



LEVEL 3

Sample!

Office Procedures

Student Worksheets





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Organisational Structures: General

Complete the sentences

chart, larger, structure, jobs, depends, formal

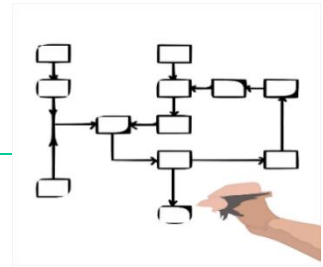
1. Organisational structure refers to the way that an organisation arranges people and _____ so that its work can be performed and its goals can be met.
2. When a work group is very small, a _____ structure may be unnecessary.
3. In a _____ organisation, decisions have to be made about the delegation of various tasks. It is these decisions that determine the organisational _____.



4. The organisational structure can be illustrated graphically in an organisational _____.
5. The best organisational structure for any organisation _____ on many factors including the work it does; its size in terms of employees, revenue, facilities and the range of its businesses.



Organisational Terms



Write the correct terms

delegation, subordinates, messages, line managers, authority, command, hierarchy

1. refers to the management levels within an organisation _____
2. are responsible for overseeing the work of other staff _____
3. report to other staff higher up the hierarchy; are accountable to their line manager for their actions _____
4. refers to the power managers have to direct subordinates and make decisions _____
5. _____ is when managers entrust tasks or decisions to subordinates.
6. The chain of _____ is the path of authority along which instructions are passed, from the CEO downwards.
7. Lines of communication are the routes _____ travel along.



Behind the Org Chart



Which Department?

1. Which department is responsible for each of these?
(over the next page too)

Human Resources (HR) Department, The Research and Development (R&D) Department, Accounting Department, I.T. Department, The Legal Department, Marketing Department

DEPARTMENT:

- Undertakes market research
- Monitors customer's needs and opinions
- Advertises goods and/or services
- Promotes the organisation

DEPARTMENT:

- Manages the finances of the organisation
- Pays the invoices received from the suppliers of goods and/or services
- Sends invoices to debtors for goods and/or services provided by the organisation
- Salaries/Payroll of staff

DEPARTMENT:

- Looks after the computers and related equipment used by the employees in the organisation
- Installs new hardware and software
- Plans how new technology can benefit the organisation
- Ensures the I.T. systems used are efficient and that they protect the organisation from cyberattack
- Salaries/Payroll of staff





SAMPLE

2. If you received these calls when working in the office, to which extension would you transfer them?

- 501 - The Accounting Department
- 502 - The Human Resources (HR) Department
- 503 - The I.T. Department
- 504 - The Marketing Department
- 505 - The Legal Department

- a) A business wants to sell a new office software package. _____
- b) An employee needs information about maternity leave. _____
- c) A company is enquiring about an invoice they have received. _____
- d) A person is looking for an application form for a job being advertised. _____
- e) A company wants to set a date to come and install new computer equipment. _____
- f) An employee is enquiring about the deductions on their salary. _____
- g) A conference organiser needs promotional material for an upcoming conference. _____
- h) A health and safety inspector needs to inform your company about new safety guidelines. _____





Office Equipment

Consider the activities that are common to an office environment.

1. You have been given a list of office tasks. Write the pieces of office equipment you could use for each:
a) Conduct research on the best social media apps for business.

b) Type and print the agenda for the meeting.

c) Make copies of the agenda for all members.

d) Phone the Health and Safety Rep for the new guidelines.

e) Scan the company's new award and email to all employees.

f) Automatically stamp letters or packages for postage.

g) Shred the outdated clients' details.



"This machine literally does nothing except fold paper into paper airplanes."



Information and Documentation

1. Explore the different ways in which information and documentation can be moved within an office setting. Write the correct letter by each list.
 - A. Receiving information and documentation
 - B. Sourcing information and documentation
 - C. Recording information and documentation
 - D. Managing information and documentation
 - E. Circulating information and documentation

Paper
 Local computer
 Answering machine
 Discs and memory sticks
 Computer server
 Timetables
 Calendars

Memos
 Circulars
 Post
 E-mail
 Telephone
 Fax
 Voice mail

Post book to record incoming and outgoing mail
 Telephone book to record incoming phone calls
 Filing
 Backing up files from the computer

Telephone
 Fax
 E-mail
 Voice mail
 Post

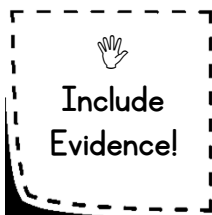
The Internet
 Brochures
 Quotations
 Invoices
 Price lists



SAMPLE

Did you?

- Demonstrate an understanding of the importance of confidentiality
- Only access information that it is appropriate to access
- Only access information for which permission has been granted
- Pass on telephone messages to the relevant person in an appropriate manner
- File away data in a safe and secure manner
- Shred any sensitive information once it has been dealt with
- Refrain from talking about office matters outside of the office



6. Include evidence for Numbers 4 and 5 with your portfolio, e.g. photographic or video recordings.

7. Did you demonstrate confidentiality?



TUTOR / TEACHER VERIFICATION

SIGNATURE	
DATE	



Making a Telephone Call

1. Name 4 things to keep in mind when making a telephone call:

2. Here are some tips for making telephone calls. Write the correct letter by each scenario.

- A. Prepare.
- B. Be clear and concise.
- C. Listen.
- D. Be comfortable.
- E. Keep records.
- F. Introduce yourself.



- a) Don't just keep talking; hear what the other person is saying. _____
- b) Know who you are calling and the reason for your call. _____
- c) Get to the point. Don't crowd the conversation with small talk. _____
- d) Say who you are and the company / organisation you're are calling from. _____
- e) Sit in your chair, make sure it's quiet and don't be very thirsty/hungry. _____
- f) Have a notepad and pen to make notes. _____



SAMPLE

a) Fill in the petty cash transactions:
Petty cash given for the day: €75.00.

- Jack Breen, from the I.T. Department took €20 for blank DVDs and returned €8.00.
- Marie Murphy, from HR, took €10 for labels and she returned €4.50.
- Jade O’Hara, from Marketing, took €30 for document covers and she returned €6.00.

Department* _____

Date* _____

Authorised by (petty cash holder) * _____

Purpose*	Voucher number	Given to	Dept.	Petty cash given*	Petty cash returned	Total expenditure
e.g. Stamps	342	Kevin Dunn	Sales	€2.50	€1.40	€1.10

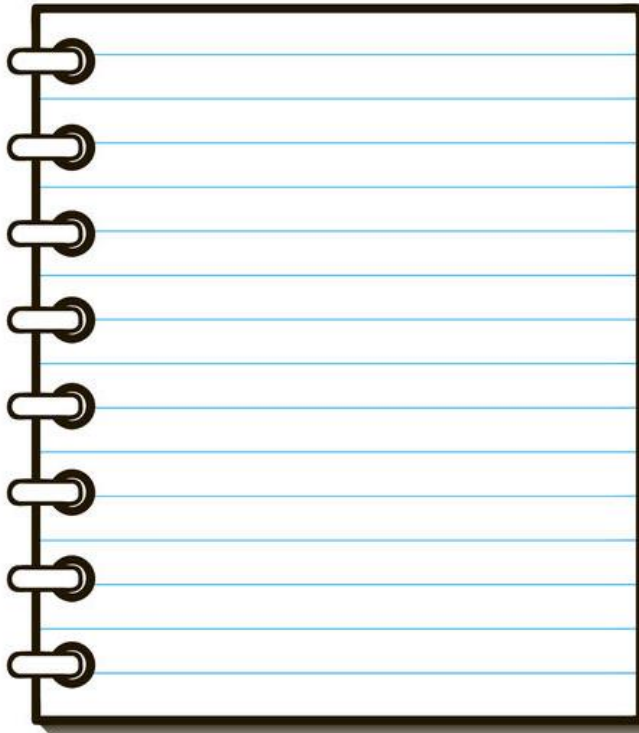
Total petty cash: _____
 Total expenditure: _____
 Total remaining: _____

ATTACH RECEIPTS HERE

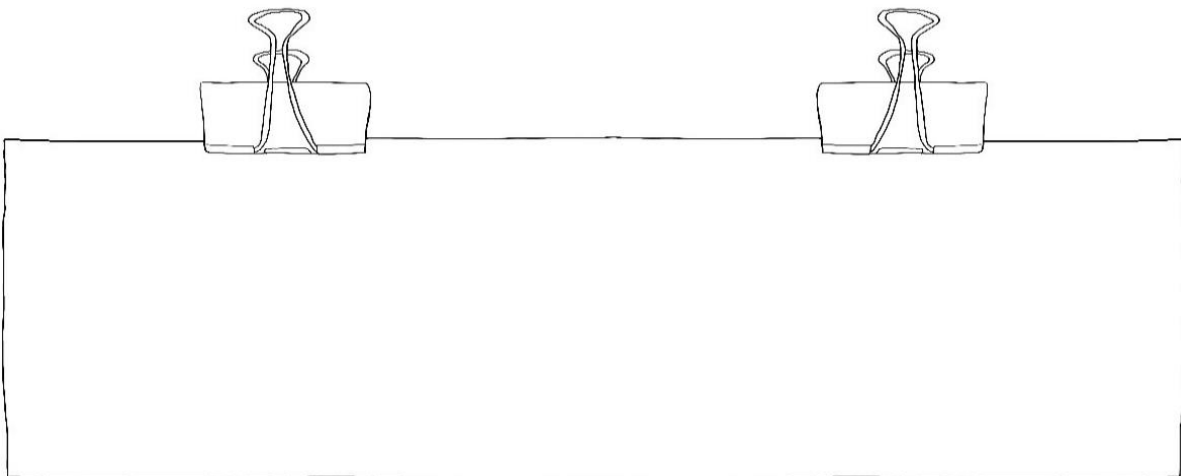


SAMPLE

- a) Urgently remind Brian Mahon that the brochures must be ordered by Tuesday 2 p.m. so that they will arrive in time for the conference. The reminder has been given by the CEO, Mr Black. Tactfully, stress the importance of the deadline.



- b) Leave a brief, but polite notice, that the security door to the building must be kept closed at all times.





Working as Part of a Team

1. What is an effective team member? Answer **true** or **false**:
 - a) A good team member is straightforward. _____
 - b) A good team member tries to do all the work himself/herself. _____
 - c) A good team member works alone. _____
 - d) A good team member is a good communicator. _____
 - e) You can count on a good team member to be honest, regardless of whether it is good news or bad news. _____
 - f) A good team member is not concerned about deadlines. _____
 - g) A good team member has a sense of fairness. _____
 - h) A good team member provides some unique skills. _____
 - i) A good team member does his or her fair share of the work. _____
 - j) A good team member is pessimistic. _____
 - k) A good team member is always quiet and keeps thoughts to himself/herself. _____
 - l) A good team member can be counted on. _____
 - m) A good team member takes credit for someone else's work. _____
 - n) A good team member has a positive attitude. _____
 - o) A good team member has strengths and weaknesses, but focuses on his/her strengths. _____





SAMPLE



1. Name one thing you can try to do if each of the following occurs:

a) Your computer has frozen.

b) The photocopier is printing at half the original size.

c) Your computer mouse has stopped working.

d) You deleted a file on the computer by mistake.

e) I am trying to forward an email.

f) My USB is not working.

g) Paper has jammed in the copy machine.



Personal Hygiene Procedures

1. Which of these good personal hygiene habits do you practise?

- Have a shower or a bath every day.
- Clean your teeth at least twice a day.
- Wash your hair with shampoo.
- washing hands with soap after going to the toilet
- Wash your hands regularly with soap and water.
- Wear clean clothes and footwear.
- Keep your nails short and clean.
- Wash your clothes regularly.
- Hang clothes outside to dry.
- Wear deodorant.
- Cover your mouth and nose when coughing and sneezing.
- Wash your hands after coughing or sneezing.
- Keep your hair neatly brushed and trimmed.
- Keep your environment clean, tidy and organised.
- Go for medical and dental check-ups.





Mapping of Learning Outcomes

1. Outline the formal structures or departments commonly found in a large organisation, Page 6 (organisational structure – general), Pages 7 and 8 (big organisations in Ireland), Page 9 (formal and informal structure), Page 10 (structuring a business), Page 11 (organisational terms), Pages 12 and 13 (organisation charts), Pages 14 to 18 (which department)
2. Describe equipment and software packages commonly used in an office environment Pages 19 and 20 (office supplies), Page 21 (office labels), Pages 22 to 25 (software packages), Pages 26 to 29 (office equipment), Page 30 (office building)
3. Outline the primary means of receiving, sourcing, recording managing and circulating business related information and documentation, Pages 31 to 35 (information and documentation)
4. Describe contracts of employment, including permanent, temporary and fixed term contracts Pages 36 to 41 (employment contracts)
5. Demonstrate an understanding of the importance of confidentiality in an office Pages 44 to 46 (confidentiality)
6. Prepare a variety of physical documentation for circulation including photocopying back to back, reducing and increasing size, collating, binding and stapling Page 53 (preparing documentation)
7. Carry out a broad range of general reception duties including making and receiving telephone calls, receiving visitors Pages 47 and 48 (answering the phone), Pages 49 to 50 (making telephone calls), Pages 51 and 52 (receiving visitors)



SAMPLE

8. Maintain a petty cash float [Pages 54 to 56 \(petty cash\)](#)
9. Communicate efficiently, noting messages concisely and conveying accurately to relevant person [Pages 57 to 59 \(message taking\)](#), [Pages 59 to 62 \(communicating appropriately\)](#)
10. Demonstrate the application of communications, team working and quality awareness in an office environment [Pages 63 to 65 \(teamwork\)](#), [Pages 66 to 69 \(producing quality work\)](#)
11. Apply appropriate health, safety and personal hygiene procedures when working in an office environment, [Pages 70 to 74 \(health and safety procedures\)](#), [Pages 75 to 77 \(hygiene procedures\)](#)

I can't see my screen!!!





Weighting

COLLECTION OF WORK 50%

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8. Office equipment, Page 26 / Which piece of equipment, Page 27 / Office building, Page 30
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SKILLS DEMONSTRATION 50%

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5. Preparing documents, Page 53
6. Communicating appropriately, Page 60
7. Working as part of a team, Page 63
8. Delivering quality work, Page 66
9. Health and safety procedures, page 70
10. Personal hygiene procedures, Page 75