Business – Office Administration

Competency-based assessment – skill building

Modules
- Organise and complete Daily Work Activities
- Communicate in the workplace
- Work Effectively with Others
- Use Business Technology
- Provide Information to Clients
- Participate in Workplace Safety Procedures
- Produce Simple Word Processed Documents

COMPULSORY


Electives:
- Mail Centre Operations
- Excel – spreadsheets

Activities
- Word processing
- Guest speakers
- Occupational Health and Safety exercises
- Meeting simulation
- Videos

Assessment
- Practical application of modules
- Completion of tasks – chapter work, test, case studies
BSB20101 CERTIFICATE 11 IN BUSINESS (Office Administration)
with selected units of competence from Certificate 111

ORIENTATION

Units to be covered:

BSBCMN207A  Prepare and process financial/business documents
This unit covers the processing of financial transactions including petty cash, invoicing and banking in a business environment.
Documents will include:
- Purchase orders/invoices
- Receipts
- Delivery docket/receipts
- Credit notes
- Statements
- Deposit books/cheques
- Petty cash vouchers

BSBCMN302A  Organise personal work priorities and development
This unit covers the skills and knowledge required to organise own work schedules, monitor and obtain feedback on work performance, and maintain required levels of competence.
Focus will be on:
- Work goals/objectives
- Work performance/evaluation

BSBCMN305A  Organise workplace information
This unit covers the skills and knowledge required to gather, organise and apply workplace information in the context of an organisation's work processes and information management systems.
Focus will be on:
- Workplace legislation
- Workplace information (correspondence, databases, financial figures, production targets, forms, sales records, computer files, personnel records).

BSBCMN306A  Produce business documents
This unit covers the skills and knowledge required to produce various business documents. It includes the skills and knowledge required to select and use a range of functions on a computer application.
Focus will be on:
- Software applications
- Document design principles
- Presentation

BSBADM305A  Create and use databases
This unit covers the skills and knowledge required to create and use a simple database.
Focus will be on: Microsoft Access
Program 2: Certificate II in Business with selected units of competence from Certificate III in Business Administration

<table>
<thead>
<tr>
<th>VCE VET Units 1–2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td><strong>Unit of competence</strong></td>
</tr>
<tr>
<td><strong>Compulsory units</strong></td>
<td></td>
</tr>
<tr>
<td>BSBCMN202A</td>
<td>Organise and complete daily work activities</td>
</tr>
<tr>
<td>BSBCMN203A</td>
<td>Communicate in the workplace</td>
</tr>
<tr>
<td>BSBCMN204A</td>
<td>Work effectively with others</td>
</tr>
<tr>
<td>BSBCMN205A</td>
<td>Use business technology</td>
</tr>
<tr>
<td>BSBCMN209A</td>
<td>Provide information to clients</td>
</tr>
<tr>
<td>BSBCMN211A</td>
<td>Participate in workplace safety procedures</td>
</tr>
<tr>
<td>BSBCMN213A</td>
<td>Produce simple word processed documents</td>
</tr>
<tr>
<td><strong>Electives: Select 2 of the following</strong></td>
<td></td>
</tr>
<tr>
<td>BSBCMN201A</td>
<td>Work effectively in a business environment</td>
</tr>
<tr>
<td>BSBCMN206A</td>
<td>Process and maintain workplace information</td>
</tr>
<tr>
<td>BSBCMN208A</td>
<td>Deliver a service to customers</td>
</tr>
<tr>
<td>BSBCMN210A</td>
<td>Implement improved work practices</td>
</tr>
<tr>
<td>BSBCMN212A</td>
<td>Handle mail</td>
</tr>
<tr>
<td>BSBCMN214A</td>
<td>Create and use simple spreadsheets</td>
</tr>
<tr>
<td>BSBCMN215A</td>
<td>Participate in environmental work practices</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>240–265</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VCE VET Units 3–4</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Compulsory units</strong></td>
<td></td>
</tr>
<tr>
<td>BSBCMN207A</td>
<td>Prepare and process financial/business documents</td>
</tr>
<tr>
<td>BSBCMN302A</td>
<td>Organise personal work priorities and development</td>
</tr>
<tr>
<td>BSBCMN305A</td>
<td>Organise workplace information</td>
</tr>
<tr>
<td>BSBCMN306A</td>
<td>Produce business documents</td>
</tr>
<tr>
<td>BSBADM305A</td>
<td>Create and use databases</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>210</strong></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>450–475</strong></td>
</tr>
</tbody>
</table>
Orientation

1. **Organise and Complete Daily Work Activities**
   - Introduction to business
   - Colleagues, supervisors
   - Workplace rules
   - Health and safety
   - Physical layout
   - Workstations – avoiding eye strain
   - Setting goals
   - Time management
   - Diaries and planners

2. **Communicate in the Workplace**
   - Types of communication
   - Body language
   - Telephone technique
   - Effective listening skills
   - Effective written communication

3. **Work Effectively with Others**
   - Teamwork, attitude, communication, knowledge
   - How to work effectively in teams
   - What makes a good communicator?
   - Knowledge – law, award, environment, skills

4. **Use Business Technology**
   - Computer system, ergonomics, health and safety
   - Storage devices
   - Programs – word processing, spreadsheets
   - Peripherals

5. **Provide Information To Clients**
   - Client contact,
   - Dress code
   - Grooming
   - Personality – empathy, tact, discretion
   - Build self-confidence
   - Questioning technique
6. **Participate in workplace safety procedures**

- Hazards – assessing risks
- Occupational overuse syndrome and ergonomics
- Noise levels
- Managing stress

7. **Produce simple word processed documents**

- Using Word, tabs,
- Business documents - letters, reports, emails, memo, use the fax
**Exercise 3**

To help us identify the types of people who work in offices, match the tasks they perform in the left column with their titles in the right column.

<table>
<thead>
<tr>
<th>Task</th>
<th>Who Performs Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greets customers</td>
<td>Accounts Clerk</td>
</tr>
<tr>
<td>Discusses work problems with an employee</td>
<td>Word Processing Operator</td>
</tr>
<tr>
<td>Draws up a Balance Sheet</td>
<td>Credit Control Clerk</td>
</tr>
<tr>
<td>Opens and distribute letters and faxes</td>
<td>File Clerk</td>
</tr>
<tr>
<td>Calls customers about outstanding accounts</td>
<td>Personnel Manager</td>
</tr>
<tr>
<td>Edits a document on a word processor</td>
<td>Receptionist</td>
</tr>
<tr>
<td>Places documents in files</td>
<td>Mail Clerk</td>
</tr>
</tbody>
</table>
By law, all employees must obey health and safety rules. Sometimes, though, it is easy to forget about these rules, perhaps because the people in the department are busy, or because there are several distractions.

Make a list of all potential accident spots you can see in the office above. When you have finished, compare your answers with those of others in your class. Then discuss what sorts of accident could occur in the office.

Imagine you are an office junior in this company. You have just witnessed an accident. A colleague has given first aid and nobody is seriously injured. To whom should you report the accident? Make a list of the details the person you reported to would need to know in order to complete an accident report form.
Anne Khan is a fire safety officer. It is her job to advise employers on fire prevention. Help her to compile a list of danger areas in the office below.

What advice would Anne want to give employees? Which items in the office should be moved immediately? Is there anything you would add to this office to make it safer?

Using your list of danger areas, and answers to the questions on the left, redesign this room to make it safer. You could draw a diagram to show your changes.
Getting Along With Others on the Job

The ability to get along with others is a valuable asset. It probably contributes more to one's success in a corporation than does high I.Q. or skill. Listed below are some types of people with whom you might be working. Place the name of each in the sentence that describes a method for dealing with that person. Also place the number of your answer in the space at the left. Then transfer these numbers into the corresponding spaces in the diagram. If you do it correctly, the three numbers in each row in the diagram will have the same total.

1. sarcastic 6. stubborn
2. careless 7. bold, outspoken
3. sensitive 8. shy
4. slow 9. lazy
5. physically handicapped

---

A. A __________________ person needs to be encouraged frequently and to be listened to. Since such persons probably will be afraid to ask questions, they should be given clear instructions and not assigned tasks that require making important decisions.

B. A __________________ person should not be made to feel “different.” Co-workers should be courteous and helpful, but should expect the same quality of work from this individual as from others.

C. Never raise your voice to a __________________ person, as it may produce a verbally explosive reaction. These individuals must be cautioned not to exceed the limits of their authority.

D. Always speak softly to a __________________ person rather than in a demanding tone of voice. Avoid saying things jokingly about these individuals as they may take it seriously and be offended.

E. A __________________ person must be constantly motivated by having the benefits of good work pointed out. It should be made clear to these individuals that they must meet standards or suffer the consequences.

F. A __________________ person resists change; therefore, it is advisable to discuss things in advance with this worker in order to develop an attitude of cooperation. Firmness is required to make this worker conform.

G. Speak slowly and clearly to a __________________ person, repeating instructions several times, if necessary, and giving frequent praise whenever work is performed properly.
Commonsense Rules for the Office

The statements below deal with general rules to follow in the day-to-day work in an office. Each of the missing words contains the letter E in the position indicated. How quickly can you complete the statements?

1. Come to work on _ _ _ _ E so your employer will know you are dependable and serious about your work.

2. When in doubt about a procedure, ask _ _ E _ _ _ _ rather than doing things incorrectly, since errors can be very costly to the company.

3. Make a list of the steps involved in each procedure and establish a definite _ _ _ _ _ _ E that you follow systematically.

4. On your calendar, list things that need to be done in the order of their _ _ _ _ _ _ _ E. Plan ahead and get things ready in advance.

5. Take time to _ _ _ _ _ E items clearly so that others can read them.

6. Think of ways to save _ _ _ _ E, such as tipping up the next card in a file at the point where you remove one (in order to reinsert it quickly and accurately).

7. Never _ _ _ _ E a mistake on an accounting form. Just cross it out and write above it.

8. When reading figures from tables, lay a _ _ _ _ E across the page to avoid reading from the wrong line.

9. Always _ _ _ _ _ E (recheck) figures by comparing with figures on other forms.

10. On complicated forms with numerous facts and figures, ask another employee to help you _ _ _ _ _ _ E after you have prepared the form.

11. Keep things on your desk arranged in an _ _ _ _ _ E fashion to eliminate confusion. (Stack similar items, keep pencils sharpened, etc.)

12. _ _ _ _ E carefully and take notes when given instructions.

13. Whenever you get new office _ _ _ _ _ _ E, be sure to read the manual carefully before attempting to use it.

14. _ _ _ _ E what others around you are doing and imitate the best procedures and practices.

Word Games for Office Practice Classes
Using a range of sources make an A-Z list of:

SOFTWARE APPLICATIONS and ASSOCIATED TECHNOLOGY required to PRODUCE BUSINESS DOCUMENTS

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |
|   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
BSBCMN306A Produce Business Documents – Theory Questions

1. Explain what is meant by ‘ergonomics’.

2. Why is it important to work with good, clear lighting?

3. Explain what is meant by ‘occupational overuse syndrome’.

4. Describe the uses of a scanner in the workplace.

5. There are two types of documents – those that communicate information and those that organize large amounts of data. Give two examples of each.

6. List two types of printers and briefly explain the overall difference between the two.

7. Complete the table. Choose the most appropriate software.

<table>
<thead>
<tr>
<th>Type of document</th>
<th>Appropriate software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales briefing paper for a board meeting</td>
<td></td>
</tr>
<tr>
<td>Table indicating roster system</td>
<td></td>
</tr>
<tr>
<td>List of Queensland clients</td>
<td></td>
</tr>
<tr>
<td>Annual report with statistical information and graphics</td>
<td></td>
</tr>
<tr>
<td>Questionnaire to send to departmental managers</td>
<td></td>
</tr>
<tr>
<td>Price list of products indicating GST calculation and total</td>
<td></td>
</tr>
<tr>
<td>Three pages of data for presentation to prospective clients</td>
<td></td>
</tr>
</tbody>
</table>

8. When designing a new document you need to take into account any guidelines set by your organization. These might relate to the way you locate data, security and confidentiality, document storage and the organisation’s policies and procedures for document production. Why is this important?

9. Using the table below, describe the main purpose of each document.

<table>
<thead>
<tr>
<th>Document</th>
<th>Main purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spreadsheet</td>
<td></td>
</tr>
<tr>
<td>Database</td>
<td></td>
</tr>
<tr>
<td>Presentation slides</td>
<td></td>
</tr>
<tr>
<td>Newsletter</td>
<td></td>
</tr>
<tr>
<td>Financial statement</td>
<td></td>
</tr>
<tr>
<td>Report</td>
<td></td>
</tr>
<tr>
<td>Web page</td>
<td></td>
</tr>
</tbody>
</table>

10. When designing a document, why is it important to think about who it is for (intended audience)? You can use examples to explain your answer.
11. Explain 3 things which affect the readability of text.

12. Select one of the following and explain what principles of design you have to consider before you prepare it: Database, spreadsheet, newsletter, web page, report, electronic presentation.

13. Locate a website and take note of it home page. List three positive and 3 negative features of the design of each and describe your overall impression of the website.

14. Why is it important to list the various tasks you have to do when producing a business document?

15. Give at least 3 reasons why it is important to check a document after you have prepared it.

16. Describe a range of ways that business documents can be stored.

17. Explain the importance of backing up data. Give examples of how this can be done.

18. Describe how you would deal with the following difficulties. (There may be more than one way of handling the situation.)
   - you’ve only used the scanner twice before and you’ve forgotten what to do
   - you are working on a spreadsheet but are having trouble embedding a chart. Instructions in the user’s manual are too complicated
   - users complain of getting a slight electrical shock when switching on the photocopier
   - a colleague has tried three times but cannot get the spell check function to work
   - you are asked to prepare a complex database but have only had basic database training

CONCLUSION

Using information you have gained from both the practical and theoretical exercises complete the Thinkers Keys activity using the Alphabet Key.