchase contract is prepared.

3. Through salesmen

- (i) This is where sales representatives are sent to convince buyers to purchase a product.
- (ii) It is normally used for new products or non-standardized items.
- (iii) The salesmen usually carry free sample which are given to the buyer and if it is accepted, a purchase order is made.

Advantages

- 1. Free samples can be received and tested.
- 2. Discounts can be negotiated.

Disadvantages

- 3. The actual product may be inferior to the sample.
- 4. Uniform stationery items are not purchased.

4. Director Procurement

- This is where items are purchased from a manufacturer or retailers.
- It is done on a cash basis and is normally for low value items or urgently required items.

Advantages

- 1. They are opportunities for obtaining quantity discounts due to the bulk buying.
- 2. The procedure is quick and simple

Disadvantages

- 1. It requires maintenance of petty cash in the office.

STATIONERY PROCEDURES

- 1. Purchasing
- 2. Receiving
- 3. Storing
- 4. Issuing

Stationery procedures refer to the procedures involved in the purchase, receiving, storage and issue of station to promote economy in the use of stationery.

1. Purchasing Procedure

- 1. Purchase budget – Each department should have a budget of the items to be purchased for the year.

2. Centralised purchasing – There should be a centralized department for purchasing stationery in order to get quantity discounts for bulk purchases.
3. Purchase Requisition – This is a written request from user departments asking the purchasing department to buy more stationery. It is a document which authorizes a purchase.
4. Inquiry – The purchasing manager makes an inquiry for quotations from several suppliers.
5. Quotations – These are received from suppliers stating the current prices
6. Selection – The best quotation is selected depending on the price, quality, terms of payment, discounts etc.
7. Purchase order – This is an official document requesting the supplier to deliver specific goods at a specific price.

Advantages of Centralised Purchasing

1. Quantity discounts can be obtained due to bulk buying.
2. More efficient purchasing methods because a purchasing manager is a qualified professional.
3. Specialization is enhanced because qualified purchasing clerks are employed.
4. There is uniformity of purchasing procedures and uniform items can be obtained.
5. There is more accountability for purchasing decisions because the purchasing manager is in full control of his department.
6. There is saving in terms of labour because few purchasing clerks are required.
7. There is better supervision of the purchasing and store staff.
8. It avoids duplication of purchasing work because only one department is responsible for purchasing.
9. Better control of stationery because it is purchased in a central department.
10. There is flexibility in job rotation because workers can rotate in the stores receiving and purchasing section.
11. There is better training of new staff because they can learn from skilled workers.

Disadvantages

- a) Boredom and monotony of work.
- b) High risk of losses in the event of a disaster.
- c) Lack of flexibility because uniform procedures are used.
- d) Delays in obtaining stationery items from a centralized department.
- e) Inconvenient for user departments because their special needs are not met.
- f) Lack of contact with senior executive.
- g) No opportunities to exploit new talents because employees are specialized in one skill.
- h) Too much movement from one office to another.
- i) High cost of messengers to distribute stationery and documents.

- j) Misplacement of records due to the large number of records in a centralized office.

Receiving Procedure

1. Centralised receiving – There should be a central place for receiving of stationery
2. Responsibility – One receiving clerk should be in charge of the receipt of stationery
3. Inspection – Incoming goods should be inspected for quality, quantity and position.
4. Delivery note – The supplier delivers goods using a delivery note which is signed in acceptance of the goods.
5. Returns – Items which are defective or in excess should be returned to the supplier accompanied by a goods returned note. The buyer should then await a credit note.
6. Goods received note – All goods received are recorded using a goods received note and the bin card is updated.
7. Invoice – The supplier sends an invoice requesting for payment.

Steps that a purchasing manager should undertake before paying an invoice

1. Verification of invoices

- a) Check your goods received note to ensure that goods were actually received in the store
- b) Confirm that the purchase was done by checking the purchase order.
- c) Check that correct quantity and quality were received by checking the goods received note.
- d) Verify that the invoice is correct by comparing it with the purchase order.
- e) Confirm by checking your payment record to avoid double paying an invoice.
- f) Check your budget allocation to see if there are enough funds to pay the invoice.
- g) Prepare a payment voucher and have it approved before paying the cheque.
- h) Stamp 'PAID' on the invoice once payment has been done.

2. Bin Card / Stock record card

This is a record that shows receipts and issues of stationery. It also shows the minimum and maximum levels of stock balances.

BIN CARD							
Item: Markers				Minimum level: 20			
Unit of issue: Boxes				Maximum level: 100			
Receipts				Issues			
Date	Qty	Invoice No	Supplier	Qty	Reg. No.	Dept.	Balances
01/03							20
03/03	50	201	AB COMPANY				70
04/03				30	111	Accounts	40
06/03				10	112	Sales	30
08/03	40	402	XY COMPANY				70

3. Storage of stationery

- a) Centralization – There should be a central store for effective control and protection of stationery.
- b) Responsibility – One storekeeper should be in charge of stationery store.
- c) Accurate record – All stationery items should be recorded in the bin card.
- d) Safety – Stationery should be protected against fire, floods and other hazards.
- e) Proper arrangement – Items should be arranged in the store according to the way they are issued e.g. frequently used items should be close to the entrance.
- f) Heavy items – This should be placed on pullets on the floor for ease of movement.
- g) Correct labeling – All the bins and shelves should be labeled for easy identification of stationery.
- h) Cleanliness and sanitation - The store should be kept clean and tidy at all times.
- i) Correct layout – This include wide gangways, natural light and ventilation and other layout features.
- j) Isolation of hazardous items – Flammable items should be kept in a separate well ventilated store.
- k) Economical space utilization – Space should be used in the most economical way.
- l) Security – The store should be kept locked when not in use and no unauthorized person should be allowed entry.

4. Issue of Stationery

- a) Centralization – There should be a central place for making issues to the user departments.
- b) Responsibility – One person should be made in charge for issues.
- c) Timing if issues – There should be a specific time for making uses. It given the storekeeper time to do other work.
- d) Recording of issues – All issues should be recorded in the bin card.
- e) First in first out method of issue – This is to avoid deterioration of stationery.
- f) Recycling – User departments should be encouraged to recycle stationery.
- g) Unit of issue – Standard units of issue should be used e.g. boxes, dozens etc.
- h) Store requisition – This is a demand note from the user department requesting for stationery

5.