



THE SOCIETY OF BUSINESS PRACTITIONERS

A number of overseas Colleges have approached the Society for specialised and specific qualifications for their own country's requirements.

TECHNICAL DIPLOMA IN SECRETARIAL & ADMINISTRATION STUDIES

Examination Subjects

1. Office procedures – Level 1 (Theory)
2. English for business communication – Level 1 (Theory)
3. Book-keeping and accounts – Level 1 (Theory)
4. Introduction to computers [Windows] (Theory)
5. Spreadsheets (Practical)
6. MS Word processing (Practical)

SYLLABUS

EXAMINATION:

Each subject to consist of 1 Examination Paper except for “MS Word processing” and “Spreadsheets” which are practical papers and these will be single Papers.

COURSE CONTENT:

Subjects and sub topics which will be covered are listed in sequence below.

(1) OFFICE PROCEDURES – LEVEL 1

1 The Office

Services

Describe the general nature and content of office work and the functions of an office.

- ◆ Receiving and collecting information in various formats
- ◆ Sorting and processing information, manually and with the help of machines
- ◆ Communicating information – verbally, in writing and via technological means
- ◆ Recording information for future reference
- ◆ Safeguarding the assets of a business.

Staff

- ◆ Identify the roles of essential clerical, secretarial, administrative and supervisory staff
- ◆ Describe their basic duties and responsibilities

Health & Safety

- ◆ Identify working practices designed to maximize a safe and healthy working environment.
- ◆ Identify potential hazards in an office environment and explain how they can be avoided.
- ◆ Describe the communication and undertake typing reporting procedures for hazards and accidents.

2 Communications

Oral & Written

- ◆ Describe the communication styles used with colleagues at all levels, clients and visitors
- ◆ Explain the need for security and confidentiality of information
- ◆ Describe and apply good reception skills
- ◆ Describe the essentials of good telephone skills and techniques, including the use of answering machines
- ◆ Design and complete a telephone message form
- ◆ Identify the range of written media available
- ◆ Compose simple letters and memoranda

Telecommunications

- ◆ Describe current telecommunications facilities, e.g., telephone systems, fax, viewdata, electronic mail

- ◆ Describe a system for circulating mail and internal communications within an organization (this may include reference to electronic mail)

3 Stationery and stock

- ◆ Describe simple stock control procedures for ordering, handling and issuing of office stationery and supplies
- ◆ Complete requisition and stock control cards.

Purchase and Sale of Goods

- ◆ Identify the principle documents in a business transaction
- ◆ Describe the sequence and indicate the origin of the documents identified
- ◆ Complete documents from the information
- ◆ Complete documents from the information provided
- ◆ Differentiate between trade and cash discount

Petty Cash

- ◆ Describe the operation of a petty cash system
- ◆ Complete a petty cash book from information supplied, including petty cash vouchers
- ◆ Balance a petty cash book using the imprest system

4 Filing and Indexing

Methods of classification

- ◆ and utilize the principle classification systems, viz. Alphabetical, numerical, subject, geographical and chronological
- ◆ State the respective advantages and disadvantages of different systems

Rules

- ◆ State the essential elements of a good filing system
- ◆ List the basic rules for operating a filing system including a retention policy
- ◆ Place a selection of items in the requested filing and indexing orders
- ◆ Explain the need to operate a tracer or out guide system
- ◆ Devise suitable cross references cards

Equipment and storage

- ◆ Recognise the range of storage media available (including reference to electronic filing and microfilm)
- ◆ Distinguish between vertical and lateral filing
- ◆ Describe different indexing systems, e.g. card, visible card, strip and rotary

5 Office support and Equipment

- ◆ Identify and briefly describe different typewriter/keyboards
- ◆ Make notes on the care and routine maintenance of typewriters and other text producing equipment (particularly disk care)
- ◆ Explain the basic hardware and software associated with word processors and personal computers, i.e. VDU, CPU, Disk drives, keyboards, printers and disk programmes
- ◆ List typical lectures to be found in word processing software.

Reprography

- ◆ Describe equipment for reproducing documents, stating special features and limitations
- ◆ Outline the principles to be applied in maintaining quality, avoiding wastage, achieving economy and meeting deadlines.
- ◆ Recognize the range of support equipment found in a reprographics section, e.g. joggers, collectors and binders.

Mail Room Equipment

- ◆ Identify and briefly describe equipment found in larger scale mailing departments viz letter openers, date stamping machines, addressing machines, folding machines, sealing machines, scales/weighing machines, and stamp affixing franking machines.

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(2) ENGLISH FOR BUSINESS COMMUNICATION – LEVEL 1

1 Reading comprehension

- ◆ Demonstrate an understanding of simple internal and external business communications, i.e. memos and letters, written telephone messages, faxes and emails
- ◆ Complete or extract explicitly, information from business documents, i.e. orders, requisitions, quotations or invoices
- ◆ Extract information from simple charts or timetables

2 Writing skills

Write simple, concise letters, providing and/or requesting routine information
Write simple memos in response to explicit instructions
Draft faxes and e-mails
Complete standard letter forms with information provided.

(The above tasks may require the candidate to communicate message of acknowledgement, confirmation, enquiry and/or thanks.

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(3) BOOK-KEEPING AND ACCOUNTS – LEVEL 1

- ◆ Apply principles, concepts and conventions used in the preparation of account statements including the concepts of business entity, prudence, consistency, and materiality and going concern
- ◆ Records: capital as real assets as well as cash, fixed assets, current assets, current liabilities, gross and net profit
- ◆ Distinguish between and give examples of revenue and capital expenditure; debtors and creditors; expenditure and income
- ◆ Illustrate the relationship of net profit to the capital account
- ◆ Prepare a capital account to record initial capital invested, cash drawing and net profit transferred from the profit and loss account
- ◆ Interpret basic accounting terms and documentations including: invoices, statements, credit notes, advice notes and delivery and dispatch notes
- ◆ Record by double entry book-keeping simple transactions concerning the purchase of assets and the purchase returns and sales returns
- ◆ Prepare a two-column cash book to record the receipts and payments of cash, cheques, standing orders, direct debits
- ◆ Show an understanding of the functions and operations of current bank accounts, the paying-in book, bank statements
- ◆ Interpret bank statements and cash book in order to draft bank reconciliation statements
- ◆ Use vouchers to prepare a petty cash book, with analysis columns, using the imprest method; balance the petty cash book and transfer the totals to the ledger accounts as necessary
- ◆ Balance the ledger accounts including the cash and bank accounts and bring down the balance to the following accounting periods
- ◆ Extract the trial balance from the ledger accounts and discuss its uses limitations
- ◆ Prepare simple stock accounts, showing transfers to and from the trading account
- ◆ Prepare simple balance sheets in vertical and horizontal formats

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(4) INTRODUCTION TO COMPUTERS [WINDOWS]

- ◆ Introduction
- ◆ Operating systems
- ◆ Microsoft Windows
- ◆ Wimp
- ◆ Desktop
- ◆ Menus
- ◆ Working with disks
- ◆ Programs
 - Starting a program
 - Closing a program
 - Opening multiple programs
 - Creating documents
- ◆ Creating folders
- ◆ Moving documents and folders
- ◆ Microsoft Windows programs and accessories
- ◆ Understanding Explorer
- ◆ Using printers

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(5) SPREADSHEETS

1 **Toolbars** Standard Format

- ◆ File handling
 - Computer system
 - Directories/Folders
 - Backup
- ◆ Different types of software applications

2 **Accessing Excel**

- ◆ Selecting a cell/row/column
- ◆ Entering or changing data
- ◆ Saving and exiting a spreadsheet

3 Editing data

- ◆ Deleting column/row
- ◆ Inserting column/row
- ◆ Copying, moving or pasting cells
- ◆ Deleting a spreadsheet

4 Data types and formats

- ◆ Adjusting column widths
- ◆ Aligning data left, right, centre
- ◆ Applying or removing bold/italics/underline

5 Formatting cells

- ◆ General
- ◆ Number
- ◆ Currency
- ◆ Accounting
- ◆ Text
- ◆ Data
- ◆ Custom
- ◆ Percentage

6 Formulas

- ◆ Arithmetic operator precedence
- ◆ Error values
- ◆ Functions:
 - Sum
 - Average
 - Date

7 Cell references

- ◆ Relative

8 Printing

- ◆ Page setup
- ◆ Orientation
- ◆ Scaling
- ◆ Paper size
- ◆ Header/Footer
- ◆ Print Area
- ◆ Print Preview

- ◆ Print
- ◆ Printer
- ◆ Printing Formulas

9 Borders and Shading

- ◆ Changing font sizes
- ◆ Merge and centre text
- ◆ Shading cells
- ◆ Borders

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(6) MS WORD PROCESSING

1 Introduction

- ◆ Word processing programs
- ◆ What is Microsoft Word?
- ◆ Starting Microsoft Word?
- ◆ Creating and saving a Word document
- ◆ Closing the Word program
- ◆ Using the help system

2 Facilities available in creating a Word document

- ◆ The keyboard
- ◆ The Word wrap
- ◆ Checking spellings and grammar
- ◆ Using the Thesaurus
- ◆ Automated features

3 Editing techniques

- ◆ Inserting text
- ◆ Over-writing and replacing text
- ◆ Deleting text
- ◆ Copying and moving text
- ◆ The undo and redo commands

4 Formatting and enhancing documents

- ◆ Working with fonts
- ◆ Aligning text
- ◆ Indenting texts and adding bullets
- ◆ Margins, paper size, orientation and line spacing
- ◆ The ruler and working with tabs
- ◆ Using templates
- ◆ Inserting dates and times

5 Working with tables

- ◆ Creating a table
- ◆ Entering and aligning text in a table
- ◆ Working with rows and columns
- ◆ Adding borders and shading

6 Creating and editing drawings

- ◆ Using the drawing toolbar
- ◆ Filling colours to objects and other effects
- ◆ Auto shapes
- ◆ Editing objects
- ◆ Clip art
- ◆ Textbox and Word Art

7 Mail Merge

8 Other Facilities

- ◆ Printing
- ◆ Mailing labels
- ◆ Inserting page numbers
- ◆ Headers and footers
- ◆ Section breaks
- ◆ Columns and newsletters
- ◆ Creating Web documents

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