

Level 4



# General Office Skills

Student Worksheets

Sample!



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# Assessment Brief 1

Course:	Level 4 General Office Skills
Course Code:	4N1116
Assessment:	1
Title:	<u>General Office Tasks</u>
Weighting:	60% Collection of work

## Guidelines

You will be expected to:

1. Describe the different office services, duties and responsibilities performed within an organisation
2. Explain the different communication media used in the office environment
3. Describe the essential elements of a good filing system to include advantages and disadvantages of different methods of classification
4. Explain the concept of data protection
5. Discuss limitation of damage to persons and property in the event of emergencies
6. Perform routine office tasks using a range of office equipment and technology
7. Communicate information effectively on behalf of self and others using a range of media
8. Process a range of business documents according to established procedures
9. Use a paper based system and a computer system to enter and retrieve data
10. Process incoming and outgoing calls including conveying information accurately
11. Apply safe working practices including care of office equipment
12. Maintain an organised, tidy and pleasant working environment

## Assessment criteria

- All tasks must be complete, correct and printed where required.
- Describe the services performed in an office, e.g. reception, telephone, stock control, filing, photocopying and postal.
- Name some possible duties and responsibilities of an office worker.
- Explain different communication media such as written, oral, visual and electronic.
- Describe different types of filing systems, including electronic and manual.
- Familiarise yourself with the Data Protection Act and why it is of importance in an office setting.

- Have a discussion about health and safety in the office. Identify possible hazards and how they can be avoided.
- Describe ways in which office equipment can be maintained and looked after.
- List ways in which an office can be kept tidy and organised.
- Carry out routine office tasks, e.g. answering the phone and making phone calls, accessing and composing emails, creating and amending office documents, using templates, recording petty cash, filing, etc.
- Examples of documents to be created or read: formal letter, agenda, minutes of a meeting, invitation, stock taking, poster, memo, budget, menu, survey, calendar, invoice, social media post, email, etc.
- Use safe working practices, e.g. avoiding office syndrome, correct posture, keeping data secure, carrying out a risk assessment, keeping the office clean and organised, etc.
- Video/photographic evidence may be required, e.g., recording of discussions or group work tasks.

Submission date:

I confirm that this is my original work.

Signed:

Date:

## C. Services in an Office

1. Here are some services. Complete the sentences:

**control, double-sided, post, transferring, appointments, classification**

Reception services, e.g. answering visitor inquiries, arranging  and the maintenance of a visitor book.

Telephone services, e.g. answering screening and  calls, giving information to existing and potential clients, and making calls on behalf of others.

Stock  services, e.g. as processing of delivery and supplier invoices for incoming goods, purchase orders, receipts and credit notes, returns notes and requisitions and issue notes for outgoing stock.

Filing services, e.g. maintenance of an efficient system using appropriate filing equipment, a recognised data  system within a filing schedule appropriate to the company.

Photocopying services, e.g. document production of one-off or multiple copies,  printing, collating and booklet creation.

Postal services, e.g. receiving/signing for  and sorting post according to status - general, confidential or urgent, date stamping and distribution of post to individual trays, pigeon-holes or department trays.



**(Practice)**

## E. Processing and Communicating Information

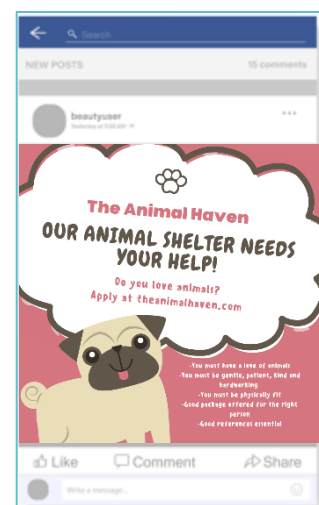
1. Read: Duties and responsibilities also include processing and communicating information in different ways. Examples:

- **Orally:** face-to-face meetings, telephone, videoconferencing, Zoom, Microsoft Teams
- **Written:** letters, memos, reports
- **Electronically:** for example, email, SMS, social media
- **Visually:** notice boards, bar charts, histograms

2. Name each type of communication:














(Practice)

## F. Filing Systems

1. Read: A well-maintained filing system allows vital information to be accessed quickly and saves a company money by saving time. Businesses, schools, government agencies and everyday people use filing systems to keep their information organised.

Here are some types of filing systems:

- A. Alphabetic
- B. Numeric
- C. Geographic
- D. Subject
- E. Chronological
- F. Colour Coding



### Alphabetic filing

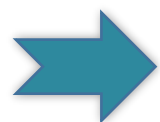
- This is the most common filing system for less than 5,000 records.
- Files are arranged in alphabetic order using the names of individuals, businesses, institutions, agencies, subjects, topics or geographic locations.
- This system is effective for client or customer name files.

### Numeric filing

- Its greatest benefit is its speed and therefore increases productivity.
- It provides a positive identification of the record and a degree of confidentiality too.
- Files are arranged in sequential order using the numbers directly from the record or an assigned number.
- Most systems use an index to retrieve the files.
- It provides accurate identification and allows for greater confidentiality.
- It is capable of infinite expansions and you can use it for more than 5,000 records, unlike alphabetic filing systems.

### Alpha -numeric filing

- Alpha-numeric filing uses a combination of names and numbers.
- You commonly use this type of filing system with subject names and numbers.
- Files are arranged according to alphabetic divisions or subject heading, then by number category.



## G. The Data Protection Act

1. Read: Many organisations, both public and private, hold information about you, e.g. your contact details, your home address, your medical history or your online browsing history.



People have concerns about their privacy, or about the accuracy and the further use of the information by the collecting organisation and any other organisation it decides to share that information with.

These concerns have led to the development of data protection laws around the world. In the EU, this area is mostly governed by the General Data Protection Regulation (GDPR). Specific EU laws also deal with matters such as criminal investigations. There are additional laws in each EU member state. In Ireland, these laws include the Data Protection Acts and other regulations.

The law states that your personal data should generally only be stored where there is a lawful basis, such as your consent or a legal obligation. You have a number of rights under data protection laws, like the right to access the personal data held and the right to have it corrected or erased in certain circumstances.

2. Answer the questions:

a) What information about you might your pharmacy keep?

b) What does GDPR stand for?

c) Name a circumstance under which your personal data can be stored.

d) What could happen if there were no data protection laws?

**(Practice)**



3. Read: Personal data is information that relates to, or can identify you, either by itself or together with other available information. Personal data can include:

- Your name
- Your address
- Your contact details,
- Identification numbers (for example your PPS number)
- Your IP address (this is your Internet address)
- CCTV footage
- Access cards
- Audio-visual or audio recordings of you
- Location data



4. Name 2 companies / organisations that hold information on you.

Company or organisation 1:

Type of information they hold:

Company or organisation 2:

Type of information they hold:

**(Practice)**

# I. Data Security

1. Read: The security of data must be maintained, as learned about on page 23. This includes the creating of passwords, changing passwords periodically, installing updates of antivirus software, backup routines and assigning access rights to data.



123456  
75243  
qwerty



3K89DI73GLzO3  
4D98L3DrMnVpL  
76fKjLsHu73Hkd

Tips for creating a strong password:

- Use a mix of alphabetical and numeric characters.
- Use a mixture of upper- and lowercase; passwords are case sensitive.
- Use symbols if the system allows. (don't use spaces)
- Use a combination of letters and numbers, or a phrase.
- Pick something obscure:
  - an odd character in an otherwise familiar term, e.g. phunnyfrog instead of funny frog
  - a combination of two unrelated words, e.g. salty-light
  - An acronym for an easy to remember quote or phrase, e.g. HersL00kn@U (Here's looking at you).

You want to choose something that is easy to remember with a minimum of 8 characters that uses as many of the techniques above as possible. One way to do this is to pick a phrase you will remember, pick all the first or last letters from each word and then substitute some letters with numbers and symbols. You can then apply capitals to some letters (perhaps the first and last, or second to last, etc.) You could also perhaps keep or add punctuation.

Some examples:

Phrase	First Letters	Password
So long and thanks for all the fish"	slatfatf	5L@tf@tF
"Best Show Ever: David Attenborough's Blue Planet II"	bsetdabp2	B53:da'BP2
"You Can't Have Everything. Where Would You Put It?"	ycheuwyp	Uch3Wwup1?

2. Based on the advice above, write down 3 strong passwords:

Phrase	First Letters	Password

**(Practice)**

# M. Routine Office Tasks



## 1. TELEPHONE SYSTEMS

a) Read: There is a variety of telephone systems in use in today's office environment.

Here are some common functions. Look at a real office telephone. Tick the functions that it has:

- A redial function that allows you to press one button and the last number you called is automatically redialled.
- A mute function that allows you turn off the microphone.
- A volume function that allows you to alter the volume of the handset.
- A hold function that allows you to put a caller on hold without losing the call.
- A memory function that allows you to store frequently used numbers.
- A conference function that allows a number of different callers to be involved in the same conversation.
- A transfer function that allows you to transfer a call to another extension.
- A function that allows you to pick up other people's phone calls, e.g. if they are out of the office.

b) Look at the telephone. Name the key:



a) Turns off the microphone.

b) Dials the same phone number again.

c) Puts the call on loudspeaker.

d) Allows you to switch between calls.

e) Calls back a missed call.

**(Practice)**



a) How much do you know about emails? Answer the questions.

What is an example of a webmail provider?

What is an Inbox?

If you delete an email, is it gone forever? Explain.

How do you attach a document to an email?

Why should you include a subject when you write an email?

Can you send the same email to a few people at once? Explain.

When would you forward an email?

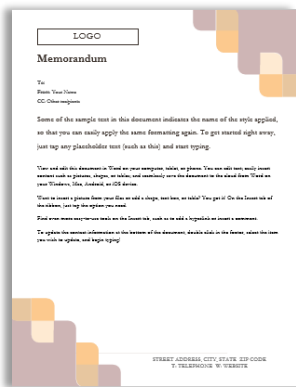
What is an advantage of email over posted correspondence?

**(Practice)**



See 'A Day at the Office' Task Book.

## 16. MEMORANDUM



A memorandum is a written message that is typically used in a professional setting. Commonly known as a "memo," these messages are usually brief and easily understood. It is a written report that is prepared for a person or committee in order to provide them with information about a particular matter.

Look for memo templates online.

Here is a typical layout of a memo:

See 'A Day at the Office' Task Book.



# FRESH FASHION

## Memorandum

SUBJECT: Autumn Clothes Line Promotion

TO: All staff

FROM: James Forest, Manager

DATE: June 14, 2021

Market research and analysis show that the proposed advertising media for the new autumn fashion lines need to be changed. Findings from focus groups and surveys have made it clear that we need to update our advertising efforts to align them with the styles and trends of young adults today. It has become increasingly important to use the Internet as a tool to communicate with our target audience to show our dominance in the clothing industry.

### Internet Advertising

Fresh Fashion needs to focus advertising on Internet sites that appeal to young people. According to surveys, 72% of our target market uses the Internet for five hours or more per week. The following list shows in order of popularity the most frequented sites:

- Google
- Facebook
- EBay
- Amazon \_\_\_\_\_

## O. Telephone Techniques

1. Read: Always have a professional manner. The caller should feel informed and appreciated.

Tips:

- Be prepared. Get familiar with your phone, and learn how to transfer calls.
- Answer right away. Answer within three rings.
- Announce yourself. "Thanks for calling Company Name".
- Be an active listener. Let the caller finish, and ask relevant follow up questions.
- Focus. Give the person your full attention.
- Consider your tone. Be friendly and smile.
- Speak slowly and cheerfully, not too fast.
- Emphasise your words, and take your time.
- Talk in your normal voice. Not too loud, and not too soft.
- Your voice should not be too high pitched or too low pitched.
- Don't use speakerphone. Opt for a headset, or do a conference call.
- Do not eat or drink, or have anything in your mouth.
- Do not use slang and never swear.
- Answer with good manners. Use Mr. or Ms.
- Summarise before hanging up. Reiterate the conclusion/next steps for the caller.
- End on a professional note. Thank the caller for their time or business.



2. Complete the conversation:

Caller: "Hi there. I need to speak to someone about an invoice."

You:

Caller: "I received a letter stating that it wasn't paid, but I have proof that it is paid."

You:

Caller: "It is Invoice HP3490. It was paid by bank transfer on the 15<sup>th</sup> September. The amount was €64.50."

You:

Caller: "I hope this does not happen again! I got quite a fright!"

You:

**(Practice)**

## s *Mapping of Learning Outcomes*

1. Describe the different office services, duties and responsibilities performed within an organisation Pages 10 to 12 (services in an office), Pages 13 to 14 (duties and responsibilities)
2. Explain the different communication media used in the office environment Pages 15 and 16 (communicating information)
3. Describe the essential elements of a good filing system to include advantages and disadvantages of different methods of classification Pages 17 to 22 (filing systems)
4. Explain the concept of data protection Pages 23 to 27 (data protection)
5. Discuss limitation of damage to persons and property in the event of emergencies Pages 35 to 37 (in an emergency)
6. Perform routine office tasks using a range of office equipment and technology Pages 45 to 59 (routine office tasks), Pages 60 to 63 (documents), Pages 68 to 69 (teamwork task), *A Day at the Office Task Book*
7. Communicate information effectively on behalf of self and others using a range of media Pages 45 to 59 (routine office tasks), Pages 60 to 63 (documents), Pages 68 to 69 (teamwork task), *A Day at the Office Task Book*
8. Process a range of business documents according to established procedures Pages 45 to 59 (routine office tasks), Pages 60 to 63 (documents), Pages 68 to 69 (teamwork task), *A Day at the Office Task Book*
9. Use a paper based system and a computer system to enter and retrieve data Pages 45 to 59 (routine office tasks), Pages 60 to 63 (documents), Pages 68 to 69 (teamwork task), *A Day at the Office Task Book*
10. Process incoming and outgoing calls including conveying information accurately Pages 64 to 67 (telephone techniques), *A Day at the Office Task Book*
11. Apply safe working practices including care of office equipment Pages 28 to 31 (office safety), Pages 32 to 34 (data security), Pages 38 to 42 (caring for office equipment), practising throughout
12. Maintain an organised, tidy and pleasant working environment Pages 6 to 9 (features of an office environment), Pages 43 to 44 (office etiquette), *A Day at the Office Task Book*