



KARPAGAM ACADEMY OF HIGHER EDUCATION

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Coimbatore-641021

DEPARTMENT OF COMMERCE (CA)

STAFF NAME : Dr. V. RAMADEVI

SUBJECT NAME: OFFICE MANAGEMENT AND SECRETARIAL PRACTICE

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CLASS: III BCOM CA A, B & C

UNIT – 1			
S. No	Lecture Hours	Contents	References
1.	1	Office Introduction - Meaning	R3: Pg no. 1.3
2.	1	Functions of Office	R3: Pg no. 1.5 – 2.6
3.	1	Primary and administrative management functions	R3: Pg no. 1.8
4.	1 (T)	Importance of office	R3: Pg no. 1.9
5.	1	Duties of a Office Manager	R3: Pg no. 2.15
6.	1	Qualities of a office manager	R3: Pg no. 2.20
7.	1	Essential Qualifications of a Office Manager	W1
8.	1 (T)	Filing and Indexing – its meaning and importance	R3: Pg no. 11.7
9.	1	Essentials of good Filing	R3: Pg no. 11.10
10.	1	Centralized and Decentralized Filing	R3: Pg no. 11.14
11.	1	System of classification	R3: Pg no. 11.33
12.	1 (T)	Methods of filing and filing equipment	R3: Pg no. 11.19
13.	1	Weeding of Old Records	R3: Pg no. 11.21
14.	1	Meaning and need for indexing	R3: Pg no. 11.36
15.	1 (T)	Various types of Indexing	R3: Pg no. 11.37
16.	1	Recapitulation and discussion of important questions	-
Total no. of Hours planned for Unit 1			20 Hrs
UNIT – 2			
1.	1	Mail and Mailing Procedures	R3: Pg no. 14.15
2.	1	Meaning & Importance of Mail	R3: Pg no. 14.16
3.	1	Centralization of mail handling work – its advantages	R3: Pg no. 14.21
4.	1	Room equipment and Accessories <ul style="list-style-type: none"> ➤ Sorting Tables and Rack ➤ Letter opener, Time and date Stamps ➤ Postal franking machine 	R3: Pg no. 9.9
5.	1	Addressing Machine Mailing scales Mailing through post Courier, Email, Appending files with email.	R3: Pg no. 9.11
6.	1	Inward and Outward mail – Receiving, sorting, opening.	R3: Pg no. 14.14

		recording, making	
7.	1	Distributing, folding of letters sent, Maintenance of Peon book, Dispatching, Courier Services, Central receipt and Dispatch	R3: Pg no. 14.15
8.	1	Office Forms - Introduction <ul style="list-style-type: none"> ➤ Meaning ➤ Importance of forms ➤ Advantages and disadvantages of using forms 	R3: Pg no. 10.1
9.	1	Types of Forms and Factors effecting Forms design	R3: Pg no. 10.3
10.	1	Principles of Form Design and Form Control	R3: Pg no. 10.7-8
11.	1	Stationery - Introduction <ul style="list-style-type: none"> ➤ Types of stationary used in offices ➤ Importance of managing stationary 	R3: Pg no. 12.2
12.	1	Selection of Stationery	R3: Pg no. 12.5
13.		Essential requirements of a good system dealing with stationary	
14.		Purchasing principles – purchase procedure	R3: Pg no. 12.10
15.		Standardization of stationary	R3: Pg no. 12.7
16.	1	Recapitulation and discussion of important questions	-
Total no. of Hours planned for Unit 2			20 Hrs
UNIT – 3			
1	1	Modern Office Equipment - Introduction	R3: Pg no. 9
2	2	Meaning and Importance of Office Automation	R3: Pg no. 9.2
3	1	Objectives of Office mechanization	R3: Pg no. 9.3
4	2	Advantages and Disadvantages	R3: Pg no. 9.3
5	2	Factors determining Office mechanism	W2
6	2	Kind of Office Machines Personal computer, Photocopier	W2
7	1	Fax, Telephone answering machine	W2
8	1	Dictating Machines, Audio Visual Aids	W2
16	1	Recapitulation & Discussion on important questions	-
Total number of hours planned for Unit 3			13 Hrs
UNIT – 4			
1	1	Banking facilities – Types of accounts	W3
2	1	Passbook and cheque book	W4
3	1	Other forms used in banks	W4
4	1	ATM and Money transfer	W5
5	1	Abbreviations / Terms used in offices – Explanation of Abbreviations used in day to day work	W5
6	1	Modes of payment	W6
7	1	Types of payments handled such as postal orders	W6
8	1	Cheque (Crossed and uncrossed)	W6
9	1	Post dated and pre-dated cheques	W6
10	1	Stale cheque, dishonoured cheque	W6

16	1	Recapitulation & Discussion on important questions	-
Total no. of Hours planned for Unit 4			11 Hrs
UNIT – 5			
1	1	Role of Secretary - Definition - Appointment	T1:PgNo. 43
2	1	Duties and responsibilities of a personal secretary	T1:PgNo. 55
3	1	Qualifications for appointment as personal secretary	T1:PgNo. 53
4	1	Modern technology and office communication	W5
5	1	Email and voicemail	W5
6	1	Internet - Multimedia	W5
7	1	Scanner	W5
8	1	Video Conferencing	W5
9	1	Webcasting	W5
10	1	Agenda and minutes of meeting	W7
11	1	Drafting, fax	W7
12	1	Messages - Email	W7
13	1	Maintenance of appointment dairy	W7
14	1	Revision of previous year question paper	-
15	1	Revision of previous year question paper	-
16	1	Revision of previous year question paper	-
Total no. of Hours planned for Unit 5			16 Hrs

Text book:

1. N.D. Kapoor (2008) Company Law, NewDelhi, Sultan Chand & Sons.

Reference Books:

1. Bhatia. R.C. Principles of Office Management, New Delhi, Lotus Press
2. Leffingwell and Robinson, Textbook of office Management, New Delhi, Tata McGraw Hill.
3. R.K. Chopra, Office Management, Himalaya Publishing house.

Website:

- W1 - www.educba.com
W2 - www.best-job-interview.com
W3 - www.talentcor.com
W4 - www.kullabs.com
W5 - www.tutorialspoint.com
W6 - www.investopedia.com
W7 - www.quora.com

KARPAGAM ACADEMY OF HIGHER EDUCATION, COIMBATORE

Class: III B COM CA Course Name: Office Management and Secretarial Practice

Course Code: 17CCU602A

BATCH: 2018-2020

UNIT – I
OFFICE AND OFFICE MANAGEMENT

Introduction

The structure of modern business has become very complex owing to increased number of business transactions. This has led to the establishment of a number of departments such as purchasing, production, sales, accounting, financing, personnel and so on. To facilitate these departments to function efficiently and economically, there arises a need to coordinate the activities of all these departments. This is ensured by establishing a separate department in a business known as office. An office occupies the central position in a modern business. Therefore, it is rightly said that an office is the nerve centre of the whole undertaking.

Meaning of an Office

In simple terms, an office is a place where some business is transacted or services are provided. It may be defined as a central place where all types of clerical work are done and all kinds of papers (letter, correspondence, files, records, etc.) are maintained to coordinate and control the affairs of the organization as a whole.

Definition of an Office

Office work is concerned primarily with the records of the enterprises making records, using records and preserving them for future reference. The office is the administrative centre of a business. The purpose of an office has been defined as the providing of a service of communication and record. Office is a unit where relevant records for the purpose of control, planning and efficient management of the organization are prepared, handled and preserved. Office provides facilities for internal and external communication and coordinates activities of different departments of the organization. An office is a place where the control mechanisms for an enterprise are located; where records are initiated for communication, control and efficient operations of the enterprise. An office is the place where work in connection with the preparing and furnishing of information is done. The acts of collecting, processing, storing and distributing

information comprise the functions of the office.

Characteristics of an Office

On an analysis of the above definition of office, the following features become evident:

(i). Location: An office is established in a particular locality so as to coordinate the functions of various departments of a business. Several factors affect the selection of an appropriate locality for establishing an office.

(ii) Accommodation: Spacious accommodation is required for carrying out the functions of office smoothly. Provision of sufficient accommodation requires careful layout of office building.

(iii) Departmentation: A modern office performs a number of activities relating to the business. All activities of the office cannot be performed by the same people. The activities are grouped under different types and assigned to people working under different departments. This facilitates specialization in office.

(iv) Work Conditions: For increasing the efficiency of the office staff and to meet statutory requirements, it is necessary to provide good working conditions such as lighting, ventilation, air-conditioning, etc.

(v) Clerical Staff: Owing to increased volume of office work, we come across several types of clerical staff in an office. The clerical staff in a large sized office may be classified into

- a) Office superintendent who relieves office manager from supervising routine office work,
- b) Clerks of various grades such as first division clerk and second division clerk,
- c) Private secretary to assist office manager and
- d) Typist.

(vi) Equipment: To increase the speed of the office work, the office is equipped with modern office appliances and equipment like computers and fax.

(vii) Information Service: The office is rightly described as a producer of information

The office is responsible for the effective flow of information through appropriate channel to all level of management. In the words of George R. Terry in Office Management and Control man's greatest tool today is information...information is required by all members of an enterprise.

Retaining, analyzing and furnishing the appropriate type of information for various purposes to various people and from time to time is one of the important objectives of a modern office.

(viii) Organization: With a view to achieve the above object, an office is to be organized on a

systematic basis. Clear cut relations are to be established between superiors and subordinates. The duties and responsibilities of every staff must be clearly laid down.

Requisites of an Ideal Office:

- (i) To maintain a good flow of work without any bottlenecks.
- (ii) To prevent duplication of work and records.
- (iii) To ensure movement of staff to the minimum.
- (iv) To prevent unnecessary correspondence.
- (v) To divide the work among staff so as to derive the benefit of specialization.
- (vi) To keep paper work to the minimum.
- (vii) To apply the principle of management by exception.
- (viii) The exceptions to the rules must be kept at minimum.
- (ix) To prevent unnecessary checking of records and documents.
- (x) To use modern office appliances to reduce monotony in office work.

Importance of an Office:

The modern commercial office is an indispensable department of every business undertaking may it be big or small, trading or manufacturing. The office exists to provide clerical services needed by all the departments of a business unit. In fact, without an efficient and well organized office, business activities cannot be carried on systematically and efficiently. Professor Dixie has aptly said that “the office is to a business what the mainspring is to a watch”. The importance of office will become evident from the following:

(i) It Helps in Identification of Business: In undertakings such as bank, insurance companies, etc., office is identified with business. Office enables the investors, customers, public, government, tax authorities, to deal with business undertakings. For enquiries, complaints, etc., people visit only the office but not other departments of the business.

(ii) Facilitates Preparation of Records and Report: The formulation of business policies to a large extent depends upon the reports and records which reflect the success or failure of the business. Management requires information in the form of reports frequently. Some such reports are prepared weekly and some monthly. It is in the office; such records and reports are prepared and furnished to the management. So, office serves as a store room of all records which serves as the basis for the preparation of reports.

(iii) Aids Management in Carrying Out its Functions: It is through office, managerial functions such as planning, organization, coordination and control are performed. In the words of

Leffing Well and Robison “a well organized office makes it possible for management to plan its operation intelligently, to put its plan into effect surely, to follow their progress currently, to determine their effectiveness promptly, to appraise the results without delay, and to coordinate all the activities of the business”.

(iv) It Provides Employment Opportunities: With the increase in the size of business, the office work also increases. To cope up with the increased office work, more number of office staff is required. Thus, existence of office department provides gainful employment opportunities to many people.

Nature of an Office Functions:

The nature of an office function in a business can be discussed as follows.

(i) Office Occupies Primary Position in a Business: In olden days, the position of office in a business unit was considered to be secondary in importance. The primary position was assigned only to production departments. The traditional view with regard to the nature of office work was that of non-productive. This is so because office work is not directly concerned with production of goods or services. When a clerk records the entries in a book, it does not involve in the production of goods or services directly. Therefore, it was considered that office staff belongs to the category of non-producers. But in modern days the office staff is treated on par with producers of goods. Although they do not actually engage in the production of goods directly, they help the production to continue. To identify the product for the office-worker, we must look beyond the particular piece of work done and consider the result that is accomplished. If there is no result, there is no product just as rejected manuscript ceases to be a product when it cannot serve as raw material for furnished product (i.e., book) for which it is intended. In this context, the office staff is non-producers. On the other hand, if a useful result is accomplished, i.e., where the work of office staff is used in subsequent stages as raw materials for desired results, then office staff constitute producers. This is justified as economists say any agency that contributes to production is production in the economic sense of the term. However, the following conditions must be fulfilled to consider office work as productive work:

- a) The result must be anticipated and believed to be advantageous.
- b) It must make possible the performance of one of the primary functions of business.
- c) It must do this economically, i.e., at a cost which that function can bear.

(ii) It is Complimentary to the Business: The modern commercial office is inevitable for the efficient functioning of a business. Today’s business, with the existence of a number of departments is ever expanding. There arises a needed to coordinate the work of all these

departments and this task is performed in the office through a network of office staff. A business unit without an office is incomplete by itself. The establishment of an office makes the business unit a complete undertaking.

(iii) Office Job is an Art: An art refers to a performance aspect requiring a certain skill and so is an office job. It is a place where several staff and clerks are engaged to perform various jobs such as recording, filing, accounting, typing and so on. The performance of all these types of jobs requires basic skill which is to be possessed by office staff. Above all, job also implies the art of getting the work done through the subordinates by the superiors.

(iv) Office Management is a Discipline: The study of office organization at one time was considered to be a part of the study of business organization. At one time was considered to be a part of the study of business organization. But today it is considered to be a separate discipline by itself. It is a branch of knowledge which involves the application of the modern principles of management to office department in order to carry out its function efficiency.

(v) Office Management is a Profession: The profession of office management is as old as the history of business. But in recent times the profession of office management has assumed greater importance. This is partly because of the specialization of office function on one hand and the aspirations by many unemployed youth for the office job on the other hand. Recognizing the importance of this profession, many universities and private institutions are offering courses in office management. Some courses are offered as full time courses and others on part time basis. These courses have attracted many young boys and girls, expecting a job opportunity in the office of many business organizations.

Functions of an office:

Primary Functions:

The functions of an office are mainly concerned with the recording of the business transaction, i.e., making, using and preserving records for future reference. Some of the records and books are to be statutorily maintained as per the requirement so far while other records are maintained to meet the needs of management. The primary functions of an office are:

(i) Receiving Information: Receiving information relating to the business from various sources is the major function of an office. An office receives information either from internal source or from external source. Information received from internal source is from the departmental heads and from other levels of management. The chief forms of such information are reports, letters and telephone messages, Customers, Suppliers, government, tax department, and investors

constitute the external source from which information is received. Information from external source taken the form of letters, orders, invoices, enquiries, telegrams, etc.

(ii) Recording Information: Having received information from various sources and in different forms, the second primary function of an office is to record them in appropriate books. The first step in recording the information is to sort them out. Then, it involves entering the information in ledgers concerned as, for example, all orders received are recorded in an order book, all communication relating to enquiries in an enquiry book and so on. This helps not only in easy identification, but also enables quick reference. Recording of information is also obligatory for meeting legal requirements.

(iii) Processing Information: Usually the information received by an office is not in a form which can be used directly by the management for decision making. Therefore, it involves arranging and processing the information systematically by trained staff. Very often it may involve calculation, condensation and simplification which meet the immediate requirements of management. Instances of processing information relates to costing report, statistical statements, financial statements and other reports of performance in the business.

(iv) Retrieval of Information: The office provides such information to the management as and when needed from its records. The information to be provided may be of routine nature or special nature and it may be verbal or in writing. Examples of information provided by office are orders, estimates, invoices, progress reports, financial statements and instructions issued on behalf of management.

(v) Protecting Assets: This involves safeguarding the assets of the business. By far the most important intangible assets to be protected by an office are the business secrets. The other asset to be safeguarded is cash. Surplus cash which is not required for immediate use is to be deposited in the bank. Necessary steps must be taken to collect outstanding debts and minimize bad debts. All the valuable assets must be insured against probable risk of loss. Contract deeds must likewise be properly protected.

(vi) Arranging Funds: If the business undertaking happens to be a public limited company, the office has to arrange for funds by the issue of shares, debentures, public deposits, etc. It must arrange for payment of dividend and interest thereon.

Secondary Functions: The secondary functions arise in course of business and are incidental to primary function. These functions may be classified as following:

(i) Communication: Communication constitutes the core of the secondary function of the office.

The office deals with two types of communication, viz., internal and external. The internal communication takes place between the management and individuals within the business through conference, interviews, telephone calls, instructions and circulars. The external communication takes place between the business enterprise and outsiders through letters, telephone, telegrams, orders and so forth.

(ii) Computation: This function involves ascertainment of cost incurred in manufacturing goods, checking the invoices, computation of wages and salaries payable to employees and assessing the value of by-products, wastes and scraps obtained in the production process.

(iii) Statistical Work: The statistical work in an office comprises of classifying, analyzing, summarizing and interpreting the report. It involves the preparation of comprehensive report accompanied by charts and diagrams as a recommendation for prompt action.

(iv) Planning and Scheduling: The planning function of office is concerned with determining what is to done, who is to do it and where it is to be done. Scheduling is concerned with the time at which the events planned are to take place, i.e., both planning and scheduling functions are based upon records.

(v) Coordination and Direction: One of the functions of office is to coordinate the working of other departments by issuing necessary directions from time to time. This increases the overall efficiency of business enterprise.

(vi) Supervision and Control: Office is also concerned with supervising the work performed in various departments and maintain pace of work in those departments which lack efficiency. This is ensured through control techniques.

Types of Office:

An office can be classified into the three types on the basis of function, location and requirement by law. The following chart depicts the types of office.

On The Basis of Function: On the basis of function performed by an office, it can be classified into two types. Head Office and Branch Office. A big business will have a number of branches spread over different places. The head office is an office which coordinates the work of all such branches established in different localities. The parent establishment is known as head office and its off-shoots are turned as branch offices. The best examples of a business which follows this type of classification are banks in our country which function with a net work of several branches spread all over the country.

On The Basis of Location: On the basis of location, office can be classified into two types:

regional office and local office. A regional office is set up at the regional level to look after the business of that region. Indian Railways offer an example for this basis of classification where it has eight zonal or regional offices. A local office confines its business to the local area where its operations are carried out.

On the Basis of Legality: According to the provisions of company Act every joint stock company must necessarily have a registered office to enable those interested in a company to communicate with it. A registered office may be established in a place other than actual place of business. An administrative office is situated to carry out the control and supervisory business near the place of business.

Size of an Office: Very often it is felt that an office is necessary only for a large sized business concern, but not for a small one. The reason is that modern business makes use of different types of office equipment which are needed for a large sized business. But this argument is not correct. Firstly, in modern days, hand operated machines are manufactured and made available to suit the requirements of small business. By using this equipment the efficiency can be maintained in office. Secondly, most of the functions which are to be performed by a large sized business are also common to small sized business, so the degree of mechanization and number of equipment can be minimized in a small business but office as such cannot be dispensed with. Thirdly, at one time, office equipments were considered very costly and they were thought to be luxury to a business. But in modern days these equipment have become ordinary and are within the reach of most of the small businesses.

FILING

Introduction

A large variety of records are found in modern offices – letters, reports, invoices, contracts, vouchers, circulars, minutes, notice, tax records, statistical records, price lists, catalogues, etc. These records constitute a written evidence of business activities and the memory of the entire organization. Since human memory is limited and cannot recapitulate the numerous transactions taking place every day, records of business transactions must be maintained. All relevant papers and documents relating to the business must be kept in some order, so that, whenever they are needed, they can be produced for use.

Meaning of Filing

Filing refers to the systematic arrangement of keeping business correspondence and

records so that they can be readily located whenever required.

Stephenson defines filing as “a mechanism whereby business records may be stored may be so as to be readily available when required.

Functions of Filing

The process of filing is concerned not only with the sorting of records but also with their systematic arrangements so that they may be traced easily asked for. Filing therefore, has four major functions:

- (i) Library Functions, by sorting and arranging the records for future reference;
- (ii) Administrative Function, by maintaining records of previous decisions and thereby helping the executive in framing business policies;
- (iii) Information Function, by maintaining, protecting and supplying the various types of information for various uses and purposes;
- (iv) Historical Function, by preserving in a systematic manner the important records bearing on the progress of the organization.

Importance of Filing

Filing is the core of records management. A large number of papers and documents cannot be preserved and handled without proper arrangement. Systematic preservation of various types of information is made possible only by a good filing system. An efficient filing system provides the following advantages:

- (i) **Efficiency:** A good filing system enables the office staff to handle the records properly without any delay. It saves time and brings efficiency in office operations.
- (ii) **Ready Reference:** Sometimes, customers repeat their past orders. Filing helps in finding their previous letters and re-executing the orders.
- (iii) **Planning:** Management has to refer to past records for framing business policies. Old records serve as the basis for future actions. Filing enables executives to take correct and quick decisions at the proper time.
- (iv) **Better Control:** Records help to control various operations in the organization. A proper check is kept on incoming and outgoing letters. Letters requiring immediate attention are disposed of quickly.
- (v) **Protection:** A good filing system protects the documents against possible loss or damage.
- (vi) **Evidence:** Filing provides documentary evidence for use in the court of law in case of a legal dispute.

(vii) Legal Compliance: Filing helps to fulfill legal obligations by keeping the documents and records which are required to be preserved under the provisions of law.

(viii) Follow-up: Filing facilities follow up action in case of securing orders, collecting payments from customers and getting supplies from the vendors.

(ix) Goodwill: A good filing system enables the staff to handle correspondence correctly and quickly. This builds up the reputation of the organization.

Steps in Filing

The filing system should be planned carefully keeping in view the objectives of filing and the nature of records. The main steps involved in installing a filing system are as follows:

(i) Listing of Documents: First of all, a list of all documents and papers to be filed is prepared. This list should be prepared keeping in view the requirements of the organization. Only those documents should be filed which will be useful in future.

(ii) Determining Period of Storage: The time period for which the documents are to be preserved should be decided in consultation with the concerned departments.

(iii) Acquiring Storage Space: The storage space should be acquired keeping in view the filing needs of the organization and the funds available for storage.

(iv) Layout of Filing Department: Proper layout of the filing department is necessary for preserving records in an easily accessible manner. The storage arrangement should be decided on the basis of the frequency of use of the documents and the officers who will need them.

(v) Determining Filing Equipment: Various types of equipment should be procured to store different kinds of documents. The choice of filing equipment depends mainly on the nature and importance of records. Fireproof equipment might have to be purchased for storing valuable documents and confidential records. Open shelf may be used for storing routine type of records.

(vi) Determining System of Classification: A suitable system should be selected for the classification of records.

(vii) Protection of Records: The arrangements to be made for protecting the records from loss or damage should be decided.

(viii) Training of Staff: The staff members employed in the filing department should be given sufficient training for handling various filing operations. Their duties and responsibilities should be clearly defined.

(ix) Issuing Procedure: Only authorized persons should be allowed to enter the filing department. Moreover, the files should be issued only to the authorized persons. A record should

be maintained of the issues and receipts of all files.

Filing Systems: The office manager has to decide whether the filing should be centralized or decentralized. The merits and demerits of both the filing systems are given below.

Centralized Filing

Meaning: Under centralized filing, the records of all the departments of the organization are maintained at one place and they are controlled by a common index plan. A separate department known as 'filing department' is created and all the files are preserved in this department. The individual departments are relieved of the work of maintaining records. All files, filing equipment and filing staff are located at one central place.

Advantages

Centralized filing system offers the following benefits:

- (i) It avoids unnecessary duplication of records. There is no need to make out several copies of orders, invoices, etc., for different departments. This saves time and effort.
- (i) Since the filing work is concentrated at one place, there is better utilization of storage space. Duplication of filing equipment is avoided and fewer filing cabinets are needed. As a result cost of filing operations is reduced.
- ii) It ensures uniformity and standardization in filing operations. Uniformity facilitates quick location and delivery of required documents. It also increases the efficiency of clerical operations.
- iii) Trained personnel can be employed to look after the filing operations. It results in greater accuracy and avoids delays in filing work. It permits specialization.
- iv) Better supervision and control can be exercised on the retrieval retention and transfer of records. Follow up measures can be operated more efficiently.
- v) Fragmentation of related documents at different locations is avoided. There is completeness of related documents as all records are stored at one place. Integrity of files can be maintained and loss of valuable records can be prevented by limiting access to file personnel only.
- vi) Heads of different departments are saved from the botheration of maintaining records. They can devote their time and attention to the main activities of their departments.
- (viii) Location and cross referencing are easy.

Disadvantages

Centralized filing suffers from the following limitations:

- (i) Since all records are stored at one place, the risk of loss due to fire, theft, etc. is increased.
- (ii) Considerable time is wasted on frequent transportation of records from the central storage area to the user departments. This may cause delay and inconvenience to them.
- (iii) Centralized filing may make it difficult to maintain secrecy of confidential documents.
- (iv) Since the filing clerks may not be aware of the specialized work of certain departments, the chances of misfiling are increased.
- (v) The central filing department may become a store of unwanted and unnecessary documents.
- (vi) Centralized filing is not suitable where some departments are located in different geographical areas.

Decentralized Filing

Meaning

Under decentralized or departmental filing systems, every department maintains its own records. The documents and files relating to a department are arranged and preserved in that department itself.

Advantages

Decentralized filing provides the following benefits:

- (a) It saves valuable time because the documents needed by a department are readily available in the department itself. Referring becomes easy and quick.
- (b) The secrecy or confidential nature of documents is maintained as they are retained in the department itself.
- (c) Specialized knowledge about the department prevents misfiling. The safety of the papers is also ensured.
- (d) When the departments are located in different geographical areas, it is the only viable method.

Disadvantages

Decentralized filing suffers from the following drawbacks:

- (i) There is duplication of efforts, space and equipment which increases the cost of filing operations.
- (ii) Specialized staff cannot be employed as the filing work in each department is not adequate enough to keep them fully occupied.
- (iii) There is lack of uniformity and Standardization of office operations.
- (iv) Confusion may arise in filing documents concerning more than one department. This may

cause interruptions in filing work.

(v) It is difficult to supervise, coordinate and control the filing operations performed in different departments.

Conclusion: Thus, both centralized and decentralized filing systems have their own merits and demerits. The choice between the two systems depends on the size and nature of the organization. The following suggestions may be useful in this connection:

(a) Decentralized filing is particularly suited to big and autonomous departments.

(b) Decentralized filing is better in case of departments located in different geographical areas and for documents of a confidential nature.

(c) Decentralized filing should be used for documents which are frequently referred to by different departments.

(d) In case of all other documents, and departments centralized filing is useful.

(e) A central cum decentralized system may be used in practice. It is a combination of the two systems explained above.

Essentials of Good Filing System

The maintenance of an efficient filing system is one of the complex problems in an office. There is no one ideal filing system, and no one ideal type of filing equipment which will meet the requirements of every record in every office. However, a good filing system should have the following characteristics.

(i) **Compactness:** The filing system is compact. In other words, it should not take up unnecessary space because modern office space is costly.

(ii) **Accessibility:** The records should be readily accessible. The system should be such as to allow the making of insertions without disturbing the existing order of the files. The importance of accessibility is greater in situations where records are to be written.

(iii) **Economy:** The filing system should be economical. It should be economical in time, space, money and operation. The cost of the installation and operation of the filing system should be as low as possible.

Classification of Filing

The greatest difficulty is not in filing records, but in finding them. Records can be looked upon in different ways ; for instance, the sales manager may think in terms of the customer's name, the factory manager may think in terms of the customers, name, the factory manager may think in terms of the product ordered, the inspection clerk in terms of the job number. The answer to the

problem of locating a record determines the system of the classification to be adopted. Classification is the process of selecting headings under which documents are grouped or classified on the basis of common characteristics before filing takes place.

Alphabetical Classification: An alphabetical classification is usually in accordance with the first letter of the name and is strictly in alphabetical manner in much the same way in which words are printed in alphabetical order in a dictionary. The telephone directory is another example of the use of the alphabetical order. On this basis, the letters and folders containing letters from various correspondents are arranged according to the first letter with which the name of the correspondent begins. For example, correspondence with those whose names or surnames begin with a will be classified and arranged together. If there are several names having the same first letter, the arrangement takes into account the subsequent letters also.

The alphabetical method of filing can be used in correspondence filing, contracts, orders, staff records, stock records, etc. This method can well be adopted for offices where the number of correspondents or subject files does not exceed 1,000.

Advantages

- (i) It is easy and simple to understand and operate.
- (ii) It is self-indexing. No separate index is needed.
- (iii) It is elastic, i.e., new headings can be introduced at any point without disturbing the classification.
- (iv) It provides a direct reference and offers a quick check so that the chances of misfiling are minimized.
- (v) There is convenience of grouping papers in the name of a company, etc. (vi) Useful provision for miscellaneous papers can be made.

Disadvantages

- (i) It takes a long time to find papers in large systems, and thus reduces the speed of operation.
- (ii) There may be congestion under common names.
- (iii) Papers may reasonably be filed under different headings or may be misfiled because of mis-spelling of names.
- (iv) There may be difficulty in forecasting the space requirements under different letters of the alphabet.

Alphabetical Numerical Classification:

Meaning

The alphabetical numerical classification is a combination of the first two systems of classification. In this system, filing is alphabetical, but under each of the alphabetical letters there are numbered folders. Thus, in the alphabetical group 'R' correspondence with Ramesh Chander may be given number R/1., with Ram Kumar R/2, and so on. This system is quite commonly in use in banks libraries, transport authorities, etc.

Advantage

This system has all the advantages of the alphabetical and numerical classifications, plus the following:

- (i) It is an elastic classification, since it can be expanded to an unlimited extent.
- (ii) It facilitates a quick reference.
- (iii) It avoids confusion of names of the same letter of the alphabet common in the alphabetical classification and has the exactness of the numerical system.

Disadvantages

The main drawback of this method is that it may become extra complicated in a large organization.

Geographical Classification:

Meaning

As the name indicates, this classification is based on the geographical origin of the papers or documents. When it is desired that the records should be maintained by territories or geographical area, this system of filing is most suitable. This is often essential for the maintenance of sales records or customers accounts. The classification may be town wise district wise, state wise, country wise or continent wise. The steps in geographical filing are:

- (i) Geographical limits are set and areas are defined which will make one unit
- (ii) All states are arranged in an alphabetical order for example, Andhra Pradesh, Assam, Bengal, Bihar, etc.
- (iii) Within each State, district wise or town wise classification may be made and an alphabetical arrangement, too, may be made.
- (iv) Within each sub division, the classification of different parties may be arranged alphabetically or numerically.

Advantages

The advantages of a geographical classification are:

- (i) It assists in speedy location of files.
- (ii) Direct filing is possible.

Disadvantages

The disadvantages of a geographical classification are:

- (i) The geographical location should be known, otherwise misfiling may result.
- (ii) Generally speaking, an index has to be prepared.
- (iii) For better results, this method should be combined with any other method of classification.

The method of geographical classification is useful for the filing of correspondence according to town or according to the customers, orders in a sales area.

Subject - Wise Classification

Meaning

Under this method of classification, all letters and documents relating to a subject are brought together in one file, even though they may have come from different sources and from different people. Letters, etc., may be classified and grouped on the basis of their subject matter and may be arranged alphabetically. The subject headings may again be sub divided into different sub groups, which may be alphabetically or numerically arranged. This basis of classification is adopted where the subject matter is of greater importance than the names or addresses of the correspondents. Sometimes this system is the best system and is adopted by professional firms as architects, engineers, purchasing officers, etc, where it is most convenient to file correspondence under contract or under the type of material bought.

Advantages

The advantages of subject classification are:

- (i) There is convenience of reference, if the subject is known.
- (ii) There is the possibility of unlimited expansion.
- (iii) It is useful when it is desired to combine different papers on single subjects.

Disadvantages

The disadvantages of subject classification are:

- (i) Filing by subject is comparatively slow and difficult, for it requires that the filing clerk should under the contents of papers, documents, etc., and should know in what connection they are likely to be required.
- (ii) Greater care has to be exercised in selecting the titles for the files. Titles must be descriptive; short and self explanatory.
- (iii) It is not very suitable for miscellaneous papers.
- (iv) Favorable cross reference is frequently required, this method is most time consuming.
- (v) An index may be needed, which makes this classification somewhat expensive.

Chronological Classification

Meaning

Under this classification, records are filed and arranged in strict date order. It is often employed in filing invoices and other vouchers associated with accounts, particularly when these constitute a journal. In correspondence filing, letters may be filed in order of the date of writing shown on them. But this system cannot be used independently. The records should be classified according to their subject and may then be placed in order of date inside the file relating to that subject.

Advantages

The advantages of chronological classification are:

- (i) When dates are known, it is a useful method.
- (ii) It is good for overall classification, e.g., correspondence in different years.
- (iii) It is very simple to operate.

Disadvantages

The disadvantages of chronological classification are:

- (i) It is useful only for a small business.
- (ii) It is not useful when the date is not known.
- (iii) Incoming letters might be separated from outgoing replies.

Factors in Selecting Classification

The system of classification and arrangement of files greatly affects the speed of reference, accuracy in filing, flexibility and transfer to reserve storage. It is, therefore, important to make a right choice of the system of classification which an organization wants to use. In making such a selection, the following factors may be considered.

- (i) **Convenience:** What is the most convenient method of reference (or cross reference)?
- (ii) **Size:** What is the size of the system? Larger systems should be numerical.
- (iii) **Simplicity:** Which is the most simple system? Simplicity should be viewed in terms of filing, location and cross reference. The alphabetical system is generally the simplest.
- (iv) **Expansion:** The system should facilitate expansion. The numerical system serves this purpose best.
- (v) **Speed of Reference:** This too, is an important consideration. Some compound or combined system may achieve this objective.
- (vi) **Accuracy:** Which system avoids the possibility of misfiling?

Methods of Filing

Various methods of filing may be classified into two broad categories (i) Conventional or old methods, and (ii) Modern methods.

Conventional Methods: The main conventional methods of filing are given below:

(i) Metal Holders: Under this method, papers and documents are placed in metal holders in chronological order. Metal holders are used for holding the papers together. This method is inconvenient and outdated. It is not of much use in practice.

(ii) Bound Book: All letters and documents are pasted in this book in chronological order. It avoids the possibility of loss or misplacement of any paper. But it is of limited use in practice.

(iii) Spike or Pillar File: A spike is a wire fitted with wooden stand. It may be kept on a table or hung on the wall. The papers to be filed are punched through the sharp point of the spike. They are put in the spike one above the other on the wooden base. This is a very cheap and simple method. But it does not protect the papers against damage by dust or insects. It is very inconvenient and time consuming to refer to a particular document. This method is suitable for a very small office only.

(iv) Concertina File: It is made of cardboard and contains a number of pockets usually sufficient to permit alphabetical classification and is readily portable. It is suitable for keeping only a small number of papers because its capacity is limited.

(v) Box File: It is a flat cardboard or metal box. Spring clips are fitted within the box to hold the papers. Papers are generally placed in manila folders which are numbered to facilitate quick reference. This method of filing is simple to operate and economical. It protects the papers from dust and damp. But it is not suitable for permanent storage of records in large organizations. Due to constant use the spring may become loose and unable to hold the papers firmly.

(vi) Pigeon Hole File or Docketing: It involves the use of a cupboard or special admirals divided into a number of small compartments. The cupboard is open from one side and the compartments are square holes, called 'pigeon holes'. Each pigeon hole bears a letter of the alphabet. When the letters are received, they are sorted according to the alphabets and then put into the respective holes. For instance, the letter received from Ram is inserted into the pigeon hole marked with 'R'. Sometimes, on the folded letters or documents their brief particulars are also recorded. This recording is known as docketing.

(vii) Press Copy Book: Under this method, all outward letters are copied out in a book maintained for this purpose. Actually the practice is to get an extra carbon copy of each letter.

The copies are then filed in the master file in chronological order. This helps to preserve documents which may become an evidence. But it is a very cumbersome and time consuming method. Location of documents and cross reference is difficult.

Modern Methods of Filing

Conventional filing methods are not suitable for modern and large offices. Therefore, the following sophisticated methods have been developed:

(i) Horizontal Filing: Under this method, the documents are inserted in files or folders. The files are kept in drawers in horizontal position i.e. one upon the other. The papers are filed in the folders in chronological order. When a file removed for reference, a guide card about its movement is kept in its place. The following types of files are used:

(a) Flat Files: These are covers of card board or thick paper fitted with metal hinges for fastening the papers together. A separate file is allotted to each customer or subject. All the letters relating to that customer or subject are kept in that file in chronological sequence. The document is punched and then inserted in the metal hinges of the file. The papers lie flat one above the other in the files. These files are placed horizontally in drawers. An index is generally displayed outside the drawers for quick reference.

(b) Arch Lever Files: These are strong cardboard folders containing strong metal arches. These arches can be operated by a lever. When a paper is to be filed, it is punched with two holes with punching machine. The lever is then moved upward which opens up the metal arches or springs. After the paper is inserted through the holes the lever is pressed down to close the springs. The papers in the file lay flat, one upon the other. This system is simple and economical. It helps to preserve the papers neatly. Any document can be referred to without removing the papers lying upon it.

(ii) Vertical Filing: Under this method, files are kept in a standing or upright position. The documents to be filed are firstly put into folders and then the folders are placed in drawers or cabinets in alphabetical or numerical order. The following types of equipment are used in vertical filing:

(a) Folders: These are the basis of vertical filing. Folders are made of manila paper, flexible plastic or rubber. The back of the folder is slightly higher than the front. The extended back is used to write the contents of the folders. When the folders are placed in the cabinet, the extended edges are visible in a sequence so that contents can be ready easily.

(b) Cabinets: Folders are kept vertically in a steel or wooden cabinet. A cabinet contains several

drawers. The drawers are deep enough to hold the folders in vertical position. Each drawer is fitted with a spider which pushes it backward and forward. There is also a mechanism in the drawer to hold the folders together. In order to divide the drawer into convenient sections guide cards are inserted at appropriate places.

(c) Suspension Filing: Under vertical filing there is no device for holding the folders and they may slide down. Suspension filing has been developed to overcome this limitation. Under this method, folders are fitted with metal bars suspended on a metal frame which is fitted inside the drawer are special cabinets containing drawers fitted with metal frames to support the suspended folders are used.

(d) Lateral Filing: Under this method, files are arranged side by side on shelves or racks in upright position, Documents are put in folders which have hooks. The folders are hung on the railings of the shelves. The tips of folders are fitted with title indicators. All the tiles kept in the cupboard are simultaneously visible. Lateral filing has several advantages which are given below:

- (i) It is economical because it occupies less space.
- (ii) Removal and replacement of files is easy and less noisy.
- (iii) It facilitates sorting of a large number of files.
- (iv) It is highly flexible and offers ample scope for expansion.
- (v) It provides greater visibility so as to facilitate quick reference.
- (vi) It facilitates quick location of records. Even ordinary almirahs can be used.

(v) Open Shelf Filing: In this method, files are kept vertically or horizontally in the open shelves. Such shelves are used in libraries. Open shelves may be up to the height of the ceiling and ladders may be used for operators. It provides all the advantages of lateral filing. Open shelves are cheaper and can accommodate more files. However, this method requires a dust free area in order to protect the life of the records.

(vi) Visible Card Filing: This method is becoming popular in larger organizations. A visible file shows all relevant information. The information is recorded on the edges of the cards. The cards are kept in open trays or filing cabinets. Each card is so arranged into a metal hinge that it overlaps the one before it and remains visible. Visible card filing can be used for maintaining records of inventories, customers, suppliers, shareholders, employees, etc. The main advantages of visible filing are as follows:

- (i) Due to simultaneous visibility of all cards, reference to the stored information can be made at

a great speed.

(ii) Signals and tabs can be used to draw instant attention to specific cards.

(iii) New papers can be easily inserted.

(iv) Important information is available at a glance and it is not necessary to read the whole card.

(vii) Rotary Card Filing: Under this method, cards are attached to a belt or series of rings that surround the core of a rotating wheel. Card can be inserted or removed by rotating the wheel to a desired location. The wheels may be kept in vertical or horizontal position in specially designed desks.

(viii) Motorized Filing: In this method of filing, an electrically operated console is used. The operator sitting at a desk can get a view of the relevant file by pressing the button. The motorized filing equipment consists of a cabinet that houses a motorized push button, chain driven arrangement of fixed cradles on which trays of record cards are revolved vertically. This method permits instant reference to the desired files. It is very convenient and reduces fatigue on the part of the operator. But equipment used in this method is very costly.

INDEXING

Introduction

After having acquired the basic knowledge about the system of filing, we are going to discuss about the technique of storing of various files in the systematic manner which is called as Indexing.

Meaning

An Index is anything that points out or indicates. It is a ready guide to the location of the required file record. It is process of determining the documents which are to be filed. It is an important aid to filing and filing because, when a large number of files are maintained for various purposes, they can be located or indicated by some sort of a guide, which is known as the Index. It is a reference list for locating a particular document in the file. It enhances the utility of the filing system because documents can be easily got at.

Advantages of Indexing

A good system of indexing offers the following advantages:

(i) Indexing helps the filing clerk to locate easily the documents and letters concerning a particular correspondent. Thus it facilitates locations.

- (ii) A good system of indexing ensures cross-reference, and so saves time and effort.
- (iii) Indexing improves the efficiency of the records administration.
- (iv) In order to achieve these benefits, a good system of indexing should be.
 - a. Simple to operate and use.
 - b. Economical in operation.
 - c. Flexible to allow for expansion when required.
 - d. Should go well with the system of filing in the organization.

Essentials of Indexing

A good system of indexing should possess the following essential features:

- (i) **Simplicity:** A good system of indexing should be simple to understand and easy to operate. It should not be unnecessarily complex in operation.
- (ii) **Economy:** A good indexing system should be economical in terms of space, equipment and effort.
- (iii) **Flexibility:** The system should have sufficient scope for expansion. It should have multiple uses. e.g. to locate a file, to provide important information, etc,
- (iv) **Safety:** It should protect the records against dust, insects, fire, rats, water, etc; It should have a locking arrangement to prevent pilferage of records.
- (v) **Efficiency:** It should be speedy in operation. It should take the least possible time to locate a card or to insert a new card.
- (vi) **Suitability:** The indexing system should go well with the system of filing in the organization. The type of indexing should be selected on the basis of the nature of filing operations.
- (vii) **Cross Reference:** Cross reference should be given under the head under which a document could be filed but has not been filed.
- (viii) **Signaling:** A slip or tab should be attached to the exposed edge of a card or file to draw attention to certain facts reordering on the card.

Types of Indexing

The various types of indexes are also known as the methods or systems of indexing. Several types of indexes are used in various offices as aids to the filing system. Some of them are rather crude and rigid, while others are highly sophisticated and expensive. The choice of any system of indexing depends upon the nature and volume of the records to be indexed. Some of the important types of indexes are described below:

Page Index: An ordinary page index consists of a page for each letter of the alphabet, fitted with

a tab showing the letter and on each page are written the names beginning with that letter and quoting the relevant page numbers. This is the type of index most in use for minutes, and is comparable to the index given at the end of a book. This type of indexing may take the following forms.

(i) Bound Book Index: It is in the form of a bound book or register divided into alphabetical section in which the names of person or documents are entered. Each section has the leaves cut away at the right hand side so that the initial letters of all the sections are visible at a glance. All entries relating to a particular letter of the same letter of the alphabet are arranged in the same section or page order. The book index is very cheap and is good for maintaining a record for a long period. The pages cannot be lost or disarranged because they are bound. But an alterations in the index is difficult and it accommodates a comparatively less number of entries. It is therefore an inflexible method.

(ii) Loose Leaf Index: A loose leaf index is one in which pages are not fixed permanently but are held by a device which makes it possible for one to take out some page or insert additional pages. The sheets of pages are fitted on to metal hinges and screwed. When a leaf is inserted or removed, the book is unscrewed and the relevant sheet is inserted or removed from it. This method, therefore, has the advantage of being flexible and adaptable. It offers ample scope for expansion. The main drawback is that the sheets may be manipulated. Lost or damaged because of the leaning of punched holes.

(iii) Vowel Index: This is an extension of the bound book index. In big organizations, where the list of correspondents is very large, too much time is wasted in locating the name under reference. Therefore, to facilitate, quick reference, the book is maintained on the basis of a vowel classification. Under this method, the sections of the index book reserved for each letter of the alphabet are divided into six sub-sections which are reserved for the 5 vowels (a,e,i,o,u) and y. The names of the correspondents or the headings of the files are recorded on the page allotted to the letter of alphabet and the vowel sub section in that order. For example, the name of Mr. Ramesh will appear on the page allotted to R and sub-section 'a' for 'a' is the first vowel in the name of Ramesh. like book indexing vowel indexing, too, is less flexible and has a very limited use.

Advantages

Page indexing has the following advantages:

(a) It is very simple method of indexing and can be understood by everyone.

- (b) It is an inexpensive method.
- (c) Very little equipment is needed to put this method into operation.

Disadvantages

The following drawbacks should also be noted.

- (i) It is an inflexible method of indexing.
- (ii) Names not in use have to be deleted from the index. As a result, the appearance of the index book or register becomes very shabby.
- (iii) Names are entered in a chronological order in the book (the order in which they come.) A strictly alphabetical arrangement of names may not be possible.

Loose Index

A loose card index is used to overcome the difficulties (drawbacks) of an ordinary page index. It consists of a number of cards of small size (12 x 7 cms), each concerned with one item of the index. The reference heading is written along the top edge of a card, and the remaining space is devoted to indicating the place where the corresponding record may be found. Cards are arranged in an alphabetical or numerical order and placed in drawers or boxes of suitable dimensions. Each drawer may have a rod running from one end of it to the other to hold the cards in position. These drawers are divided into alphabetical section by means of guide cards. To facilitate the location of an individual card, tabbed guide cards may be inserted at intervals.

Uses

Card indexing has numerous uses, some of which are:

- (i) To keep particulars of employees
- (ii) To keep accounts of stock items
- (iii) To keep records of investments and assets
- (iv) To keep the names and address of customers, dealers shareholders, creditors and debtors.
- (v) To keep records of different assets
- (vi) To keep records of installment sales or sales on hire purchase basis
- (vii) To keep the specimen signatures of account holders (in a bank)
- (viii) To keep a catalogue of books (in a library)

Advantages

The card indexing offer the following advantages:

- (i) The cards can be arranged in any order alphabetical, numerical, geographical etc., and order can be changed to suit the changing needs of the business.
- (ii) The system is quite cheap to install and operate. The equipment required includes cards and

drawers of the desired size.

(iii) The cards provide a complete list of the names, address, telephone numbers, etc., of the persons or firms with whom the dealing take place.

(iv) The system is highly elastic: New cards can be inserted or dead cards removed at any time without disturbing the sequence.

(v) The system is flexible. The number of cards can be increased or decreased from any group without disturbing the order of the cards.

(vi) Each card may be ruled according to the particulars or information required.

(vii) The system is simple to understand and operate. Every person in the organization can operate the system with great ease and without requiring any book.

(viii) Cross reference is facilitated.

(ix) Cards can be put to many uses. For instance, in a library two cards per book may be prepared, one for the author and the other for the title of the training.

(x) The cards wanted for reference can be taken out without in any way holding up the work of recording of information as other cards are left behind.

(xi) In a big business house, cards indexing are cheaper than ordinary indexing. Expenses of having a bound book and its occasional renewal, with addition, to existing correspondence are saved or an avoided.

(xii) For special purpose, coloured cards can be used to facilitate easy classification of customers or sub groups.

(xiii) Guide cards to tabs may be used to highlight certain information, etc., overdue accounts, stock items in short supply, etc.

(xiv) The index may be used by several persons may use the card index at the same time.

(xv) Any information can be obtained or recorded quickly and without difficulty.

Drawbacks

The disadvantages of a vertical card index are:

(i) The card index is blind, i.e., a large number of cards cannot be seen at a glance. It therefore takes a longer time to locate a particular card.

(ii) There is a danger of separate cards being lost, mutilated or destroyed.

(iii) Supervision or checking may be difficult if system provides for a free removal of the cards.

(iv) Cards get torn or spoiled through constant handling and therefore have to be replaced.

(v) The system is comparatively more costly than ordinary page indexing.

Visible Card Index

Under this system, the cards are laid flat in transparent covers in a shallow tray or in metal frame. Each card is fitted into a metal hinge so that it overlaps the one before it in such a way that a narrow strip at the bottom, containing the name or title, remains visible. The principal underlying the visible card index is that the cards overlap, so that one line of entry on each card projects and is visible, thus forming a one-line index. The cards tray may contain 50 cards and is fitted horizontally into cabinets or attached vertically to the metal stand. The trays are fitted with hinges which enable the operator to write on each card without removing it from its place. This saves time because a speedy reference to cards and the posting of cards become possible. The catchy advertisement slogan for the visible card index is; Look at the record not for it',

Advantages

The visible card indexing offers the following advantages:

- (i) It occupies less space and provides instant reference.
- (ii) Though visible indexing costs more, the saving in time and labour is so much that it offsets the additional cost. Studies have shown that it saves 75 per cent of the time required to look up card under the non-visible system.
- (iii) Additional information can be easily written on the cards without even disturbing the order in which they have been kept.
- (iv) Speedy reference is possible as the names of the customers or subject are all visible.
- (v) Posting of the cards is very speedy, which saves time.
- (vi) It helps listing of customers or subjects as a photograph of the tray one provide a ready list with minimum effort and expense.
- (vii) It aids the management in controlling purchases, inventories, sales, production and other functions of a business.

Disadvantages

The disadvantages of a visible card index are:

- (i) The requisite type of equipment is more costly than the equipment required for a non-visible indexing system.
- (ii) The training of the staff is necessary for the operation of the visible card indexing System.

Because of the advantages offered by this system, it is now used by all the modern offices.

Strip Index

In every office, whatever the organization, a list of the names addresses and telephone numbers. etc., of the correspondents has to be maintained. The strip index is especially designed for this purpose. It consists of a frame into which strips of stiff papers can be fitted in any required order. Each strip is devoted to one item. Frames containing these strips may be either fixed on the wall, or arranged on a rotary stand which can be turned round so that one can look at any part of the index. The strips can be protected from exposure or damage with removable transparent celluloid or plastic window sheets. Strip indexing offers similar advantages and suffers from the same drawbacks as those of visible card indexing.

Wheel Index

This is a modern method of visible indexing, popularly known for its providing instant reference. The method is a variation of the visible card index discussed earlier. Under this system, cards are arranged about the circumference of a wheel which may be portable or set in a cabinet or desk. A single wheel can hold as many as 5,000 cards and as many as six wheels can be set up within easy reach of a clerk sitting at his desk. The capacity can be further increased when wheels of a bigger diameter and arranged horizontally. In this system, cards can be withdrawn and inserted without disturbing the other cards and entries can be made on the cards without removing them from the wheel.

SELECTION OF SUITABLE INDEX

Since every system of indexing has its merits and drawbacks, a selection of a suitable system of indexing becomes a very difficult task. Some methods are rigid, while others are flexible, though sophisticated and expensive; some are blind, while others are visible. In the circumstances, in deciding about the type of the indexing system to be used in the office, the office manager should consider the following factors:

- (i) The requirements of the filing system adopted by the organization.
- (ii) The objectives of keeping an index.
- (iii) The type and the extent of information needed.
- (iv) The frequency of withdraws or insertions.
- (v) The requirements of space for a particular system and the availability of space.
- (vi) The need to take out the card for the purpose of recording information.
- (vii) The cost of equipment, labor, stationery and supplies required for each system and the amount of money available for the purpose.
- (viii) The need for the use of signals.

Steps in filing and finding records

The following steps need be taken for filing a particular record letter or a document:

- (i) Consulting of Index:** The first step is to find out from the index the description and location of the folder concerning that document or record. Where files are arranged alphabetically; a separate index is not required. In such a case, only the files have to be referred.
- (ii) Filing the Document:** If a file folder is there, the document shall be placed there on top of the other letters since in the folders, documents are filed chronologically.
- (iii) Making New Folder:** If there is no file folder, a new one has to be opened for future needs. Where the document is not an important one and a new folder need not be opened, it may be placed in miscellaneous file in the alphabetical order.
- (iv) Cross Referencing:** If cross referencing is required, the document may either be filed at the chief place and reference to it is made at other places, or is copied out and a copy is fixed at each place of reference.
- (v) Placement of Folder:** After filing the document, the file folder is placed in its proper place in the filing cabinet.

The following steps need to be taken for finding a particular record:

- (i) Tracing Out the File Folder:** The first step again is to consult the index and locate the particular file folder for document now needed. Instead of index, files are directly referred in case of alphabetical classification.
- (ii) Removing the File:** When the file folder is traced out, it shall be removed from the filing cabinet and an out guide card inserted in its place to indicate the destination, if the file is sent to a particular person.
- (iii) Miscellaneous File:** Where the document is in a miscellaneous file, the file should not be removed. Instead, only the document shall be removed and an out guide card placed in the appropriate point. The document shall be placed in a temporary file and sent to the person who wants it.
- (iv) Refilling:** When the concerned file folder or document is returned to the filing section after reference to it has been made, the file or document should again be placed at its appropriate point by removing the out guide card placed there earlier.

QUESTIONS

I. Briefly answer the following questions

1. Define office
2. What are the objects of office?
3. What are the characteristics of office work?
4. What are the features of office work?
5. What are the factors for the growth of office work?
6. What are the factors determining the size of office?
7. What are the measures for the size of an office?
8. Write the importance's of office?
9. What is Filing?
10. What the modern methods of filing?
11. What is classification?
12. Mention the factors selecting classifications?
13. What is Chronological Classification?
14. Describe Geographical Classification.
15. What is Index?
16. What is Indexing?
17. Mention the types of index.
18. List out the essentials of indexing.

II. Answer in detail the following questions

1. State and Explain the modern concept of office
2. Define office. Discuss the main feature stating nature of office work.
3. Explain the purpose and nature of office work.
4. Explain the factors determining size of office.
5. Future office: challenges and Task- Discuss
6. Describe the main functions of office.
7. Enumerate the importance of office
8. Give various auxiliary or subsidiary functions of office.
9. Explain in detail the methods of filing.
10. Enumerate the modern method of filing.
11. Explain the various forms of Classifications.
12. Describe the factors selecting classifications.
13. Enumerate the steps in filing.
14. Explain in detail the importance of filing.
15. Describe the centralized filing and explain the advantages and disadvantages.
16. Describe the decentralized filing and explain the advantages and disadvantages.
17. Enumerate the different types of index.
18. Elucidate the essentials of Indexing.
19. Explain the selections of suitable index.

	OFFICE MANAGEMENT AND SECRETARIAL PRACTICE - 17CCU602A UNIT I						
	Question	Option 1	Option 2	Option 3	Option 4		Answer
1	Business means	commerce.	industry and commerce.	trade and commerce.	selling and buying of goods		industry and commerce.
2	Which of the following is not an economic activity?	A doctor practicing.	A lawyer practicing law.	A professional cricketer playing cricket.	A student playing cricket		A student playing cricket
3	The moral beliefs held by an individual	Values	Rights	Duties	Personal		Values
4	Which of the following is an extractive industry?	Cattle breeding.	Forest cultivation.	Hunting	Flour mills.		Hunting.
5	Ethics is derived from the Greek word	ethos	etho	ethic	ethical		ethos
6	A valid definition of a business purpose is to	create a customer.	maximize profits.	serve the society.	increase the wealth of the firm		create a customer.
7	Sole-trade organization is also called as	individual proprietorship.	Partnership.	joint stock company.	co-operative society.		individual proprietorship.
8	The interests and rights of customers are given top priority	The Vendor Model	The Civic Model	The Austre Model	The Artistic Model		The Vendor Model
9	In case of minor acting as a partner, his personal properties are	liable for the debts of the firm.	not liable for the debts of the firm.	partly liable for the debts of the firm.	only debts of the firm.		not liable for the debts of the firm.

10	To be a receptionist you must be able to;	Write up questionnaires and surveys.	Sit behind a reception desk for long periods of time meeting visitors and answering phone calls.	Carry out market research activities.	Manage a team of office juniors.	Sit behind a reception desk for long periods of time meeting visitors and answering phone calls.
11	How should you treat VIP visitors?	In a manner befitting their position.	Just like every other visitor.	By offering them a complimentary car park pass.	Offering to make them a cup of tea	In a manner befitting their position.
12	A visitor wants to park their car in the company car park, what do you do?	Make some polite conversation about their car.	Point blank refuse, and tell them to park elsewhere.	If there is a space, issue them a car park pass.	Tell them there are no spaces available, even when there are.	If there is a space, issue them a car park pass.
13	What is Microsoft Outlook used for?	To keep a track of office expenses.	It's part of the diary management system.	Used to assist with company audits.	The management of emails and personal information.	The management of emails and personal information.
14	To present a professional image of the company a receptionist should;	Have pointless and casual conversations about the weather with all visitors.	Point out to visitors any shortcomings in their dress style.	Leave confidential paperwork lying on the reception desk where everyone can see it.	Be calm and polite at all times, and deal with all of their enquiries in a professional and courteous manner.	Be calm and polite at all times, and deal with all of their enquiries in a professional and courteous manner.
15	To create effective presentations and correspondence you should;	Have good knowledge of Microsoft Office packages like Word & Excel.	Be able to file away paperwork properly.	Be prepared to plagiarise and copy other people's writing.	Know how to add and subtract	Have good knowledge of Microsoft Office packages like Word & Excel.
16	Part of a receptionist's duty is	Find out the number of the person calling, so	Weed out unwanted sales	Have casual conversations	Get rid of all callers as fast as they can.	Weed out unwanted sales calls, identify

	to screen phone calls, the reason for this is to;	you can call them back later.	calls, identify important calls and then only forward those on.	with the caller.		important calls and then only forward those on.
17	An effective all round receptionist is;	A team player who is also able to work on their own initiative.	A loner who works best on their own.	An extrovert who is only effective when they work as part of a team.	A person who is only sociable after work.	A team player who is also able to work on their own initiative.
18	What is a switchboard?	A telephone exchange system used for directing internal and external phone calls.	A electronic diary management system.	A device used to identify computer faults.	Specialist software used to track executive appointments.	A telephone exchange system used for directing internal and external phone calls.
19	Effective Diary management helps you to:	Book hotels for the company.	Complying with all legal, regulatory and best practice guidelines.	Participate in meetings.	Keep track of company appointments and events.	Keep track of company appointments and events.
20	A receptionist should have good communication skills so they can;	Be the first point of contact for people who enter the company premises and create an immediate positive impression of the company.	Gossip with colleagues.	Pass messages from one person to another.	Write professional correspondence	Be the first point of contact for people who enter the company premises and create an immediate positive impression of the company.
21	What does sorting and distributing the post mean?	Writing up correspondence to be sent out.	Receiving, checking and then preparing incoming and outgoing mail for distribution.	Proof checking the grammar in letter to be sent out.	Receiving the post then filing it away to be dealt with later.	Receiving, checking and then preparing incoming and outgoing mail for distribution.
2	What does visitor	Offering visitors a	Making	Asking	It refers to the	It refers to the

2	management mean?	cup of tea upon their arrival.	people sign a visitors book when they first arrive.	visitors questions about how their day has been.	practice of welcoming, processing and then monitoring a visitor's stay.	practice of welcoming, processing and then monitoring a visitor's stay.
2 3	A receptionist should have a good memory for names and faces, so they can;	Remember regular visitors and thereby offer them a quicker and more personal service.	Use computer equipment more effectively.	Write letters more professionally.	Learn to use new office equipment.	Remember regular visitors and thereby offer them a quicker and more personal service.
2 4	Visitor passes can help to;	Keep a track of who has entered the premises and also reduce on-site criminal activity.	Make visitors feel more valued.	Tell senior managers how many people have visited the company.	Create a professional image of the company.	Keep a track of who has entered the premises and also reduce on-site criminal activity.
2 5	What is a visitor signing in book used for?	Finding out the names of visitors.	Keeping track of who is in the building.	Obtaining a visitors signature.	To find out how many people visit the company on a daily basis.	Keeping track of who is in the building.
2 6	When will a partnership be dissolved?	In any case of death of any of the partner.	By mutual consent.	By insolvency of any of the partner.	By insanity or madness.	In any case of death of any of the partner.
2 7	The oldest form of business organization is	partnership.	sole proprietorship.	joint stock company.	co-operative undertaking	sole proprietorship.
2 8	The maximum number of partners in a firm carrying on banking business is .	7	10	50	20	10
2 9	The agreement of partnership	must be oral.	must be in writing.	can be either oral or in writing.	must be in writing on a stamp paper	can be either oral or in writing.
3 0	A partner in a firm	cannot transfer his share to an outsider.	can transfer his share to an outsider with the	can transfer his share to an outsider	can transfer his share to an outsider with the consent of all other	cannot transfer his share to an outsider.

			consent of majority partners.	without the consent of any other partners.	partners			
3 1	Partnership may come into existence	by the operation of law.	by an express agreement only.	by an express or implied agreement only.	by inheritance of property.			by an express or implied agreement only.
3 2	A manager with a share in the profits	is only a servant of the firm.	becomes a partner by the operation of law.	becomes a partner by implied agreement.	becomes a partner from status.			is only a servant of the firm.
3 3	Registration of partnership is	optional under Indian partnership act.	compulsory under the Indian partnership act.	compulsory under the income tax act.	compulsory under Indian contract act.			optional under Indian partnership act.
3 4	A nominal partner is	not entitled to share the profits of the concern.	entitled to equal share in the profits unless there is an agreement to any other profit sharing ratio.	not liable for the acts of other partners.	not able to third parties.			not entitled to share the profits of the concern.
3 5	The minimum number of members in a private limited company is	Two	Three	Seven	Ten			Two
3 6	A Joint stock company is governed by	Companies Act 1965	Companies Act 1946	Companies Act 1956	Companies Act 1966			Companies Act 1956
3 7	The liability of shareholders of a public company is limited to the	paid up value of shares.	nominal value of shares.	extent of their private assets.	accounts called up.			nominal value of shares.
3 8	The most important	the liability of its member is limited.	members can conveniently	it offers infinite scope	it mobilizes vast amount of financial			members can conveniently transfer

	advantage of a joint stock company form of business organization is that		transfer their shares.	for expansion.	resources.	their shares.
39	A Company is called an artificial person because	it does not have the shape of a natural person.	it cannot be used in the court of law.	it is invisible and intangible.	it exists only in contemplation of law.	it is invisible and intangible.
40	In the co-operative organization, the voting rights of members are	in proportion to the capital paid by each member.	equal, irrespective of amount of capital contribution.	in proportion to the nominal value of capital held by each member.	in proportion to the total finance supplied including the amount of loan by each member.	equal, irrespective of amount of capital contribution.
41	Localized materials are available at	all the places.	certain places	central places	local places	certain places
42	The liability of members of a co-operative society is	limited to the amount of nominal value of capital held.	limited to the amount of paid up value of the capital held.	Unlimited.	limited or unlimited depending upon what the society has opted for it.	limited or unlimited depending upon what the society has opted for it.
43	Membership of a co-operative is	compulsory.	voluntary.	not essential.	nominate	voluntary.
44	The minimum number of members for registration of a co-operative society is	two	seven	ten	twenty	ten
45	Co-operative and public companies are similar in respect of	the liability of members.	the minimum number of members required for registration.	the maximum number of members.	method of distribution of profit.	the maximum number of members.
46	Which of the following is an example of a	Delhi cloth and general mills Ltd.	Tata iron and steel Co. Ltd.	Industrial Finance Corporation of	Swadesh Cotton Mills Lt	Industrial Finance Corporation of India Lt

	company incorporated by a special act of parliament?			India Ltd.			
4 7	Dividend on preference capital will be paid	only when there are profits	even if there are no profits.	only when directors recommend.	only when share holders recommen		only when directors recommen
4 8	A public corporation means	public company.	government company.	statutory corporation.	department of union government.		statutory corporation.
4 9	The partnership entity is	legal entity.	legal entity and accountable entity.	neither entity nor accountable entity.	group of individuals without legal status.		legal entity and accountable entity.
5 0	Promoter is a person who	takes part in the incorporation of a company .	is a director.	is a relative of the managing director.	works to publicity to the company.		takes part in the incorporation of a company .
5 1	The minimum number of shareholders in a public limited company is	two	three	five	Seven		Seven
5 2	The limit for maximum number of members in a public company is restricted to	2000	5000	10000	no limit.		no limit.
5 3	A private company should have at least	2 members.	7 members.	10 members.	50 members.		2 members.
5 4	An association of 25 people not registered under the companies act, but carrying on business,	partnership.	private company.	public company.	illegal association.		illegal association.

	is a/an						
5 5	A partnership firm cannot raise funds through	bank loan.	partners loan.	Debentures.	partners capital.		Debentures.
5 6	Over-capitalization results from	payment of excessive amount for goodwill.	underestimating the rate of capitalization.	raising more money than can be profitably used.	raising only the money.		raising more money than can be profitably use
5 7	Which of the following sources is not use for medium term financing?	Issue of equity shares.	Issue of debentures.	Term loans from banks.	Sale of current asset.		Issue of equity shares.
5 8	Which of the following securities is not redeemable?	Equity shares.	Preference shares.	Cumulative preference shares.	Debentures.		Equity shares.
5 9	Which of the following securities proves a burden on finances of the company, when company is not earning profits?	Equity shares.	Preference shares.	Redeemable preference shares.	Debentures.		Debentures.
6 0	Preference shares are those which carry preferential right in respect of	dividends.	repayment of capital.	both dividend and repayment of capital.	right to vote on all important motions in AGM.		both dividend and repayment of capital.

KARPAGAM ACADEMY OF HIGHER EDUCATION, COIMBATORE

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UNIT – II
MAIL AND MAILING PROCEDURES

Types of Business Letters:

Business Correspondence is extremely diverse. There is a variety of correspondence that a modern businessman has to deal with his business routine.

It is very difficult to classify the business letters to give an exhaustive list of the kinds of letter a businessman has to write because different situations call for different approaches. However, for the purpose of convenience business letters may be classified into following classes.

1. Letters of Inquiry and Reply
2. Offers and Acceptance
3. Order-their Execution and Cancellation
4. Claim, Complaints, and Settlements of Accounts.
5. Circular Letters
6. Letter relating to Agency
7. Status Enquiries
8. Collection Letters
9. Application for Situation
10. Letters of Recommendation and Letters of Credit.
11. Bank Correspondence
12. Letters Relating to Export and Import.
13. Insurance Correspondence
14. Letters to Editors.
15. Correspondence with Government Departments and Public Bodies.
16. Correspondence of a Company Secretary.

Procedure for Handling Inward Mail and Outward Mail:

Meaning of Mail:

The term “Mail” in the common parlance refers to written communication. It may be either

received or sent out. A mail received is known as inward mail and a communication sent out is called as outward mail. As stated already, every business organization receives as well as sends a large number of mail every day.

Definitions:

George R. Terry rightly remarked that “it is doubtful that a modern office could exist without mail”. The reason is obvious that every business house has to maintain close contact with the outside world. It should correspond to its customers, its own branches, departments, and various other institutions, government etc., the business firm grows; the volume of transactions will also grow.

Procedure for Mail Handling:

Incoming Mail Handling Procedure

1. Receiving the Mail: Generally mails are received once or twice a day as delivered by the postman, when the volume of correspondence is large, a post box or post bag is hired in the post office, and an office peon is sent to collect the mail from the post office. Sometimes letters are received through the messengers of the offices. In the emerging scenario private courier services rendering very speed post service to the office.

2. Sorting the Mail: After the mail has been received in the mailing department, it should be sorted out before it is opened. It is easier to sort out sealed envelopes than different sized pieces of paper. Private letters of the employees may be sorted out at first than comparing to the business letters.

Business Letters should be sorted out into three groups:

- a) Registered and unregistered letters or mail;
- b) Sealed and unsealed envelopes; and
- c) Confidential and urgent letters, private or personal, secret, and other official letters.

Sorting of letters means grouping of letters on definite order. Sorted mail makes the delivery of letters convenient and quick.

3. Opening the Mail: Letters may be opened by hand or by letter opening machines. A paper knife is mostly used in offices to split open envelopes etc. If the number of letters is very large, a

letter opening machine may be used with advantage. In small organisation letters are opened by the officer or head clerk. The following guidelines may be followed for opening the mail.

- a) The sorting and Opening of the mail should start atleast half an hour to one hour before the opening time of the office.
- a) The office manager should see to it that the work in the office start immediately after the opening of the mail, otherwise the time and money spent on an early opening of the mail would be wasted.
- b) The staff in charge for opening the mail should be fully conversant with the method of sorting and opening the mail. If possible, a mailing manual should be used in this regard.
- c) After an envelope has been opened, it is necessary to remove the content from it. Empty envelopes should be fastened by a pin or clip or stapler.

1. Scrutiny of Contents: After the removal of the contents, it must be scrutinised to find out for whom and for which department, they are meant for. The sorting of letters has been done on a departmental basis at this stage. Before sending the mail to the concerned departments, the enclosures to the letters should be checked, compared and verified with the covering letter to find out whether they are in order or not. Occasionally, the enclosures may be a cheque, bank drafts, postal order or a valuable document. If any discrepancy or omission is found while scrutinising then the matter should be immediately brought to the notice of the mailroom supervisor. Letters in which certain previous references are given may be sent to the filing department from where the letters and the relevant files may be sent to the concerned department.

2. Stamping the Mail: After proper scrutiny is done, the date stamping of letter must be done. Sometimes the date and time of receipt would be stamped on the letter. For stamping of letters, a stamp is prepared which contains the serial number, the date of receipt and time of receipt if necessary. A references stamp is attached if the letters relate to numbers of departments. A design of specially design stamp is given below.

Format of Stamp

3. Recording the Mail: After the stamping work, letters received are recorded in inward mail register or letters received book. Before recording of letters in the register, the contents are scrutinized properly so as to ensure the department to which it belongs. The inward mail register contains

1. Serial number 2. Date of receipt 3. Senders name and address 4. Nature of contents 5. Subject of the letter in brief 6. Remarks and initials of the officer with date.

\ 7. Distributing the Mail: This is the last step in the inward mailing routine. In this stage letters are handed over to the concerned departments. The letters are distributed through messengers or sometimes with the help of mechanical devices like conveyor- belt or pneumatic tube.

8. Follow up Action: Follow up action is very important because it is concerned with keeping track of mail. This stage makes an enquiry whether the letter is replied or not.

Procedure for Handling Outward Mail (or) Outgoing Mail:



Fig. Outgoing Mail Procedures

Handling of outgoing mail involves the following steps:

1. Collecting of Letters: Letters prepared in various departments should be sent to the despatch section as quickly as possible. In many business houses, different departmental letters should be typed, duly signed by the executive along with the addressed envelopes to the mailing department. The letters should be put in a tray labelled "Outgoing Mail".

2. Sorting Out the Letters: After the mail reaches the mailing room, they are sorted as to whether intended for internal or local delivery or to be sent to outside firms and individuals. At this stage, sorting is also necessary because sometimes there may be letter from different

departments, addressed to the same firm or to the same individual. All such letters can be sent under one cover.

3. Recording in the Outward Mail Register: After sorting, the letters are entered in the mail register or peon book. The letters sent through post office alone are entered in the “Outgoing Mail Register”. Letters to be sent through the office peon or messenger are recorded in the peon book. This register also serves as a record of postage expenses. Each letter is given a serial number as per the despatch book or peon book. The same serial number is also recorded on the register.

4. Folding and Inserting: After recording, the letters are folded and inserted into envelopes. Generally the addresses are typed on the envelope in the department itself and the envelopes are sent along with the letter. The dispatching clerk before inserting the letter into the cover should verify – (i) whether the address given on the letter agrees with the address typed on the envelope, and

(ii) the number of enclosures are in agreement with the number specified in the letter. Envelopes can be addressed by machine where communications are regularly sent to the same addressee. For ensuring quick and prompt delivery, complete address along with pin code should be specified.

5. Sealing: The envelopes can be sealed with paste or gum. The envelopes and inland letters should be folded carefully and sealed with gum. When window envelopes are used, it should be checked whether the address is fully visible through the window.

6. Stamping: After sealing, the letter should be adequately stamped. The mailing clerk should have a thorough knowledge of the postage rates so that no more or less stamps can be affixed. If more stamps are affixed than needed, it will be a mere waste of money. On the other hand, if the value of the stamp is less than the actual rate, the recipient has to pay a fine, which will damage the reputation of the firm. For this purpose, the latest copy of Post and Telegraph Tariff Guides can be kept in the mailing department for reference. Franking machines are also used now-a-days.

7. Posting or Delivering the Mail: Posting the mail is the last step in the process of handling the outgoing mails. Office messengers can send letters to local addresses. Registered letters, V.P.P. should be sent to the post office. In cases where “Certificate of Posting” is required, they

should be sent to the post office along with the list of letters with the required stamp affixed on the list. This list may be pasted in the outgoing mail registers. Likewise, acknowledgements or receipts issued by the Post Office should also be pasted in the register.

PIN Code:

Pin code stands for Postal Index Number Code. Postal Index Number (PIN) or PIN Code is a 6 digit code of post office numbering used by India Post. This system was introduced on 15th August 1972 by Shriram Bhikaji Velankar, an additional Secretary in the Union Ministry of Communications, in order to make the process of delivering letters and parcels more efficient.

The system was aimed to simplify the manual sorting and delivery of mail by eliminating confusion over incorrect addresses, similar place names and different languages used by the public.

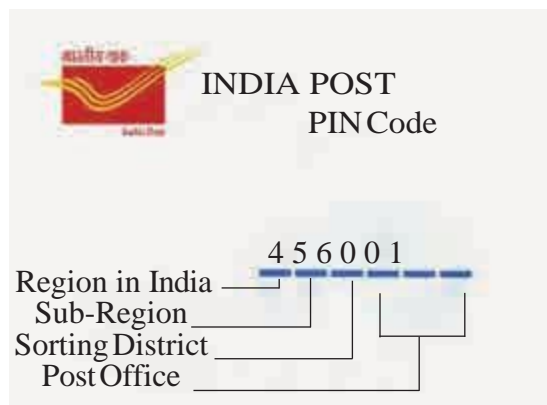


Fig.. PIN Code

Postal Services:

Post office plays a vital role in incoming and outgoing correspondence. Some of the important services rendered by a post office are:

1. Money Order: All post offices provide remittance facilities to the public by means of money order. The money order form should be filled in with the name and address of the addressee, remittance amount, and is to be presented to a post office along with the money and money order commission. The post office issues a receipt for the same.
2. Postal Orders: Postal orders are issued by post office as a part of their remittance service. These orders are issued in all denominations from fifty paise to rupees hundred. Commission is charged by the post office where they are issued. Payment can be made and received by the

holder on presentation of the order at the mentioned post office in India. The postal order is valid for a period of six months from the last day of the month of the issue. During this period it can be presented for payment.

3. Insured Post: The currency note or Valuable documents can be sent through post office by using insured cover. The insured cover comprises documents. Currency notes must be sealed with an indicator for the amount for which the article is insured, both in words and figures must be mentioned. An Acknowledgement of delivery form is filled and submitted. The prescribed fee for insurance is required to be paid according to the value insured for.

4. Mail and Telegraphic Transfer: Mail transfer is an order to make payment, drawn by one branch of bank upon another branch and the order is sent by airmail post. If the order is sent by telegraph it is called telegraphic transfer.

1. Letter Correspondence Service: The most economical service rendered by the post office is that of a mail and parcel services. Ensuring prompt, regular and speedy postal services are vital functions to industry and commerce. Regular Postal services comprises of delivering letters, post cards, printed matters and parcels.

2. Message Sending Facilities (Telegram, Telex, etc.): Post offices also provide facilities such as telephone, telex, telegram, etc., through which messages are sent throughout the world.

3. Value Payable Post (VPP): Business firms can avail facility to send articles to their customers and recover the value of the same. Only registered articles can be sent under VPP including letter, parcels, books, and newspapers etc., Post office collects the amount together with VPP commission from the addressee and remits the same to the sender.

4. Speed Post: Any urgent communication can be sent through speed post. This is one of the special services rendered by the post office. Important letters, valuable medicines, Demand draft (DD) are some of the items sent through speed post.

5. Post Box: The Post boxes are available for rent in all big post office with two keys. One remains with post master and other is handed over to the hirer. A number is allotted for each box. All letters which bear the box number shall be placed into the box. The hirer or the authorized person can go to the post office at any time during working hours and open the box and clear it.

6. Post Bags: Post bags are safer than post boxes. Under this arrangement, the post office supplies a bag with lock and duplicate key. The original key will be kept with the post master.

All the postal articles addressed to the firm or the person will be placed inside the bag by the postal workers and locked. The messenger of the hirer can get the bag across the counter of the post office.

Modern Equipment Used in an Office:

Instructional Machines Accounting, Tabulating and Computing Machines

Miscellaneous Machines

Modern Machines

I. Instructional Machines:

1. Telephone:

Telephone becomes an important instrument in modern business houses. With the help of this facility, a firm can have quick and prompt communication with others. Now-a-days it is impossible to imagine the office without a telephone. It is the most convenient means of oral communication. It is widely used for internal as well as external communication. According to distance and area, telephone calls are classified as local calls, trunk calls and overseas calls.

The following are some of the internal and external services available to telephone users.

(a) Direct Link

(b) Direct Link with Extension

(c) Private Branch Exchange (PBX) System

(d) Private Automatic Branch Exchange (PABX) System

(e) Electronic Private Automatic Branch Exchange (EPABX)

(f) Intercom

2. Mobile Phone:

A mobile phone is a wireless device which can be used to make calls and send text messages. As the technology changes rapidly; nowadays mobile phones are bundled with many additional features, such as web browsers, games, cameras, video players and even navigational systems.

A mobile phone may also be known as a cellular phone or simply cell phone.

3. Dictation Machines:

Dictation Machines are generally used by the executives who need to draft letters, memos, and reports are best off dictating the copy and recording it, as speaking is much faster than writing and can be done while performing other tasks. This type of equipment chosen depends on the preference of the dictators, number of users, frequency of use, and budget. Some dictation equipment use cassette tapes and most of the modern versions are digitally recorded and also this phone system is used for recording. Once the audio is recorded, this file is processed to another employee, who transcribes the audio into a written document, saves and emails or prints it.

II. Accounting, Tabulating and Computing Machine:

1. Adding Machine: Adding machines may either be manually or electrically operated. Most

adding machines have a roll of paper on which the figures are typed and this is known as a “Tally Roll”. It is used for addition and also for multiplication, subtraction and division.

2. Calculating Machines: It calculates at a greater speed and runs without making any noise, but such machines are usually expensive. The essence of a calculating machine is that it can perform addition, subtraction, multiplication, and division operations.

3. Billing Machine: Billing machines are used to prepare invoices, bills of lading, cash memo, etc. The machine makes all calculations of discounts, commission, addition, subtraction, total, etc. Papers and carbons are fed into the machine and set automatically.

4. Accounting and Book Keeping Machines:

These machines are used for

- a. Posting in journals, cash book, ledger, etc.,
- b. Preparation of cheques, pay rolls, cash receipt and payment sheet
- c. Preparation of copies of ledger accounts along with posting
- d. Calculating and computing figures and drawing ledgers or cash book balances

5. Tabulating Machines:

The tabulating machine is an electro mechanical machine designed to assist in summarizing information stored on cards. It was invented by Herman Hollerith.

6. Electronic Computer:

It is an electronic device by which data is processed electronically at great speed. It is a replica of human brain. It may be noted when the computers are used for data processing, the process is known as Electronic Data Processing (EDP). There are two kinds of computers (a) Analog computer and (b) Digital computer. Analog computers are used for scientific and research data processing. Digital computers are used for calculating the data in one billionth of a second.

7. Electronic Payment or E-Payment:

Electronic payment system is a system which helps the customer or user to make online payment for their shopping to transfer money over the internet. Some examples of EPS: a. Online reservation b. Online bill payment c. Online order placing d. Online ticket booking (Movie).

III. Miscellaneous Machines:

1. Franking Machines:

Franking machine is used in large offices for affixing postage stamps on envelopes. The outgoing mail is inserted in the machine and a handle is operated either manually or electrically. It automatically prints in a franking design comprising the postal charge and the date of posting in bright red ink. It has a meter which records the amount and balance on hand.

2. Impression Stamps:

These include rubber stamps bearing certain impressions like “paid”, “delivered”, “checked”, etc. Stamps bearing date with time and numbering devices also fall under this category.

3. Time Recording Machines:

This popular machine is used for recording the accurate time of arrival and departure of the office employees in offices and factories.

4. Payroll Machines:

It is used for making the payroll of the employees, calculating the amount to be paid to each employee.

5. Slide Rule:

It is a type of scale which is used to make different measurements rapidly and accurately.

6. Punching Machine:

This is a small apparatus which punches holes on papers. The holes are required to tag and fasten the papers. It is operated manually.

7. Stapler:

It is a small machine which binds together a few papers with a small piece of thin wire. It is very commonly used in small offices.

8. Calculators:

A variety of calculators are available in the market. It is useful for multiplication, division, addition and subtraction, calculation of discount, interest, wages, etc. It helps to reduce human labour in arithmetical calculations.

9. Envelope Sealing Machine:

This is a machine which automatically seals the envelopes. It will dampen the gummed flaps of the envelopes; thus sealing of the envelopes becomes very easy.

IV. Modern Machines:

1. Swipe Machine:

A swipe machine is a payment terminal provided by the bank on which the merchant can swipe a dip card to receive payments. Since the card can be a debit or a credit card the machine is also known as a credit card swipe machine or a debit card swipe machine.

2. Laptop:

It is a portable and compact personal computer with the same capabilities as a desktop computer. Laptop computers have an L-shape design and the screen can be lowered and closed to allow for easy transportation of the machine. It is a portable computer and suitable for using while travelling.

3. Pen Drive:

A pen drive is small storage device shaped like a pen with built-in data storage that connects to a computer by a USB Port. (Universal Serial Bus- It is the most popular connection used to connect a computer to devices).

4. Projector:

Projectors can be used for delivering lectures and presentations to large groups as well as watching movies and other videos at a backyard home theatre. They can be found in a variety of environments, including classrooms, conference rooms and in homes and yards.

5. LED (Light Emitting Diode) Projectors: Instead of a traditional halogen lamp, they use light-emitting diodes, which are more environment friendly and long lasting. LED projectors use either DLP technology, replacing the colour wheel and white-light lamp with red, blue, green LEDs or LCOS technology which is found in projectors.

6. LCD:

Liquid crystal displays (LCDs) consist of liquid crystals that are activated by electric current. They are used most frequently to display one or more lines of alpha-numeric information in a variety of devices.

7. Bio-Metric:

A Biometric device is a security identification and authentication device.

Such devices use automated methods of verifying or recognizing the identity of a living person based on a physiological or behavioural characteristics. These characteristics include fingerprints, facial images and voice recognition.

8. Currency Note Sorting and Counting Machine:

A currency note sorting machine is a compact and portable desktop solution for multi-currency counting and sorting challenges. It can denominate and authenticate different currencies at a processing speed of 1000 notes per minute. A currency note counting machine is a machine that counts money either stacks of bank notes or loose collections of coins. Currency counters are commonly used in vending machines to determine the amount of money which has been deposited by customers.

9. CCTV:

It is called closed circuit TV. A self-contained surveillance system comprises of cameras, recorders and displays for monitoring activities in a store or company.

10. Fax Machine:

A fax machine is the telephonic transmission of scanned printed material (text or images), usually to a telephone number associated with a printer or other output device. The original document is scanned with a fax machine, which treats the contents (text or images) as a single fixed graphic image, converting it into a bitmap. In this digital form, the information is transmitted as electrical signals through the telephone system. The receiving fax machine reconverts the coded image and prints a paper copy of the document.

11. Photostat Machine: It is popularly known as “Xerox” machine taking its name from the company manufacturing this machine. Photocopying machines help in getting exact copies of the original at a greater speed. The term xerography means dry pictures. Copies of diagrams, illustrations, drawings etc. can also be obtained. It eliminates the need for checking.

Factors to be considered for selecting equipment:

Following are some of the factor to be considered while selecting appropriate equipment:

(1) Ease of Operation: Faster operation, less fatigue, and fewer errors go with ease of operations. Here are some contributory factors; indexing the amounts, operating the control keys etc.

(2) Flexibility: Unless there is enough work to keep a highly specialized machine busy, it is better to select one which can be used for different types of work. In absence of flexibility, the purchase of the machine is not at all justified.

(3) Durability: A machine is used by different people under varying conditions. Unless, it is strong and durable, it would be a poor investment.

(4) Portability: A machine is frequently moved from user to user or from one place to another place in the same work area. Compactness and ease of handling saves time and energy and increase the use of the machine. Modern machine have been reduced in size and weight without the sacrifice of the quality.

(5) Adaptability: If a machine can be used without disrupting an existing system, it would be better to do so than go in for one which necessitates a considerable rearrangement of the forms and records involved in extensive recopying of information and of adjustments in procedures.

(6) Service: Reliable and continuous performance demands quick repairs and proper maintenance. The machine which can be serviced promptly has advantage over one which cannot be serviced.

(7) Operating cost: This includes such things as supplies, the space occupied, the special equipment and forms required, repairs, etc.

(8) Reputation of the Supplier: Few people have the expertise to judge the mechanical qualities of a machine so one has to depend upon the integrity of the manufacturer and dealer to furnish a good machine and to backup claims and guarantees.

Office furniture is necessarily a part of total environment in which the employees work. Right kind of furniture must be provided so as to provide maximize comfort to the employee. The number and the type of furniture to be purchased for any office will depend on the number of departments and office workers, the nature and volume of work to be performed and the office space available for their accommodation

Fittings and Accessories:

Generally office fittings include desk lamp, telephone stand, waste paper basket, etc. When choosing or selecting such items, their colour may be considered, because the colour of these must not ruin the pleasing atmosphere of the office. Clerks should be provided with certain accessories in order to perform their work efficiently. Such items may be pen holders, sorting trays, boxes, cabinets, etc.

Types of Furniture Used in Office:

Every office requires different types of furniture. Furniture can be classified on the basis of its physical appearance and the purpose for which it is used. E.g. Executive furniture, Special purpose furniture, Built-in furniture and General clerical furniture.

1. Desk: The performance of an office employee is very much influenced by the type of desk he uses. The primary function of any desk is to provide a suitable surface for writing, checking, sorting and examining. There are different types of desks for different persons depending upon the nature of work and status. (i). Executive desk (ii). General purpose desk and (iii) Computer desk.

i. Executive Desk: These are designed to suit individual tastes and quite often they are designed as a show piece of an organisation. Their purpose is also to impress visitors. Sharp edges and corners are eliminated. Table top is covered with a sheet of glass.

ii. General Purpose Desk: It is a general purpose single pedestal desk with less elaborate design.

iii. Computer Desk: Computer desks are generally standard flat-topped, single or double pedestal desk with provision for placing keyboard.

2. Tables: Tables are generally needed for sorting of mail despatch, for holding meeting of committees, etc. However, in some office table fitted with drawers and other devices are still used by clerks for writing purpose.

3. Chairs: There is a need for providing the right type of chairs to the office employees as they spend most part of the day in the office. Chairs meant for computer operators should have adjustable back rest to enable the user to perform their work efficiently.

4. **Filing Cabinet:** A filing cabinet is a piece of office furniture usually used to store paper documents in file folders. The two most common forms of filing cabinets are vertical files and lateral files. A vertical file cabinet has drawers that extend from the short side of the cabinet. A lateral file cabinet has drawers that extend from the long side of the cabinet.

5. **Modular Furniture:** Modular furniture is pre-made or readymade furniture which can be used according to the need and room spacing. It is easy to install and dismantle according to need. It gives modern look to office. It is also available in various colours and designs. There are various types of modular furniture.

- i. Two in one furniture. This type of furniture has two purposes.
- ii. Three in one furniture. This type of furniture has three purposes.

Principles in Selecting the Office Furniture:

Following are some of the principles to be considered while selecting office furniture.

1. **Suitability:** The selected furniture must be suitable for the job. The working area of the table should be sufficient. It must also have space to keep files (incoming and outgoing), stationery, etc.

2. **Comfort:** The seat of the workers, shape of the chairs and tables must be so designed that the workers would not feel any fatigue while doing their jobs. This will result in efficiency, in turn, more output. The equipment, forms, stationery, etc., must be within easy reach. Those items frequently used, should be placed at hand.

3. **Design:** Prior to purchase, one must have an idea of the size, height and design of the furniture. For example, the size, height, design, number of drawers of the table should be decided on the basis of work done on it.

There are many designs of tables available in the market. One must decide whether the top of the table should be of polished wood or glass plate or laminate surface. The decision regarding the choice of the furniture, say table, desk, chairs, etc. as to its size and design depends on the officer who uses it.

4. **Durability:** Metal furniture is more costly than wooden furniture. But the maintenance charges of wooden furniture are more than those of the metal furniture. Nowadays, metal i.e., steel furniture is more popular, because it is more durable than wooden furniture. Moreover, steel

furniture is safe against fire, burglary etc.

5. Weight: As the business expands, the size of the office also increases. The existing layout of the furniture has to be rearranged according to the required comfort. It may become often necessary to move the furniture from one place to another. Therefore, it is better to have light weight furniture. If the furniture is light, there will be less breakage and wear and tear when the furniture is shifted.

6. Space saving: Furniture which would occupy minimum space should be selected. The decision regarding the design of the furniture should depend upon the space available in the office and the number of persons who work there.

7. Cost: The cost of the furniture should not be neglected when selecting it. It should be kept within the financial limit.

8. Hygiene: The outlay of the furniture should be so made that it will be easy to clean the furniture as well as the floor underneath it.

9. Usefulness: The furniture should be selected according to the nature of the particular job. When it is not needed for the department, it can be easily transferred to another department, where it may be useful.

10. Appearance: Furniture should have a good appearance and be pleasing to the eyes. This will impress the workers and visitors. Wooden furniture looks attractive. Furniture of high quality wood is durable. It has a warm look and gives comfort to the users. Many varieties and designs of furniture can easily be made.

11. Multi-Purpose Uses: Furniture should be adaptable to multi-purpose uses, wherever possible. This permits standardization in the purchase of multi-purpose desks and enables office workers to perform more than one type of work with the help of same kind of furniture.

	OFFICE MANAGEMENT AND SECRETARIAL PRACTICE - 17CCU602A						
	UNIT II						
		OPTION 1	OPTION2	OPTION3	OPTION4		ANSWER
1	Investment in which of the following is most risky?	Equity shares.	Preference shares.	Debentures.	Lan		Equity shares.
2	A project, which may not add to the existing profits, should be financed by	debentures.	preference share capital.	equity capital.	public deposits.		preference share capital.
3	The management of the company is entrusted to	Promoters	Employees	Share holders	Board of Directors		Board of Directors
4	is a substitute for a companys signature.	Director signature	Manager Signature	Common Seal	Managing Director Signature		Common Seal
5	Debentures cannot be	irredeemable.	participating.	registered.	bearer.		registre
6	Control of management of the company mainly vests in	equity shareholders.	preference shareholders.	debenture holders.	share holders.		equity shareholders.
7	were the pioneers of the co-operative movement	Blackstone society	Rochdale Society of Equitable Pioneers	Common Purpose Society	Mutual Help Society of Pioneers		Rochdale Society of Equitable Pioneers
8	The surplus generated by co-operatives is distributed in the form of	Cash and kind	Dividend and profit	Profit and dividend	Dividend and bonus		Dividend and bonus
9	Bank overdraft is a good source of finance for	short term.	medium term.	long term.	short and long term.		short term.
10	The most important	provide	provide	give proper	give		provide

	economic function of new issue market is to	liquidity to securities.	facilities for converting saving into investments.	direction to the flow of capital.	direction.	liquidity to securities.
11	New issue market is an integral part of the	stock exchange.	capital market.	stock exchange and capital market.	discount houses.	capital market.
12	Which of the following are components of organized sector of stock exchange?	Commercial banks.	Investors in securities.	Financial institutions like IDBI.	Other financial institutions.	Investors in securities.
13	Which of the following methods is not used for raising capital through the sale of new securities?	By issue of prospectus.	Rights issue.	Stock exchange placing.	Private placing.	Stock exchange placing.
14	The most common method used for marketing of new securities is	sale of existing shareholders.	stock exchange placing.	direct sale to public through prospectus.	sale to biometers.	direct sale to public through prospectus.
15	The first stock exchange was set up in India in	Calcutt	Bombay.	New Delhi.	Chennai.	Bombay.
16	Stock Exchanges in India are under the control of	Central Government.	C.C.	R.B.I.	Financial Institution.	Central Government.
17	A speculator who applies for new share is	a stag.	middle man.	Jobber.	lame duck.	a stag.
18	Dealings in stock exchanges can be done by public	directly.	directly or through brokers.	only through brokers.	only by corporate houses.	only through brokers.
19	Members of Bombay stock exchange are	brokers and jobbers.	brokers and tarawaniwalas.	jobbers and tarawaniwalas.	there is no such classification of	brokers and tarawaniwalas.

	unofficially classified into				members of stock exchange.	
20	Contango charge is paid by	bull speculator to bear speculator.	bear speculator to bull speculator.	lame duck to bull speculator.	stag to under writer.	bull speculator to bear speculator.
21	In India there are recognized stock exchanges at present	fifteen	sixteen	seventeen	twenty one	twenty one
22	Listing of securities in a stock exchange for the purpose of trading indicates that	at the time of listing, the company is financially sound.	at the time of listing, the company is legally organized.	the stock exchange guarantees about the financial soundness of the company.	the stock exchange not guarantees about the financial position.	at the time of listing, the company is legally organize
23	A firm which outsources its works requires	more employees	less employees	skilled employees	semi-skilled employees	less employees
24	When a right to purchase securities is acquired it is know as	call option.	put option.	double option.	single option.	put option.
25	When a right to sell a security is acquired, it is known as	call option.	put option.	double option.	single option.	call option.
26	Stock exchange deals with the	second hand securities.	issue of equity shares.	issue of preference shares.	issue of debentures.	second hand securities.
27	Dividend and interest are	synonymous terms.	different from each other.	debited to profit and loss account.	divisible profits.	debited to profit and loss account.
28	Register of member is a	statutory book.	statistical book.	official book.	registered book.	statutory book.
29	firm enjoys lowest average cost of	Representative	Optimum	Small-scale	Equilibrium	Optimum

	production.						
30	When did SEBI come into force?	1992	1991	1990	1993		1992
31	scale firms enjoy economies of scale.	Complex	Medium	Large	Small		Large
32	Indexing is an important	method of filing.	method of maintaining account books.	aid to filing.	method of maintaining statistical books.		method of maintaining account books.
33	The primary objective of co-operative society is	Service Motive	Profit	Sales Turnover	Democratic Management		Service Motive
34	Industries are engaged in extracting and supplying products from earth ,air and water	Extractive Industries	Manufacturing Industries	Genetic Industries	Assembly Industries		Extractive Industries
35	Providing fair returns to investors	Social objectives	National objectives	Economic objectives	Human objectives		Social objectives
36	The term_ is concerned with moral values	Ethics	Business	Profit	Loss		Ethics
37	What is called to buying of shares by taking money from brokers?	Margin trading.	Curb dealing.	Badla.	Forwar		Margin trading.
38	The primary aim of co-operative is to	earn more profits.	serve the members.	raise production.	raise more money.		serve the members.
39	A sleeping partner is one who	contributes capital.	takes active part in the business.	contributes members.	contributes materials.		contributes capital.
40	Business risks can be	avoided.	reduced.	ignored.	erase		reduce
41	In case of dissolution of partnership, the business of the firm	does not come to an end	comes to an end	will come to an end shortly	constitution of the firm remains unchanged		does not come to an end

42	Earning Goodwill is for business ethics	Need	Uses	merits	None		Need
43	In vertical filing system, files or folders are kept	one upon the other.	in standing upright position.	in packets or large envelopes.	in a cupboard, divided into a number of small compartments		in standing upright position.
44	The computations in a computer are performed by	logical unit.	memory unit.	output unit.	control unit.		control unit.
45	layout is not flexible.	Product	stationary	functional	combined		Product
46	Which of the following methods of filing do you recommend for a large size undertaking?	Pigeon hole system.	Spike files.	Box files.	Vertical filing.		Vertical filing.
47	Planning and control are _____ functions of an office	informative.	administrative.	publi	private.		administrative.
48	Maintenance of records is the _____ functions of an office	direct.	indirect.	basi	private.		basi
49	is a major physical facility in an office.	Office accommodation.	Open office.	Closed office.	Public office.		Office accommodation.
50	is an important consideration for setting up an office.	Office accommodation.	Office location.	Closed office.	Public office.		Office location.
51	is the arrangement of furniture and equipment with the available floor space.	Office accommodation.	Office location.	Office layout.	Open office.		Office layout.
52	Layout based on similarity of work.	Group.	Process.	Open.	Close		Group.
53	highly flexible type of	Sole Trading	Partnership	State	Joint Stock		Sole Trading

	organization	Concern		Enterprises	Companies	Concern
54	In case of _____ layout, production is carried on in special purpose machine.	functional	product	stationary	combined	product
55	Office is in the form of a hall where all the employees work.	Open.	Public.	Private.	System.	Open.
56	Nature of the product is the vital factor, which influences the _____ of the <u>units</u>	size	profit	sales	Demand	size
57	refers to a smaller area	Site	State	District	Country	Site
58	means a fraction of the capital of a company	Stock	Exchange	Bear	Stag	Stock
59	Which type of classification is based on the area of operation?	Alphabetical classification.	Numerical classification.	Subject wise classification.	Geographical classification.	Geographical classification.
60	The higher the _____ level of the employee, the lower the job satisfaction.	Managerial	Educational	Satisfaction	All the above are incorrect	Educational

UNIT - III

MODERN OFFICE EQUIPMENT

Introduction

So far we have discussed various matters regarding office functions, office management, office location, office accommodation, office furniture, office filing, and indexing. The next step is to discuss about the Office Machines and Equipments. In the modern world, the mechanization plays a vital role in office organisation.

Meaning of Mechanization

The concept of mechanization in the office refers to the process by which machines and equipments are introduced with a view to speeding up the administrative process. In other words, the mechanization means the decision to shift from manual to machines in the operation of an office.

Objectives of Mechanization

The following are the important objectives for which mechanization is introduced:

(i) Saving in Labour: The main reason for the installation of office machines is to reduce the labour cost. Savings in labour cost refer to annual savings in their wages, or an increase in the volume of work handled by the existing office.

(ii) Time Saving: Saving in time is another objective of mechanization. Machines should be used whenever it is important to save time. Time saved in office routine may be beneficially utilized in some other operations of the enterprise.

(iii) Accuracy: Office machines may be of special value in promoting accuracy, particularly in the operations of the Accounting and Sales Department. The machines also exercise a cheque on manual work, apart from locating errors and frauds.

(iv) Minimization of Frauds: Certain machines, if installed, do not save time or labour, their values lies in the fact that they reduced the chances of fraud, embezzlements etc, by the employees. Examples of such machines are cheque writing machines, franking machines etc.

(v) Effects on Personnel: Many machine operations relieve manual drudgery, and reduce the monotony of work and fatigue. To that extent machines improve the morale of the employees.

Advantages of Mechanization: Since mechanization has become an important part of the modern office administrative process, a critical analysis of its advantages and disadvantages may be made. The main advantages of mechanization are.

(i) Better Quality of Work : The work performed by a machine is usually uniform, and is neat and more legible than when it is done by hand. An analysis can be obtained automatically at the time of entries in ledger accounts and stock record etc.

(ii) Lower Operating Cost: Office machines are labour and time saving devices. They lead to savings in wage-bills or release the staff for other work. Machines do require a large amount of initial capital investment; but, in the long run, their use is profitable.

(iii) Improved Efficiency: Machines bring speed and accuracy to all types of office work, and thus

increase the efficiency of employees.

(iv) Facilitates Control: From the management point of view, greater control is possible and more information may be available than before; hence an extensive use of a machine would ensure that office work is performed efficiently.

(v) Greater Accuracy: Mechanization ensures accuracy of work, especially in accounting, computation and statistical calculations. It prevents clerical errors and omissions.

(vi) Relieves Monotony: mechanization reduces the monotony of doing repetitive work, which is boring and time consuming. As a result, the employees who do a great deal of repetitive work are somewhat more contented than they would be if machines were not used.

(vii) Facilitate Standardization: Mechanization facilitates standardization of office routines and procedures, and therefore, a better co-ordination of work is achieved.

Disadvantages of Mechanization: The disadvantages of mechanization are.

(i) Workers Resistance: Workers often disapprove of machines, particularly computers, partly because they fear that they might lose their jobs and partly because of various real difficulties which they have experienced with individual machines. But it is unwise to generalize from single and faulty. Machine installations are it is best to bear in mind the advantages which generally arise from their applications.

(ii) High Cost: A small firm cannot install accounting machines or computers because of their very high cost. The cost of the operation of certain types of machines and equipment is also high and beyond the resources of small offices. Moreover, the breakdown of big machines is often expensive, apart from the fact that this breakdown dislocates office work.

(iii) Uneconomical: If office machines are not used to their fullest capacity, they become uneconomical. Idle machine means idle capital.

(iv) Require Special Skill: Machines call for specialized skills for their operation. Moreover, the machines cannot perform the work which needs great intelligence. For instance, when an accounting machine is installed, an accountant is still required.

(v) Risk of Obsolescence: some machines have a high degree of obsolescence; the machine and its methods may be out of date before it is fully paid for. To avoid this risk, it is better to purchase only those machines which have as wide and as universal an application as possible.

(vi) Surplus Staff: Some machines require trained and experienced operators when, therefore, an operator is absent work piles up. For this reason, two operators have often to be employed in an office when there is work only for one; the second operator is required for relief purposes alone.

(vii) Dominance of Machine: Unless great care is taken, the machine will become more important than the work it performs and the human labor will be relegated to a subordinate position.

(viii) Other Problems: Machine usually creates noise and space problems in the office.

Factors in Selection

(i) Ease of Operation: Faster operation, less fatigue, and fewer errors go with the ease of operation. Here are some contributory factors; indexing the amounts, operating the motor bar or handle, operating the control keys, visibility of the printed result, recording of the answer simplicity of operations is an important factor in training operation efficiently and inexpensively.

(ii) Flexibility: Unless there is enough work to keep highly specialized machine busy, it is better to select

one which can be used for different types of work. In the absence of this flexibility, the purchase of the machine would not be justified at all.

(iii) Durability: A machine is used by different people under varying conditions. Unless, therefore, it is strong and durable, it would be a poor investment.

(iv) Portability: A machine is frequently moved from user to user or from one place to another in the same work area. Compactness and ease of handling saves time and energy and increase the use of the machine. Modern machines have been reduced in size and weight without the sacrifice of quality.

(v) Adaptability: If a machine can be used without disrupting an existing system, it would be better to do so than to go in for one which necessitates a considerable rearrangement of the forms and records involved, of extensive recopying of information, and of adjustments in procedures.

(vi) Service: Reliable and continuous performance demands quick repairs and proper maintenance. The machine which can be serviced promptly has advantage over one which cannot be so serviced.

(vii) Operating Cost: This includes such things as supplies, the space occupied, the special equipment and forms required, repairs, etc.

(viii) Reputation of the Supplier: Few people have the expertise to judge the mechanical qualities of a machine; one has therefore, to depend upon the integrity of the manufacturer and the dealer to finish a good machine and to back up claims and guarantees.

(ix) Styling: Modern offices require machines which are pleasing in design and color. Other design functions, such as are satisfactory from the point of view of touch and sound, should also be considered. These include a convenient keyboard, simple motor bars, proper control keys, uniform action of all the keys and levers, quiet operation, and neat, legible printing

(x) Cost: Cost, not necessarily the purchase price, is a major factor in buying a machine. Frequently, a machine whose purchase price is higher than that of another is a better buy in the long run. If two machines are comparable in terms of saving in labor and time, maintenance costs, supplies and durability, the net purchase price should then be the deciding factor. The net price includes the trading allowance for present equipment and the expected residual values after depreciation.

Classification of Office Machines

Office machines have been classified in many ways. One writer has classified them as follows:

- (i) Machines for computing, such as adding machines and calculators.
- (ii) Machines for the creation and preparation of accounting records, such as book keeping machines and addressing machines:
- (iii) Machines for the handling of correspondence, such as dictating machines, scaling machines, and label pasting machines.
- (iv) Machines for handling money, such as cash registers, coin-changers, and cheque protectors.
- (v) Machines for inter communication, such as the telegraphic typewriter and electric alarm systems.

Types of Machines

The following are the various types of machines used in the modern office:

Typewriters

The typewriter is the most commonly used and best known of office machines. It is used not only for neat and clean letter and reports but also for the fact that a number of copies can be made with the use of carbons or stencils. Typewriters are available in different sizes and shapes and have different technological sophistications. Mention may be made of the following types of typewriters.

(i) Standard Typewriters: Standard typewriters are of standard size and are designed for use in typing correspondence and reports on quarto, foolscap or A4 size paper, and are satisfactory for most office work. The basic standard typewriter may be modified in a number of different ways to meet special requirement. Remington, Godrej and Facit are the different makes of standard typewriters available in India.

(ii) Portable Typewriters: These typewriters are light weight and smaller in size. They are ideal for personal use by business executives who often go on tours.

(iii) Noiseless Typewriters: Though not completely noiseless, these typewriters are much quieter than the standard typewriters. They utilize a special type of bar to reduce the noise of the impact of the bar on paper. They are of great advantage when the typist works in the same room with an executive or with other clerks. But they are not so good for multi-copy work as standard typewriters one, are rather expensive to maintain.

(iv) Electric Typewriter: An electric typewriter operates on electric power. It is a standard typewriters provided with an electric motor. A very light touch on the typewriter keys put them in motion. It has been established that the energy input for an electric typewriter is about 1/4 of that required for a standard typewriter. The following advantages may be derived from the electric typewriters:

- (a) In the hands of skilled typists, they are faster to operate than standard typewriters. They give uniformly good impression even when the touch of fingers is erratic.
- (b) They lessen the fatigue of typist and improve the quality of his work.
- (c) They can provide as many as 20 copies with the use of carbons as against five provided by standard typewriters.
- (d) They are good for cutting stencils and the typing of invoices.

(v) Automatic Typewriters: They are power driven machines which operate from a player piano type roll which has been cut on a standard typewriter. The matter to be typed is first punched on a paper tape or paper roll, or a special stencil is cut to serve as a master plate or record. The master is then placed on the automatic typewriter, which plays back or type out the matter, at a very speed (up to 200 letters can be produced in a single working day) at about 150 words per minute. When non-standard matter- name, address, special codes, etc. is inserted, the automatic device is switched off to insert this matter. One form of automatic typewriter can store a substantial number of standard paragraphs, from which routine letters can be composed by a push button selection.

(vi) Variable Type Machines: These are typewriters on which different sizes and styles of typefaces and type blocks may be interchanged according to need and without much difficulty. Spacing between letters can also be adjusted by fitting a special space adjustment device on the machine. A variable type machine is also known as a vari-typewriter. In vari-typewriters, the type, instead of being carried on bars, is mounted on a block or golf ball which is dropped into position on the machine. As a key is depressed, the block turns until the required character is in position, and then the printing action takes place. Type blocks can easily be interchanged without removing the paper from the platen, thus permitting a variety of type styles on one sheet of paper. Vary- types are of particular value in the cutting of stencils for printing

office forms, and also for laying out statistical reports, when a range of type styles can be used to distinguish one set of figures from another, and to give whatever emphasis may be required.

(vii) Typewriters With Additional Attachments: A variety of type writer attachments have been introduced to do special purpose jobs. For typing continuous strips of office forms, a continuous stationery attachment may be fitted to a standard typewriter. By fitting a front feed attachment to the typewriter, certain papers for example, cheques and receipts-can be inserted in the front and typed. The card holding attachment enables the operator to insert stiff labels and cards in the machine and type them with ease. A typewriter fitted with carbon roller equipment makes copies without the use of carbons.

(viii) Special-Purpose Typewriter: Special purpose typewriters are available for special types of work; for example, tabulation, typing of scientific formulas, etc. The dual unit typewriter is used to type formats, tables, formulas etc. The hectograph carbon roll typewriter is used to produce master sheets for hectograph duplicating machine. The flat bed typewriter is capable of typing directly into bound books.

(ix) Electronic Typewriters: Electronic typewriter incorporate the latest micro- processor technology which makes it a technological marvel of supreme versatility and reliability, so much so that it is virtually a thinking machine. Every function on the electronic typewriter is automatic, and the machine obeys any command for alignment, proportional spacing, underlining and centering, to name just a few.

(x) Electronic Typewriters With Spell Check: An improvement over the traditional electronic typewriter is the introduction of spell check in it. The moment a mistake is made, the spell check stops the typewriter. It then refers to its mammoth, over 80,000 word dictionary and corrects the mistake. It thus improves the efficiency of the office by giving flawlessly typed documents.

Duplicators

If frequently happens that more than one copy of a letter or document is required. The simplest method is to make the copies at the same time as the original. This is usually done by using carbons, carbon backing or carbonless copy papers, each of which will provide a small number of legible copies. For example, up to 4 copies may be obtained by hand, up 6 copies on a standard typewriter, about 12 copies on a noiseless typewriter up to 20 copies on an electric typewriter. But when are required in a larger number, or cannot be made in the first instance, duplicating or coping processes are employed. The term copying is therefore used when one or a few copies are taken direct from the original and the term duplicating is used when substantial number of copies is made from a prepared master copy. The different types of duplicating machines or processes are considered below:

(i) Gelatin Duplicator: This is the oldest type of duplicator. It consists of a tray containing gelatin on to which the master copy (prepared with a special aniline ink) is pressed. The copying paper is then pressed on the gelatin with a dampened roller to obtain a copy. This is not a popular

method these days because the duplicating process is cumbersome, and only a limited number of copies (up to 20 25) can be obtained.

(ii) Spirit Duplicator: A spirit duplicator is also known as the hectograph and can reproduce typewriting, handwriting or drawing in a variety of colors. In the hectograph method, a master copy is prepared on a sheet of art paper by means of a hectograph carbon paper. The carbon paper is placed is placed with the coated surface upwards, and the art the art surface of the paper is placed with the coated surface upwards and the art surface of the paper is placed on it. The matter to be reproduced is then written in pencil, with bull pen or on the typewriter on the exposed side of the art paper, causing a carbon

impression in reverse to be obtained on the surface. The master copy is then fitted round a drum on the machine so that the carbon image is on the outside. To get the copy, the master is subjected to a slight dampening with crude mutilated spirit which enables it, when passing through the machine, to remove a fine carbon deposit from the master, and leave an impression on the copy paper.

(iii) Stencil Duplicators: The stencil duplicator was first invented in 1881 as a flat-bed machine. In 1889, the rotary duplicator was developed. Since then, stencil duplicators have undergone a tremendous development and change. Today's stencil duplicators can be manually-operated or power driven. They are available in the market under different brand names-shurie Roneo, Gestener, Kilburn etc. The stencil method of duplication employs a coated fibre sheet, which is typed or traced with a stylus with the matter to be duplicated. The stencil is then put on the duplicating machine. The stencil gets ink through the cuts on it and imprints the material on the duplicating paper which comes in contact with the stencil automatically when the machine is operated by hand or by electricity.

(iv) Electronic Stencil Duplicators: The latest innovation in duplicating machines is the electronic stencil duplicator, on which master are electronically scanned so that the contents of the documents are reproduced accurately and precisely on a stencil from which copies are made. Electronic duplicators are most versatile. Photographic copies of any type of document, chart, diagram, illustration, etc., whether handwritten, typed or printed, can be obtained with an electronically produced stencil. Up to 10,000 copies may be prepared with a stencil which takes only a few minutes to prepare. But because of its cost, (about Rs. 50,000) the machine cannot be used by a small or medium-sized office.

(v) Off-Set Litho Machines: The off-set lithograph is not so much a duplicating process as an office printing process. In this system, masters are prepared on thin metal sheets or specially surfaced paper. They can be typewriter with the aid of a special ribbon, hand written or drawn by using a greasy ink or ball pen,

Photocopying

Photocopying is a term which covers a number of processes. The essence of the photocopying of any document is that it is an exact photographic copy of the original which is obtained by the use of a special machine, not requiring the assistance of typists. Although the processes differ in many respects, the equipment consists basically of two parts, viz., the exposure unit, in which the original and the copy paper are exposed to a suitable source of light, and the processing unit, in which the copy paper is developed and fixed. The processing unit is usually built into the same casing as the exposure unit. In some processes, it is necessary to remove the copy from the exposure unit and feed it manually into the processing unit (known as the two-stage process). In others, the processing follows automatically after exposure and the finished print is obtained (known as the single-stage process). There are Nine Methods of photocopying:

(i) Reflex Methods: By this method, a negative copy is produced on photographic paper. After wet processing and drying this is used in turn to produce one or more positive copies by further exposure and developing.

(ii) Diffusion Transfer: By this method, the first exposure is made on to a negative, but unlike the reflex process, the negative is processed in the machine together with a sheet of non-light sensitive paper to produce an immediately readable copy. The negative can be used several times, and up to 15 copies can be produced from the same negative.

(iii) Gelatin Transfer: By this method, after wet developing, the negative copy is squeezed against a plain sheet of paper to which the image is physically transferred. This process employs a gelatin-coated matrix on which the negative copy is developed. It is a very cheap method, for it makes use of uncoated non-light-sensitive copy paper. Six to fifteen copies can be obtained by this method.

(iv) Direct Positive: By this process, a photocopy is produced in a single stage on to the photographic paper. A special translucent paper is available which, together with a suitable light filter, can produce a right-way reading positive image, although the quality is slightly unsatisfactory in this case.

(v) Dye-Line: This process is also known as the blue printing process, and is used for copying plans, charts, etc. The matter is drawn on a translucent or transparent paper placed in a printing frame in direct contact with a sensitized paper and exposed to sunlight or artificial light. The positive copy is then developed and washed like the negative of a film. Diazo paper is cheap, and the developing is quite rapid.

(vi) Electrostatic: Electrostatic copying or Xerograph is a process of electrical photography which uses ordinary papers and which requires no chemical treatment. Under this system, the original document is placed in the machine, where the image is illuminated and projected through a lens system on to a selenium plane or drum which has been previously given a positive electric charge. The properties of selenium are such that where light falls, the electrical charge is lost, but where it is shaded, the charge remains. Thus an electrostatic pattern of the image is left on the place. On this image, a negatively charged ink powder is cascaded, which adheres to it, giving a powder image of the original. This is then transferred on to paper and made permanent by exposure to heat. Xerographic machines have been developed to a stage where all that is necessary to do is set the dial on the machine for the number of copies required and push the print button. The copies are then printed automatically.

(vii) Thermal Process: In the thermograph or heat transfer process, the document to be copied should be drawn, written or printed in a mineral-based ink or ink pencil. Thus it will not copy ball pen inks, some coloured inks and spirit duplicated copy. By this method, the original document together with a sensitized paper, is fed into the machine, and is subjected to heat from an infra-red lamp. The infra-red rays are absorbed by the mineral based writing but are reflected from the plain areas on the original an impression is thus caused on the copy paper by heat transfer. The operation is quick and requires no chemical processing. But the copy paper is relatively expensive.

(viii) Dual Spectrum: The thermal process produces copies only from black images and cannot be used to copy coloured images. In the dual spectrum process, however, the originals may be written in any colour and may even be single-sided or double-sided. The dual spectrum process is a dry contact process which produces positive copies in a single stage. Moreover, since it is a flat-bed machine, copies may be made from bound books.

(ix) Microphotography: Microfilming strictly speaking is not a copying process. It is associated with the maintenance of records. The photographing of documents on motion picture film (8mm, 16mm or 35mm) is known as microfilming. By this method, documents to be preserved are photographed by a machine, known as “Recordok”, on a single roll of film. Up to 6000 photographs can be taken in an hour and up-to 1,000 documents can be recorded on 10 meters of 16mm film, which can be stored in an area equivalent to that occupied by a match box. After the photographs of documents are obtained, the film roll is developed into a negative. This film is numbered, indexed and filed properly for future reference. Whenever required, these films can be processed and prints obtained. To view documents which have been microfilmed, a machine known as the “Reader” is used, which projects the film on to a screen for

easy reading.

Accounting Machines

Modern organizations, including government offices, have to cope with a large volume of figure work. Not only accuracy but speed, too, is essential in doing figure work. This job may either be done manually or with the help of accounting machines. Accounting machines help in computing and analyzing various types of figures with the utmost accuracy and at fantastic speed. It is for this reason that the use of accounting machines has become increasingly popular in modern offices. The various kinds of computing, accounting and tabulating machines are considered below:

(i) Adding Machines: Adding machines may either manually operated or electrically operated. In a manually operated machine, a key is depressed, and the machine prints (and adds) when the crank at its side is pulled. In an electrical machine, however, the power bar takes the place of the crank. Adding machines are two major categories: adding-listing machines and non-listing adding machines.

(ii) Calculating Machines: Calculating machines are used when calculations have to be made on a large scale. These machines contribute greatly to business efficiency by eliminating routine and tiring mental work, and by eliminating errors, etc. They also contribute to economy in staffing and generally increase clerical efficiency. Calculating machines are primarily used for multiplication and division; and they accomplish these functions by repetitive, high speed addition and subtraction. They perform operations of percentages, decimals, squaring, square roots, logarithms, etc. They act as memory banks for certain types of operations, and are particularly suited to the calculation of interest, commission, discount, statistical data interpretation, etc. Calculating machines may be broadly classified into the following five categories.

(a) Printing Calculators: This machine looks like an adding listing machine and may have a full bank keyboard or a ten-key board. It is very easy to operate. The keys are depressed to register the figures for calculation. Then the symbol key (for multiplication, etc.) is pressed, and the answer is obtained by pressing the total key.

(b) Key-Driven Calculator: It looks like a non-listing adding machine. The keys are depressed and the figures appear on the dial of the machine. Multiplications are obtained by repeated additions and divisions by repeated subtractions.

(c) Rotary Calculator: It may be operated manually or electrically. This machine can perform all the four functions of addition, subtraction, multiplication and division. It is of two types- lever-set, key-set; and both operate on the same principle.

(d) Automatic Calculator: They are actually rotary calculators which operate electrically.

(e) Electronic Calculator: an electronic calculator is capable of performing extremely complex calculations. It operates electrically, and valves and transistors are used in it as in a radio or a TV set. It can be electrically operated or battery operated; and it may be a full bank or ten-key type. It works at a very high speed and performs complex calculations in less than a thousand part of a second.

(iii) Cash Registers: Cash registers are machines used by such organizations as departmental or chain stores, big retail shops, supermarkets, etc., where a large number of customers make cash payments for purchases. A cash register simultaneously records cash transactions on a tape, produces printed slips and operates cash drawers. The receipts are added simultaneously and the total is shown on the meter. The register can also be used to check the receipts with the cashier. The machine record is kept under lock and key and forms a complete unalterable record of its operations.

(iv) Coin-handling machines: Coin-handling machines are used in organizations where coin-handling is of great importance, e.g., banks, railway stations, retail stores, super markets, transport offices, booking agencies, etc. These machines are three types: coin sorters; cash counters; and coin changing machines. Coin sorters are used to sort (separate) coins of different denominations after they are passed through the machine; the totals, too, are recorded on the dials. Cash counting machines are used to find out the total of the coins passed through them; the total is shown on the dial. Coin changing machines automatically calculate the change which is to be returned to the customer and deliver the correct amount. The advantages of coin handling machines include:

- (a) Greater speed;
- (b) Relief from the monotony of the job of separating and counting coins;
- (c) Accuracy in calculation and balancing the change etc. Coin handling machines, however, are not popular in India.

(i) Address Machines: Since 1893, when the first addressing machine was marketed, there have been phenomenal improvements in its design and working speed. The term addressing came from the function for which the machine was first designed, viz, reproduction of names and addresses on newspaper wrappers. The machine is in reality an office duplicating machine; out instead of producing many copies of only one master, it prints one copy or a few copies, as required, of each of a series of masters. It is now used in different types of jobs involving repetitive information-to prepare job cards, payroll sheets, invoice, notices dividend lists, etc.

(a) Metal plate Machine: It uses metal plate made of zinc or aluminum on which is embossed the name, address or their information which is to be duplicated. The metal plate is embossed by an electrically operated typewriter called the plate embosser. Plates can be mounted with an index card for quick reference. Metal plates are strong and last long.

(b) Film Stencil Machine: It uses a film stencil mounted on a cardboard frame. For quick reference, the frame has a label bearing the same information as the stencil. The stencil can easily be prepared on a typewriter and are easy to handle.

(c) Spirit Master Process: This machine works on the principle of spirit duplicator. The master copies under this process are easy to prepare on the typewriter without any apparatus being fitted. This addressing machine is cheap, neat and compact.

(ii) Franking Machines: Postal stamping or franking machines are used to affix stamps on outward letters and envelopes. In large offices, where hundreds of outgoing envelopes have to be stamped every day, these machines are very useful. A franking machine may be hired from the posts and telegraphs office under a license. The letter or envelope to be stamped is inserted in the machine and a handle is operated. The machine marks the letter with the required denomination of the postage stamp. When the amount of postage set in the meter is used up, the machine gets automatically locked until the meter is again reset on further payment. By means of this machine, a firm's insignia, trade mark, slogan or advertising message can be printed on the envelopes at the time the postage impression is made. The advantages of the machines include:

- (a) Simplified postage accounting;
- (b) Saving in time;
- (c) Elimination of errors in stamping; and

(d) Avoidance of wastage of stamps.

(iii) Mailing Machines: Various types of machines are used to handle inward and outward mail. These machines are called mailing machines and are discussed below:

(a) Letter opening machines are used to open the mail. These machines open letters by cutting a very thin strip from one edge of the envelope. They can be operated manually or electrically, and can be adjusted to open envelopes at a speed of 100 to 500 letters per minute.

(b) Paper folding machines are used where a large number of letters, circulars and other documents have to be folded each day. An electrically operated folding machine can fold 10,000 to 20,000 sheets of paper per hour.

(c) Inserting machines are used for the automatic insertion of the folded letters into the envelopes at a high speed.

(d) An envelope-sealing machine is used to automatically seal the envelopes. This machine dampens and sticks the flaps of envelopes and works at a very high speed.

Punched Card Machine

Punched card machines are used for a variety of purposes for invoicing, sales and purchase accounting, calculations of wages, stock control, cost accounting, budgeting etc. These machines perform clerical operations as well-writing, copying, sorting, comparing, etc. The following punched card equipment is used for these purposes:

(i) Punching Machine: This machine is used for punching the holes in the punch cards, corresponding to the information which needs to be processed. A punched card machine may also be fitted with a mark sensing device which allows for the holes to be punched automatically corresponding with pencil marks made on the cards.

(ii) Punched Card: It is a printed card form containing holes representing numerical and alphabetical characters and arranged in columns ranging from 40 to 160 in numbers.

(iii) Verifiers: These are used to verify the accuracy of the original punching.

(iv) Reproducing Punches: These can automatically reproduce another card, either whole or in part.

(v) Sorting Machines: These will sort out the punched cards under any selected column on the card. The machine sorts out one column at a time by sensing the position of the hole. Sorting is done at a speed of 1000 cards per minute.

(vi) Interpreter: It can read the specific information contained in the punched card and print it in alphabetical characters on the face of the card. This printing helps the user to read the card in an ordinary way.

(vii) Collators: These are used to supplement the sorting equipment. They can combine two sets of punched cards into one set in the right order, or separate one batch of cards into two or more batches, or sort cut cards by the pre-determined punch holes, irrespective of the sequence.

(viii) Tabulator: It is the main into which punched cards are fed. It prints the final record resulting from the operations of the machines described above in the foregoing paragraphs. It prints the information under different heads, makes totals and sub-totals, and calculates and prints balances, etc. It is a very versatile machine and can print invoices, statements of accounts, purchase or sales analysis statements, wage sheets, etc.

Office computers

(i) Meaning: Electronic computers are the latest addition to the long list of office machines. A computer is a replica of the human brain and performs all types of clerical operations very quickly and accurately. It is used to solve business problems through the application of a variety of mathematical and logical or decision-making techniques. In doing so, it can decide what, where and when previously prepared data are required and, if necessary, issue instructions to an operator accordingly. The basic types of computers are the analog, the digital and the digital- analog. Digital computers are commercially very popular. The leading manufacturers of computers in the world are IBM, National, Burroughs, G.E.C., English Electric Corporation, Honeywell, Frenti, etc.

(ii) Functions of Computers: A computer is a giant mechanical brain which can process, analyze, store or supply information instantaneously. It can perform the following functions:

- (a) To receive one or more programmes of instructions, store them and obey them as and when required;
- (b) To take new information through one or more input channels and store it for reference as required by any of the programmes;
- (c) To perform any arithmetical calculation, which may be repetitive in nature, as required by the programme;
- (d) To select any carry out alternative courses of action, according to the information it produces;
- (e) To apply checks to the data it receives or produces and, if a test indicates a failure, produce a record or signal to procure human intervention;
- (f) To store the data produces for future reference;
- (g) To select information from the store, arrange it in any sequences, and discharge it through one or more output channels to be printed for human use, or to be recorded for subsequent computer use.

(iii) Components of Electronic Computers:

- (a) Input: It is that part of the machine which accepts information in the form of punched cards or punched tape, or magnetic tape or teleprompter.
- (b) Arithmetical Unit: This is also known as the Accumulator. It performs calculations of the figures fed into it at a fantastic speed of one million per second.
- (c) Storage or Memory Unit: This consists of a magnetic core, a magnetic drum, a magnetic tape, discs or rods, magnetic cards or thin film.
- (d) Control Unit: This consists of the console (stop, start, etc.) and the programme fed into the machines as well as a co-coordinator or control unit in the machine.
- (e) Output: This is where the results of the process are delivered by the machine in the form of punched cards, punched tape, magnetic tape or line printers; the results are printed in ordinary language for inspection and checking purposes.

(iv) Advantages: the outstanding advantages offered by computers are:

- (a) Provision of more information than would be otherwise available;
- (b) Provision of control information at a great speed;
- (c) Indirect financial saving by having various types of applications; for example, Inventory control and

stock valuation;

(d) Elimination of human labour to an extent which no other machine can do;

(e) Extraordinary speed with complicated calculation; elimination of human errors and provision of mechanical efficiency of the highest order;

(f) Flexibility of operation, for any number of programmes can be prepared for different business operation;

(g) Selection of significant information out of a mass of data;

(h) There are some tasks, such as building mathematical “models” to aid decision-making or applying mathematical techniques, which cannot be performed economically except with the help of a computer because of the speed at which it operates.

(v) Disadvantages: The disadvantages of a computer are:

(i) It is very costly to install and run, and therefore can only be used by large organizations.

(ii) A single computer can do the work of hundreds of workers, resulting in retrenchment of staff, which may strain personal relations.

(iii) The installation of a computer often means preparatory work for two to three years at great expense.

(iv) Computers upset all office system and procedures, and adversely affect the working of the organization in the initial stage.

(v) Any breakdown of the computer would completely dislocate the office work.

(vi) Normally, a year or so passes from the time an order is placed to the time the computer is installed. Since computer technology is a field of constant and rapid development, a new and more sophisticated model may make the one ordered quite out of date even before its installation.

(vii) A computer leads to the centralization of the control system, which has its own disadvantages, for the balance of power shifts to computer room to the detriment of the whole organization.

(viii) properly trained staff for computers is often on short supply. This may raise acute maintenance problems.

Desktop Publishing: Desktop publishing system is one of the most promising and existing application of personal computer technology today. It is called “Desktop Publishing” because most of the tools it requires can fit on top of a desk. Desktop publishing means literally, running

a publishing company from the desktop. It is now possible to do everything that normally goes on in a publisher’s office-writing, editing, design, typesetting, paste-up, printing and indeed accounting and marketing-in one machine that you can put on your desk. You don’t need specialist outside supplier or complex typesetting machinery. You can now get publishing from a simple machine. A basic desktop publishing system consists of personal computer such as Apple or IBM/PC, page layout software and a page printer, such as a laser printer, or a typesetting machine. Four areas have been identified for which desktop publishing technology is best suited:

(i) Business publishing

(ii) Periodical publishing including newsletter

(iii) Book publishing

(iv) Personal publishing

A desktop publishing system has the potential to write and format documents, create and incorporate graphics, prepare camera-ready copy for printing keep databases of mailing and subscription lists, create official advertising filers and brochures and keep all the financial records-no matter how large or small it is.

Dictating Machines

Dictation to a stenographer writing on shorthand or typing on a stenotype necessitates the presence of both the dictator and the stenographer. This may not always be possible. The stenographer might be busy taking dictation from some other executive, or doing some other work, or the executive may feel the urgency of dictating letters or may want to dictate letters while on tour or at his residence or in late evening hours. These difficulties may be overcome by the use of dictating machines; the executive may dictate something to the machine and leave the rest of the job to be done by the typist. This machine provides for the storage and later for the reproduction of the spoken messages. A dictating machine, by a combination of electronic and mechanical means, records the voice on a variety of mediums, including wax cylinders, plastic discs, wire and coated types, or on magnetic tapes. The recording unit (plastic disc or magnetic tape) can be removed from the machine after dictation and sent (even by mail) to the place of transcription. The transcribing machine reproduces the voice. The recording unit may be erased and re-used, possibly hundreds of times. A dictating machine may also have inter-room connections, and the executive may dictate letters without calling the stenographer to his room. (An ordinary tape recorder may also be used for similar purposes). The dictating machine may also be fitted with a device which makes corrections possibly in the dictated message. In addition to machines for desk use, there are portable models, some of which are small enough to be carried in the pocket.

The advantages of these machines are:

- (a) The dictator can work in his own time. Shorthand typists or secretaries are not tied to the hours during which the dictator works.
- (b) These machines are used to affect economy in correspondence work. Sometimes, a stenographer can be dispensed with by having a dictating machine.
- (c) Typists can be fully utilized and controlled. Work measurement is possible.
- (d) The shorthand writer's taking down time is entirely saved.
- (e) These machines provide for an accurate recording of lengthy minutes of meetings, debates and proceedings.
- (f) Telephone conversations, interviews, etc., can be recorded immediately, together with notes for action following from them.
- (g) The machine can replace the telephone, e.g., for issuing instructions to subordinates. This would often save time and has the added advantage of being a written record of what took place in the course of a conversation.
- (h) When the load of dictated matter is uneven, the transcription may be evenly allocated among the typists.

The disadvantages of these machines are:

- (a) Dictators sometimes speak indistinctly. The typist has, therefore, to replay the tape or wax cylinder in order to understand clearly that which has been dictated. In this way, some time is wasted.
- (b) Some users of dictation equipment only dictate letters after first writing them out in long hand; so they waste time.
- (c) Typists suffer from transcribing strain and therefore from some lack of accuracy. They also have difficulty in “setting out” a letter because they do not know how long it would be when letter starts.
- (d) The absence of personal contact between the typist and dictator (executive) is responsible for unsatisfactory human relations and breakdown in communication.
- (e) Failure of power or a breakdown of the machine may hamper dictation and transcribing work. While considering the installation of a dictating machine, the volume, character and points of origin of the work should be taken into account. Certain amount of skill is required to operate a dictating machine. Moreover, a highly technical matter is difficult to dictate and should, in any case, be transcribed by a specialist.

Stenographic Machines

These machines are also referred to as shorthand or steno typing machines. These are machines to which matter can be dictated phonetically on a moving paper tape. The typist then transcribes the tape on an ordinary typewriter. The machine is portable, and skilled operators can maintain very high speeds. Stenographic machines are particularly suited for reports of meetings; for the tape can be passed on to typists from time to time during the course of the meeting, and the typing can proceed almost simultaneously with the meeting. The main advantages of this machine are:

- (a) Dictation can be taken at a very high speed (even up to 180 or 200 words per minute);
- (b) It is less fatiguing to operate than to take down matter in shorthand;
- (c) Since the machine uses the phonetic system, it can be used for dictation in any language (English, German, French, etc.)
- (d) The machine is portable and noiseless. It does not cause any disturbance to the works in the office.
- (e) It offers the facility of typing even when dictation is in progress, since parts of the stenotype tape can be passed out to the typist from time to time.

Miscellaneous Machines

In addition to the above office machines, the following are some other machines and equipment which are used in a modern office.

(i) Time Recording Clocks: These machines are used to record the correct time of the arrival and departure of office and factory employees. The time is printed on cards. Each employee is allotted a recording machine while coming into or going out of the office or factory. Generally speaking, these machines are fitted with a clock to show the time.

(ii) Payroll Machines: These machines, also known as steel paymasters, are used to perform many functions connected with the payment of wages. They can make calculations of wages, count the exact money for each employee (by making up the denominations of notes) and then place the money in each envelope. These machines have not yet been introduced in this country.

(iii) Cheque Writing Machines: Also known, as protect graphs, these machines are used to write the particulars on a cheque, and crossing it. The use of this machine eliminates the possibility of fraud and alteration of the contents of a cheque.

(iv) Cheque Signing Machines: These machines imprint the specimen signature of the drawer on a large number of cheques. The use of this machine provides protection against the forging of a signature.

(v) Numbering Machines: These machines are used to imprint serial numbers on office forms, reports and other papers. They are fitted with a self inking device and change the number automatically after it is passed against a paper. They can be set to print each number once, twice or repeatedly.

(vi) Impression Stamps: Different types of rubber stamps are used in an office to imprint date, number, time or words like Paid, Receive, Cancelled, Registered, Book Post, etc., on incoming or outgoing office papers, etc. Rubber stamps are also used to cross cheque and bills, etc.

(vii) Laminators: It is a machine to protect office documents. It is ideal for laminating engineering drawings, sales literature, legal documents, identity cards, important contracts etc.

QUESTIONS

I. Briefly answer the following questions

1. Define mechanization.
2. What are the advantages of mechanization?
3. Write any 3 objectives of mechanization.
4. Write any 4 factors in selecting machines.
5. What are the classifications of office machine?
6. What id noiseless typewriter?
7. Define duplicator.
8. What is Franking Machines?

9. What is an office computer?
10. What are the components of electronic computers?

II. Answer in detail the following questions

1. Define Mechanization. Explain the advantages and disadvantages of mechanization.
2. Explain the types of office machines.
3. Explain the types of duplicating machines.
4. Explain the different methods of photocopying machines.
5. Explain the various kinds of accounting Machines

	OFFICE MANAGEMENT AND SECRETARIAL PRACTICE - 17CCU602A						
	UNIT III						
		OPTION 1	OPTION 2	OPTION 4	OPTION 5		ANSWER
1	Which type of classification is based on date and time order?	Alphabetical classification.	Numerical classification.	Subject wise classification.	Chronological classification.		Chronological classification.
2	In which method of filing, a spike is fixed in a wooden or a metal base?	Pigeon-hole method.	The spike file.	Card board filing.	Box filing.		The spike file.
3	means a place for purchasing and selling something	Exchange	Stock	Stag	Bear		Exchange
4	In which method of filing, all the letters and documents are passed in the book in choronological order?	Box file.	Bound book.	Metal holders.	Pillar file		Bound book.
5	Horizontal filing is also called as	box filing.	flat filing.	open filing.	pillar filing.		flat filing.
6	Which types of files are available in the form of tray that lie flat horizontally in a cabinet?	Horizontal files.	Vertical files.	Visible files.	Metal files.		Visible files.
7	Which index system is used when small information is required about customers?	Vowel index.	Book index.	Strip index.	Card index.		Strip index.
8	is a machine which process text material on a page when operator strikes keys are arranged on the key boards.	Typewriter.	Photocopier.	Roller copier.	Private.		Typewriter.
9	Standard typewriter which operates through electricity is	portable typewriter.	electronic typewriter.	mini typewriter.	macro typewriter.		electronic typewriter.
10	The OTC Exchange of India is a company incorporated under the Companies Act	1956	1966	1955	1957		1956

11	PBX stands for	Private Book Exchange.	Private Branch Exchange.	Private Block Exchange.	Private Business Exchange.	Private Branch Exchange.
12	is an instrument which reproduces sound at a distance by means of electricity.	Typewriter.	Telephone.	FAX.	Photocopier.	Telephone.
13	Which machine is used for stamping outward mail?	Franking machine.	Adding machine.	Mailing machine.	Accounting machine.	Franking machine.
14	OTCEI stands for	Over The Counter Exchange Of Indi	Over The Country Exchange Of India.	Over The Comparison Exchange Of India.	Over The Company Exchange Of India.	Over The Counter Exchange Of Indi
15	SEBI stands for	Shares Exchange Board of Indi	Stocks Exchange Board of India.	Securities Exchange Board of India.	Speculators Exchange Board of India.	Securities Exchange Board of Indi
16	A Bull speculator is also called as	mandiwal	tejiwala.	tarawaniwalas.	vaniwalas	tejiwal
17	The person who deals in shares, debentures as independent operators are called as	brokers	jobbers	tarawaniwalas	Manidiwalls	jobbers
18	Office is to a business what the mainspring is to watch by	G R Terry.	Lawrence S R Dicksee.	Standing ford.	Mill.	G R Terry.
19	The purpose of an office is to furnish essential services to the	public	management	clerks	creditors	management
20	The office management simply means to	eliminate	withdraw	control	decide	control
21	Filing is an important aspect of	record keeping.	book keeping.	house-keeping.	time keeping.	record keeping.
22	Which is the first procedure for dealing at stock exchange?	Placing an order.	Selection of broker.	Contract note.	Settlement.	Selection of broker.

23	Equity shares were earlier known as	ordinary shares.	deferred shares.	redeemable shares.	irredeemable shares.	ordinary shares.
24	A _____ is an acknowledgement of a debt.	Share.	Debenture.	Equity share.	Preference share.	Debenture.
25	The debentures are given a security on assets are called as _____ debentures	unsecured.	secured.	bearer.	registre	bearer.
26	The preference shares which cannot be converted into equity shares are	cumulative.	non-cumulative.	redeemable	non-convertible.	non-convertible.
27	Fixed capital is also called as	blocked capital.	unblocked capital.	working capital.	non-working capital.	blocked capital.
28	Co-operative societies have _____ management	government	democratic	autocratic	private	democratic
29	Debentures are to be redeemed on the expiry of a certain period.	Redeemable	Irredeemable	Convertible	Non-convertible.	Redeemable
30	The return of shares to the company is known as	surrender of shares.	transmission of shares.	redeemable shares.	irredeemable shares.	transmission of shares.
31	The optimum point is an _____ size of firm	ideal	average	over	extra	ideal
32	A representative firm works under _____ conditions	average	ideal	bad	good	average
33	Which type of shareholders does not have voting rights?	Equity shareholders.	Preference shareholders.	Deferred shareholders.	Ordinary shareholders.	Preference shareholders.
34	Which shareholders are the real owners of the company?	Equity shareholders	Preference shareholders	Deferred shareholders	Convertible preference shareholders	Equity shareholders
35	Unsecured debentures are also called as	mortgaged debentures.	simple debentures.	bearer debentures.	registered debentures.	simple debentures.
36	The first organized stock exchange was set up in the year	1887.	1992	1991	1994	1887.

37	The first stock exchange in the world is	Mumbai stock exchange.	American stock exchange.	London stock exchange.	France stock exchange.	London stock exchange.
38	Which method of filing is useful for those concerns where numbers of letters are small?	Pigeon-hole.	Card board filing.	Spike.	Press copy book metho	Card board filing.
39	Business includes	non-economic activities.	economic activities.	social activities.	production activities.	economic activities.
40	Office is a place where	office work is done.	employees are housed.	records are kept.	control is situate	office work is done.
41	Office layout aims at	providing space to all employees.	optimum utilization of space.	providing larger open space.	providing space.	optimum utilization of space.
42	An open office has the benefit of	privacy.	economy.	efficiency.	inflexibility.	economy.
43	Which method is suitable for large office?	Pigeon-hole system.	Spike filing.	Vertical filing.	Horizontal filing.	Horizontal filing.
44	SEBI was given statutory status on	30.1.1992	1.1.1992	4.3.1992	4.4.1992	30.1.1992
45	means a method of filing while indexing	Classification	Trays	Page Index	Visible Books	Classification
46	Modular furniture	saves costs.	saves time.	saves space.	saves electricity.	saves space.
47	The Dewey Decimal Classification divides human knowledge into	(A) 10 basic categories.	(B) 100 basic categories.	(C) 1000 basic categories.	(D) 10000 basic categories.	(A) 10 basic categories.
48	Call Number of a Book Means	(A) Book Number	(B) Class Number	(C) Both (A) and (B) are true	(D) None of the above	(C) Both (A) and (B) are true
49	Accession Number means	(A) Call Number of a book	(B) Unique Number for a book inside a	(C) Book Number	(D) Class number	(B) Unique Number for a book inside a

			particular library.			particular library.
50	Main use of Shelf list is	(A) Cataloging	(B) Circulation	(C) Stock Verification	(D) Book Selection	(C) Stock Verification
51	Posting the right person at the right place is called _____	(A) Recruitment	(B) Coaching	(C) Deployment	(D) Induction	(A) Recruitment
52	TQM is a system of continuous improvement employing participative management and centered on needs of the _____	(A) Customers	(B) Staff	(C) Organization	(D) Government	(C) Organization
53	Financial support given to libraries are of two types - Recurring and	(A) Ad-hoc	(B) Endowments	(C) Annual	(D) Non-recurring	(B) Endowments
54	Principle of maximum aggregate benefit is concerned with__	(A) Growth of library	(B) Library use	(C) Library service	(D) Library fee	(C) Library service
55 takes items of expenditure for libraries as the working data for allocation of funds.	(A) Method of details	(B) Per capita method	(C) Principle of economy	(D) Library budget	(D) Library budget
56	. A budget which mainly covers items of current revenue and expenditure is called ____.	(A) Programme budget	(B) Welfare economics	(C) Current budgeting	(D) Capital budgeting	(D) Capital budgeting
57	The library budget of a university is passed by the ?	(A) Senate	(B) Executive Council	(C) Academic Council	(D) Research Council	(B) Executive Council
58	In fund accounting, _____ fund can not be used for other purposes.	(A) Recurring	(B) Non-recurring	(C) Restricted	(D) Encumbering	(A) Recurring
59	Scrutiny of financial transactions is called	(A) Budgeting	(B) Programming	(C) Accounting	(D) Auditing	(D) Auditing
60	What is the largest challenge	(A) Employees	(B) Accuracy	(C) Accuracy	(D) Upgrading	(B) Accuracy

	of office automation?	may not know how to use the tools			the technology will require more training	
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UNIT IV

Various Types of Bank Accounts

1. Saving Account
2. Regular Savings
3. Current Account
4. Recurring Deposit Account
5. Fixed Deposit Account
6. DEMAT Account
7. NRI Accounts

1) SAVINGS ACCOUNT:-

a) Basic Savings Bank Deposit Accounts (BSBDA)

- o This account will be considered as normal banking service.
- o For this account, maintenance of minimum balance is not required.
- o ATM card/ ATM cum Debit card, Rupay card will be given for the account holders.
- o There are going to be no limit on the number of deposits that can be made in a month but, account holders will be allowed most of 4 withdrawals in a month, which includes ATM withdrawals also.
- o The above facilities will be given without any charge. There will be no charge levied for non-operation/ activation of in-operative basic saving bank deposit account.
- o For this account, overdraft facility will be provided up to Rs. 5000/-.

b) Basic Saving bank Deposit Accounts Small scheme (BSBDS)

- o These are accounts with relaxed KYC, with a minimum document requirement of self-attested address proof & photograph.
- o Total credit should not exceed 1Lakh rupees in a year.
- o Maximum balance should not exceed Rs. 50,000/- at any time.
- o Cash withdrawals & transfers must not exceed Rs.10, 000/- in a month.
- o Remittance from foreign account cannot be credited to this account without completing normal KYC formalities.
- o Prepared by : Deepu Nair , Assistant Professor, Department of Commerce , KAHE
- o This account can be opened only at Core Banking Solution linked branches of banks or at such branches, where it is possible to manually monitor the fulfillments of the conditions.

REGULAR SAVINGS BANK ACCOUNT

- o Any resident individual- single accounts, two or more individuals in joint accounts, Associations, clubs etc., are eligible for this account.
- o Modest credit option available to the depositor.
- o Two free cheque books will be issued per year.
- o Internet banking facility will be provided without any charge.
- o Balance enquiry, NEFT, Bill payment, Mobile recharge etc., are provided through mobile phones.
- o Students can open this account with zero balance by providing the required documents.

2) CURRENT ACCOUNT

- Any resident individual- single accounts, two or more individuals in joint accounts, Associations, Limited companies, Religious Institutions, Educational Institutions, Charitable Institutions, clubs etc., are eligible for this account.
- Payments can be done unlimited number of times.
- Funds can be remitted from any part of the country to the corresponding account.
- Overdraft facility will be available.
- Internet banking facility is available.

3) RECURRING DEPOSIT ACCOUNT

CUMULATIVE DEPOSIT SCHEME

- Any resident individual- single accounts, two or more individuals in joint accounts, Associations, clubs, Institutions/Agencies specifically permitted by the RBI etc., are eligible to open this account in single/joint names.
- Periodic/Monthly installments can be for any amount starting from as low as Rs.50/- onwards.
- Account can be opened for any period ranging from 6 months to 120 months, in multiple of 1 month.
- The amount selected for installment at the start of the scheme will be payable every month.
- The number of installments once fixed, cannot be altered.
- Approved rate of interest is compounded every quarter.
- The amount after maturity will be paid to customers one month after the deposit of the last installment.
- Pass book will be given to the depositor.
- TDS will be applicable on the interest, as per the latest changes in the Income Tax Act on cumulative deposits also.

4) FIXED DEPOSIT ACCOUNT

a) SHORT DEPOSIT RECEIPT

- Banks accept deposits from customers varying from 7 days to a maximum of 10 years.
- The period of 7 days & above but not exceeding 179 days deposits is classified as 'Short Deposits'.
- The minimum amount that can be deposited under this scheme is Rs. 5 lakh for a period of 7-14 days.

b) FIXED DEPOSIT RECEIPT

- Any resident individual- single accounts, two or more individuals in joint accounts, Associations, Minors, societies, clubs etc., are eligible for this account.
- The minimum FDR in metro & Urban branches is Rs. 10,000/- & in rural & semi urban & for Senior citizens is Rs.5000/- .
- For the subsidy kept under the government sponsored schemes, Margin money, earnest money & court attached/ordered deposits, minimum amount criteria will not be applicable.
- Depositors may ask for repayment of their deposits before maturity. Repayment of amount before maturity is allowable.
- Interest rate differs from bank to bank depending upon the tenure of the deposits & as when the bank changes the rate.
- Additional interest of 0.50% is offered for senior citizens on deposits placed for a year & above.

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5) DEMAT ACCOUNT

- Used to conduct stress-free transactions on the shares.
- An individual, Non-Resident Indian, Foreign Institutional Investor, Foreign National, Corporate, Trusts, Clearing Houses, Financial Institution, Clearing Member, Mutual Funds, Banks and Other Depository Account.
- For opening this account, an individual has to fill a form, submit a photo of the applicant along with a photocopy of Voter ID/ Passport/ Aadhar card/ Driving License & Demat account number will be provided to the applicant immediately after the completion of processing of the application.

Pass Book and Cheque Book

Passbook or Bank Statement is a copy of the account of the customer as it appears in the bank's books. When a customer deposits money and cheques into his bank account or withdraws money, he records these transactions in the bank column of his cashbook immediately.

Correspondingly, the bank records them in the customer's account maintained in its books. Then they are copied in a passbook and given to the customer. With the computerization of banking operations, bank statements (in lieu of passbook) are issued to the customers periodically.

Thus passbook is a record of the banking transactions of a customer with a bank. All entries made by a customer in his cashbook (bank column) must be entered by the bank in the passbook.

Hence, the balances as per bank column of the cashbook must agree with the balance as per passbook. Of course the balances will be equal and opposite in nature. For example, if the cash book shows a debit balance of Rs.5000, then the passbook must show a credit balance of Rs.5000 and vice versa. But in most cases, these two balances may disagree on account of various reasons.

Format of a Bank Passbook or Bank Statement:

Name of the bank _____

Address of the bank _____

Account No. _____

Customer Name: _____

Address of the customer: _____

Date	Particulars	Cheque No.	Withdrawals (debits)	Deposits (credits)	Balance	Initials

Causes for Disagreement:

The major cause for the disagreement is that certain items have been entered in one book only (i.e., cash book or pass book only). In other words certain debits or credits made in one book (say in cashbook) are omitted to be entered in the other book (say in passbook) and vice versa.

Such items may be listed as follows:

1. Cheques sent for collection or deposited into the bank but not yet collected. When a customer deposits cheques into bank, he makes entries (debit bank account) immediately in his cashbook.

But the bank will credit the customer account in the passbook only when the cheques are realized. In that case the balances will disagree and cashbook balance will be more than the passbook balance.

2. Cheques issued by the customer but not presented to the bank for payment. When a customer issues cheques to his suppliers/creditors, he will enter the transaction (credit bank account) immediately in his cashbook.

ADVERTISEMENTS:

But the banker will debit customer account only when the suppliers/creditors present the cheques for payment. Due to this gap, the two balances will disagree and cashbook balance will be more than the passbook balance.

3. Bank charges and interest on overdraft are first debited in the passbook and recorded in the cashbook afterwards. This will cause for the disagreement and cashbook balance will be more than the passbook balance.

4. Interest on bank credit balance and interest on investment, dividends, etc., and bills collected by the bank on behalf of the customer are first credited in the passbook and recorded in the cashbook later on.

This makes the two balances to disagree and cashbook balance will be less than the passbook balance.

5. Items like direct payments made by the bank as per standing instructions of the customer and dishonor of a bill discounted with the bank, etc., are first debited in the passbook and recorded in the cashbook later on.

This will make the two balances to disagree and cashbook balance will be more than the passbook balance.

6. Commitment of errors such as errors of omission or commission or in casting, carry forward, balancing, etc either in the passbook or cashbook or in both will cause for the disagreement in these two balances.

Cheque Book

Cheque book, on the other hand, is a book, which contains several leaves which enables you to draw your own money from the bank, where you have an account or you can issue cheques to third party like, say, for example, LIC of India, Income tax authorities, or your friends, or making utilities bills etc. A pass book will help you to know the latest balance available in your account, based on which you can draw the amount through your cheque book or make payment to a third party.

A cheque book consists of number of cheques in lots of 20, 50 and 100 depending upon use by the account holder. Through cheque one can withdraw or remit money to another, but passbook contains records of all types of transactions such as debits and credits including withdrawal by cheque.

Cheque book and pass book both are different documents of an account holder.

OFFICE MANAGEMENT AND SECRETARIAL PRACTICE - 17CCU602A							
UNIT IV							
		OPTION 1	OPTION 2	OPTION 3	OPTION 4		ANSWER
1	What are the two parts of the annual report of the library	Primary and Secondary	Analytical and Systematic	Upper and Lower	Descriptive and Statistical		Descriptive and Statistical
2	How many columns are there in the accession register?	10	12	14	16		14
3	PPBS relates to	Book selection	Journal selection	Budgeting	Library records		Budgeting
4	Zero based budget is concerned with	Present	Past	Future	Remote future		Future
5	Another term of PERT is	CPM	POSDCORB	MBO	HRM		CPM
6	POSDCORB is related to	Library cataloguing	Library reference service	Library administration	Library automation		Library administration
7	What are the standard size of the Accession Register is	16" * 12"	16" * 13"	16" * 11"	16" * 18"		16" * 13"
8	A good library building is an outcome of librarian and.	Registrar	Building Corporation	Finance Officer	Architect		Architect
9	_____ are the storage areas for the various types of documents kept in a library.	Tasks .	. Racks	Stacks	Desks		Stacks
10	Study carrels are exclusive areas meant for	Students	Public	Women	Researchers		Researchers
11	Library catalogue cards are filed in specially designed drawers called	Charging tray	Catalogue cabinet	Display rack .	Filling equipment		Catalogue cabinet
12	Information Gatekeepers come under _____ sources.	Documentary	Human	Institutional	Neo-conventional		Documentary
13	_____ is a legal document and can be used as a source of industrial information.	Report	Law Review	Patent	Specification		Specification
14	In Encyclopaedia Britianica, _____ acts as an index to	Bibliography	Introduction Part	Propaedia	Micropaedia		Micropaedia

	macropaedia.						
1 5	One of the book selection principles states that “the best reading for the largest number at theCost.”	Maximum	Medium	Least	Zero		Least
1 6	Payments for the books purchased can be made only after	Accessioning	Classification	Cataloguing	Arrangement in the shelf		Accessioning
1 7	The standard size of an accession register is ?	15” x 13”	16 x 13”	12” x 5”	5” x 3”		16 x 13”
1 8	Technical section performs mainly two functions namely classification and	Accessioning	Bills payment	Cataloguing	Shelving		Cataloguing
1 9	Getting books back from the users and releasing the borrower’s ticket is known as	Charging	Holding	Reserving	Discharging		Discharging
2 0	While entering the library, the personal belongings of a reader is kept in _____	Cloak Room	Property Counter	Gate counter	Store room		Property Counter
2 1	Books misplaced on the shelves by readers are restored. This work is referred to as.	Shelving	Stock verification	Shelf rectification	Shifting		Shelf rectification
2 2	Outdated and seldom used books are withdrawn from the library is known as _____.	Shelving	Weeding	Circulating	Guiding		Weeding
2 3	The objective of library binding is _____ of the library materials.	Proper organisation	Accessibility.	Durability	Humidity control		Durability
2 4	All part and pages of a volume are correctly sequenced in the first stage of binding process known as?	Sewing	Guard	Pulling	Collation		Collation
2 5	Sheets before and after the text of a book are called _____.	End papers	Attach cover	Head bands	Gilding		End papers
2 6	Leather being used as one of the binding materials i.e., _____ is the strongest leather.	Roan	Imitation	Pig skin	Sheep skin		Sheep skin
2 7	. _____ has prescribed certain standards for library binding.	ILA	ALA	BLA	NBT		ALA

28	A skillful method of providing means mechanism and structural elements to streamline organizational work is known as _____	Strategic planning	Role analysis	Work culture	Autonomous planning		Strategic planning
29	Calcutta Public Library was established during	15th Century	16th Century	19th Century	20th Century.		19th Century
30	_____ budgeting does not take into account what happened in the past but emphasizes on current activities.	Formula	Performance	Programme	Zero-base		Performance
31	The library budget of a university is passed by the?	Senate	Executive Council	Academic Council	Research Council		Executive Council
32	In fund accounting, _____ fund cannot be used for other purposes.	Recurring	Non-recurring	Restricted	Encumbering		Recurring
33	Scrutiny of financial transactions is called	Budgeting	Programming	Accounting	Auditing		Auditing
34	_____ is one of the records of circulation section.	Accession Register	Day book	Catalogue Card	AACR-2 (R)		Accession Register
35	The marketing concepts in Library Service include	analysis, planning, implementation and control	advertising, planning, analysis and control	distribution, control, analysis, implementation	indexing, planning, control and implementation.		advertising, planning, analysis and control
36	There are a few basic factors which may be applied in winning the hearts of the readers. They are	Psychological factor, environmental factor, social factor	Self factor, psychological factor, service factor	Service factor, philosophical factor, self factor	Technological factor, service factor, self factor.		(DI Technological factor, service factor, self factor.
37	Doing again is also called as _____	doing once	revising	not again	incorrect		revising
38	The written word is still a _____ channel of communication	minor	negligible	major	small		major
39	At the _____ of the notice, kind of meeting should be mentioned	top	bottom	corner	middle		top
40	Next to the title in the notice name and	the company	the secretary	board	the branch		the company

0	registered address of _____ should be entered						
4 1	The day, date, time and place of meeting with clear _____ where the meeting is to held is to be declared in the notice.	notice	message	address	report		address
4 2	If special business to be transacted at the meeting, then he notice should also contain the _____	explanatory statement	minutes	report	agenda		explanatory statement
4 3	Proxy Form should be enclosed with _____	the minutes	the notice	the document	the report		the notice
4 4	Creating an effective agenda is one of the most important elements for a _____ meeting	productive	normal	ordinary	unhelpful		productive
4 5	_____ an outline for the meeting	Agenda	Minutes	Motion	report		Agenda
4 6	Agenda can be used as a _____ to ensure that all information is covered	database	checklist	proof	security		checklist
4 7	AOB stands for _____	An Order book	Any other business	Any order Book	Any other Board		Any other business
4 8	The _____ are usually written from the notes taken by the chairman and secretary during the course of the meeting	Minutes	motion	agenda	resolution		Minutes
4 9	The minutes must be recorded in _____ serially numbered	lines	paper	paragraphs	note		paragraphs
5 0	Each paragraph in minutes should preferably given by a _____	Para	title	space	heading		heading

5 1	All the resolutions passed at the meeting should be in the same order at the _____	notice	agenda	declaration	resolution			agenda
5 2	If certain matters could not be discussed in the meeting, because of lack of time, that fact must also be stated in the _____	agenda	notice	Minutes	report			Minutes
5 3	An agenda is a list of meeting activities in the order in which they are to be taken up, by _____ with the call to order	end	middle	last	beginning			beginning
5 4	Minutes are the _____ record of an organization	formal	usual	official	normal			official
5 5	Written minutes are distributed to board members _____ each meeting for member's review	after	before	end of	in-between			before
5 6	Minutes for the previous meeting should be reviewed right away in the _____ meeting	next	same	current	board			next
5 7	At every business meeting the secretary of the board or any other appointed person usually takes _____ during meetings	minutes	notes	records	drafts			minutes
5 8	The body of the minutes should include, with each motion being a separate _____	note	book	paragraph	line			paragraph
5 9	Which of the following is called a 'banker's cheque' ?	Demand draft	Debit card	Pay order	Banker's draft			Banker's draft
6	What is a Cross cheque ?	which can be	which can be	which can be	which can be encashed			which can be

0		encashed only by the drawee	encashed only through a bank	encashed only at the State Bank of India	only after it has been transferred to another person	encashed only through a bank
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UNIT – V

Company Secretary

every company requires Company Secretary who can help in statutory and legal filing requirements. Contrary to the name, it is not a mere secretarial position, there are various responsibilities which a CS has to follow. He is the legal expert of the company and has to fulfill the responsibility to be a compliance officer of the company. In short he is the personnel adopted by the Board of Directors who has to handle the legal and the statutory requirements

Roles of and Responsibilities a Company Secretary

Maintain a list of directors' names

File documents with Registrar of Companies

Ensure documentary requirements as per Companies Act

Organize, prepare agendas, hold general meetings and record minutes

Manage shareholder meetings

Statutory Books and Registrars

Be a linking factor for directors, shareholders and regulatory authorities

Filing corporate returns

Ensure proper compliance and execution of contracts and agreements

Specialized services as required by the directors

Definition of Company Secretary

As per Section 2 sub-section 24 of Companies Act, 2013

Company Secretary or Secretary means a Company Secretary as defined in clause (c) of sub-section (1) of section 2 of the Company Secretaries Act, 1980 who is appointed by a company to perform the functions of a Company Secretary under this Act

As Per Company Secretaries Act, 1980

“Company Secretary” means a person who is a member of the Institute of Company Secretaries of India

The requirement to appoint a Company Secretary in Private Limited Company is governed by the Provision of Rule 8A and in Public / Listed Company by the provisions of Rule 8 of The Companies “Appointment and Remuneration of Managerial Personnel” Chapter XIII under Section 203 of the Companies Act, 2013

Following Companies need to appoint whole time company secretary (mandatory)

All Listed Companies (Rule 8 Companies Appointment & Remuneration of Managerial Personnel Rules, 2014)

Every Public Company having paid-up share capital of Rs. 10 Cr. or More (Rule 8)

Every other Company having paid-up share capital of Rs. 5 Cr. or More (Rule 8A)

Appointment of Company Secretary

Provisions in Companies Act 1956

As per the Companies Act 1956, every company having a paid up capital of 5 crore or more must have a whole time company secretary and if the company is listed, it must also have a company secretary who acts as a compliance officer as per the provision of listing agreement of stock exchange (s) which are monitored by the Security Exchange Board of India.

Duties of the Company Secretary

The duties of a company secretary are classified under the following heads:

1. Statutory Duties:

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A. Duties towards the company: The Companies Act, 2013 imposes a number of duties on the secretary such as:

- (a) To make a statutory declaration for obtaining certificate of commencement of business;
- (b) To sign annual report; and
- (c) To sign every balance sheet and every profit and loss account in case of non-banking companies.

B. Duties to directors: The duties of a company secretary in relation to directors are:

- (a) To work according to instructions of directors;
- (b) To maintain all important correspondence, files and records for reference of directors; and
- (c) To draft directors report.

C. Duties to whole-time managerial authority: If a company is managed by managing directors or a manager, the main duties of a company secretary in relation to such managerial personnel are:

- (a) To organize and control head office of the company efficiently;
- (b) To submit all statutory returns in time; and
- (c) To draft contracts with vendors, if any, and also with underwriters and share brokers.

2. General Duties:

A. Duties towards office and staff: It is a company secretary's duty to see that various departments are properly organized, supervised, co-ordinated and adequately staffed. He must act as a friend, philosopher and guide to staff.

B. Other duties: The miscellaneous duties of a company secretary are:

- (a) To represent the company on social functions;
- (b) To act very cautiously and in the best interest of the company, in case of any emergency;
- (c) To act with authority and maintain secrecy of confidential matters; and
- (d) To perform his duties honestly and diligently.

Personal Assistant duties

A Personal Secretary works with senior staff to provide one-to-one support. Typically PAs support senior managers by offering administrative help such as monitoring a manager's email, drafting communications on their behalf, planning and organising meetings and their travel. Personal Assistant needs to have a deep understanding of the company and know who

the key personnel are, as they are representing a senior member of staff. For this same reason, it is important a Personal Assistant has great interpersonal skills, is well-presented and professional.

Ultimately, the role of a Personal Assistant can be extremely broad and vary on a day-to-day basis. Some Personal Assistant duties should include:

- reading, monitoring and responding to your boss's email,
- answering calls and liaising with clients competently,
- preliminary drafting of correspondence on your boss's behalf,
- delegating work in your boss's absence,
- diary management,
- planning and organising meetings,
- organising complex travel
- taking action points and writing minutes,
- preparing papers for meetings,
- taking dictation,
- planning and organising events,
- conducting research,
- preparing presentations,
- managing and reviewing filing and office systems,
- typing documents,
- sourcing and ordering stationery and office equipment,
- managing ad hoc projects

Responsibilities may include but are not limited to:

- devising and maintaining office systems, including data management and filing.

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- arranging travel, visas and accommodation and, occasionally, travelling with the manager to take notes or dictation at meetings or to provide general assistance during presentations;
- screening phone calls, inquiries and requests, and handling them when appropriate; meeting and greeting visitors at all levels of seniority;
- organizing and maintaining diaries and making appointments;
- dealing with incoming email, faxes and post, often corresponding on behalf of the manager; taking dictation and minutes;
- carrying out background research and presenting findings;
- producing documents, briefing papers, reports and presentations;
- organizing and attending meetings and ensuring the manager is well prepared for meetings; liaising with clients, suppliers and other staff.

Qualifications of the Personal Secretary:

A personal secretary should have the following qualifications:

1. He/She must have sound education. He must have post-graduate qualifications in Economics or Commerce, preferably with a degree in Law.
2. He should have a high standard of general knowledge and be well-informed on current affairs.
3. He should have a thorough knowledge of trade or profession.
4. He must have good knowledge of English—both written and spoken. He has to make correspondence, write reports, minutes etc. in English.
5. He must have good communication skills. The secretary has to explain a lot to other persons.
6. He must have a dynamic personality and pleasing behaviour.
7. He should have a sharp memory and must be hard-working.
8. He should have knowledge of office organisation, procedures and rules.
9. He should have knowledge of shorthand and typing, fax and computers, e-mails and intranet as also internet.

Modern Technology in office Management

With developments in technology and an ever-evolving workforce, office management is constantly changing. Here are seven trends currently shaping office operations. The cloud
More and more businesses are adopting cloud computing, and this trend is expected to keep growing. The cloud can improve and streamline all sorts of processes—from collaboration and project management to data organization and information backup. And, of course, don't forget about cloud-based visitor management. iPad visitor management system software Here are 7 tips for moving your business to the cloud. Automating office tasks

Technology enables offices to automate like never before. As we noted in this previous post, many everyday tasks can be automated to save time, cut costs, and boost efficiency. If you're spending large chunks of your day on repetitive tasks and low-value work, it's time to automate.

Accommodating a mobile workforce

Remote working on the rise. As a result, companies are seeking ways to allow their workers more flexibility in when, where, and how they do their jobs. Mobile devices, collaborative software, and other technology help offices stay flexible and lean. Office management software

Office management software allows you to customize and manage “front-office” and “back-office” tasks. Whether you're looking for support with CRM, social media, human resources, or accounting, office management software can help. Check out our post on how to choose office technology that supports your business strategy. Computer-aided facility management (CAFM)

To use their office spaces most efficiently, some companies turn to CAFM software. This software helps businesses manage space allocation, maximize the use of facilities, and improve facilities planning and maintenance. If this sounds like something you would benefit from, check out this comparison of CAFM software from Software Advice.

Activity-based working

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Activity-based working has been a hot trend in recent years. In traditional office set-ups, workers are assigned specific desks or workspaces. But in an activity-based office, employees choose from a variety of workspaces that are tailored for specific tasks, like collaboration, research, or socializing. While activity-based working may not be for everyone, for many people it can improve efficiency and increase worker satisfaction.

Bring your own device (BYOD)

BYOD policies are on the rise. This is because companies are becoming less afraid of employees using their own devices at work and instead starting to embrace the flexibility it allows. BYOD has both benefits and risks, but smart companies realize that this is the way of the future, especially as freelance and remote work become the norm. Modern office management is all about increasing efficiency so employees can get more done. Download our ebook to learn how to conquer today's biggest productivity killers.

Office Communication:

To commune means to make conversation. This is an ordinary function in our daily life. This is necessary to make contacts, to explain things, to exchange ideas, to convey information, to give instruction, and to remove misunderstandings. Communication is indispensable for existence. Communication, however, has a more specific meaning in management science.

According to Prof. Allen, "It is a bridge of meaning. It consists of a systematic and continuous telling, listening, and understanding." It is clear that communication is complete when the message sent by the communicator is understood by the communicatee. It is a bridge of meaning, i.e., the meaning of a message is understood in the same sense by the communicator and the communicatee.

Importance of Office Communication:

Its importance is great and is growing. The success of an organisation depends upon how extensively and intensively communication is being carried out by it. It is described as a tool of management. It is the last word in management. Whenever more than one person meet together, there is communication between them.

In an office people meet and work together. Therefore, there must be communication among them. The primary function of an office is communicating, internally and externally. An organisation needs an office because all communication will go out from, and come into, it. Largest number of office machines are meant for communication.

Types of Office Communication:

Broadly speaking, communication can be internal and external. Internal communication takes place among the people working inside, the office. It also means communication between employer and employees or among the members of an association or between a company and its shareholders.

External communication is with the outsiders, like the customers, the suppliers, the debtors, the creditors, the other organisations, the Government and its different agencies, and finally the public at large. The secretary has a major duty to supervise and control both the types of communication.

According to methods, communication can be sub-divided into three parts—oral, written (correspondence), and gestural.

Internal Communication:

Through communication employer-employee relationship as well as superior-subordinate relationship can be maintained. Decisions taken at the top management level flows downward at the execution and operating levels through the chain of superior-subordinate relationships inside an organisation structure.

Unless the objectives and policies of the organisation are communicated to the staff, neither they can identify themselves with the organisation nor can they do their respective functions. Whenever any change is to be introduced in the organisation, prior communication has to be made to the members of the staff so that they get mentally prepared. Otherwise there may be a shock. The employees also must be able to communicate their grievances, complaints or difficulties to the employer.

By this, better employer-employee relationship is established and misunderstandings, if any, are removed. Communication is described as a two-way traffic. Internal communication can

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be oral, written, visual, and gestural. Holding of meetings, conferences etc., having joint consultation or group discussion, etc., sending of reports, copies of minutes, etc. are some of the effective methods of internal communication.

There are different machines or labour saving devices used for internal communication:

- (a) Oral—Inter-com telephone system, Dictaphone, pneumatic tubes, etc.
- (b) Written— Typewriter, duplicating machines, etc.
- (c) Visual—Photography, micro-film, television (for remote control), etc.
- (d) Signalling—Calling bells, buzzers, red lights, etc.

External Communication:

External communication is essential for carrying out the activities and for the development of any organisation, trading or non-trading. This is necessary for widening and improving public relations and also for enhancing goodwill and prestige. Different methods of advertisement are meant for communication. Publication of reports, journals, etc. is also another technique. External communication can be oral, written, and visual. Mechanical Devices:

There are different machines or labour- saving devices used for external communication:

- (a) Oral—Telephone with trunk system, cables, etc.
- (b) Written—Typewriter, duplicating machines, tele-printer (the telex system), etc.
- (c) Visual—Photography, television, etc.

Necessity of Office communication

Effective Communication is significant for managers in the organizations so as to perform the basic functions of management, i.e., Planning, Organizing, Leading and Controlling. Communication helps managers to perform their jobs and responsibilities. Communication serves as a foundation for planning. All the essential information must be communicated to the managers who in-turn must communicate the plans so as to implement them. Organizing also requires effective communication with others about their job task. Similarly leaders as managers must communicate effectively with their subordinates so as to achieve the team goals. Controlling is not possible without written and oral communication.

Managers devote a great part of their time in communication. They generally devote approximately 6 hours per day in communicating. They spend great time on face to face or telephonic communication with their superiors, subordinates, colleagues, customers or suppliers. Managers also use Written Communication in form of letters, reports or memos wherever oral communication is not feasible.

Thus, we can say that “effective communication is a building block of successful organizations”. In other words, communication acts as organizational blood.

The importance of communication in an organization can be summarized as follows:

1. Communication promotes motivation by informing and clarifying the employees about the task to be done, the manner they are performing the task, and how to improve their performance if it is not up to the mark.
2. Communication is a source of information to the organizational members for decision-making process as it helps identifying and assessing alternative course of actions.
3. Communication also plays a crucial role in altering individual's attitudes, i.e., a well informed individual will have better attitude than a less-informed individual. Organizational magazines, journals, meetings and various other forms of oral and written communication help in moulding employee's attitudes.
4. Communication also helps in socializing. In today's life the only presence of another individual fosters communication. It is also said that one cannot survive without communication.
5. As discussed earlier, communication also assists in controlling process. It helps controlling organizational member's behaviour in various ways. There are various levels of hierarchy and certain principles and guidelines that employees must follow in an organization. They must comply with organizational policies, perform their job role efficiently and communicate any work problem and grievance to their superiors. Thus, communication helps in controlling function of management.

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An effective and efficient communication system requires managerial proficiency in delivering and receiving messages. A manager must discover various barriers to communication, analyze the reasons for their occurrence and take preventive steps to avoid those barriers. Thus, the primary responsibility of a manager is to develop and maintain an effective communication system in the organization.

Agenda

An agenda is a list of meeting activities in the order in which they are to be taken up, beginning with the call to order and ending with adjournment. It usually includes one or more specific items of business to be acted upon. It may, but is not required to, include specific times for one or more activities. An agenda may also be called a docket, schedule, or calendar. It may also contain a listing of an order of business.

An agenda lists the items of business to be taken up during a meeting or session. It may also be called a "calendar". A meeting agenda may be headed with the date, time and location of the meeting, followed by a series of points outlining the order in which the business is to be conducted. Steps on any agenda can include any type of schedule or order the group wants to follow. Agendas may take different forms depending on the specific purpose of the group and may include any number of the items.

In business meetings of a deliberative assembly, the items on the agenda are also known as the orders of the day. Optimally, the agenda is distributed to a meeting's participants prior to the meeting, so that they will be aware of the subjects to be discussed, and are able to prepare for the meeting accordingly.

In a workshop, the sequence of agenda items is important, as later agenda steps may be dependent upon information derived from or completion of earlier steps in the agenda. Frequently in standard meetings, agenda items may be "time boxed" or fixed so as not to exceed a predetermined amount of time. In workshops, time boxing may not be effective because completion of each agenda step may be critical to beginning the next step.

In parliamentary procedure, an agenda is not binding upon an assembly unless its own rules make it so, or unless it has been adopted as the agenda for the meeting by majority vote at the start of the meeting. Otherwise, it is merely for the guidance of the chair.

If an agenda is binding upon an assembly, and a specific time is listed for an item, that item cannot be taken up before that time, and must be taken up when that time arrives even if other business is pending. If it is desired to do otherwise, the rules can be suspended for that purpose.

Minutes Of Meeting

Also known as **protocol** or **note**, minutes are the live written record of a meeting. They include the list of attendees, issues raised, related responses, and final decisions taken to address the issues. Their purpose is to record what actions have been assigned to whom, along with the achievements and the deadlines.

Format of Minutes of Meeting

A minutes of meeting normally includes the following elements –

Name of the company – to the top-left of the page.

Date – to the top-right of the page.

Topic – after two return keys; Center-aligned.

Attendees – Name and designation (2 columns of a table).

Absentees – name, roles, reasons for absenteeism. (3 columns)

Agenda at hand – topic to be discussed.

Issues raised – along with the names of the speakers.

Suggestions – made along with the names of the speakers.

Decision – the outcome of the meeting.

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Task List – task allotted and the respective allottee.

Future Meetings – the date and topic of the next meeting. Fax Messages

Today, fax is mostly used for transmitting documents with sensitive content (e.g. medical records, agreements, credit card authorization forms, and similar), as it is perceived as one of the safest ways to transmit documents.

Having a confirmation of a successfully sent fax even counts as a legally valid proof that you have sent a particular document to someone in some countries (while sending an e-mail does not). Due to these reasons, fax is still widely used in many industries that deal largely with sensitive documents (e.g. law, healthcare, insurance). However, other industries are not exempt either. Sending personal documents by fax, such as proof of residence or utility bills, is still often required for opening various types of accounts (online banking accounts, merchant accounts at an online store, etc.).

Scanner

A scanner is a device that copies a picture in digital form. After capturing the image, the data is transferred to the computer.

People use scanners to store their hand held pictures in their computer, and one might scan a document for business, school, etc.

The two main types of scanners are flatbed and portable scanners.

A flatbed scanner is the most common type of scanner, and it is designed to scan flat objects.

A portable scanner is designed for travel purposes.

A sheet fed scanner is much like the flatbed scanner, only this may now be immobile and be used in stores to scan items on shelves.

Optical scanners capture the image of a usually flat object and transfer it to a computer, much like flatbed scanners. In order to produce a better quality image, as most people strive for in their printing, you need a higher resolution scanner.

The resolution of a scanner is measured in dots per 12-inches, which makes sense because the more dots you have, the more color that shows up, producing higher quality scans.

Along with the resolution of a scanner comes the quality, which can be edited and improved once the image is scanned. If the user wants an extremely detailed scan, the drum scanner is a great tool to make this possible.

It uses a photomultiplier tube to scan on a glass cylinder and send light rays in three beams, making light and color change and producing greatly detailed images.

There are even apps on our phone that we can personally scan documents to have on-the-go. The problem with this, however, is privacy issues and the crisis of having your phone or any other device stolen which has scanned any personal information.

While scanners are a tremendous help especially in businesses, it is important users be aware of the risks and use with caution.

Although digital cameras are considered standard today, many individuals still have negatives from their days of using a film camera.

This traditional film can easily be digitized using a specialized film scanner. Increasing the resolution will allow for higher quality reproductions of the images.

As the Recipient

Proper use of email as business communication isn't relegated to just the sender. When checking your business email, do your part to communicate effectively. Don't leave the sender hanging; even if you can't write out a lengthy reply to an email, at least jot a note that lets the sender know you've received it and you plan to respond soon.

Maintenance of work diary

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Many historical figures kept work diaries or journals. Ben Franklin, John Adams, Andy Warhol, and countless others have recorded the events of their day in some form. While these historic diaries are incredibly fascinating for us to read today, the benefit they gave to the writers was probably far greater.

Richard Branson has written bestsellers based largely off of his years of recording his daytime thoughts and working experiences into journals. Reading Branson's thoughts motivated me to keep a loose log of work and life experiences as well. The ritual has helped me immensely, probably more than any other work or time management "hack."

My process is pretty simple: At the end of each day I'll recount what worked, what didn't, and some other random things that happened during the day. There isn't a lot of structure, just merely stream of thought that lasts about fifteen minutes. Sometimes I'll vent in wordy prose, other times I'll just make a quick list. I've found that it's not so much what or how I write, but rather that I do it. The results have been profound for me. I'd recommend this practice to anyone. Here's why:

1. The release

If anything, it feels good to unwind and recount the bits of the day. There's something about the finality in writing something down on paper that makes it more real, and makes the memories stronger. I doubt I'd be able to remember half of what I did throughout the day if I didn't recount them. It also helps with answering that recurring question of "Where did the day go?!"

2. An honest overview

If you're like me, you keep lists of stuff that needs to be done throughout the day. I've had days where the morning started with 15 things on the list, and ended with 13 left undone. Ouch. Yet being able to recall the day allows me to see some of the other things I did get done that weren't on the list.

3. See the wins

We often forget the things that we got done during the day for lots of reasons. We're taught at an early age that what we do isn't as important as what we didn't do. After all, what we don't get done often impacts us more in work and other social settings. This causes us to automatically shove the stuff we did accomplish into the back of our minds, and fret about the undone. However, focusing on what we have done—the wins—in our day rejuvenates. Going to bed looking at what was accomplished can be a massive motivator to help start the next day, and can keep us from closing the day on a sour note.

4. Minimize your mistakes

One definition of insanity is repeating the same process over and over again, while expecting a different outcome. Similarly, it's easy to plow through each work day like the last, without giving a second thought to the events of the day. This is especially true for our bad days. On our worst days, we simply want to unwind and not have to relive the nightmare that was the previous working day. But it turns out the worst parts of our days are important to remember as well (even though it stings). Reverse engineering what went wrong is helpful to ensure it doesn't happen again, and work journals are perfect for this.

5. A new perspective on your day

The most helpful part of this exercise for me is getting perspective on what my days end up looking like. After a particularly bad day last month I reflected, stiff drink in hand, on all the events of the day. This helped me to see that my day wasn't as bad as I had remembered it. In fact, it was a really decent day, minus a couple setbacks towards the end. In my mind I had made these setbacks out to be more important than they were. The day wasn't a total loss after all! Perspective is everything.

	OFFICE MANAGEMENT AND SECRETARIAL PRACTICE - 17CCU602A						
	UNIT V						
		OPTION 1	OPTION 2	OPTION 3	OPTION 4		ANSWER
1	Secretary is one of _____ officers of the company	the principal	Chief	the Primary	the Major		the principal
2	The word "Secretary" is derived from the Latin word _____	Secretarius	Secretais	Secret	Secretarum		Secretarius
3	The word secretary means _____	personal officer	secret officer	executive officer	Confidential Officer.		Confidential Officer.
4	A _____ is usually appointed by an important person such as a minister in the government, professionals like doctors, lawyers, etc	Private Secretary	Association Secretary	Secretary of Co-operative Society	Official Secretary		private secretary
5	Generally, full-time secretaries are appointed in _____	Co-operative Society	Government Department	Trade union	private secretary		cooperative society
6	Each department of the government is under the control of a _____	minister	secretary	governor	collector		secretary
7	The secretary of a company _____ the management in the day-to-day work of Company Law and mercantile law and of accounts, etc.,	assist	help	guides	advise		guides
8	In addition to the performance of the routine office work, if he also acts as the Chief Executive Officer of the company, he becomes an _____	Routine Secretary	whole time secretary	executive secretary	part time secretary		executive secretary
9	A copy of the compliance certificate should be attached with _____, where the company does not have a whole-time Company Secretary	Directors' Report.	Auditors Report	Statutory report	annual report		Directors' Report.
10	The first secretary is often referred to as _____ Secretary	routine	executive	Protem	whole time		Protem
11	In the eyes of law, the secretary is a mere _____ of the company	servant	agent	dealer	broker		servant
12	What is the time limit for conducting statutory meeting? - _____	1 Month	2 Months	3 Months	6 Months		6 Months
1	Appointment of Secretary should be intimated to _____	30	60	90	120		30

3	Registrar of Companies within ____ days from the date of his appointment						
1 4	Any person occupying the position of a director is _____	manger	director	managing director	additional director		Director
1 5	If the, Board entrusts the Secretary with routine duties, he is called, _____	Routine Secretary	executive secretary	part time secretary	whole time secretary		Routine Secretary
1 6	Compliance Certificate can be issued by a company secretary in whole-time practice or a firm of company secretaries is restricted to _____ in the calendar year	forty	sixty	twenty	fifty		fifty
1 7	A routine secretary is just the _____ of the Board of Directors	mouth-piece	hand-piece	head-piece	tongue-piece		mouth-piece
1 8	The secretary has to do only what he is directed to do by the _____	chairperson	directors	manager	Shareholders		directors
1 9	_____ advises the 'union on various matters connected with labour	Secretary of Trade Union	Company Secretary	Secretary of a Local Body	Secretary of a Government Department		Secretary of Trade Union
2 0	The Board, however, cannot alter the _____ of the secretary as they are determined by the law	powers	duties	rights	liabilities		duties
2 1	_____ helps the secretary in guiding the chairman and board of directors, and in performing his duties confidently	Impressive personality	General Knowledge	Knowledge of the Industry	Knowledge of Mercantile Law		General Knowledge
2 2	The Companies Act also states that no individual can hold the office 'of 'secretary in more than _____ such company	five	fifteen	one	ten		one
2 3	A company having paid-up capital of Rs. 2 crores must have a _____ secretary	whole time	part time	routine	executive		whole time
2 4	If the person appointed as secretary functions as secretary in any other company, he has to notify the other company within _____ of his appointment	15 days	20 days	30 days	45 days		20 days
2 5	A Secretary cannot be appointed as _____	director	Chairman	auditor	managing director		auditor

2 6	The services of a secretary may be terminated by giving him _____ as per the terms of the service agreement	intimation	notice	instruction	letter		notice
2 7	A secretary being a servant of the company, his suspension and dismissal are governed by the normal law applicable to _____	owner and servant	management and staff	employer and employee	supervisor and employee		employer and employee
2 8	The services of the secretary may be terminated without notice if he makes _____ secretly	incomes	profits	records	books		profits
2 9	The rights of a company secretary mostly flow out of his _____ agreement with the company	loan	share	dividend	service		service
3 0	A company secretary is not only a servant of the company but also a servant of the _____	government	directors	law	Shareholders		law
3 1	Under _____, the secretary has to arrange for timely submission of returns and payment of tax	Income Tax Act	Sales-tax Act	Indian Stamp Act	Companies Act 1986		Sales-tax Act
3 2	As the _____ are the owners of the company, the secretary has to safeguard their interest	shareholders	debenture holders	creditors	debtors		shareholders
3 3	The _____ has to function as a medium of communication between the directors and the general public consisting of debenture holders, bankers, solicitors, creditors and the 'prospective investors	chairperson	directors	Secretary	members		Secretary
3 4	_____ liabilities refer to all those liabilities imposed on the secretary by the Companies Act	General	Statutory	Universal	Common		Statutory
3 5	Under _____ the company secretary is responsible for collection and payment of income tax	Companies Act 1956	Indian Stamp Act	Income Tax Act, 1961	Finance Act		Income Tax Act, 1961
3 6	The Secretary has to file various returns and statements with the _____ of Companies as per the requirements of the Companies Act	director	Registrar	chairman	members		Registrar
3 7	In actual practice, a _____ occupies a position of importance in the administrative set-up of	Board of Directors	Chairman	managing director	company secretary		company secretary

	the company						
3 8	In the company set up, both the board of directors and the: secretary play a _____ role to each other	substitute	unlike	complementary	unusual		complementary
3 9	The board of directors is responsible for the overall management of the company's _____	business	shares	shareholders	meeting		business
4 0	The directors are the _____ of the company, the secretary is its eyes, ears and hands of the company.	head	nose	heart	brain		brain
4 1	It is the secretary who carries out the orders of the _____	chairperson	board of directors	shareholders	members		board of directors
4 2	The company secretary is in close touch with the work of the board and has access to the _____ matters of the company	public	civic	confidential	open		confidential
4 3	The secretary possess a thorough knowledge of the various legislative enactments relating to _____	firm	HUF	sole proprietorship	companies		companies
4 4	In matters relating to staff, shareholders and outsiders, generally, the secretary is allowed to exercise his _____	discretionary power	compulsory power	mandatory power	fixed power		discretionary power
4 5	The Secretary acts as the agent of the board of directors and carries out the instructions of the _____	manager	Managing Director	board of directors	chairman		board of directors
4 6	The Secretary is also required to act as a _____ of the company and improve the image of the company in the minds of the public	confidential officer	Public liaison officer	public relations officer	an adviser		public relations officer
4 7	The Secretary acts as a _____ and ensures that the confidential matters of the company are not leaked out	Public liaison officer	confidential officer	an adviser	an executive officer		confidential officer
4 8	The Secretary acts as a _____ between the board of directors on the one side and the staff, shareholders and the general public on the other side	liaison officer	an adviser	an executive officer	confidential officer		liaison officer

49	The Secretary acts as _____ and advises the directors and the chairman on important matters affecting the business of the company	an co-ordinator	an officer	an adviser	an executive officer		an adviser
50	Generally speaking, the role of a secretary is _____	three – fold	two - fold	five - fold	six - fold		three – fold
51	Under the _____ secretary is responsible for the duties of a secretary and such other ministerial and administrative duties as may be assigned to him	Income Tax Act	Companies Act	Indian Stamp Act	Customs Act		Companies Act
52	The important responsibilities of the company concerning to statutory as well as legal commitments vest within the hands of _____	The directors	the Secretary	the Chairman	the members		the Secretary
53	Under the _____ it is duty of a secretary to see that the documents such as letter of allotment, share certificate, debenture and mortgages are issued duly stamped	Companies Act 1956	Income Tax Act	Customs Act	Indian Stamp Act		Indian Stamp Act
54	In _____ co – ordination the secretary has to make a link between Shareholders, Government and the Society	domestic	internal	external	inner		external
55	In _____ co – ordination the secretary has to link Management level such as Chairman, Board of Directors, Managing Director, employees of the business, auditors	external	exterior	internal	outdoor		internal
56	_____ is considered as the link between the Company, Shareholders, Society and the Government	Board of Directors	Company Secretary	Chairman	Registrar		Company Secretary
57	The secretary has to report the day to day affairs of the company to the _____	managing director	Chairman	Secretary	Board of Directors		Board of Directors
58	As an _____, secretary is the person who has to look after every aspect of the business such as financial, functional and other human relations inside the organization	administrative officer	personnel officer	Co - ordinator	Statutory Officer		administrative officer
59	The personnel administration of the secretary is a _____ role	easy	difficult	simple	primary		difficult
60	The _____ administration of the secretary includes recruitment, training, promotion,	official	legal	Personnel	individual		Personnel

	discharge and dismissal of the staff in case of any mischievous behavior						
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