Administration

Administrative Services
Support Notes
[Intermediate 1]

Learning
+Teaching
Scotland

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Outcome 1

Outline methods of identifying qualities and skills required of an administrative assistant at a junior level

Duties and qualities required of an administrative assistant at junior level

Introduction

Admin Support Assistant (Junior Level)

Permanent, Full Time
£13,358–£13,950

We are looking for an Admin Support Assistant to help in our busy department. This post is primarily to deal with a range of services within the department that require contact with clients and staff, therefore, good communication skills are important.

Additionally, the successful post holder will handle enquiries and other general duties such as accurate data inputting, filing and answering the telephone. Knowledge of computerised systems is essential, but full training in our internal systems will be given. A working knowledge/understanding of Microsoft Office packages and the Internet would be an advantage.

Education to SVQ Level 2 / Standard Grade is essential and previous data inputting experience is desirable.

Application forms are available from the Personnel Section on 0131-123-4567 or e-mail personnel@co.uk

Administration Assistant

£13K

Ref: 2914/ADMIN AST

Working as part of the busy administration team, your main duties will include secretarial support in the form of preparing WP documents, maintaining customer and supplier details, dealing with mail, filing, petty cash and covering reception. Other duties may include answering the telephone, reprographics and answering e-mail enquiries.

Given the computerised nature of this post, the suitable candidate will have up-to-date experience of using Word, Excel, Access and e-mail. The successful candidate should also demonstrate good communication skills, organisational skills and be able to work both unsupervised and as part of a team.

Applicants should be trained to NC level and preferably have relevant work experience.

For further information, contact Gordon Christie, Administration Manager.

Outcome 1

This unit prepares the student for an administrative job at a junior level, similar to the jobs outlined in the above job adverts.

At this level you will be required to fulfil general administrative duties such as dealing with the mail, filing, answering the telephone and covering reception as well as using information and communications technology. In order to carry out these tasks competently you will require good IT skills and good communication skills.

Are you up for the job?

Job description

More details relating to a specific job are usually found in a job description. A job description sets out some background to the post, the duties associated with the post, the post holder's responsibilities and who their line manager is. The information contained in the job description will be similar to the job adverts shown above, but will give more details and will usually include a complete list of duties.

Person specification

From the job description, the organisation can prepare a person specification. The roles and responsibilities detailed in the job description will highlight the skills, qualifications, experience and personal qualities required from a suitable candidate.

Each component of the person specification is usually classed as essential (a must-have skill or quality) or desirable (having this skill or quality would be an advantage, but it's not vital). Thus a profile of the ideal person can be prepared and used to assist in the selection process.

There follows an example of a person specification for a junior administrative assistant.

Outcome 1

	Essential	Desirable
Skills, Knowledge and Abilities	Ability to accurately key in data Ability to create and edit word-processed documents Ability to create and edit spreadsheets Confident at using e-mail and Internet Ability to file accurately Ability to deal with visitors to the organisation	Ability to create and edit databases Knowledge of prioritising workloads in order to meet deadlines Ability to learn new ICT skills quickly
Qualifications	NQV Level 2, NC Office Administration or equivalent	Standard Grade English and Maths
Experience		Previous administrative experience at a junior level
Personal Qualities	Excellent verbal and written communication skills, including good telephone manner Ability to quickly follow verbal and written instructions Willingness to undertake training to improve skill	Good organisation skills Good time management skills

Outcome 1

Identify current skills and gaps in skills

Introduction

Most people find it difficult to assess their own skills and qualities. However, it is an important task that will highlight any areas you need to gain knowledge or experience in. Staff development is vital to ensure that you are doing your job to the best of your ability. Training and development will also help further your career and may lead to a promotion in your organisation.

Skill scan

A skill scan is a statement describing your skills, knowledge and qualities to date. For example:

Consider the following skills (on page 8). For each, use a rating of 1–4 where 1 indicates that you are very good at this skill and 4 indicates that you have no knowledge or experience of this skill.

Outcome 1

	Very Good 1	2	3	No Knowledge 4
(a) Ability to prioritise workloads in order to meet deadlines	☐	☐	☐	☐
(b) Excellent verbal and written communication skills	☐	☐	☐	☐
(c) Excellent organisational communication skills	☐	☐	☐	☐
(d) Ability to quickly follow verbal and written instructions	☐	☐	☐	☐
(e) Awareness of health and safety issues	☐	☐	☐	☐
(f) Ability to deal with incoming and outgoing mail	☐	☐	☐	☐
(g) Ability to file documents properly	☐	☐	☐	☐
(h) Ability to deal with visitors to the organisation	☐	☐	☐	☐
(i) Ability to follow procedures for dealing with petty cash	☐	☐	☐	☐
(j) Confident at using e-mail and Internet	☐	☐	☐	☐
(k) Ability to use initiative and work unsupervised	☐	☐	☐	☐
(l) Ability to work as part of a team	☐	☐	☐	☐

Having completed a skill scan, you will be able to analyse your own level of skill and knowledge. Columns 3 and 4 will highlight areas in which you need further training and development.

Outcome 1

An alternative approach to a skill scan may be to prepare a SWOT analysis where you identify your areas of strengths and weaknesses with any opportunities and threats you face.

Strengths What positive characteristics do you have? What are you good at? Do other people compliment you on certain skills or qualities?

Weaknesses Are there things you do badly? What skills and abilities need improvement?

Opportunities What are the promising prospects facing you? Are you doing all that you can to ensure success in your studies and secure a job in the future? What more could you be doing?

Threats How are things likely to change in the future, especially with regard to IT? Will you be able to adapt? Are there any obstacles that could threaten your success on this course?

Skills, knowledge and qualities that require improvement will be highlighted under weaknesses and threats.

Use the grid below to complete your own personal SWOT analysis.

Strengths	*Weaknesses*
Opportunities	*Threats*

OUTCOME 2

Outcome 2 Outline factors affecting the administrative assistant in the work environment

Working practices and benefits to employees

Introduction

As society, lifestyles and attitudes have changed so too have working practices. In particular the normal working day has become a thing of the past and both employers and employees have become more flexible.

Employers benefit from more flexible working practices as staffing levels can be set to handle busy periods. Part-time staff can be scheduled to work at busy times of the day or week and temporary staff can be employed during busy seasons such as summer or Christmas (depending on the product or service).

Employers can also benefit from a more satisfied and motivated workforce which in turn can lead to the following benefits:

- increased job performance and productivity

- lower staff turnover (in other words, staff will stay with the organisation for longer) which in turn will reduce recruitment and training costs

- lower absences

- ability to attract a wider range of applicants and the right calibre of employee.

Employees also benefit from these flexible practices to help improve their work–life balance. Working practices such as flexi-time and part-time working help employees to manage their work and meet family responsibilities and personal interests.

Outcome 2

Not only are employees more satisfied and motivated at work, they are happier, healthier, they have improved concentration at work and have time to focus on life outside work. With the help of flexible working practices, there is a reduction in stress created from having to cope with personal and work commitments. In the long term, employees can benefit from improved skills and experience having been able to stay with the same organisation for a longer period.

Read the following case study from the Beardmore Conference Hotel.

'In an area where competition with other employers is tough, we need to stand out from the crowd. Our flexible benefits package has helped us recruit some excellent people – and they have stayed with us too!' says Carol Hampson, Human Resources Adviser.

Recruitment and retention of staff are major issues for the hospitality industry, but Beardmore Conference Hotel has devised a number of ways to attract the staff it needs, including many policies geared to work–life balance.

Competition with other employers in the area is tough, but Beardmore's flexible approach to accommodating individuals' needs within the demands of the business has enabled it to attract and retain the right calibre of people.

Flexible working also helps cater for busy periods. For example, non-managerial staff work annualised hours. This means that if the hotel is particularly busy one week, staff are prepared to stay longer until the work is done. In return, they can leave earlier if the hotel is not so busy. Sometimes it may entail employees working very hard for a four-month stretch in the summer, but shorter hours in winter.

Family-friendly policies also help to increase staff loyalty – time off for dependants, career breaks, and term-time only working are acceptable as long as the job can be done. Training is also encouraged, as any form of learning benefits the company in terms of increased staff self-esteem, motivation and commitment.

Source: The Department of Trade and Industry (http://164.36.164.20/worklifebalance/)

So what are flexible working practices? Well, for example, Sainsbury's offers their retail non-management employees a range of contracts. This helps families balance their working hours with childcare, and helps students balance their working hours with exams and study periods.

Outcome 2

Specifically, students are allowed to work in one store during term-time and another during the holidays.

A range of flexible, and not so flexible, working practices are given below.

Full-time

Employees are required to work a set number of hours per day (commonly 9 a.m.–5 p.m.), 5 days per week. The average full-time week in the UK is 41 hours, the longest in Europe.

Source: Eurostat

Part-time

Part-time working refers to weekly basic hours that are less than full-time. The number of hours worked will depend on the nature of the job and will be agreed by employer and employee. Examples of part-time hours: 3 full days per week, 5 half days per week, etc.

Part-time hours are commonly scheduled to cover peak periods such as first thing in the morning (for covering mail and other routine duties) or at lunch times.

Part-time employees are entitled to the same wage rates, working conditions and benefits received by full-time employees. However, part-time employees receive these benefits on a pro-rata basis, in other words in relation to the number of hours worked. If a part-time employee works a half-week then they will receive half of the wages received by a full-time employee.

Flexi-time

Employees may vary their starting and finishing times so long as they complete a minimum amount of hours per month. The only restriction is that employees must be present at busy or important times of the day, known as core times. Core times vary from organisation to organisation but are likely to be 10 a.m.–12 p.m. and 2 p.m.–4 p.m. Outwith these times, employees can choose their own start and finish times.

Employees can accumulate flexidays (days off) by building up the number of hours worked in the month.

Outcome 2

Flexi-time allows increased personal freedom for employees and allows for personal and domestic arrangements (such as dropping off the kids or attending a doctor's appointment) and avoiding travelling in peak periods. Another advantage of flexi-time is that the employee can continue with a large, complicated task without interruption.

In order to administer a flexi-time system, it is necessary to keep an accurate record of time spent in the office. Employees may therefore be required to use clock cards where they have to record their arrival and departure times.

Job-share

Job-sharing is a voluntary arrangement in which one full-time job is shared between two (or sometimes more) employees, each working on a part-time basis. The pay and benefits will be shared between each employee in proportion to the hours each work.

Offering job-sharing is a way of recruiting or retaining an employee who otherwise would not be able to work for the organisation.

Job-sharers may work split days, split weeks, alternate weeks or their hours may overlap. Commonly one employee will work at the beginning of the week and the second employee will work at the end of the week. Some arrangements may also include alternating hours such as Monday, Wednesday and Friday one week then Tuesday and Thursday the following week.

Homeworking

For some employees working from home may be a preferred option. By working from home, employees do not have to spend time and money travelling to and from work. Employees can also work at times that are more suitable and with fewer interruptions. It is also more comfortable to work from home: employees can swap their suits for a dressing gown and slippers if they like!

However, there are drawbacks associated with working at home. The main drawback of working from home is the sense of isolation felt by the employee and the lack of social contact with workmates. It is also easy to be distracted when at home – you may have experienced this from trying to do homework or study at home.

Outcome 2

Teleworking
The number of employees working away from the office has increased as information and communications technology has advanced. These technologies include broadband Internet connections, which are becoming more and more popular and affordable, and multimedia mobile phones with improved Internet access.

Those employees who work away from the office, making use of these telecommunications technologies are referred to as teleworkers. You should note that teleworkers do not only work from home, executives or salespeople who are constantly on the move can also be classed as teleworkers.

In addition to the advantages outlined under the heading 'homeworking', teleworking allows for even greater flexibility – employees can work from almost anywhere, eliminating stress and increasing productivity. Another advantage of teleworking is that it brings the organisation closer to the customer as employees are more mobile. The use of the Internet and e-commerce also means that organisations can attract more customers from all over the world.

By reducing the number of employees in the workplace, the organisation can also reduce overheads such as heating, lighting, rent and cleaning. However, there is one main disadvantage. The cost of purchasing and setting up teleworking equipment is expensive.

Outcome 2

Read the following article for a summary of the advantages and disadvantages of teleworking.

Teleworking 'is good for your health'
Andrew Swinton 14 October 2002

The results are in: ditch the office and work at home if you want to stay healthy.

More than 90% of BT's teleworkers who responded to a survey said they experienced less stress and that their productivity increased – plus, they had more leisure time.

Respondents also included among the benefits the ability to multitask, the lack of commuting and the ability to choose when to work.

Drawbacks for teleworking included concern at increased working hours, and home-based teleworkers felt isolated from 'social and professional contact in the workplace' which, they said, can be demotivating and depressing. Some also said that teleworking made it more difficult to get visibility at higher management level – a case of 'out of sight, out of mind'.

However, the overall feeling was that the advantages of working from home far outweighed the drawbacks.

Adrian Hosford, director of BT group social policy, said the report reinforced the growing importance of flexible working for the company's employees and a national trend of increasing numbers of teleworkers. 'Most staff say they are enjoying an improved quality of life, reduced stress, feeling more productive,' said Hosford. 'BT is benefiting from higher employee productivity and morale as well as lower absenteeism.'

Source: http://news.zdnet.co.uk/

If you would like to learn more about teleworking, visit http:// www. eto. org. uk/faq/faq03.htm

Outcome 2

Hot-desking
To overcome the disadvantages of homeworking and teleworking it is common practice for workers to have a balance between working in the office and working from home. In these circumstance workers will not be allocated their own desk – this is known as hot-desking.

When employees work in the office, they set up at any available desk. When they have finished working they have to clear away files and leave the area free for whoever uses the workstation next.

For some employees, hot-desking makes them feel insecure as they do not have their own defined space. Employees also dislike the fact that they cannot have personal touches, such as family photographs, around them.

For employers, hot-desking not only saves space and money, it encourages employees to be organised and tidy.

In one section of IBM, over 800 sales representatives are employees but only 300 desks are provided. The philosophy behind this approach is that sales representatives will make more sales away from their desks. Hot-desking is therefore used to encourage the employees to be out of the office, selling!

Outcome 2

Contract of employment

Induction

The Employment Rights Act 1996 requires that employers give employees, who are employed for one month or more, a written statement of their terms and conditions of employment and their rights as employees. This contract of employment should be issued within two months of the employee starting work.

Features of a contract of employment

As stated by the Contract of Employment Act 1972 a contract of employment should contain the following:

- the name and address of the employer and the employee
- the title of the job and the date when employment began (and, if applicable, when it will end)
- the hours of work
- the rate of pay (or the method to be used to calculate pay), when payment will be made (weekly or monthly) and the dates of any increases
- holiday entitlement
- conditions relating to sickness benefit
- details regarding any pension schemes
- a note explaining disciplinary rules and procedures and grievance procedures
- period of notice that the employee must give and is entitled to receive.

This statement should be kept up-to-date and the employee notified in writing of any changes within one month of the change.

Outcome 2

Types of contract
The terms and conditions of each employment contract will vary from job to job. Examples of different employment contracts are as follows.

Temporary
A temporary contract is one that does not last indefinitely but the date at which the employment ends will not be stated. In some cases, there may be an opportunity for permanent employment. Temporary contracts are commonly used as a trial period to vet new employees before offering a permanent contract. This period is commonly referred to as a probation period. If the employee does not perform their job satisfactorily, the contract will not be extended beyond the probation period.

Permanent
The word permanent means everlasting or endless. A permanent contract is therefore one that does not have an end date – it is a safe, secure job.

Fixed term
This is similar to a temporary contract, but the difference is that an end date will be stated. Alternatively, a fixed-term contract will end on completion of a certain task. Fixed-term contracts are likely to be used for busy periods or for special, one-off tasks.

Full-time
As previously mentioned, full-time refers to the number of hours worked in a week. On average this is 41 hours per week in the UK. If you are employed for this number of hours each week, you have a full-time contract.

Part-time
If an employee is employed for less than the full-time hours, they are said to have a part-time contract.

Other relevant legislation

The following section is not a mandatory part of your course, so the information is provided for extra interest only. If you do not wish to learn more about your legal rights regarding working hours, period of notice, redundancy or unfair dismissal you should go directly to the section ‘Health and safety issues’ – (starting on page 21).

Outcome 2

Working hours
On 1 October 1998, the Working Time Regulations 1998 took effect. These regulations give employees the right to:

- 4 weeks annual paid leave
- 11 consecutive hours rest in any 24-hour period
- one day's rest in a week
- a 20-minute rest break after 6 hours work
- a limit of an average of 48 hours work in one week
- a limit of an average of 8 hours work in any 24-hour period for night workers.

Period of notice
The minimum period of notice the employer must give the employee is:

- after 4 weeks of unbroken service – at least one week
- for 2 years of unbroken service – at least 2 weeks
- for each further complete year of service – one additional week (up to 12 weeks).

After 4 weeks of unbroken service, the employee is required to give notice of at least one week. This minimum period of notice does not increase with length of service. A contract of employment may state longer periods of notice required from both the employer and the employee than the minimum requirement stated by the Act.

Both parties may voluntarily give up their rights to notice or the employee may accept pay in place of notice.

Redundancy
An employee may be made redundant in one of the following situations:

- the business is closing down
- the business is moving
- there is insufficient work or a labour surplus.

An employer must consult with trade unions over any proposed redundancies. If the union feels that the employer has not met requirements, it can complain to a tribunal.

Employees who are made redundant are entitled to a period of notice.

Under the Employment Rights Act 1996 employers are required to make a compensation payment (called a redundancy payment) to employees dismissed because of redundancy. The amount payable will be related to the employee's age, length of service and their weekly pay.

Outcome 2

Employees who have not worked continuously for an organisation for 2 years full-time (or 5 years part-time) are not entitled to a redundancy payment; nor are employees who are younger than 20 or those who have reached the retirement age.

Employees who are entitled to statutory redundancy pay should receive approximately one week's pay for every year worked.

Unfair dismissal
The Employment Relations Bill 1999 states that employees who have worked for an employer for more than one year have the right not to be unfairly dismissed. Unfair reasons for dismissal under this Act include an unfair reason for dismissal or not following correct procedures when dismissing. Where an employee is dismissed because of lack of ability and qualifications, misconduct or lack of demand for the product produced, this is fair dismissal.

An employee who claims to have been unfairly dismissed can appeal to an industrial tribunal. Complaints to an industrial tribunal must be received within 3 months of the end of the contract.

Where the tribunal finds in favour of the employee then the tribunal can order:
- the employee to be given back the same job
- the employee to be given another job
- compensation to be paid.

Outcome 2

Health and safety issues

Induction training

The word ‘induction’ comes from the word ‘introduction’. Induction training is training which an employee first receives when starting a new job. The personnel (or human resources) department will be responsible for general induction training such as general policies and procedures. The employee’s department will be responsible for specific job-related training.

In some organisations the induction processes will last for a few hours, in others they can last for a few days.

All employees must be given training on health and safety issues as part of their induction training.

Health and safety policy statement

A health and safety policy statement sets out how an organisation manages health and safety in the workplace. It demonstrates the organisation’s attitude towards health and safety and the steps, arrangements and systems the company has in place to ensure it is following health and safety legislation.

There is a requirement under the Health & Safety at Work Act 1974 that an organisation with five or more employees must have a written health and safety policy.

A health and safety policy is not just a legal requirement. It demonstrates an organisation’s commitment to achieving good health and safety standards. It should also clearly set out what is required by the employer and employee of an organisation and show that the organisation tries in every way to reduce accidents and ill health within the workplace.

All employees should read, understand and follow the health and safety policy.

Responsibilities of employer and employee

The Health & Safety at Work Act 1974 sets out the responsibilities of employers and employees with regards to health and safety in the workplace. Compared to previous legislation, this Act is more in depth and applies to all places of work and everyone at work.

Outcome 2

Employers' responsibilities:

- provide and maintain suitable surroundings
- provide information and training
- provide protective clothing and equipment if necessary
- prepare a health and safety policy.

Employees' responsibilities:

- take reasonable care for their own safety and others
- cooperate with employer
- do not interfere with or misuse equipment.

Common security measures

The extent of an organisation's security arrangements will depend on the type of organisation, its size and the nature of its activities.

Security measures should be taken for various reasons: to protect and reassure staff, to prevent theft of stock and equipment and to maintain confidentiality of information. The organisation will need to implement security measures for the entry and movement of staff, visitors and access to information.

Staff entry and movement
To ensure that only authorised personnel have access to the premises an organisation can use a combination of the following methods:

- intercom and/or security doors

- identification passes to be carried (if not displayed) at all times – passes will display name, title, department, picture; may contain an electronic activating device such as an electronic strip which needs to be swiped for entry; will be re-issued regularly

- careful handling and issue of keys.

Outcome 2

Visitors
To ensure that only genuine visitors enter the premises an organisation can use a combination of the following methods:

- visitors should report to reception on arrival and have their reason for visiting verified
- the reception should be located at the main entrance and constantly staffed
- other entrances should be minimised
- visitors' passes to be issued and displayed
- visitors should not be left unsupervised
- the receptionist should ensure that all visitors leave the building and that passes are returned.

Access to information and technology
In accordance with the Data Protection Act an organisation should use a combination of the following methods to ensure the security of information:

- use of passwords – these should not be obvious and should be regularly changed
- use of read-only files – some files can be read but not amended
- virus-screening software should be used to ensure that files are not lost
- use of locked rooms, filing cabinets and computers
- confidential documents should be discarded appropriately.

General security measures
Other security measures that can be taken to protect staff, equipment and information include the use of specialist security firms, the use of CCTV, a register of serial numbers of computers and the use of ultraviolet markers to identify equipment.

Outcome 2

Accident report form
Accidents should be entered into an Accident Book or an Accident Report Form. Serious accidents, by law, must be reported to the Health and Safety Executive who will investigate the matter.

Accident Report Forms should be completed with as much detail as possible to find out exactly what happened and what can be done to prevent the accident from happening again.

An example of an Accident Report Form is given overleaf.

Outcome 2

Accident Report Form

This form must be completed in all cases of accident or injury and submitted to the Safety Officer.

INJURED PERSON	
Surname:	Forenames:
Title: * Mr / Mrs / Miss / Other	Date of birth:
Home address:	
Status: * Employee / Student / Contractor / Visitor / Other	
If employee, state job title and department:	
Date and time of accident:	
Place of accident:	
How did the accident happen? Give full details and describe any injuries suffered.	
Was first-aid treatment given? * Yes / No	
If YES, give details of first-aid treatment given:	
Was the injured person taken to hospital? * Yes / No	
If YES, which hospital was the injured person taken to?	
State the names and positions of any persons who were present when the accident occurred:	
Signature of person reporting the incident:	Date of report:

* Delete the options that do not apply

Outcome 2

Current legislation
There follows a brief summary of other current legislation relating to health and safety in the workplace.

Fire
Fire Precautions (Places of Work) Regulations 1995

This legislation was introduced to ensure employers take reasonable steps to protect employees in the event of a fire. Under this legislation employers should:
- assess fire risks in the workplace
- check fire detection time and warning system
- check evacuation routes
- provide reasonable fire-fighting equipment
- check employee knowledge of fire procedures
- check and maintain fire safety equipment.

Visual Display Unit
Health & Safety (Display Screen Equipment) Regulations 1992

In keeping with technological advances, this legislation was introduced to ensure employers provide comfortable working conditions for computer users. The key points of this legislation are:
- Employers are required to assess the computer environment, identify potential risks and take action to minimise these
- Workstation requirements:
  – adjustable controls on VDU
  – adjustable and stable seating
  – suitable workstation surface and design
  – adjustable, separate keyboard
- Vary work and allow regular breaks
- Arrange eye tests
- Provide adequate training.

First Aid
Health & Safety (First Aid) Regulations 1981

The purpose of this legislation is to ensure employers provide first-aid equipment, facilities and staff in the event of an accident or incident. The key points of this legislation are:
- Employers must provide a suitably stocked first-aid box
- A first-aider should be appointed (one for 50–100 employees recommended in an office)
- Employees must be informed of first-aid arrangements.

Outcome 3

Outcome 3
Describe the administrative tasks carried out by an administrative assistant at a junior level

Incoming mail

Introduction

It is important that mail received in the organisation is dealt with promptly. This is so that others in the organisation are able to make a start on their day's work

It is therefore not uncommon for mail room staff to begin work early to ensure that mail is available when other staff in the organisation arrive for work.

In cases where the normal mail delivery by the postman is not early enough, the organisation may rent a post-office box so that mail can be collected at any time.

Procedures

When processing incoming mail the following steps should be carefully followed:

1. Remove any envelopes that are marked private, personal or confidential – these should be delivered to the person named on the envelope, unopened.

2. Open the remaining envelopes – at both ends – carefully so as not to damage the contents.

NB In some organisations it will only be general mail which is opened in the mail room. Specifically addressed mail is delivered to the individual or department unopened.

3. The envelope may be kept for a few days in case of any queries, for example missing enclosures.

4. Unfold the papers and apply a date stamp.

5. Make copies as necessary for documents to be seen by more than one person, or use a circulation slip.

6. Check for enclosures, indicated at the foot of a page by 'Enc' for one enclosure or 'Encs' for a number of enclosures.

   Other, less frequently used marks include '/' and '…' indicated in the margin alongside the line which mentions the enclosure.

   (i) Any missing enclosures should be noted at the foot of the letter in pencil – any missing money enclosures should be reported to your supervisor.

   (ii) Any cheques, postal orders or money should be recorded in the remittance book.

Outcome 3

(ii) Attach letters and enclosures together.

7. Sort the mail into bundles ready for distribution to the various departments. To help you decide which department the mail should be sent to, look for:

   (i) 'For the attention of ...' typed above Dear Sir/Madam

   (ii) A subject heading typed beneath Dear Sir/Madam. If no subject heading is supplied, read the letter quickly.

Equipment

The following equipment will be of use when dealing with incoming mail:

Letter-opening machine
As the name suggests this equipment is used to open envelopes. It works by removing a narrow strip from the edge of each envelope. It is advisable to tap the envelope beforehand to ensure that the contents are not damaged.

Date-stamping machine
Instead of the familiar manual date stamp used at your library, larger organisations may use an electronic date stamp that automatically prints the date and time mail was received.

Photocopier
For documents requiring copying and distributing to more than one person.

Trolley
For large amounts of mail a trolley may be necessary to transport documents and parcels to the various departments.

Pigeon holes
Each member of staff will have their own pigeon hole which is used to deliver mail.

Outcome 3

Outgoing mail

Introduction

The following procedures relating to outgoing mail may appear obvious and a matter of common sense to some. However, it is important that nothing is overlooked so as not to create an unfavourable impression with customers. Have you ever received a letter which had the wrong name on it, or where the enclosure was missing? To create a positive impression it is important that outgoing mail is dealt with carefully.

Procedures

Most mail rooms will have a deadline, the time by which all mail should have been sent to the mail room for processing. At this time, the following steps should be followed when dealing with outgoing mail.

1. Check that enclosures have been included, that the letter has been signed and that the address on the envelope matches the address on the letter.

2. Fold and insert letters into the envelopes.

3. Seal the envelope.

4. Weigh bulky items.

5. Affix the correct stamp value (or use the franking machine to print the postage rate).

6. Record the value of stamps used in the postage book.

7. Arrange into different categories (inland, overseas and letters which need to be taken to the post office).

8. Take special-category mail to the post office. A summary of special postal services is given below.

Branch Direct

For organisations that have a number of offices, branches or shops, this service offers safe and quick delivery of internal mail between sites. Branch Direct can collect items after office hours, sort and combine deliveries into one, leaving staff free to get on with other duties.

Business Collection

The post office will collect letters, small packages and international post (Recorded Signed For and Special Delivery items) from a designated collection point in the organisation.This service is free to organisations that spend over £15,000 per year on post-office services.

Outcome 3

Business Reply
To encourage replies from customers without them having to pay for postage, organisations can use Business Reply. Customers will post the pre-printed postcard or envelope without having to attach a stamp. The firm receiving the mail pays the cost of postage and a small, additional charge.

Cash On Delivery
By using this service, organisations can arrange for the postman to collect the value of the parcel before it is handed over to the customer. The post office will then send the payment on to the organisation.

Certificate of posting
A certificate of posting provides evidence of where and when an important letter has been posted.

Freepost
For firms who wish to encourage customers to reply, Freepost can be used so that the customer does not need to pay for the postage. The word 'Freepost' is used in the address and the letter does not require a stamp.

Post Ofice Box
Mail can be delivered to a mailbox at a local sorting office. This allows organisations to have a discreet address and mail can be collected at any time.

Recorded Signed For
This service is suitable for sending important documents such as birth certificates and examination papers. The person sending the letter is given a receipt as proof of sending and the person receiving the letter is required to sign for it. For an extra cost, the sender can request proof of delivery.

Redirection Service
When an organisation moves to a new location, the post office will forward mail to the new address. This service is available for up to 2 years but mail can only be redirected to a UK address.

Sameday
As the name suggests, important mail will be delivered by the end of the day.

Special Delivery
This service guarantees that a first-class packet or letter will be delivered the following day.

If you would like more information on postal services, visit http://www.royalmail.com

Outcome 3

Equipment

The following equipment will be of use when dealing with outgoing mail.

Folding and inserting machine
To save time, letters and documents can be automatically folded and inserted into envelopes using this machine. Not only is it quicker, it is more accurate and neater than documents folded manually.

Letter and parcel scales
The cost of postage will depend on the weight of the letter or parcel. It is important that the scales used are sensitive – if you do not pay sufficient postage, the recipient will be asked to pay the outstanding amount plus a handling fee. This will not create a good impression with your customers.

Outcome 3

Franking machine
Instead of applying stamps, a franking machine is used to print the value of postage as well as the date and time of posting. In addition to saving time applying individual stamps the machine also meters the total postage used, eliminating the need to keep a record of stamps used.

Small items of mail room equipment
Small items used in the mail room are known as mail room sundries. These may include stapler, hole punch, string, tape and scissors.

Filing

Introduction

All administration departments will need to file documents on a regular basis. This task is likely to be undertaken by an administrative assistant at a junior level.

The method of filing used will depend on the type of organisation. Whereas most organisations will file alphabetically, some organisations may use alternative methods. Banks for example may file customer details based on account numbers – this is known as numerical filing; utility companies such as Scottish Power or British Gas may file records by area – this is known as geographical filing.

Purpose

It will be necessary for all organisations to keep documents and records for a short while for reference or dealing with enquiries. It is therefore essential that organisations have an effective filing system so that documents can be easily found. An effective filing system will also ensure that documents are neither damaged nor lost.

Procedures

As in the case of dealing with mail, it is important that procedures are followed carefully when filing, in order to avoid papers being misplaced, lost or damaged.

There follow below some useful procedures which may be adopted by an organisation to ensure efficient and effective filing.

Outcome 3

Release symbol
This is a special mark that indicates that a document has been dealt with and may be filed. Commonly indicated by ‘F’.

Cross-reference cards
When individuals and organisations change their name, their filing point will also change. A cross-reference card will be inserted at the point of the previous filing point to redirect people to the new place of the file. Cross-reference cards may also be used for a letter or report that deals with more than one topic.

Out cards
An out card replaces a file that has been removed. This prevent files being lost and time being wasted looking for a file that is not available. An out card records the title of the document, the name of the person borrowing the file, when it was borrowed and when it was returned.

Miscellaneous files
This is a file that is used for storing papers when there is no file for them. Once four or five papers have been received from the same firm or regarding the same topic, then an individual file should be created.

Pending papers
These are documents that cannot be dealt with immediately because further information is required. The word ‘pending’ means waiting for a decision. These documents will be stored in a pending file temporarily.

Methods of filing

There are various methods of filing available. The most appropriate method will depend on the type of information filed by the organisation. Below is a brief outline of the main methods of filing.

Alphabetical filing
People’s names are filed in alphabetical order of their surnames. Firms, societies, organisations and clubs are filed in alphabetical order of their registered names.

Numerical filing
Numbers instead of letters are used as the filing point, for example account numbers or student ID. This type of system is easy to extend as each new file is simply given the next number. However, some numbers are difficult to remember, so it may be necessary to keep an alphabetical index of all customers together with their account number.

Chronological order
This is filing in order of the date. Most papers are placed in files in date order, with the latest paper on top and the oldest at the back of the file.

Geographical order
This is filing in alphabetical order of area – towns, regions or countries.

Outcome 3

Subject filing

This is a useful method of filing papers under topics. Each topic or subject is filed in alphabetic order. It is especially useful for filing personal papers.

Alphabetical filing

Given that this is the most common method of filing, the rules of alphabetical filing are discussed here in greater detail.

When filing peoples' names alphabetically, you should remember the following key points.

- Names of people are filed by surname, then by first names if the surnames are the same.

- Prefixes (for example, Van Outen) and double-barrelled names (for example, Palmer-Tompkinson) are treated as though they are one word.

- Abbreviations (for example, St or Mc) are treated as though they are written in full (for example, Saint or Mac).

- Titles (for example, Sir, Lady, Mr or Miss) are ignored when filing.

- File a shorter surname (for example, Bush) before a longer surname (for example, Bushell).

When filing organisations' names alphabetically, you should remember the following key points.

- Names of organisations which contain any personal names are filed under the surname (use the first surname if there is more than one).

- Names of organisations which do not contain any personal names are filed under the first word.

- Numbers in names are treated as if the numbers were written in full.

- Words like The and A are ignored.

- Names that include initials (for example, HSBC Bank PLC) should be filed before names that are written in full (for example, Halifax), unless you know what the initials stand for in which case file as if the name were written in full.

Outcome 3

Electronic filing

Commonly customer, supplier and employee details will be held electronically on a database. Electronic filing has many advantages over paper-based systems:

- *improved presentation* – files held electronically appear more professional than those which are handwritten

- *easy to amend* – if details require amending this can be easily and quickly done using an electronic database as opposed to rewriting a handwritten index card

- *sort order* – whether records need to be sorted alphabetically by name, alphabetically by area, numerically by ID number or chronologically by date this can be done at the press of a button

- *improved accuracy* – human error is eliminated so that records will not be filed in the wrong order, because electronic databases will not allow two customers to have the same account number

- *interrogation* – by performing a query on the database specific information can easily be found – such as the addresses of all those customers who live in Aberdeen or the names of all employees who started work in the last year.

Outcome 3

Reprographics

Introduction

The word ‘reprographics’ comes from the word ‘reproduce’, meaning to create a duplicate image or copy.

Routine duties performed by the reprographics department will include making copies of letters, reports, catalogues and booklets. In addition to preparing the copies, this department will also be responsible for the finishing touches such as binding the pages and laminating covering pages.

The reprographics department will also be responsible for ensuring that copyright legislation is followed.

Equipment

The following equipment is likely to be found in the reprographics department:

Photocopier
The most common item of machinery that is used to produce copies of documents. There is likely to be a photocopier in your school office or your college’s library. Developments in photocopying now mean that various tasks can be performed, such as double-sided copying and enlargements. Photocopiers also combine other functions such as stapling and collating (arranging pages in order).

Laminator
To make pages more hard-wearing and to protect papers from damage, a thin plastic coating is applied using this machine.

Binder
Pages of a large report or booklet can be bound using a variety of techniques. These include: comb binding, coil binding and wire binding. The difference is the type of material used on the spine of a document to hold the pages together. How has your school or college bound these materials?

Scanner
A device that reads paper-based images and converts them into digital images for use on the computer. Some scanners can scan text that can then be edited.

Outcome 3

Printer
Printers are commonly used to print off copies of documents held electronically. A printer should be used to print a master copy of a document and then a photocopier used to produce duplicates – this method is more cost-effective than printing multiple copies.

Reception

Job Vacancy – Receptionist **£12–£15 K**
You will be working for a leading retail head office. Your role as a receptionist will be busy. The key purpose of the job is to represent the company by promoting a good professional image to the customer. Your main duties will include meeting and greeting all clients, answering and redirecting all calls using a multi-line switchboard, organising the meeting room diary, sorting and distributing post and faxes, liaising with couriers and other admin duties when required. You must have previous reception experience with a high level of customer contact, be highly presentable and have excellent communication skills. For more information please contact Ahmid Mohammed, Administrative Supervisor.

Introduction

The job of a receptionist is very important as he/she is usually the first contact visitors have with an organisation. To give these visitors the right image of the organisation, the receptionist should make a good first impression.

Duties and qualities of a receptionist

The main duties of the receptionist will be to receive visitors to the organisation and make appointments.

However, he/she may also be expected to fulfil some of the following duties:

- keyboarding
- answering the telephone
- filing
- handling mail.

Outcome 3

It is therefore necessary that a suitable receptionist will be:

- pleasant and polite
- neat and well presented
- able to get on well with people
- patient, calm and able to cope under pressure
- knowledgeable about the organisation
- clearly spoken.

Dealing with visitors with an appointment

Callers such as those attending an interview or meeting are expected. All callers with an appointment will be logged in the Appointments Book (or Appointments Diary). The Appointments Book is prepared in advance and will contain the following details:

- names of expected callers (in order of appointment time)
- time they are due to arrive
- who they are visiting
- reason for the visit (in some cases)
- visitor's pass number (in some cases).

Once you have checked the Appointments Book, you should contact the person the caller has come to see. If the caller is received immediately, then the receptionist should give directions, lead the caller to the room or ask that the caller be met at reception then taken to the room. However, if the caller is required to wait, the receptionist should direct the caller to the waiting area and ensure they are comfortable.

Dealing with visitors without an appointment

Examples of callers without appointments include customers with complaints, job vacancy enquiries, sales reps and family or friends of employees.

In this case, the caller should be informed that it is not usual for visitors to be taken without an appointment, but you will try to find someone who is available.

If no-one is available, apologise to the caller, explaining that you have tried unsuccessfully to find someone who is free to deal with them. You may able to make an appointment for a later date, otherwise ask the caller to write or telephone to make a future appointment. Alternatively, take the caller's details and arrange for someone to contact them later.

If someone is available then deal with the caller as above – now they have an appointment. However, because this caller is not in the Appointments Book he/she should be recorded in the Register of Callers (or Reception Register).

Outcome 3

The Register of Callers contains the following information:

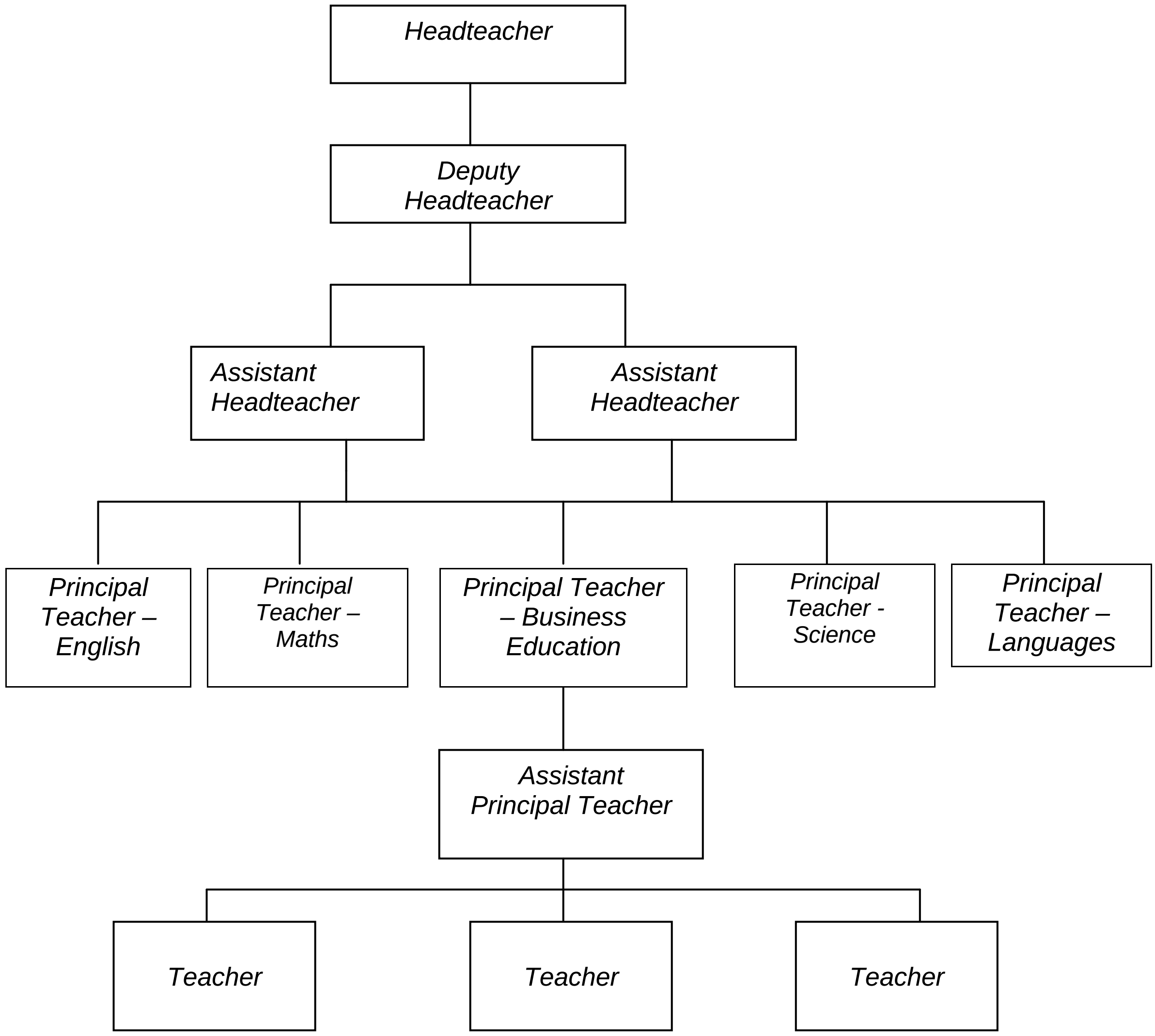
- date
- name of caller, company address and telephone number
- who they are visiting
- time they arrived
- time they left
- visitor’s pass number (in some cases)
- car registration number (in some cases).

Dealing with regular callers

Some callers are expected, but do not require an appointment. Regular callers such as engineers, plumbers and cleaners will not be recorded in the Appointments Book and therefore should be recorded in the Register of Callers. On arrival, these people should be announced to the relevant department.

Outcome 3

Organisation charts
An example of an organisation chart is given below:



An organisation chart is a useful tool for showing visitors the relationships between individuals, the chain of command, the span of control and who has authority over others. For example a customer with a complaint will be able to use the organisation chart to identify who they should best speak to.

Outcome 3

Electronic diaries

Advances in technology have led to the demise of the paper-based diary and individuals now make use of electronic diaries. Functions that can be carried out by electronic diary software include:

- appropriate slots for appointments are automatically found – this may be particularly helpful in dealing quickly with an unexpected caller

- routine appointments can be programmed so that automatic reminders are given

- a number of diaries may be accessed and coordinated to schedule a time for complex appointments such as large meetings

- files can be directly linked to database files to provide more information quickly – for example, by clicking on an appointment in the diary, a receptionist can have direct access to that visitor's details.

The main advantages are therefore:

- the receptionist can access others' diaries to check for expected callers

- if appointments overrun or appointments are changed, amendments can be easily made and the receptionist informed automatically

- much quicker than manually skimming through pages of a diary to find an available appointment for an unexpected caller.

Outcome 3

Petty cash

Introduction

The word ‘petty’ means small. Petty cash therefore refers to small amounts of cash used to pay for small items such as stationery, stamps, travel expenses or window cleaning. It is therefore necessary to keep a small amount of cash in the administration department so that the finance department is not constantly disturbed for small amounts of cash.

Procedures

The amount of money held in the petty-cash box will be relative to the size of the organisation. Small organisations may only need £50 for petty-cash items whereas a larger organisation may require a petty-cash balance of £250.

Before being issued with money from petty cash, employees will be required to complete a petty-cash voucher. The petty-cash voucher should be checked and signed by an authorised person. The administrative assistant in charge of petty cash must not pay out money without an authorised petty-cash voucher – this helps to prevent fraud. On receipt of the money the recipient should sign the voucher, and then the administrative assistant will store the voucher in the petty-cash box along with the remaining cash.

Where possible, employees should provide receipts to account for all petty cash spent.

At the end of each week (or fortnight or month) the petty-cash vouchers and the remaining balance in the cash box should be checked. Once everything balances back (i.e. the value of receipts plus the remaining balance should equal the opening balance) then the petty cash should be restored to its original balance. The amount needed to restore the petty cash to its original balance is known as the imprest.

Related documents

Examples and illustrations of the documents associated with the petty cash system are given below.

Petty-cash vouchers
Each organisation will have its own preferred design to suit the purpose of the petty-cash system. The main features are the voucher number, date and details of the amount issued, the signature of the recipient and an authorisation signature.

Outcome 3

An example is given below:

Petty-Cash Voucher	PCV No Date:	
Details	Amount (£)	
TOTAL		

To be collected by: ______________________

Authorised by: ______________________

Issued by: ______________________

Sign on Collection: ______________________

Petty-cash receipts
Valid receipts can include till receipts for items of stationery or bus tickets.

Petty-cash statement
The administrative assistant is responsible for keeping a record of all cash received and issued in the petty-cash statement. At the end of every week, the balances will be checked and the imprest amount calculated. An example of a petty-cash statement is given overleaf. In this example after one week an imprest amount of £9.15 is required to restore the petty-cash balance to £50.00. The analysis column headings will vary from organisation to organisation. The supervisor or manager can identify any areas of over-spending by quickly looking at these analysis columns. In this example, the amount spent on travelling may be a cause for concern.

Outcome 3

Petty-Cash Statement									
CASH RECEIVED		CASH PAID				ANALYSIS			
Date	Amount	Date	Details	Voucher No	Amount	Postage	Travel	Office Expenses	Other
14/04	£50.00	14/04	Stamps	92	2.60	2.60			
		15/04	Bus Fares	93	8.00		8.00		
		15/04	Taxi Fare	94	10.00		10.00		
		16/04	Taxi Fare	95	4.50		4.50		
		18/04	Pens	96	2.25			2.25	
		19/04	Taxi Fare	97	8.50		8.50		
		20/04	Window Cleaner	98	5.00				5.00
			Total		40.85	2.60	31.00	2.25	5.00
			Balance c/f		9.15				
					50.00				
21/04	£9.15								

OUTCOME 4

Outcome 4

Describe the uses and features of the Internet and office technologies

Uses of the Internet

Introduction

When we refer to the Internet we are usually talking about the World Wide Web (WWW) but this is only one feature of the Internet. The WWW stores millions of web pages containing text, pictures, movies, animation and sound.

You can find your way around the WWW by typing in the web address, for example, http://www.bbc.co.uk. If you do not know the web address then you can enter a key word, for example BBC, into a search engine such as Google, Yahoo or Ask Jeeves.

There are millions of websites on the WWW covering topics such as arts (www.tate.org.uk); references (www.encyclopedia.com); government statistics (www.statistics.gov.uk); news (www.news.bbc.co.uk); sport (www.itv-f1.com) and newspapers (www.scotsman.com). You can also buy online (www.amazon.co.uk); take part in auctions (www.ebay.co.uk); book a holiday (www.expedia.co.uk) or play games (www.electrotank.com).

However there are other features of the Internet such as e-mail, instant messaging and discussion groups.

E-mail

Electronic information can be directly sent from one computer to another computer anywhere in the world using e-mail. More than just an electronic letter, e-mail can be used to send diagrams, pictures, video clips or sounds.

Useful features of e-mail include being able to send the same message to more than one mailbox, attach other documents to a message, reply quickly and easily to a message and forward a message to another mailbox. Addresses can also be stored in an address book and retrieved instantly.

Advantages of e-mail:

- it's easy – setting up and using an e-mail account is relatively straightforward, and users are guided through features with easy-to-use menus and buttons

- it's fast – messages can be sent instantly from your office to anywhere in the world

Outcome 4

- it's cheap – the cost of sending an e-mail is far less expensive than making a telephone call, sending a fax or posting a document; e-mail can also be sent, received, read and then deleted without using any paper

- it's convenient – unlike using the telephone, e-mail messages can be sent and received at any time of the day

- it's reliable – e-mail is more reliable than regular mail, so you know that the message has been delivered

- it can be easy to sort – unlike regular mail which has to be opened and scanned, you can see your messages at a glance and attend to those which are urgent

- it's more secure – unlike telephone messages, fax messages and regular mail, e-mail messages are secured by a password and will only be read by the intended recipient.

However, the first main drawback of e-mail is that the informal nature of the message makes the tone difficult to manage and the message can come across in the wrong way. The lack of personal interaction can also make the message unclear – without being able to see body language and hear the tone it can be difficult to interpret the message accurately.

E-mail is also open to misuse in the office, and therefore requires monitoring. Many hours every day are lost through personal use of email, such as sending jokes to friends.

Lastly, SPAM or junk mail. You should never open attachments from unknown senders as they may contain viruses and never reply to random mail shots – that will only encourage more junk mail.

Outcome 4

Instant messaging (or chat rooms)

Using instant messaging, individuals can communicate with each other in real time. In other words a number of people will be connected to the Internet at the same time, sending and receiving messages instantly. Everyone in the group can see the messages as individuals ‘talk’ to one another. However, it is possible to send private messages to an individual and you can control who is part of the group (referred to as your ‘buddy’ list).

The main advantage of instant messaging is that the conversation is live – it provides immediate responses and interaction between participants.

However, as with e-mail, because you can’t see or hear the other people, instant messaging can be an unclear way of communicating.

Instant messaging can also be distracting. Some instant messaging formats run in the background on your machine. Then when someone wants to contact you, a window pops up with the message. This is the reason that instant messaging is banned from many student machines in schools and colleges.

Finally, but most importantly, there are security concerns with instant messaging. Individuals taking part in instant messaging can disguise their true identity; so be careful – never give away personal details such as your telephone number or address when chatting.

Discussion groups

Also known as message boards, newsgroups or forums.

Individuals connect to a certain site on the Internet and post messages to each other, usually in the form of questions and answers. This differs from chat rooms because the conversation is not in real time. People can visit the site at any time to read others’ messages and post their own questions or responses – the whole group does not need to be present at the same time. This feature of the Internet is similar to an online notice board or bulletin board.

Discussion groups are usually devoted to a specific topic of discussion and access can be limited by use of a password. Your school or college may have discussion groups that students can use to discuss certain subjects or assignments.

Outcome 4

Advantages of the Internet to source business information

Introduction

Not only has the Internet improved communication, but also organisations can use the Internet to advertise their product, provide up-to-date information about their services and ultimately sell more products.

The Internet benefits both the organisation and customers because of its convenience and speed.

Students also find the Internet useful to find information and research assignments. Again, the main advantages are the convenience and the speed.

Convenience

Access to the Internet is commonplace these days. All students will have access to the Internet at school or college, most will have Internet access at home and others will visit Internet cafes.

Accessing the information is easy – either type in the web address or enter key words in a search engine. It's that easy … it's all at your fingertips!

Speed

Finding the relevant web page can be done quickly using a search engine. Type in your key words then your search engine (e.g. Google, Yahoo or Ask Jeeves) and they will find you thousands of matches (known as hits) in less than a second. Think carefully about your key words however: the more specific you are, the less hits you will have to investigate.

Depending on the complexity of the web page, information will load on your screen very quickly. Internet connections are getting faster so that even complicated web pages are displayed quickly.

Quality

So long as you access a reliable site, such as government sites (indicated by .gov.uk), academic sites (indicated by .ac.uk) and reputable sites such as www.bbc.co.uk then the information provided is of reliable quality.

The quality of the information is also enhanced by the interesting way it is presented, making use of colours, pictures, sound and video.

Quantity

There are millions of web pages contained on the Internet covering every subject imaginable. This can make finding the information you need difficult and time consuming; some would therefore argue there is too much information!

Accuracy and currency (i.e. up-to-date)

Active web pages are up-dated on a regular basis. Compared to text books, the information found on the Internet therefore tends to be more accurate and up-to-date.

Other advantages of the Internet include the fact that a larger, global audience can be reached; it is relatively inexpensive and the Internet is open 24/7.

However, beware; not everything contained on the Internet is accurate or true – anyone can post anything on the Internet so always visit official or reliable web pages.

Uses and features of electronic methods of communication

Introduction

As previously discussed, developments in information and communications technology (ICT) have improved communication in the workplace, offering easier and faster methods. However, this has also led to an increase in the amount of information.

To allow this information to be shared within the organisation and to avoid the need to duplicate and distribute the information manually, networks are used.

Networks

A **network** is a number of computers connected together to allow them to share resources such as printers, software programmes and data files. It is likely that your school or college networks its computers.

Many networks are run from one powerful main computer called a server. This can hold the files of all computers that it is linked to and acts like a manager.

The two main types of network are the local area networks (LANs), such as is found within a school or business; and a wide area network (WAN), which links computers over large distances.

Outcome 4

Advantages of networks

- Sharing devices such as printers saves money
- Network **software** licences are likely to be cheaper than buying several individual licences
- Files can easily be shared between users and data can be accessed from any location within the network
- Network users can communicate by internal **e-mail**
- Security is good – users have limited access to only appropriate files by means of a password; they cannot see other users' files
- A **file server** is easy to back up as all the **data** is stored in one place; this is usually done automatically on a regular basis to ensure that important data is not lost or damaged
- File management is carried out centrally – it is important for organisations to have good 'house-keeping' processes in place to clear out unnecessary data so that the network is not overloaded; this will include archiving old data, general disk clean-up and regular reminders to staff to delete unwanted files
- Management can monitor user activity on the network.

Disadvantages of networks

- Purchasing the network cabling (or wireless network components) and equipment can be expensive
- Managing a **network** is complicated, requires training and a network manager usually needs to be employed
- If the file server breaks down all the computers will break down
- **Viruses** can spread to other computers throughout the network
- There is a danger of **hacking,** particularly with wide area networks – expensive security procedures are needed to prevent this.

Electronic diaries

Refer to page 41.

E-mail

Refer to pages 45-46.

Outcome 4

Voicemail

Voicemail is a telecommunications feature that transfers unanswered calls to an electronic mailbox where callers can leave messages. It eliminates the need for an answer machine.

When you are unavailable or your phone is switched off, voicemail is used to record messages that can be retrieved later. This means that colleagues and customers can leave messages for you when you are out of the office or in a meeting.

Fax

Fax machines are used to transmit exact copies of documents (containing text, diagrams and graphics) via the telephone network. By inserting the original and dialling the recipient's fax number, a copy will be received within seconds and the original can be retained for filing.

Provided the recipient's fax machine is turned on, documents can be transmitted at any time. Companies may also save money by transmitting at cheap-rate times by using the delayed transmission function.

Fax machines are an easy-to-use, quick and cheap method of transmitting information to any part of the world.

Modern fax machines also have scanning and copying facilities.

Current legislation

Introduction

This section looks at legislation that controls how information is collected and stored (The Data Protection Act 1998); how information is copied and used (The Copyright, Designs & Patents Act 1988) and how information held electronically is accessed (Computer Misuse Act 1990).

As you can see from the dates of these Acts, this legislation was introduced recently to keep up with developments in information technology. As technology continues to improve and diversify, it may be necessary for your teacher or tutor to provide additional information on current legislation.

Data protection

This Act governs how personal information is collected, used, stored and destroyed. Originally the Act was introduced in 1984 to protect only computer-based information. However, in 1998, the Act was amended to also include paper-based information.

Before we consider the details of this Act, it is first necessary to explain two pieces of important terminology:

Outcome 4

Data subject
Individual to whom the personal data refers

Data user
The person or organisation that controls the way in which the data is used

Under this Act, the Data Protection Registrar supervises data users. Data users must register the following details with the Registrar:

- the nature of data held
- why it is held
- how it was collected
- who it will be disclosed to.

Anyone processing personal data must comply with the following eight principles of good practice.

1. The personal data shall be obtained fairly and lawfully.

2. Personal data shall be used only for the registered purpose.

3. The personal data shall not be disclosed for purposes other than those registered.

4. Personal data held shall be adequate, relevant and not excessive for its purpose.

5. Personal data held shall be accurate and kept up-to-date.

6. Personal data shall not be kept for longer than necessary.

7. Data subjects shall be entitled to: be informed of any personal data held by the data user; access any personal data held; have data corrected or deleted where appropriate.

8. Appropriate security measures shall be taken against unauthorised access to personal data, disclosure of personal data and accidental loss of personal data.

Failure to register with the Registrar and obey these principles can result in prosecution. Penalties can include fines (of up to £5,000) and the removal of the data files. Data subjects may complain or seek compensation for damage or distress caused by inaccurate data or the loss or disclosure of data.

Let's look at an example of how these eight principles can be obeyed. We will use the example of information held about students on a college database obtained from an application form.

Outcome 4

1. The application form will be used to determine if the student will be offered a place on the course applied for. If any other use will be made of the information, this must be stated on the form, in particular if it will be used for future marketing or passed on to a third party.

2. The college will register with the Data Protection Registrar, stating how it intends to use the student information. The college is not permitted to use this information for any other purpose.

3. The college is not allowed to pass on student information to a third party, for example the student union, universities or employers.

4. The application form should be carefully designed so that only relevant information (such as name, address, qualifications and work experience) is collected. Information such as bank details would be excessive, as these details have no bearing on whether or not the student will be offered a place on the course.

5. The college will have procedures for checking student information. As part of their induction, students may be asked to check and confirm that the information is correct. Inaccurate information must be corrected and out-of-date information deleted. Where paper-based information is destroyed, this must be done using a shredder or alternative secure procedure.

6. The information will only be retained for a limited period then destroyed once it becomes unnecessary or out-of-date. The length of time information is held will depend upon the type of information. For example, any queries relating to an assessment result are likely to be received within one year; this is also the length of time that the Scottish Qualifications Authority (SQA) reserves the right to check internal assessment papers. Assessment materials are therefore usually destroyed after one year.

7. Students have the right to ask the college for a copy of their information. The student can demand that inaccurate information is corrected and out-of-date information is deleted.

8. Access to students' personal details should be limited to authorised members of staff. The information should be held securely, either locked away if paper-based or protected by a password if computer-based. All college staff will be trained not to disclose student information to external parties without the express permission of the student.

Here are some actual examples of how this Act has been breached (or broken) in recent years.

Example 1
Utility companies (such as Southern Electric and Thames Water) were under investigation after customer database records were used to post marketing materials. Customers were not fully aware of the way their personal information would be used when it was first gathered.

Outcome 4

Example 2
The Halifax Building Society was warned for improper disposal of personal information after confidential details (such as name, address, account numbers and balances) were found outside a Plymouth branch. The Data Protection Registrar has the right to serve an enforcement notice and to prosecute the offender if there are more breaches.

Example 3
A police officer was charged under this Act for accessing and printing personal data from the national police computer relating to customers of a friend's debt collection agency. The charge was dismissed, because there was no evidence of the police officer actually passing the information on.

Copyright

The Copyright, Designs & Patents Act 1988 controls the copying of protected material and ensures that no unauthorised copying of material takes place. This Act applies to more than just paper-based materials such as books and newspapers, and also covers music and computer programs.

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- use of the copyright mark © followed by the name of owner; for example, © The Scottish Qualifications Authority
- the statement 'all rights reserved'
- the statement that 'no part of this publication may be reproduced without permission'.

Outcome 4

Computer Misuse

The Computer Misuse Act 1990 was introduced to prevent unauthorised access to computer systems (for example, computer hacking). The Act also covers the use of computers to commit a criminal offence.

Under this Act the following actions are not permitted:

- unauthorised access to computer material
- unauthorised access with the intent to commit an offence
- unauthorised changes to computer materials.