



Office Practice N5

Lecturer Guide

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Lecturer Guide: activities and assessment

The answers provided and discussed are only guidelines for the assessment of the activities; therefore, other well thought-out answers should be credited when evaluating students.

Activities

The benefits of practical activities on a regular basis cannot be overestimated. Activities should be evaluated while the theory is still fresh in the minds of the students and be completed while studying the specific section. In this way, problem areas could be identified and addressed at an early stage.

The activities can be done either as a written assignment by an individual student/group, or as an oral exercise by a group/class.

When the whole class is involved, the following methods can be used:

- a brief portrayal or explanation of the required answer
- a group or class discussion
- writing the required information down on the board.

Assessment

The following evaluation criteria for activities are important:

- the correct information
- a complete coverage of the subject
- initiative and originality that are appropriate and relevant
- the layout and presentation of the answers.

Answering activities and case studies

Question interpretation

To be able to interpret and answer a question correctly, the following rules should apply:

- Read each question twice before answering.
- Underline confusing words and use a dictionary for clarification.
- Use the textbook as source for the interpretation.

Answering a case study

When answering a case study, the following rules should be applied:

- Find the section in the textbook to which a specific question relates.
- Use the theory in that section and make a decision as to a standpoint to take.
- Motivate the decision by giving examples from the case study.
- Reach a conclusion.

Module 1: The organisational structure and office layout

After completing this module, students will be able to:

- understand organisational structure and its functions
- understand the importance of the management assistant in the organisation
- understand the role of communication in an organisation
- discuss the office environment
- name and describe different office layouts
- explain ergonomics in the work environment.



Activity 1.1

SB page 33

1. **In a letter addressed to the speakers of a meeting, the manager used the old name instead of the new name of the hotel where the meeting is to be held. You did not call the manager's attention to this during dictation. On all previous announcements of the meeting, the new name of the hotel was used. You are certain that the new name is correct because you made all the arrangements. What should you do?**

What happens when you know your boss is wrong:

- Do you inform him of his errors or do you keep quiet and let the company sort it out?
- How do you tell your boss he is wrong?
- How can the secretary/management assistant cautiously and diplomatically handle the situation without angering the manager?

Essentially it involves a non-judgmental and polite approach. The following steps could be followed:

- **Privately:** Never reprimand the boss in front of other people. Approach your boss privately in his office and handle the situation with utmost respect.
- **Time:** Do not make it a lengthy process; briefly explain the error and what the real facts are.
- **Rectify the matter yourself:** When the manager is not available for some reason you can rectify the matter yourself and an e-mail can be sent to the manager, e.g.:

Sir, I just did a quick check on the meeting arrangements. When dictating the letter to the speakers of the meeting, the old name for the hotel instead of the new name was used. I did not call your attention to this at that time but in all previous announcements about the meeting the new name of the hotel was used. All arrangements were also made using the new name. Attached is the notice I have compiled to send to the speakers to rectify the information. If you could please confirm the action to be taken, it would be much appreciated.

*Students could propose any sensible way of solving the problem as long as the method involved is done in a professional and diplomatic way.

2. **You frequently overhear employees within the department and occasionally executives with whom your boss works closely, say that they did not know about a communication. The manager's standard reply is: "I sent you a copy of that" and "I circulated this to everyone in the department." Nevertheless, there is no evidence. Suggest a method that can be used to solve this problem. Also, explain how you would suggest this new method to the manager.**

3.2 The gathering, arrangement and distribution of useful or relevant information (SB pages 21-22)

Method to solve the problem:

The first important matter in this regard is for the management assistant to have a thorough knowledge of the organisation. She should compile lists of the following:

- Different departments/section in the organisation
- Specific function of each department/section
- Manager/supervisor/contact person in each department/section
- Employees working in each department/section
- Methods of distributing the information
- Methods of ensuring feedback from recipients.

Informing the manager:

The following information should be clarified with the manager:

- The different organisational lists
- Methods of distributing the information
- Methods of ensuring feedback from recipients.

Keeping record:

Keeping record of all information that was distributed as well as the feedback given by employees should be part of the secretary's daily routine.

This will ensure the correct and timeous delivery of all documents and a record of the recipients' feedback.

3. Suggest a plan that can be used to ensure the distribution or mailing of copies to all the persons who are to receive them.

2.3.3 Flow of internal documents (SB pages 16-17)

The first important matter in this regard is for the management assistant to have a thorough knowledge of the different departments, their functions, the contact person in each department or section, as well as a list of employees working in each department or section. This will ensure the correct and timeous delivery of all documents.

The next important aspect is to ensure feedback from recipients that they have actually received the information.

Methods of communication and feedback from recipients:

Inter-office memorandums

Where employees do not have direct access to computers the written inter-office memorandum is more often used than an oral instruction. Immediate and important information is distributed to personnel by placing the memorandums in their personal office mailboxes. This eliminates misunderstanding and can be filed for reference purposes.

Since the memorandum is now primarily sent via e-mail, an office group e-mail address list should indicate the employees working in the specific department/section. The delivery of information to e-mail addresses is ensured as the management assistant will receive a notification should the e-mail address not exist. There is also the option of receiving Read Receipts on specific e-mails.

Distribution lists

This is a list with the names of the personnel who must receive messages or memos. Meeting correspondence and important notices of departments can be distributed in this way. Feedback on receiving the documents or information should be indicated by the recipient by signing next to his/her name on the list.

Direct-answer forms

Inter-office stationery is created and provides a direct answer form. The receiver can answer immediately and return the form with his name indicated, for record keeping.

Route paths

These routes are designed and used to circulate important letters, circulars, instructions or bulletins that should be read by those indicated on the list. After reading the specific document the recipient signs next to his name before circulating it to the next person.

Faxes

This reproduction method is still used in some offices and is a speedy and accurate way in which to transfer office information. A receipt is printed after the fax was sent and should be kept with the cover letter for record purposes.

Electronic communication systems and messages

In the modern day office, many of the methods mentioned above have been replaced by the different forms of electronic communication e.g. e-mail, websites, and the different social media platforms.

4. Enquire from the fire department or any other training institution how to apply for a certified qualification in first aid.

If students cannot get access to the fire department in their surrounding area, they could use the online information given by the South African Red Cross Society.

This society is part of the world's largest humanitarian movement and supports people affected by natural disaster and conflict. It is neutral and impartial and works with partners across South Africa and throughout the world to provide assistance to vulnerable communities. The Red Cross is the founder member of First Aid Training and have provided training in Health and Care for over 100 years. Their training courses are available to the public and are approved by the Department of Labour.

Proceeds from Training are used in marginalised communities affected and infected by the HIV and AIDS pandemic. The Red Cross website: <http://redcross.org.za/training/>

5. Find out from your college administration what the emergency plans are in the event of fire at the college. Initiate a fire drill with your classmates.

The students should at least have a copy of the emergency plan and the roll call procedure of their college, and know:

- who the first person to be contacted is on the premises
- the contact number of the fire brigade
- what roll call procedure to follow
- the safest gathering place in case of an emergency
- the emergency exits and fire escapes
- the shortest route out of the building complex
- what actions to take when trapped.



Activity 1.2

SB page 34

1. To obtain a better understanding of the concept 'diagonal communication', visit the following link: <https://www.youtube.com/watch?v=OhKkf3LVH8o>

2. Briefly discuss the following functions of a manager:

1.1.2 The main departments and their functions (SB pages 2-3)

2.1 Planning

The manager decides what must be done, setting goals so that deadlines will be met.

2.2 Organising

The manager decides how, according to the organisational structure, it must be done (who does what).

2.3 Activating or leading

The manager gives the instructions on how and when tasks must be done. The manager must have the ability to coordinate and motivate personnel to fulfil tasks.

2.4 Controlling

The manager determines whether deadlines have been met.

3. Offices differ in nature, use and layout. Businesses need to choose the best layout style for their needs. Briefly discuss the following office types:

3.1 Secluded office designs

5.1 Secluded office design (SB page 26)

Design

Individual employees or groups of employees are accommodated in separate offices, leading off a central passage. The type of work done in the offices determines the furniture used. Furniture in any office will include typewriters, tables and chairs for a typing pool, filing cabinets or shelves for a filing room, chairs and desks for office workers and drawing boards and draftsmen's chairs for draftsmen.

Utilisation

The status of the occupants is reflected by the size, location and furnishings of the room. The higher the position, the larger and smarter the office will be. The furnishing and placement of objects also convey a non-verbal message about the firm's image to outsiders. The senior managers will deal with the public more often.

Advantages of a secluded office layout

- This office indicates status, prestige and authority.
- The offices are private and work, negotiations and interviews can be done confidentially.
- It is quieter and a higher level of concentration is possible for office workers.
- Work can be done without interruptions.

Disadvantages of a secluded office layout

- More floor space is required.
- Effective supervision is difficult and can lead to a drop in productivity.
- Work flow is hampered.
- It is more expensive to build and maintain.
- Communication among staff is difficult.

3.2 Open-plan offices

5.2 Open-plan office layout (SB page 27)

Design

The open-plan office layout is the new approach to office design – large, open areas with no dividing walls. These areas are remodelled with columns, plants and placement of furniture. Specialists in open-plan design take into account furniture, décor, lighting, heating and ventilation, floor space and the cost of cleaning and repairs when they design the space.

Office space is left open in new buildings so that the company that moves into the premises can do the interior design according to company requirements.

Utilisation

People doing related work are grouped together in a large space. The spaces are partitioned and the employer's office, the managers' areas, the different functions – clerical, financial, marketing – are all demarcated. How the divisions will be made, how many and whom to partition off will depend on the company and how it functions.

Advantages of an open-plan and panoramic office layout

- Valuable office space is saved.
- This layout of office furniture promotes work flow and therefore productivity, work achievement and efficiency.
- Cleaning and maintenance are more economical.
- Supervision is easier.
- There is better communication between workers because they are grouped together.
- Lighting and ventilation are utilised more efficiently and economically.

Disadvantages of an open-plan and panoramic office layout

- Poorly planned work flow may mean extra noise, movement and disturbance.
- There is a lack of privacy for confidential calls or matters.
- Overcrowding is a possibility.
- There is no space for individuality or a personal stamp.
- Those far from windows are crowded in centre of room with no fresh air or natural light.
- It could promote idle chatter and socialising, reducing productivity.
- The space is impersonal, belongs to no-one and can become untidy.

4. Discuss the following:

4.1 Line authority

4.2 Staff authority

Class discussion

5. State SIX factors to keep in mind when buying furniture for an office.

6.3.1 Factors to take into account when buying furniture (SB pages 31-32)

Students can list any six of the following factors:

- Office furniture should be chosen with great care.
- Buy furniture of a high quality. Cheap furniture is not durable and must often be replaced at a high cost.
- The furniture must contribute to the safety and comfort of the workers.
- Furniture must have sufficient working and storing space and if necessary, must be used to conceal electrical cables.
- Where possible, new furniture must fit in with the existing furniture and equipment in the office.
- Furniture must be easy to clean and also not too heavy.
- Chairs and desks must be efficient.

Module 2: Office administration

After completing this module, students will be able to:

- determine the best location for and decorate and manage an office
- implement administrative office functions
- organise and plan your work
- implement time and task management
- manage a diary
- use follow-up systems and make use of memory techniques
- manage and maintain a filing system
- manage the telephone effectively
- manage the mailroom.



Activity 2.1

SB page 38

1. **As a group, visit your college administration block to critically evaluate the location, general appearance and decor of the college's administrative workstation.**

1.1 Location, general appearance and décor (SB pages 36-37)

The class should be divided into groups with a chosen person from each group to represent them to visit the office. An arrangement with the management assistant in the administration office should be made for the delegates to visit the office at a convenient time. When compiling the checklists, students should include a space on the list where each aspect on the checklist could be rated on a scale from 1 to 5.

2. **Use the guidelines discussed in section 1.1 in the textbook to compile a checklist of items to evaluate.**

Checklist to evaluate the location of the office

- It can be easily reached.
- It will be away from loud noise (e.g. entrance to the college building).
- It will be easy to reach from the outside.
- Visitors need not walk through the whole building to reach it.
- Clear indications like 'reception' and 'information' to lead the way.
- People and documents will always flow in the same direction.
- Workers communicating on a regular basis during the day will have workstations near each other for better work-flow.
- The management assistant will have some privacy.
- An environment of confidentiality can be maintained (plants and partitions).

Checklist for the general appearance of the office

- The workstation should always give the impression of efficiency.
- The office furniture should be arranged in such a way that the management assistant can always see who enters or leaves the workstation – this will make her an effective receptionist and creates a professional image.
- Furniture should all fit in. A uniform and neat appearance can be obtained by not using both modern and antique furniture and not adding steel furniture if the existing furniture is made of wood.
- One colour scheme should be used for the workstation. Colourful covers with different patterns should be avoided, neutral and light colours should rather be used.
- Ergonomically designed furniture, specifically designed to make the workstation safe and comfortable, should be bought to minimise physical and psychological stress.

- The workstation should always have a neat and clean appearance: no piled up papers should be on the desk, and no dirty cups, glasses or mugs should be left out. A clean water bottle and glass can be kept on the desk.
- Dusting should be done on a regular basis and special anti-static products can be used to clean computers, printers, photocopy machines, etc.
- Decorations should add to a feeling of professionalism and calmness. It should be done in good taste. A nameplate with the management assistant's name and surname can be placed on the desk or office door.

Checklist for the decor of the office

The workstation must be decorated in such a way that a calm, professional and effective atmosphere will be portrayed. Furniture should match and complement each other.

The following aspects will play a role in decorating the office:

Colour: colour creates a specific atmosphere and should add to the feeling of relaxation and calmness. Pastel (lighter) shades of the company's colours, as reflected in its logo, can be used. If one uses more than one colour, it should be different shades of the main colour. Lighter colours can make a small room look bigger and darker colours can make a room look smaller.

Wall decorations: paintings, prints, photos, etc. should all fit in and create a professional and relaxed atmosphere. Enlargements of the company's activities and achievements can be framed. When buying decorations, quality should have preference above quantity.

Pot plants: plants should not be too big, it should look healthy and well looked after and be well placed. While it can be used to create a space for privacy, it should never clutter the office.

Furniture: the colour scheme of the furniture, curtains, walls and carpets should fit in together. With furniture the emphasis should be on quality, comfort and style. Keep to a specific style and rather buy fabric than imitation leather. When partitions are used it should fit in with the furniture.

Curtains and blinds: as mentioned the curtains should fit in with the carpets and furniture. Curtains must be kept clean – washed or dry-cleaned – and be shrink proof. Office blinds are available in all fashion colours and looks professional.

Carpets and tiles: when fitting carpets the traffic flow, static electricity, and cleaning of the carpets should be kept in mind. Rather use a carpet with speckles on a darker background for dirt not to show easily or Scotch Guard® it to protect it from getting dirty too easily. Tiles should be slightly rough and not polished in such a way that it becomes slippery. If it is a cold room that is not used regularly, it might be better to fit carpets rather than tiles.

Music: when using music in the background of an office, it should be just loud enough to be heard and not be disturbing. It can have a calming effect and can prevent mental tiredness. The tempo should be varied and should fit in with the time of the day.

3. Present your findings on a table/spreadsheet. Use appropriate headings.

Each group should discuss the findings of their representative and compile the findings in a suitable format (e.g. an investigation report) for the group.

4. Compare and discuss the results with the rest of the class. Critically evaluate the workstation.

In a class discussion, the different findings of the different groups should be compared and the aspects on the checklists that received a low rating should be the focal point. If an agreement cannot be reached, a second visit to the office by the representatives should be arranged. A conclusive agreement should be reached during the second visit excluding any further class discussion. A final report on which all students agree should then be compiled.

5. Make suggestions for improvement in the area.

The report should contain the suggestions for change or improvement of the office with regards to the location, general appearance and decor of the office. The final report should be a combined report on the findings regarding the three checklists of all the groups and can be presented to the administration office as a recommendation.



Activity 2.2

SB page 40

Divide into three groups and obtain the information as instructed in questions 1, 2 and 3. Discuss the results with the whole group.

- 1. Visit the workstation of your college's administration block and observe the following:
Look at how the office is placed physically within the entire college setup.
Is there a reason why the desk is where it is?
Analyse the traffic pattern around and through the workspace.
Do co-workers have to pass through it to get from one operation to another?**
- 2. Study the work pattern of the secretary working in the office:
How often does she go back and forth to the filing cabinets each day?
How far away from her desk are the filing cabinets?
Do other workers share these files?**
- 3. Is there a more efficient way to organise the office?
Draw a sketch of the office and try a different layout.**
- 4. Keep the following in mind:
Will the work be done more effectively?
Will the changes affect another worker's effectiveness?**

1.3 Layout and workstation management (SB pages 38-44)

Students should remember that planning the office layout carefully can help to maximize the available space and increase worker productivity. Poorly designed office layouts can cause workers to become bored, disinterested, or frustrated. This can lead to a reduction in profits.

Guidelines for the layout:

- Using one large area rather than a few smaller offices, leads to better utilisation of lighting, ventilation and communication.
- Departments working together should be placed near each other.
- The reception area should be placed in such a way that people looking for the management assistant will not disturb the other people and offices.
- The location of the workstation should be such that people walking to and fro from the notice board, soft drinks vendor and photocopy machine, need not go through the workstation/reception room.

- Desks should be arranged in such a way that optimal use can be made of natural lighting and air.
- Enough provision should be made for electrical plugs and wiring.
- It should be possible to move partitions without influencing the lighting or air negatively.
- Workers should not face direct sunlight while working.

Planning a layout

Steps to take:

- Measure the working space. Rooms and office areas can appear much larger or smaller than they really are, depending on what is in them, the lighting and the shape of the room.
- Measure the office furniture and other large items, such as large filing cabinets, so you know the dimensions of the items you need to fit into the office.
- Identify the sections of the office space that will be used for primary working areas and the positioning of electrical outlets, light sources and phone jacks.
- The main working areas should be kept away from break areas and kitchens where workers gather, as those areas could decrease productivity by causing distractions.
- Space for office supply storage, files and large machines should be set aside.
- Machines used often, such as copiers and fax machines, should be located in easily accessible areas where there is enough room for several people to gather.
- Giving workers room to move without constraint helps to promote good ergonomics which can lead to fewer injuries, aches and pains.
- Measure walkways to make sure there is plenty of room for at least two people to walk in opposite directions. The more people you have working in the office, the wider the walkways should be.

Office arrangement

Consider using a clustered arrangement of desks or tables instead of the typical line of cubicles when designing an office layout to accommodate several workers. A workplace can have a number of different desk arrangements. Some layouts have offices in separate rooms, and some have a more open plan arrangement.

Traditional desk arrangements

Traditional desk arrangements include separate offices with walls and doors for those in authority. Workers on the lower rungs of the career ladder often sit away from the offices in an open-plan desk layout, either with or without partitions.

Open-plan desk arrangements

A more modern desk arrangement is an open-plan layout, where each employee sits at desks partitioned by dividers that only rise a few inches above the level of the desk. This allows easy communication between colleagues and staff members. Each desk has a computer and a telephone, with printers shared between workers. Choosing an open plan as layout for an office could result in promoting idle chatter and socialising and thus reduce productivity.

Cubicle forms

Companies that are looking to make the most efficient use of space will employ a cubicle farm layout, rows of desks with partitions that in some cases rise to ceiling level. Aisles periodically separate the cubicles for access, egress and the communication of employees. Each cubicle has a single desk with one computer and a phone line. Printers are often shared between two or more cubicles. This arrangement makes the best use of floor space, but workers can feel as if they are robots and some may miss colleague interaction.

'Hot desk' arrangements

Some businesses looking to maximize the floor space of the office may adopt a "hot desk" arrangement, where two or more employees share the same office space at different times of the day or week.

**Activity 2.3****SB page 70****The planning of a large project was delegated to you.****1. Draft a checklist for the tasks you need to accomplish in order to complete the entire project.**

4.10 Managing a large project (SB pages 67-68)

Managing the project by using an action plan

To plan a project the management assistant needs to take all the aspects of the project into consideration, namely the planning, organising, leadership, coordination and the control thereof.

Guidelines to create an action plan:

Whenever you find yourself facing a large project that seems overwhelming, it is time to create an action plan. This is the list of all the tasks you need to accomplish.

An action plan is different from the 'to-do list' because it focuses on a single goal. To create an action plan, first list all the tasks that need to be accomplished to achieve the goal and put them in the order they need to be completed. Break each task on the list into smaller subtasks. Listing a few items may cause you to think of other tasks.

Keep the action plan nearby as you begin working through the plan item by item. If additional tasks are needed that were not on the original plan, revise the plan and work from the new version.

Additional guidelines to follow:

- Do your planning in conjunction with all people involved.
- Put the planning in print.
- Design a checklist for activities, people responsible, dates for completion, etc.
- Each person must get a copy of his/her responsibilities.
- To control activities on a regular basis, keep the target dates in mind.
- Dates must be set for each phase of the planning - the date for sending out and the response to invitations must be before the date of the function.
- Arrange a check in time that allows enough time for alternative arrangements, should the unexpected occur.
- Have meetings from time to time to determine if people are still keeping to the time table.

2. Compile a task record with the necessary columns and headings to indicate the tasks, people and dates involved in the project.

4.10 Managing a large project (SB pages 67-68)

Students can get involved in organising a sports day at the college, preparing for the visit of a high ranking person to the college, organising an entrepreneurial day, helping with the prize giving ceremony at the end of the term, etc.

3. Compare your work with that of your classmates and then come up with one combined checklist and task record.

4.10 Managing a large project (SB pages 67-68)

Students compare their own work with the work of classmates and create a combined checklist and task record.



Activity 2.4

SB page 70

1. Discuss FOUR planning mechanisms available to help management assistants to structure their work.

4.2 Planning mechanisms and aids (SB pages 61-62)

To-do list:

- Start by writing down all the tasks to be completed.
- Break larger projects up into smaller tasks, similar to an action plan.
- Keep subdividing larger tasks until each item on your to-do list will take no more than one to two hours to complete.
- Once everything is written down, you can prioritise the list by assigning letters or numbers.
- For example, all items that have a high priority are marked with the letter A. All items that have an extremely low priority are marked with the letter F.
- Continue prioritising your to-do list using the letters B, C, D and E.
- Sort the list with the high-priority tasks at the top of the list.
- You can also create a smaller, daily version with a list of all the items you plan to complete that day. Review the master list every morning and create a new daily to-do list.
- Some of the low-priority tasks will be carried over from one to-do list to the next for several weeks or even months.
- As long as you do not forget about those items, there is no need to worry about them.
- Raise the priority level of an item if the task has a set deadline.
- The list can be set up a week in advance.
- The list can be expanded or changed every day, if required.

Task record

Keep a record of all tasks that have been completed. A specific date for completion of a task serves as a reference. Design a form that indicates the task description, persons involved, the time started and the time of completion or deadline, tasks that have been completed, tasks still in progress and tasks not yet completed.

Time sheets

A time sheet is divided into separate columns for time, activity, time spent on a task and comments. All daily activities can be filled in on this sheet. It is important to indicate time spent on an activity. The management assistant monitors that not too much time is spent on unnecessary activities. If there is never enough time to finish certain tasks, it is an indication that more time should be allocated for those tasks in the future.

Diary

The diary is used to organise the daily activities in the company. It includes the manager's requirements, planning and work. The diaries of the manager and the management assistant must be synchronised. Every morning, diaries must be checked and any conflicting activities or appointments should be rescheduled. All fixed meetings and other important recurring appointment dates must be indicated and taken into account. Remind the manager every morning of the day's meetings and appointments.

2. Name SIX guidelines that can help a management assistant to cope with interruptions in the workplace.

4.11 Time management (pages 68-70)

Students can make use of the Internet to find tips on how to deal with interruptions in the workplace:

- Work on one task at a time.
- Start the day with a difficult task.
- Group similar tasks.
- Keep a list.
- Prepare in advance.
- Do not postpone.
- Keep your work up to date.

3. Name FOUR tips on the correct sitting position that will help prevent muscle cramps and spasms.

1.3.2 Workstation management (Tips for your sitting position that will improve your output SB page 43)

Students can choose any four of the following tips:

1. Sit up straight when typing – keep your feet on the ground.
2. The lower back must be supported by the back of the chair.
3. Tilt the back of the chair from time to time to stretch the muscles of your back.
4. When you write, rest both elbows on the table to support the body.
5. The correct seat height is just above the knee when you stand in front of the chair.
6. Elbows should be level with the working surface.
7. There should be a space of 10 cm between the front of the seat and the back of the knee.



Activity 2.5

SB page 73

1. Consult a person working as a management assistant and identify the time-wasters he/she experiences in the daily office routine.

4.12 Time-wasters (SB pages 71-73)

Students may arrange to visit any management assistant they know. This may be a friend, an acquaintance known through a part time job, an office secretary, a family member working as a management assistant, etc. When consulting with the person the list of time-wasters as mentioned in the textbook should be taken along. Discussing some of the time-wasters with the person could stimulate the person to expand or mention some additional time-wasters as well.

2. Suggest ways of how time could be used more effectively with each of the identified time-wasters.

4.12 Time-wasters (SB pages 71-73)

Telephone calls

Long discussions on insignificant things are not necessary. Be friendly, ask what you want to know, give information, but be professional and to the point. No personal calls to family and friends should ever be made from the office during working hours.

Lack of planning

Keep the daily, weekly and monthly planning in mind. Set up a priority list accordingly, and be sure to keep to it - this is a sure way to handle a crisis or if something unexpectedly crops up.

Crises

Keep as calm as possible. If you cannot handle the crisis yourself, contact the right person as soon as possible. Have information readily available, e.g. a list of important telephone numbers, manuals, an information dossier, etc. Keep in mind what person will be able to help you via the career network and always have their contact information at hand.

Finding the manager

Present a professional image of the company by knowing the whereabouts of the manager during working hours. Continuous communication is absolutely necessary to avoid frustrating situations and to prevent unnecessary waste of time.

Disorganised manager

Establish a good rapport with the manager. Offer to help him in organising his tasks and time better. Each time documents are taken to the manager, store them in their covers. Open correspondence immediately and dictate the answers.

Unclear instructions

Make sure the instruction from the manager is correctly understood. Immediately ask in case of an uncertainty.

Doing too much

There is no sense in trying to do too much. The management assistant has to know that she can delegate certain tasks. Other tasks can be left over for the next day. It is better to do what you do right, than to leave certain things incomplete. Do not volunteer for extra work if you know you already have a lot to do, rather complete the task at hand to the best of your ability and so win the trust of your manager.

Unnecessary tasks

Tasks like sweeping the office floor, cleaning the waste paper basket and buying refreshments for tea time is not the management assistant's task. Eliminate any other unnecessary extra work. Make sure delegated tasks do not have to be redone.

Redoing tasks

Make sure a task is done right the first time it's done. Make sure the instruction regarding the task is understood correctly. Perform the task correctly and to the best of one's ability. When delegating a task and it was done right, but not precisely as you would have done it, don't do it over.

3. **Draft a list of time-wasters along with new habits as hints for better time management. Compile the list in column format using the appropriate headings.**

4.12 Time-wasters (SB pages 71-73)

Students can consult the Internet for tips and new habits on better time management.

Websites to use:

<http://www.organisemyhouse.com/the-top-12-time-wasters-and-how-to-avoid-them/>

<http://www.broadvision.com/en/blog/the-7-biggest-workplace-time-wasters-and-how-to-avoid-them/>

<https://www.americanexpress.com/us/small-business/openforum/articles/top-employee-time-wasters-and-how-to-prevent-them/>

4. **Compare your work with classmates and compile one combined list.**

Students compare their own work (question 3's answer) with the work of classmates and create a combined list.

5. Name FIVE time-wasters you need to identify and eliminate.

Student's own response.



Activity 2.6

SB page 80

1. You now understand the aspects of time and task management, diary management and follow-up systems and are ready to prepare a systematic daily plan and to-do list from the tickler file. As first task of your day, start with the to-do list and tickler file, progressing with your daily tasks throughout the day up to the tidying of the workstation at the end of the day.

4.2 Planning mechanisms and aids (SB pages 61-62)

The 'to-do list'

Task lists are often divided into:

- A general to-do list (or task-holding file) to record all the tasks the person needs to accomplish.
- A daily to-do list which is created each day by transferring tasks from the general to-do list.

Creating a 'to-do list':

- Start by writing down all the tasks you need to accomplish.
- Larger projects should be divided into smaller tasks, similar to an action plan.
- Keep subdividing larger tasks until each item on your 'to-do list' will take no more than one to two hours to complete.
- Once everything is written down, you can prioritise the list by assigning letters or numbers.
- For example, all items that have a high priority should be assigned the letter A.
- All items that have extremely low priority should be assigned the letter F.
- Continue to prioritise your 'to-do list' using letters B, C, D and E.
- Sort the list with the high-priority tasks at the top of the list.
- You can also create a smaller daily version with a list of all the items you plan on completing that day - you then review the master list each morning and create a new daily 'to-do list'.
- Some of the low-priority tasks are carried from one 'to-do list' to the next for several weeks or even months.
- As long as you do not forget about those items there is no need to worry about this. If there is a deadline involved you need to raise its priority level.
- The list can be set up a week in advance.
- The list can be expanded or changed on a daily basis.

Task record

- Record is kept of completed tasks.
- A specific date for completion of a task serves as a reference date.
- A designed form indicates task description, persons involved, time started, and time of completion of the task.
- An indication of completed tasks, tasks still in process and incomplete tasks is at hand.

Time sheets

- A time sheet is divided into columns for time, activity, time spent on task and comments.
- All daily activities can be filled in on this sheet.
- It is important to indicate time spent on an activity.
- The management assistant can monitor that not too much time is spent on unnecessary activities.
- It indicates what tasks take longer to finish and helps with time planning for the future.

Diary

- The diary organises the organisation’s daily activities. It includes the manager’s needs, planning and work.
- The diaries of the manager and the management assistant must co-ordinate.
- Every morning diaries must be checked to eliminate any clashing activities.
- All fixed meetings and other important dates must be indicated and taken into consideration.
- Every morning the manager must be reminded of important tasks for the day.

Examples of daily tasks:

- Airing the room and regulating the air conditioning
- Arranging the desk for maximum efficiency
- Consulting the desk calendar for tasks to be done
- Answering the telephone
- Control of the diary
- Opening and distribution of mail
- Daily filing
- Dictation with manager
- Word processing
- Placing work and work-in-progress files in a safe place at the end of the day
- Planning of the next day’s work by making a list of things to do
- Organising the desk for the next day
- Tidying the manager’s office and the workstation before leaving

Additional information:*Master to-do list for the management assistant*

- Air your office and regulate the air conditioning.
- Arrange your desk for maximum efficiency.
- Replenish your supplies.
- Prepare your notebook and pencils for taking phone messages or to be ready if the employer gives you tasks that requires taking down notes.
- Consult the documents and files in the follow-up/tickler system.
- Consult your personal dairy to see what must be done during the day.
- Check list of recurring matters:
 - appointments
 - meetings
 - payroll dates
 - bill payments
 - tax or insurance deadlines
- Give your employer a reminder list of appointments and other activities.
- Prepare any material from the files the manager will need.
- Try to order activities in the most productive way – if leaving the desk to run an errand do other errands at the same time.
- Use the telephone or e-mail to deliver a message instead of doing it in person unless instructed to do otherwise by the manager.
- Keep pickup and delivery times in mind when planning tasks that involve mailing or shipping.
- Maintain a daily to-do list on paper or on the computer.
- Check off each item as it is accomplished.
- When new projects come in, try to complete them as soon as possible.
- Prioritise the tasks.
- Consult with the manager to prioritise the tasks if you are busy with a task and a new one comes in.
- Before leaving the office to go home, make a list of what you have to do the following

- day.
- Put away all of your work and work-in-progress files, either in your desk drawers or in a filing cabinet.
- Work that is especially sensitive (e.g. client lists or accounting records) should be put away in a locked file cabinet.
- As a routine activity you should keep your work area clean.
- Clean out your desk drawers regularly.
- Your computer and other office equipment should be cleaned using a slightly damp towel.
- Schedule regular servicing for all office equipment as part of a preventative maintenance programme.

2. You are required to use all the information regarding the planning mechanisms and aids discussed in the above sections.

Students should have a thorough knowledge of the theoretical sections mentioned under section 4 (Time and Task Management), 5 (Diary Management) and 6 (Follow-up systems, transferring and memory techniques) in the textbook to be able to apply the knowledge as a practical skill.

3. Compare your work with your classmates and then come up with one combined daily plan and to-do list template.

Students compare their own work with the work of classmates and create a combined daily plan and to-do list.



Activity 2.7

SB page 80

1. Name and discuss SIX types of desk organisers.

6.3.1 Techniques (SB page 79)

- Urgent tasks file – Tasks that must be dealt with first and be completed
- Dictating file – All typing tasks and business letters
- Tasks file – Priority list/to-do list of relevant tasks and documents
- Review file – Contains information of interest, but not important
- Filing file – All documents to be filed
- Discard file – Usually information from the review file that is no longer relevant and can be thrown away.

2. Explain how the management assistant schedules and controls appointment times of the manager.

5.3.1 Scheduling and controlling appointment times (SB page 75)

- Do not make appointments for the manager at times set aside for doing routine tasks. Consider his/her time management style.
- Certain times are considered not to be effective for meetings, e.g. Monday mornings, public holidays, immediately prior to lunchtimes and in the late afternoons when concentration levels often drop.
- Keep appointments' duration down to what you judge to be an acceptable time limit. Do not block out several hours; if a meeting does run over, it will not be considered a waste of time.
- Choose days and times carefully. Always check the other events of the day or week around the proposed appointment to determine whether the appropriate time and focus can be given to the appointment.
- Remember that the manager has other priorities and commitments throughout the day.

- Try not to overcommit him/her with too many appointments in a single day.
- Make a note in your diary to gather the relevant information and documents for the manager to read before the date of the meeting.
- Remind the manager of other commitments for the day and find plausible excuses to rescue him/her from appointments that are taking up too much time. The manager will indicate to you whether the meeting should continue.
- Clearly note the name, job title and organisation of the person as well as the reason for the appointment in the diary.
- For appointments in other towns, supply the date, time, street address, map directions, GPS coordinates, name and telephone numbers of the contact person.
- When the manager returns to the office after a holiday or visit, inform him/her of everything that has happened. Do not make any appointments for one or two days after he/she has returned – it will give the manager the much needed time to catch up. Make sure to catch up on all documents that need to be signed and telephone calls that need to be made.

3. Explain why a follow-up drawer consists of 31 divisions and a further 12 divisions.

6.1 Follow-up systems and filing cabinet with 43 reminder files (SB page 77)

A follow-up drawer usually consists of the following:

- Thirty-one divisions, numbered according to each day of the month from 1 to 31
- A further 12 divisions according to the 12 months, from January to December.



Activity 2.8

SB page 92

1. Name and describe FIVE steps for the training and development of personnel working with a remittance register.

9.4 Personnel training and development (SB page 92)

- *Step 1: Identify persons who need training* – People who handle money and use the remittance register must be regularly monitored.
- *Step 2: Determine the most common mistakes made* – Such mistakes include mail that disappears, incorrectly sorted mail, slow sorting and distribution of mail, illegible hand writing where cash received is recorded and negligence in handling cash.
- *Step 3: Develop a training programme* – When people and mistakes are identified, it is necessary to develop a training programme to meet those specific needs, e.g. the mailing clerk will receive training to correctly and effectively sort the mail; the person working with money will be made aware of the enormous responsibility of working with money and of the importance of paying careful attention to every detail. The mistakes that were identified will determine the content and objective of the training.
- *Step 4: Present the programme* – Decide who will do the training, where it will be done, when it will be done (not when the company has its busiest time) and what it will cost.
- *Step 5: Evaluate the performance after the training session* – Observe the performance of workers executing the ‘weak areas’ that were identified before the training. This will give an indication of how successful the training programme was. If the feedback is negative, it may be that the training needs were incorrectly diagnosed. Training objectives may have to be determined again and the training repeated.

2. Name the FIVE basic steps to be followed for personnel training and development.

Same steps as listed in the answer of question 1 above.

Module 3: Dealing with messengers

After completing this module, students will be able to:

- explain the management and control of messengers
- indicate the proper way of giving orders to messengers as well as the best way to direct them to destinations
- discuss the function and coordination of messengers and delivery vehicles
- discuss the dispatch and collection of documents and articles
- Indicate the measures that can be put in place to ensure the safe delivery of documents and articles
- discuss how messengers can use the shortest and best routes from pick-up to delivery and how to deal with detours
- discuss how to handle messengers from other companies regarding security and entrance control
- acknowledge delivery of documents and articles.



Activity 3.1

SB page 97

Interview the messenger of the college (or any other business that the lecturer has made arrangements with) and write down the responsibilities and duties of this person. Compare the interview notes with others in your class. Consider which correspond and what must be added. Use this to write a job description for a messenger.

Students compare their own work with the work of classmates and create interview notes that can be used to write a job description for a messenger.



Activity 3.2

SB page 103

1. **Make a list of all the courier services operating in the area where the college is located. Invite one of them and ask a messenger to deliver a short talk to explain specifics such as dispatch, collection and delivery, planning of routes and rerouting.**

Students research which courier services operate in the area of the college, and invite a messenger from one of these courier services to deliver a talk about specific job-related topics such as dispatch, collection and delivery, route planning and rerouting.

2. **Name FIVE duties of an office messenger within a business.**
1.1 Functions of a messenger (SB pages 94-95)

Students can choose any five of the following functions:

Duties within a business include the following:

- Carrying or moving items from one building or office to another building or office within the business
- Collecting and distributing mail (envelopes) and small packages within the different departments and between departments of the business according to a roster
- Managing the collection, dispatch and delivery of mail and packages by couriers
- If clerical duties are included in the job description, mailroom duties such as opening incoming mail, registering it and preparing mail for delivery
- Copying documents
- Filing the records of items that have been delivered and received as well as doing general office filing
- Chauffeuring and transporting management or visitors to the business, as the need arises.

3. Give FOUR ways in which management can ensure the security and safety of documents and articles to be delivered.

5.1 Ensuring security and safety of documents and articles to be delivered (SB page 99)

Students can choose any four of the following:

- The OHS Act must be adhered to regarding the handling, transferring, storing or delivery of certain items, e.g. items containing corrosive and flammable substances. Messengers must receive appropriate training for handling such items.
- Regular health, safety and security checks regarding the handling and transport of items should be done.
- Registers, such as outgoing mail registers and incoming mail registers, and delivery documents must be completed accurately and diligently.
- A key register should be kept to indicate who is in charge of keys to storage areas, documents and vehicles.
- When cash is handled and transported, security is of utmost importance. Security standards must be high – arrange for security guards whenever necessary.
- Post boxes must have keys and postage bags must be locked on the outside. When registered articles are collected from the post office, a business stamp with the postal detail of the business must be presented otherwise the items will not be handed to the messenger.

Module 4: Access control, security and safety

After completing this module, students will be able to:

- discuss the business policy regarding access control, security and safety
- compile a procedural manual applicable for access control, security and safety
- indicate the principles used to prevent industrial espionage and do a security clearance
- discuss access, the function of identification cards, the handling of outside visitors and control within buildings
- explain the use of access cards by employees in general and understand areas of high security within a business or organisation
- give an example of a visitor register
- indicate the duties of the person controlling the visitor register, including the follow-up of enquiries control of the register
- discuss the different types of scanning equipment that can be used by businesses for access control, as well as the control function thereof
- discuss security, specifically with respect to the management assistant's workstation, taking into account the handling of confidential information, money, documents, passwords and electronic data and storage of documents of a sensitive nature
- discuss safety in the office and guidelines on how to deal with unsafe situations in the office
- discuss the compilation of a manual for use in the following situations: bomb threat, fire, hostage situation, armed robbery and basic First Aid.



Activity 4.1

SB page 111

Use the internet to identify different types of access cards (get examples) and pictures of card readers, scanners or biometric apparatus. Use these pictures to prepare an A3 poster on which the type of access device is linked with the processing device.

2. The use of identification and access cards (SB pages 108-111)

Students must research different types of access cards and card readers and create a poster with the types of access devices, linked to the processing device.



Activity 4.2

SB page 113

Learners work in groups of 3 to 6. Create your own business. Give this business a name and determine how strict you want access control to be. Decide on the columns you want to put in the visitor register. Appoint someone from the group to be in charge of the visitor register. Ask each member of the group to give the details of five visitors. Complete the register using this information. Ensure that each group member has a copy.

3. The visitor register (SB pages 111-113)

Students complete the activity by creating the access register based on their fictitious visitors.



Activity 4.3

SB page 113

Briefly discuss SIX ways in which industrial espionage can be prevented.

1.3 Principles for the prevention of espionage (SB page 107)

Students can choose any six of the following:

Preventing espionage:

- Develop a policy for ethical business practice. Adhering to ethical practices will help staff to not compromise or land in situations where they could be blackmailed for information.
- Identify sensitive and/or intellectual information and classify it accordingly.

- Determine who will be allowed access to buildings, offices, filing systems, files and information.
- If a business is vulnerable to espionage, all staff must be subjected to a security check before being appointed.
- Do not employ temporary staff or consultants unless background and security checks have been done. This is especially important for IT technicians who could install spyware on computers.
- Do regular office sweeps to check for listening devices or any other spyware.
- Ensure that secure measures are in place when laptops are removed from the business premises, e.g. locking laptops away when not in use and using an external memory drive.
- Ensure that documents are returned to their files and that data disks, external hard drives and files are locked away.
- Do not allow confidential information to be removed from the workplace without authorisation.
- Install electronic access devices, activated by card, fingerprint or voice recognition, to areas of high security or risk.
- Be vigilant about supplying information. Be alert to people asking work-related questions. Do not be tempted to share sensitive information with unauthorised personnel or strangers.



Activity 4.4

SB page 120

1. **Learners work in groups of 3 to 6. Ask your lecturer to make a few copies of the OHS Act available to you. Divide into groups and study the act. Highlight specific clauses that refer to health and safety in the office. Display this list in your classroom.**
6. *Guidelines to ensure safety in the office (SB pages 118-121)*

Students in each group create a list pertaining to health and safety in the office from the OHS Act.

2. **Ask your lecturer for a copy of the college safety manual. If there is no manual, draft a list of safety aspects to be adhered to in the classroom.**
6. *Guidelines to ensure safety in the office (SB pages 118-121)*

The college will have a safety manual in place as it is law. Students, in the same groups, create a list pertaining to safety aspects that must be adhered to in the classroom, based on the college safety manual.

3. **Visit areas on the college premises and identify conditions or actions that could be considered as unsafe, dangerous, risky or hazardous.**
6. *Guidelines to ensure safety in the office (SB pages 118-121)*

Students, in the same groups should be allowed to visit any area of the college to try to identify conditions or actions that could be considered unsafe, dangerous, risky or hazardous.



Activity 4.5

SB page 122

- Learners work in groups of 3 to 6. Use the following example of an OFFICE SAFETY CHECKLIST to check for potential hazards in an office environment. Offices in the college can be visited and administrative staff interviewed to assist you in completing this checklist.

6. *Guidelines to ensure safety in the office (SB pages 118-121)*

Name of person responsible for completing the checklist: _____			Building: _____		
			Department: _____		
			Section: _____		
			Level: _____		
Office no: _____		Phone no: _____		Date completed: _____	
Item description	Concern/Risks	Yes/No	Action taken	Comments	Signed off by (signature)
1. Filing cabinets	Drawers overloaded	Y	Training given to file clerk	Problem solved	
	Drawers left open unsupervised	N	–	–	
	Documents stacked on top of filing cabinet	Y	Buy additional cabinet	Cabinet not bought – alternative arrangement (archiving)	
	No keys to lock cabinet	Y	Locksmith made new keys	Completed	
	Cabinets rusted at edges due to water spill from air conditioner	N	–	–	
2.					
3.					
4.					
5.					

Students form check for potential hazards in the office environment by visiting offices of administrative staff.



Activity 4.6

SB page 128

Take stock of how vigilant you are when it comes to your personal safety. Think about short cuts you take to get home, whether you lose track of time etc. Develop a plan of how you can become more vigilant about your surroundings, safety and security.

Students must develop a plan and set guidelines of how each of them can be more vigilant about their surroundings, safety and security.



Activity 4.7

SB page 128

1. Name FIVE safety hazards in the workplace.

6.1.2 Unsafe conditions (SB pages 120-121)

Students can choose any five of the following safety hazards (or even mention a few of their own)

- Boxes stacked against walls, objects left on the floor, files stacked on top of filing cabinets and overloaded filing cabinets could topple over all create unsafe conditions.
- Loose carpeting or loose/chipped tiles could cause people to stumble and fall.
- Electric cables that run underneath carpets, especially loose carpets, could cause people to trip and fall. Electric cabling must be properly ‘trunked’ against a wall.
- Overloading of power points and the use of faulty appliances pose serious hazards. Kettles, radios, microwaves etc. can potentially cause an electric shock and fire.

- High-gloss tiles or wet tiles are dangerous. Air conditioners that drip onto tiled areas make the floor surface slippery.
- Furniture or trash placed near or in walkways/passages may cause people to bump into it. Sharp edges and overloaded equipment can cause serious injury.
- Doors that open into passages pose the risk of someone being knocked over if the door is opened suddenly. Such doors, when open, also block passages.
- Lighting that is inadequate creates areas in walkways, passages or next to lifts that are poorly lit. Emergency lighting must be available for use during power/electricity shortages.
- Poor ventilation or air-conditioning units that do not function optimally can cause fluctuation in humidity and temperature. This can result in employees suffering from ‘sick building syndrome’. The incorrect placement of desks and/or computers can create a continuous glare.
- Staff who are not adequately trained in first-aid (or not enough trained staff), lack of a first-aid kit, lack of safety or evacuation plans and fire drills and lack of smoke detectors all pose serious threats in the workplace.
- Lack of an OHS committee and adherence to the OHS Act will lead to an unsafe work environment.

2. Name FOUR unsafe actions in the workplace.

6.1.3 Unsafe actions (SB page 121)

Students can choose any four of the following:

- Misuse of chairs – Falling off a chair that has been used instead of a stepladder to reach higher surfaces, tilting back in the chair too far and falling, sitting down without first looking, leaning sideways from a chair in order to retrieve something
- Poor handling of stationery – Finger cuts when handling paper, sharp pencils, pens and scissors pointing upwards in stationery holders, using guillotines or paper cutters without the safety guard, using your fingers to remove paper jammed in a photocopier
- Negligence when using filing cabinets – Overloading drawers, leaving drawers open, leaving the upper drawers of a filing cabinet open, using your foot to close a drawer, overstocked shelving
- Walking while holding sharp objects – Such as pens/pencils in your mouth, a pair of scissors or a letter opener in your hand or carrying ungainly stacked objects that obscure your vision
- Computer-related risks caused by operators – Failure to take regular breaks, causing dry eyes, an incorrect or static sitting position causing back ache, poor body posture leading to the user placing their hands incorrectly on the keyboard and causing carpal tunnel syndrome, sitting too close to the computer screen, light from windows that cannot be adjusted satisfactorily
- Wrong or quick movements – Such as running in the passage, walking rapidly while carrying hot or dangerous fluids, the wrong posture when lifting and carrying heavy objects, trying to carry too much at once, carrying chemical substances that are not properly packed, safeguarded or sealed
- Negligent use of electrical equipment and connections – The overloading of plugs, failure to switch off the power supply to equipment before removing it, operating electrical equipment incorrectly, using faulty electrical appliances, electrical wiring that is not wired according to instructions, cabling that is not properly fixed to a wall.

Module 5: Assisting with travel arrangements

After completing this module, students will be able to:

- compose a planning document for the manager's approaching business trip
- follow the procedure when the service of a travel bureau is used
- perform the specific duties involved when a business trip is planned
- take action regarding difficult situations that may occur during the absence of the manager and know the best way to solve problems that may occur
- compile a list of guidelines to be followed when a management assistant accompanies a manager on a business trip
- compose a planning document for the manager's approaching business trip.



Activity 5.1

SB page 147

1. Explain the difference between:

1.1 a private meeting and a public meeting.

1.1.1 Types of meetings (SB pages 132-133)

Private meetings are attended by members only and all members have a say in decisions as well as a right to vote.

Public meetings can be attended by anyone/members of the public. They are held to share information or to discuss issues that concern those invited. Public meetings are called so that people may express their opinions, listen to a public speaker or a proposed plan, learn about a specific topic or work together to solve problems. It is one of the most traditional ways to consult local people.

1.2 a formal meeting and an informal meeting.

1.1.1 Types of meetings (SB pages 132-133)

Formal meetings must be validly summoned or convened. They are held to present important financial, organisational and operational information to those who make decisions regarding these matters. These meetings have a specific agenda and the minutes are recorded.

Informal meetings are not as rigidly planned and regulated as formal meetings and usually take place in casual settings. These meetings are used to address daily operational and policy issues, e.g. one-on-one meetings, team meetings or informational meetings. They can be used to brainstorm ideas, solve problems, train staff or for teambuilding.

2. Explain the main purpose of the constitution of an organisation.

1.1.2 Constitution (SB page 134)

To set out the principles or rules that governs the company. The company's right of existence and its legal status is defined by the constitution.

3. List the SIX most important requirements of the notice of a meeting.

1.1.7 Notice and agenda (SB pages 135-136)

Students can choose any six of the following:

- Should be in writing or in format prescribed by the constitution of the organisation (notice may also be given by phone, fax or e-mail, or a notice placed in a local newspaper)
- Sent out by a person authorised to do so (chairperson or secretary)
- Signed and dated
- Must be unconditional, i.e. no conditions may be added
- Explain the reason for the meeting or state type of meeting (e.g. annual general meeting, executive committee meeting, etc.)
- Clearly indicate the venue, date and time of the meeting

- Include a detailed agenda
- Must be sent to registered addresses of attendees
- Appropriate period of notice is required – period will differ according to the type of meeting, as stated previously, and the constitution of the company.

4. Provide an example of an agenda using an acceptable format.

1.1.7 Notice and agenda (SB pages 135-136)

FINANCE COMMITTEE MEETING

The Finance Committee of the Board of Directors of Gaggle Company will meet on Friday, 31 May 2019, at 10:00 in the Second Floor Conference Room of the Tafelberg Building.

1. Opening
2. Present
3. Apologies
4. Minutes of previous meeting
5. Matters arising
 - 5.1 Budget Committee Report
 - 5.2 Training sessions
6. New matters
 - 6.1 Sponsorships and donations
 - 6.2 New accounting software
7. General
8. Date of next meeting
9. Closing

5. Define motions.

1.1.10 Motions, voting and resolutions (SB page 138)

A motion is a formal step to introduce a matter for consideration or discussion at a meeting.

6. Distinguish between the minutes and a report of a meeting.

1.1.14 Minutes and report (pages 139-140)

Minutes are official documents. The purpose of minutes is to provide an accurate record of the decisions made, including any resolutions passed, at a meeting. They must also outline key discussion points and any opposing views. Minutes are far more structured and detailed than reports. Reports are short and cover only the main points. A report will typically only include the decisions reached, not the points of discussion that led to the decision.

6.1 List the most important requirements of minutes.

1.1.14 Minutes and report (pages 139-140)

Minutes should contain the following:

- Name of the organisation
- Type of meeting (annual, weekly, committee name, etc.)
- Date, time, and place
- Name of chairperson and secretary – who also sign and date the document
- List of attendees and apologies – to note whether a quorum is present
- Motions – exact wording of the beginning of a motion, e.g. “I move for the adoption of the agenda”
- Decisions, and actions taken or assigned
- Any point of order rulings
- Summary of discussions
- Closing of the meeting.

7. Discuss the role of the secretary or management's assistant:

7.1 before a meeting;

1.2.3 Preparation for the meeting (SB pages 142-144)

The secretary / management assistant must:

- Prepare the notice and agenda of the meeting with the chairperson
- Book venue
- Sent notice and agenda to members
- Prepare a checklist for the meeting
- Prepare chairperson's agenda
- Prepare a meeting file for the chairperson
- Make stand-in arrangement to run office in his/her absence
- Confirm booking of venue
- Prepare venue – layout and organisation of furniture
- Arrange refreshments
- Order and set out stationery
- Arrange the necessary equipment

7.2 during a meeting;

1.2.4 Actions during the meeting (pages 144-145)

During the meeting the secretary / management assistant:

- Takes notes/makes tape recording of proceedings
- Assists the chairperson
- Deals with interruptions
- Delivers messages to members

7.3 after a meeting.

1.2.5 Actions after the meeting (SB pages 145-146)

After the meeting, the secretary / management assistant:

- Hands back the venue – tidies it first and rearranges furniture if necessary
- Returns equipment
- Collects and stores stationery and other equipment
- Returns items/documents left behind by attendees
- Sorts and files all documents
- Confers with chairperson regarding minutes
- Types minutes
- Get the chairperson to check minutes, sign and date them
- Circulates minutes
- Keeps copy of minutes with action column to record progress of any follow-up actions
- Diarises important deadlines and appointments
- Lists post-meeting activities to be managed
- Handles correspondence
- Checks progress of actions assigned to members.



Activity 5.2

SB page 156

Simulated activity

ABC Enterprises has decided to host a conference next year. You have been appointed as the event planner. Compile a strategic plan and list the possible expenses to be included in the budget.

2.2 The role of the secretary/management assistant in connection with formal events (SB pages 148-155)

Student responses will vary. The following details should be included.

Strategic plan:

- General
 - Clear and concise objective
 - Target group and number of participants
 - Name that will be used
 - Location/venue, date(s) and times (daily start and end times)
 - Preliminary budget
- Venue selection
 - Contact appropriate venues and arrange site inspections to compare properties
 - Look at size, audio-visual and IT equipment available
 - Look at catering options and prices
 - Consider parking and transport
 - Confirm dates, hours and prices and negotiate contract
- Attendees/delegates
 - Compile preliminary list of participants
 - Send out invitations
 - Finalise list of participants
 - Organise accommodation and transport for participants
 - Arrange recreational activities
- Speakers
 - Identify potential keynote speakers
 - Send invitation and negotiate contracts
 - Make arrangements (travel and accommodation)
- Marketing
 - Contact potential sponsors and exhibitors
 - Create theme and logo, and design name tags
 - Advertising campaign – Internet, television/radio, printed media and social media
 - Design and print brochures, tickets, advertisements and invitations
- Organisation
 - Organise system of payments
 - Arrange staffing and volunteers
 - Accommodation and transport for staff/volunteers
 - Arrange décor
 - Finalise entertainment and catering reservations
 - Arrange/book technicians for audio-visual/IT equipment
- Onsite management
 - Ensure that equipment is operational
 - Activities, social programme and functions for delegates
 - Check disaster management compliance, emergency evacuation, fire and paramedic compliance
- Registration
 - Ensure updates of registration forms and website/online links
 - Establish delegate payment policy
- Clean up
 - Arrange quick clearing of venue
 - Ensure that teams do not cause damage for which you will be liable

The **budget** includes:

- venue hire
- staff time
- marketing
- registration
- printing – programmes, name tags, advertisements

- stationery
- entertainment and recreation
- speakers and training
- audio-visual equipment and production costs
- IT/Internet costs
- food and beverages (delegates, staff and volunteers)
- transport
- accommodation
- insurance, taxes, gratuities and other service charges
- photographer.

Summative assessment

SB page 156

1. Short questions

Choose the correct answer.

1.1 A meeting attended by representatives/delegates from the same organisation to discuss matters important to the organisation is called a ...

- A. formal meeting.**
- B. private meeting.**
- C. conference.**
- D. congress.**

1.1 D

1.2 A meeting attended by all members of an organisation is called a ... meeting.

- A. board**
- B. general**
- C. business**
- D. financial**

1.2 B

1.3 A public meeting at which one or two experts present a short course for others in the same field is called a ...

- A. seminar.**
- B. symposium.**
- C. congress.**
- D. special committee meeting.**

1.3 A

1.4 The formal record of a meeting is called the ...

- A. notice.**
- B. agenda.**
- C. minutes.**
- D. register.**

1.4 C

1.5 A resolution is ...

- A. a method of voting.**
- B. a changed proposal.**
- C. a decision taken by members.**
- D. a rule that is not followed.**

1.5 C

(5 × 1)

2. Long questions

2.1 Discuss the requirements for a meeting to be valid.

(2 × 2)

A meeting is valid if the following requirements are met:

- Convened by the proper authority (the company's secretary or the chairperson is the proper authority)
- Proper notice is given
- Agenda is made public
- It has legal purpose
- Quorum (required minimum number of persons) is present
- Only legal members are present
- Chairperson is a proper person (the authorised, properly chosen chairperson)
- Meeting is conducted according to the agenda.

2.2 List the procedure for a meeting.

(9 × 1)

Procedure for a meeting:

- Notice of meeting sent out to all members (minimum seven days before proposed date)
- Agenda sent out with the notice
- Chairperson checks the quorum
- Opening of meeting
- Presenting apologies
- Confirmation of the minutes of the previous meeting
- Any matters arising from minutes (individual or committee feedback/reports, etc.)
- Matters on the agenda are discussed in the order in which they are listed
- Opportunity for members to raise other business
- Closing the meeting.

2.3 Explain the requirements for a notice.

(5 × 1)

The requirements for a notice – any six of the following:

- Should be in writing or in format prescribed by the constitution of the organisation (notice may also be given by phone, fax or e-mail, or a notice placed in a local newspaper)
- Sent out by a person authorised to do so (chairperson or secretary)
- Signed and dated
- Must be unconditional, i.e. no conditions may be added
- Explain the reason for the meeting or state type of meeting (e.g. annual general meeting, executive committee meeting, etc.)
- Clearly indicate the venue, date and time of the meeting
- Include a detailed agenda
- Must be sent to registered addresses of attendees
- Appropriate period of notice is required – period will differ according to the type of meeting, as stated previously, and the constitution of the company.

2.4 Discuss the duty of the secretary or management assistant before, during and after a meeting.

(5 × 3)

1.2.3 Preparation for the meeting (SB pages 142-144)

Before meetings, the secretary/management assistant must check the following:

- List of attendees
- Venue – availability
- Notice and agenda – sent to all attendees
- Arrangements made for taking minutes
- Necessary equipment is available and/or set up
- Notepapers, stationery and nametags have been obtained
- Any papers/documents/reports to be discussed have been circulated
- Copies of previous minutes have been circulated

- Any information requested at last meeting is available
- Catering arranged and refreshments are available
- Attendance is confirmed
- Chairperson's agenda is prepared
- All arrangements have been checked with the chairperson.

1.2.4 Actions during the meeting (pages 144-145)

During the meeting, the secretary/MA:

- Takes notes/makes tape recording of proceedings
- Assists the chairperson
- Deals with interruptions
- Delivers messages to members

1.2.5 Actions after the meeting (SB pages 145-146)

After meeting, the secretary/MA:

- Hands back the venue – tidies it first and rearranges furniture if necessary
- Returns equipment
- Collects and stores stationery and other equipment
- Returns items/documents left behind by attendees
- Sorts and files all documents
- Confers with chairperson regarding minutes
- Types minutes
- Gets chairperson to check minutes, sign and date them
- Circulates minutes
- Keeps copy of minutes with action column to record progress of any follow-up actions
- Diarises important deadlines and appointments
- Lists post-meeting activities to be managed
- Handles correspondence
- Checks progress of actions assigned to members.

2.5 Describe the contents of the chairperson's file. (6 × 1)

1.2.3 Preparation for the meeting (SB pages 142-144)

Content of chairperson's file:

- The chairperson's copy of the agenda
- Minutes of the previous meeting
- A list of attendees
- Copies of documents/relevant papers circulated to members (e.g. work reports on key outcomes; financial reports)
- Documents/information pertaining to points on the agenda
- Any resources that might be necessary for the meeting.

2.6 List SIX considerations that should form part of the budget for an event. (6 × 1)

2.2.1 Planning file (SB pages 149-154)

Any of the following six considerations for the budget:

- Venue hire
- Staff time
- Marketing
- Registration
- Printing – programmes, name tags, advertisements
- Stationery
- Entertainment and recreation
- Speakers and training
- Audio-visual equipment and production costs
- IT/Internet costs

- Food and beverages (delegates, staff and volunteers)
- Transport
- Accommodation
- Insurance, taxes, gratuities and other service charges
- Photographer

2.7 Discuss the most important criteria regarding the venue of a conference. (5 × 1)

2.2.1 Planning file (SB pages 149-154)

Points to consider when choosing a venue:

- Size – it should easily accommodate the expected number of participants
- Location – within easy reach of public transport, restaurants, accommodation of out-of-town participants
- Air conditioning, lighting and acoustics
- Layout that suits the style of the event (discussed in more detail below)
- Availability and cost of audio-visual equipment needed by speakers
- Accessibility for persons with disabilities
- Services included in the hiring of venue, e.g. parking, security, catering, décor, etc.
- History of the venue – all participants should feel comfortable
- Accessibility to Internet and Wi-Fi

2.8 List FIVE details that should be included in the final invitation to delegates. (5 × 1)

2.2.1 Planning file (SB pages 149-154)

Five details an invitation should include:

- The final programme, include the list of speakers and topics
- All costs that due by then
- Final date for registration
- Times for registration
- Venue
- Accommodation options
- Catering
- Transport details

2.9 Explain the duties of the secretary BEFORE a conference. (5 × 1)

2.2.2 Duties before events (SB pages 154-155)

The duties of a secretary before a conference:

A pre-convention meeting should be held at the venue 24 to 48 hours prior to the launching of the event. This allows planners to review procedures, meet the staff and check that everything is in place. Any problems can be dealt with timeously.

Checklist prior to the event:

- Lighting, air conditioning and equipment
- Requested extras (e.g. extra rooms/kitchen facilities, etc.) available
- Restrooms
- Accessibility for persons with disabilities
- Layout instructions have been followed
- Stationery and folders
- Water containers and glasses
- Equipment/apparatus – screen, microphones, etc.
- Extra copies of documents
- Name tags
- Staff to receive and escort VIPs
- Assistants for registration
- Refreshments and catering
- Media coverage
- Security

2.10 Name FIVE layout plans that may be considered for an event.**(5 × 1)***2.2.1 Planning file (SB pages 149-154)*

Five layout plans that can be considered for an event:

- Theatre style
- T-shape,
- Classroom style
- Boardroom style
- U-shaped
- Workshop style
- Banquet style/round tables.

Total: 70**Activity 5.3****SB page 160**

- 1. Divide the class into small groups and allocate a different task to each group.**
- 2. Contact a travel agent of a local travel agency and ask permission to make an appointment with them to observe their activities.**
 - Observe how reservations for a domestic or international flight are made for a client.
 - Observe the procedure followed and documents involved for hiring a car from a car rental company.
 - Decide on an international destination, gather the necessary brochures and obtain all the necessary information to be able to arrange a trip to the chosen destination.
 - Compile a list of questions you would like to ask a travel agent.
 - Enquire about the computer software the company uses and find out what the training of the programmes entails.
 - Ask the travel agent for a list of 'hints' or 'tips' she could give a management assistant who is consulting an agency to help her arrange a trip for her manager.
- 3. Discuss the information obtained and compile a reference file to keep for future use.**

Students can make use of the Internet to obtain information preparing them for the visit. Visit the following websites for more information:

<http://www.flightcentre.co.za/company/legal/booking-tnc>

<http://www.flysaa.com/lv/en/flyingSAA/FAQs/FAQs.html>

<http://www.capterra.com/sem/tour-operator-software?gclid=CPuBurD078oCFdUW0wodMXQGBg>

**Activity 5.4****SB page 173**

- 1. Make an appointment with a management assistant of any business of your choice.**
- 2. Ask him/her to give you an example of a difficult situation he/she has experienced during the absence of her manager from the office.**
- 3. Ask how the situation was dealt with and what actions were taken to solve the problem.**
- 4. Ask for some tips and good advice regarding the handling of difficult situations in the office when the manager is absent.**
- 5. Have a class discussion and decide on at least FIVE best practices on how to successfully deal with difficult situations in the absence of the manager and how to best solve the given problems.**

6. Handling difficult situations in the absence of the manager (SB pages 172-173)

Each student should have a list of guidelines regarding the handling of a difficult situation in the absence of the manager with him/ her to guide the interview with the management assistant.

In case of a difficult situation, the management assistant can use the following procedure:

- During the absence of the employer, it is expected from the management assistant to use her own judgment and discretion in matters which cannot be referred to other people.
- Sometimes she will be capable of handling matters on her own, but she must be aware not to take matters into her own hands.
- When the employer contacts the office on a regular basis, she must use the opportunity to discuss difficult situations with him. She can also compile a list of urgent matters she wants to discuss with him. The manager will decide whether the management assistant should contact him by e-mail or send his e-mails to him while he is absent from the office.
- When the employer does not contact the office on regular basis, she must use her own discretion whether she must contact the employer or whether it should be referred to someone else. She must decide whether the matter is relevant to the visit overseas or not.

For the class discussion afterwards:

Examples of additional best practices when dealing with difficult situations in the absence of the manager:

- The main objective of the management assistant in the absence of the manager would be to let the office routine still run smoothly. A professional image should always be portrayed.
- The management assistant should be well acquainted with the specific duties of every worker in every department or section of the organisation to know where to find expert input from a knowledgeable or skilled worker in the case of a difficult situation.
- Cross departmental training for the employees on a regular basis could be helpful. When a difficult situation comes about, the problem becomes a corporate matter to be shared and solved by all.
- The management assistant should strive to have good human relations with co-workers. She could then without restraint turn to co-workers to obtain assistance in a difficult situation.
- The management assistant should assist the manager in building a corporate culture in the organisation. Having regular meetings with the employees and informing them about important matters and decisions will inspire workers to be involved when a difficult situation needs to be resolved.
- The manager should provide the management assistant with the names and telephone numbers of managers in similar professions to help and assist in the case of an emergency or difficult situation.



Activity 5.5

SB page 173

1. List THREE types of vaccinations a traveller should get.

Students can make use of the Internet to research types of vaccinations required for certain destinations. Some examples include:

- Yellow fever
- Malaria
- Hepatitis A and B

Visit the following useful site: https://www.vaccines.gov/who_and_when/travel

2. Discuss FIVE duties of the management assistant during the manager's absence from the office.

5.3.2 Duties during the manager's absence (SB pages 171-172)

Students can choose any five of the following:

- You are not on holiday while your manager is away. Complete all tasks and duties that were put aside while you were preparing for the trip.
- Stay at your desk, working at the same pace you would have had your manager been in the office. If you are an assistant to more than one executive, schedule in as much time as possible to do work for the other executives in the office.
- Open incoming mail as soon as possible. When the manager is away from the office, allow additional time on your schedule to take care of incoming mail.
- Use your good sense to decide what you can deal with yourself and what to refer to another person and which matters should be left until the manager's return.
- Keep photocopies on your desk of documents of completed tasks to bring your manager up to date when he/she returns.
- If you cannot communicate with your manager regularly, you will have to judge for yourself whether a matter is important enough for his/her involvement or whether someone else must deal with it in his/her absence.
- If you and your manager have arranged to communicate regularly, make a list of the items to be discussed with him/her. You can also keep the manager up to date with regular e-mails.
- Open a file with details of all tasks to be dealt with when the manager returns; telephone, fax and e-mail messages can also be included.
- Schedule appointments for the manager in the same way you would if he/she were in the office. Arrange only a few appointments for the first few days the manager will be back in the office.
- Plan your schedule so that you will have the first day the manager is back at the office free to follow up on work generated by the recent trip.

3. Discuss FIVE guidelines for planning a preliminary itinerary.

5.1.2 Preparing the itinerary (SB pages 162-163)

Students can choose any five of the following:

- Decide how many places to visit in the available time. Keep in mind that a too full itinerary can become complicated when there are delays or unforeseen circumstances. A crisis can develop quickly and can make it impossible to continue with the trip. Schedule in free afternoons or mornings, leaving an opening to reschedule if it becomes necessary.
- Check for public holidays and major events in the countries the manager will be visiting. Take the different time zones into consideration as well as daylight saving hours. For instance, October in Paris is conference month and accommodation is booked a year in advance.
- Check where the manager would like to spend a weekend or whether he/she would prefer travelling.
- Consult with your employer about places to be visited, the number of appointments required in that location, the time required in each location and preferred dates. All meetings and appointments must be confirmed.
- Also confirm the manager's preferred mode of transport, e.g. car, bus or train, preferred airline and preferred type of accommodation: – Large hotel or a small intimate hotel – The type of room – Central or secluded location.
- Make appointments well in advance for visas and vaccinations, if these are required.
- Type up a rough draft of the trip with all these personal choices of the manager regarding hotels, dates and transport. This draft can be given to an experienced travel agent, who will make further practical arrangements.
- Finalise reservations only after the manager has approved them.
- With every possible detail considered, the final itinerary can now be drawn up.
- This plan must be submitted to the manager for approval. Be prepared to answer any questions and to motivate your choices.



Activity 5.6

SB page 174

From all the information you have obtained by studying this material and through your practical experience obtained by completing the activities, compile your own ten best guidelines for the management assistant when planning a business trip for her manager.

3.1 How to plan a business trip quickly (SB pages 157-159) as well as 5.1 Arrangements for the trip (SB pages 161-171)

Students can use the information on pages 157, 158 and 161 in the textbook to decide on their own 10 best guidelines to plan a business trip for the manager or consult the Internet for additional information.

Example of additional guidelines

Create an itinerary

It is the key to find out exactly what your manager is planning during his business trip. All who, when, where, how questions need at least semi-solid answers.

Communication

When using phones abroad, upgrade the manager's existing mobile plan with their current provider.

Check times periodically

As flights are constantly rescheduled, the management assistant should be up to date with the latest information regarding flight times.

Purchase refundable tickets

Meetings can be cancelled and new ones scheduled at the drop of a hat. Purchasing refundable tickets will save the organisation money.

Checklists

Create detailed lists and note down everything to ensure you are on target.

Transport

Consult with the manager regarding his travel preferences and arrange accordingly.

Customs regulations

Know the rules and regulations regarding customs and taxes in the county/countries your manager is going to visit.

Weather

With the change in weather patterns the management assistant should help prepare the manager to plan for all weather situations.

Travel insurance

Make sure the insurance covers all the necessary aspects like hospital costs, baggage lost, cancellation fees, etc.

Make it as relaxing as possible

Try to make the whole experience as comfortable as possible for the manager. Ensure that your manager is at the airport with ample time to spare so he does not feel rushed. Invest in access to an airline lounge to really make sure your manager is fresh and ready to face the first meeting, which could potentially be only moments after he lands.

**Activity 5.7****SB page 175****1. Briefly discuss FIVE travel documents that must be arranged beforehand and taken with on the trip.***5.1.6 Travel documents and related arrangements (SG pages 165-169)*

Students can discuss any of the following five travel documents briefly:

- Passport (must be valid and certain countries requires a certain amount of pages to be unused for it to still be valid e.g. USA)
- Visas (if required by destination travelling to)
- International driver's licence
- Health certificates (vaccinations received)
- Insurance certificates (medical cost covered in case of emergency)
- Monetary arrangements (when applying for a Visa, the consulate requires the applicant's bank statements of the past three months)
- Copies of any other important documents e.g. flight tickets, confirmed accommodation, confirmed excursions, etc.

2. Discuss FIVE guidelines that the assistant must follow when accompanying the manager on the business trip.*7.1 Guidelines (SB page 174)*

Students can choose any five of the following guidelines:

- The management assistant must take care of the routine tasks, type minutes and agendas, make other arrangements and reservations and even act as an interpreter if you speak a foreign language.
- You could also be responsible for arranging a function and be required to act as host/hostess.
- Select the outfits you take on the trip carefully and prepare for all occasions. At the same time, take as little as possible! Do not take any unnecessary items with you. Crease-resistant clothing will help you look fresh every day. Choose mix-and-match outfits.
- It is extremely important that the management assistant is neatly and stylishly dressed throughout the trip.
- When you act as host/hostess, maintain a strictly professional relationship with the manager to avoid any embarrassing situations.
- Respect the manager's privacy. Take note when he/she would like to be alone. Continue with outstanding tasks on your own or retire early.
- Always act professionally.

Module 6: Financial record keeping and management

After completing this module, students will be able to:

- Complete a remittance register correctly
- Handle a basic wage system
- Manage a petty cash system
- Control and handle the depositing of money
- Handle, prepare and control internal claims.



Activity 6.1

SB page 180

As the management assistant of a bookstore you opened the mail on 19 March 2011, as part of your daily routine. Different payments made to the store were included in the mail.

The following payments were made:

- Mr P. Brown sent a cheque for R82,99 to pay for a book bought.
- ABC Stores sent a cheque for R210,00 to pay for A4 photocopy paper bought.
- Mrs T Molefe sent a postal order for R78,99 to pay for files she ordered.
- Mr Naido sent a cash amount of R20,00 to pay for parking space used.

1. Make the correct entries into the register.

1. Remittance register (SG pages 178-179)

Students should compile/draw or copy an example of a remittance register with the bookstore's name and the applicable headings.

X-Y-Z BOOKSTORE REMITTANCE REGISTER					
DATE	RECEIVED FROM	CASH/ CHEQ. P.ORD	AMOUNT	A/C NO.	REMARKS
19/03/2011	Mr P. Brown	cheque	R82,99		book purchase
19/03/2011	ABC Stores	cheque	R210,00		A4 ph/copy paper
19/03/2011	Mrs T. Molefe	p/order	R78,99		files
19/03/2011	Mr Naido	cash	R20,00		parking space

2. Work with a peer and ask her/him to draft a checklist to check if you have followed the correct procedure from the point where you received the payments in the mail up to where you filed the receipts.

1. Remittance register (SB pages 178-179)

Guidelines to complete the remittance register:

- The completion of a remittance register is always done in the presence of another person during the process of opening the mail.
- All entries in the register should be done neatly, legibly, and correctly, without corrections.
- If there is a correction to be made, it is done by drawing a single line through the incorrect entry, with the correct entry immediately above and initialled by both parties present.
- All the information required should be entered.
- No lines are kept open between entries.
- Payments received should be made as safe as possible, e.g. cheques are to be crossed and cash is to be kept in a safe place.
- All payments received together with the remittance register are to be handed over to the cashier without delay.

Checklist for entering payments received through the mail

The following information should be entered into the remittance register:

- Date of receiving the remittance or payment.
- Name of the person/company who sent the payment.
- The type of payment made (cheque, postal order or cash).
- The amount that was sent.
- The account number for which the payment was made.
- Special remarks where applicable (e.g. post-dated cheque or certified mail).

Checklist for directing payments received

After recording the money in the register, the further flow of the payments is directed:

- The payments are taken to the cashier for the purpose of issuing receipts.
- The cashier signs the remittance register to confirm the correctness of the entries.
- The cashier issues an official receipt and enters the receipt number against the entry in the remittance register.
- The receipt can be mailed or can be filed in the file of the person who made the payment.



Activity 6.2

SB page 186

You are the person responsible for paying wages for three workers doing a paint job at your business. Wages are payable for the week 18 - 22 March 2011 and the basic wage rate is R36,20 per hour.

R. Pieters worked from 08:00-16:00 Monday to Friday with a 25% deduction on the gross pay.

S. Swartz worked from 08:00-16:00 Tuesday to Friday with a 25% deduction on the gross pay

P. Modise worked 08:00-13:00 from Monday to Friday with a 25% deduction on the gross pay.

1. Complete a time-sheet for each worker.

2.2.4 Paying wages to employees (SB pages 184-187)

EMPLOYEE NAME: R.Pieters			DATE: 18–22 March 2011		
EMPLOYEE NUMBER: 001			DEPARTMENT: contract worker		
JOB DESCRIPTION: Painting					
EMPLOYEE TIME RECORD					
DATE	JOB NO	ACTIVITY	TIME START	TIME FINISH	HOURS
18/03/2011		painting	08:00	16:00	08 hours
19/03/2011		painting	08:00	16:00	08 hours
20/03/2011		painting	08:00	16:00	08 hours
21/03/2011		painting	08:00	16:00	08 hours
22/03/2011		painting	08:00	16:00	08 hours
AUTHORISATION REQUIRED FOR ALL OVERTIME HOURS			TOTAL REGULAR HRS: 40 hours		
TOTAL OVERTIME: Zero					
Supervisor's signature _____					

EMPLOYEE NAME: S.Swartz			DATE: 19–22 March 2011		
EMPLOYEE NUMBER: 002			DEPARTMENT: contract worker		

JOB DESCRIPTION: Painting					
EMPLOYEE TIME RECORD					
DATE	JOB NO	ACTIVITY	TIME START	TIME FINISH	HOURS
19/03/2011		painting	08:00	16:00	08 hours
20/03/2011		painting	08:00	16:00	08 hours
21/03/2011		painting	08:00	16:00	08 hours
22/03/2011		painting	08:00	16:00	08 hours
AUTHORISATION REQUIRED FOR ALL OVERTIME HOURS			TOTAL REGULAR HRS: 32 hours		
			TOTAL OVERTIME: Zero		
_____ Supervisor's signature					

EMPLOYEE NAME: P. Modise			DATE: 18–22 March 2011		
EMPLOYEE NUMBER: 003			DEPARTMENT: contract worker		
JOB DESCRIPTION: Painting					
EMPLOYEE TIME RECORD					
DATE	JOB NO	ACTIVITY	TIME START	TIME FINISH	HOURS
18/03/2011		painting	08:00	13:00	05 hours
19/03/2011		painting	08:00	13:00	05 hours
20/03/2011		painting	08:00	13:00	05 hours
21/03/2011		painting	08:00	13:00	05 hours
22/03/2011		painting	08:00	13:00	05 hours
AUTHORISATION REQUIRED FOR ALL OVERTIME HOURS			TOTAL REGULAR HRS: 25 hours		
			TOTAL OVERTIME: Zero		
_____ Supervisor's signature					

2. Use the information obtained and complete a wagesheet.

2.2.4 Paying wages to employees (SB pages 184-187)

Students should know:

- The gross wage is the total amount of money a person earns for the pay period before any deductions are made.
- The net wage is the amount of money that remains after the necessary deductions have been made.
- The net wage is derived at by simply deducting the total amount of deductions from the gross remuneration (*gross wage minus total deductions = net wage*).

X-Y-Z ENTERPRISES (PTY) LTD WAGE SHEET									
NAME	DATE	TIME	BASIC WAGE	OVERTIME	GROSS	DEDUCTIONS		NET	
						TAX	UJF		
R. Pieters	18/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	19/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	20/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	21/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	22/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
TOTAL:		40 hours			R1 448,00	R362,00	R362,00	R1086,00	

X-Y-Z ENTERPRISES (PTY) LTD WAGE SHEET									
NAME	DATE	TIME	BASIC WAGE	OVERTIME	GROSS	DEDUCTIONS		NET	
						TAX	UJF		
S. Swartz	19/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	20/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	21/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
	22/03/2011	08:00-16:00	R 36,20	Zero	R 289,60	R 72,40	R 72,40	R 217,20	
TOTAL:		32 hours			R1 158,40	R 289,60	R 289,60	R868,80	

X-Y-Z ENTERPRISES (PTY) LTD WAGE SHEET									
NAME	DATE	TIME	BASIC WAGE	OVERTIME	GROSS	DEDUCTIONS		NET	
						TAX	UJF		
P. Modise	18/03/2011	08:00-13:00	R 36,20	Zero	R 181,00	R 45,25	R 45,25	R 135,75	
	19/03/2011	08:00-13:00	R 36,20	Zero	R 181,00	R 45,25	R 45,25	R 135,75	
	20/03/2011	08:00-13:00	R 36,20	Zero	R 181,00	R 45,25	R 45,25	R 135,75	
	21/03/2011	08:00-13:00	R 36,20	Zero	R 181,00	R 45,25	R 45,25	R 135,75	
	22/03/2011	08:00-13:00	R 36,20	Zero	R 181,00	R 45,25	R 45,25	R 135,75	
TOTAL:		25 hours			R 905,00	R226,25	R226,25	R 678,75	

3. From the completed wage-sheet, do a coinage analysis for each of the workers in order to know what different cash denominations must be acquired from the bank.

2.2.4 Paying wages to employees (SB pages 184-187)

Preparing cash pay-outs:

If wages need to be paid out in cash, a coinage analysis need to be done in order to arrive at the correct number of notes and coins needed from the bank to be able to make up all the wage envelopes.

Most computerised systems do this automatically, but a manual wage system requires a manual computation.

Students should know that a coinage analysis is when you are using the minimum number of notes and coins to arrive at the total of the amount.

Coinage analysis for:

R. Pieters: net wage of R1 086,00
 5 × R200 notes = R1 000,00
 1 × R50 note = R 50,00
 1 × R20 note = R 20,00
 1 × R10 note = R 10,00
 1 × R5 coin = R 5,00
 1 × R1 coin = R 1,00
 Total: = R1 086,00

S. Swartz: net wage of R868,80
 4 × R200 notes = R 800,00
 1 × R50 note = R 50,00
 1 × R10 note = R 10,00
 1 × R5 coin = R 5,00
 1 × R2 coin = R 2,00
 1 × R1 coin = R 1,00
 1 × 50c coin = R 0,50
 1 × 20c coin = R 0,20
 1 × 10c coin = R 0,10
 Total: = R 868,80

P. Modise: net wage of R678,75
 3 × R200 notes = R 600,00
 1 × R50 note = R 50,00
 1 × R20 note = R 20,00
 1 × R5 coin = R 5,00
 1 × R2 coin = R 2,00
 1 × R1 coin = R 1,00
 1 × 50c coin = R 0,50
 1 × 20c coin = R 0,20
 1 × 5c coin = R 0,05
 Total: = R 678,75

If there is more than one worker, the notes and coins required for each worker are added together to give a total notes and coins requirement.

Banks supply a standard form on which this may be filled in and should accompany the cheque that is cashed for the wage pay-out.

It is important to cross-check the total of the coins and the notes requirements with the total of the net wage to ensure that no errors have been made in calculating the coinage.

An employer may also pay wages by means of cheques, rather than in cash, but sometimes this is very inconvenient to workers that do not have bank accounts.

Increasingly it is becoming more attractive to rather open accounts for employees at a bank into which their pay is paid, rather than paying them in cash, as the risk of robbery has become great with cash pay-outs.

R. Pieters: net wage (R1 086) + S.Swartz: net wage (R868,80) + P. Modise: net wage (R678,75) = R2 633.55

12 × R200 notes	= R2 400,00
3 × R50 notes	= R 150,00
2 × R20 notes	= R 40,00
2 × R10 notes	= R 20,00
3 × R5 coins	= R 15,00
2 × R2 coins	= R 4,00
3 × R1 coins	= R 3,00
2 × 50c coins	= R 1,00
2 × 20c coin	= R 0,40
1 × 10c coin	= R 0,10
1 × 5c coin	= R 0,05
Total:	= R2 633,55



Activity 6.3

SB page 189

Your IMPREST cash for the month of March 2011 is R200.

1. Draft a page with the columns of a petty cash book and enter the transactions that were made for the following:

Petty cash transactions: March 2011

- 2 Paid R12,85 at the Post Office for sending a certified letter.
- 7 Bought a receipt book from CNA for R38,85.
- 9 Bought sugar at Checkers for R15,00.
- 16 Bought an ink-cartridge for printer R20,00.
- 22 Bought correction ink for R20,00 from CNA.
- 29 Donated R20,00 to the Red Cross.
- 30 Flowers from Flora Mecca for the management assistant's birthday paid R65,00.

Petty cash management (SB pages 187-189)

Amount Received	Date	Particulars	V.N.	Total	Postage	Printing	Cartridge	Stationery	Misc.
R200,00	02/03/2011	Post Office	2011/03/01	R12,85	Cert/letter			Receipt/b	Sugar
	07/03/2011	CNA	2011/03/02	R38,85					
	09/03/2011	Checkers	2011/03/03	R15,00					
	16/03/2011	Printer ink	2011/03/04	R20,00			cartridge	Cor/ink	Donation
	22/03/2011	CNA	2011/03/05	R20,00					Birthday
	29/03/2011	Red Cross	2011/03/06	R20,00					
	30/03/2011	Flora Mec.	2011/03/07	R65,00					

2. What were the total petty expenses for the month?

Total petty expenses for the month = R191,70

3. What was the amount that was left over at the end of the month?

Amount left over at the end of the month = R8,30

4. How much should the IMPREST cash be, to make the IMPREST for April 2011 the same as it was at the beginning of March 2011?

IMPREST cash amount for April 2011 should be R200,00 (amount of R8,30 left over + replenished amount of R191,70 = R200,00)

**Activity 6.4****SB page 192**

1. **Work together in groups of 3 or 4 to discuss how a deposit slip should be completed before it is handed in at a bank.**
2. **Each student should bring a deposit slip from a different bank to discuss their differences.**
3. **The group can compare the deposit slips and will note that they look slightly different, but that the general layout is the same.**
4. **Transaction details are filled in on the right side of the deposit slip:**
 - a) **The date is filled in (sometimes as dd/mm/yy) in the 'Date' field at the top**
 - b) **The two boxes are headed: 'Rand/R' and 'Cents/c'.**
 - c) **Fill in the amount of notes under the heading 'Rands' on the first line**
 - d) **Fill in the amount of coins under 'Rands' and 'Cents' on the next line**
 - e) **Fill in the amount for Postal and Money Orders under 'Rands' and Cents' on the third line**

- The cheque amounts are filled in on the next line.
- The following information is provided for each cheque:
 - ✓ The drawer's name
 - ✓ The bank that issued the cheque
 - ✓ The branch name/clearing code
 - ✓ The cheque amount under the headings 'Rands' and 'Cents'
- Information for one cheque only can be written per line on the deposit slip. If there are more cheques than available lines, the deposit slip can be turned over and cheque details written on the reverse.
- The 'Total' box at the bottom of the slip is for the total amount of money deposited: notes, coins, postal and money orders and cheques, including those written on the reverse of the slip.
- The following information is recorded on the left-hand side of the deposit slip:
 - ✓ The name of the company is written in the 'Credit' field.
 - ✓ The initial and surname of the person (management assistant) who deposits the money are written in the 'Paid in by' / 'Depositor's reference' field.
 - ✓ A signature is made in the 'Signature' field.
 - ✓ The company's telephone number is written in the 'Tel' field.
 - ✓ The account number of the company is filled in in the bottom line.
- After that, the deposit slip with the counted money can be handed to the teller at the bank.
- Go through the checklist again to make sure everyone in the group understands how to fill out a deposit slip.

4. Depositing money (SB pages 189-192)

Students form groups of three or four and complete all the steps outlined in the activity.



Activity 6.5

SB page 195

After a fraudulent expense reimbursement scheme was identified in the organisation, you are instructed to investigate the matter and to suggest ways in which fraudulent actions can be counteracted.

- 1. Work together with a peer and suggest possible counteractive measures that can be included in a policy on internal claims.**
- 2. In summary, draft a list of the anti-fraudulent measures you think should be included in the policy.**

5. Internal claims (SB pages 193-195)

One of the easiest ways to steal from a company is through expense reimbursements. The two primary fraud schemes that are committed are employees claiming reimbursement for fictitious expenses or employees inflating an actual expense.

Control measures to prevent fraud

Safeguarding the organisation from becoming a victim to expense report fraud should start by maintaining strong internal control:

- Maintain a travel reimbursement policy that controls this activity - prohibited activity or items and specific amounts allowed per day should be detailed in this policy and regularly communicated to the employees.
- Require original documentation to be either submitted with the reports or kept for a period of time for audit purposes.
- Use a formal review process in which a department manager reviews employees' reports - payroll or human resources should perform an oversight role as well.
- Ask questions if expenditures look extraordinary or abnormal - waiting for a larger problem to build will only be more difficult and costly to resolve later.
- Have all disbursements made in a formal manner - cash shouldn't be advanced to employees if at all possible.
- Make use of corporate charge cards for greater control - with corporate cards, companies can query each card individually and ensure that payments are being made against them.
- If using corporate charge cards, receive credit activity reports on a monthly basis from the issuing company - this activity can be compared to actual expense reports to determine if it is being accurately reported.
- Annually audit a sample of employees' expense reports to ensure they meet the company's policy - be sure that proper documentation exists to support the expenditures that were requested.
- Treat reimbursement activities consistently – either let employees pay expenditures and seek reimbursement or have the company pay these expenses directly. (Flip-flopping between the two could allow for duplicate reimbursement to occur).
- Prosecute employees found to be violating or falsifying their expense reports - if they are allowed to escape unpunished others will follow their actions.

Verification of claim information

The management assistant should verify that no fictitious expenses or inflating of actual business expenses occur.

Claiming reimbursement for fictitious expenses:

- Charging for items used for personal reasons (gas, groceries, hotels, etc.).
- Billing for travel and expenses that never materialized (cancelled airline tickets, seminar or convention registration fees, tuition reimbursement and professional dues payments).
- Seeking reimbursement for items that were never purchased (office supplies, gifts for clients).

- Collusion among employees who both bill separately for travel or mileage reimbursement when they travelled together.
- Outright falsifying or manipulating receipts.

Inflating business expenses can be found when employees:

- Claim meals and entertainment reimbursement that may be more than the allowed amount per day or items not reimbursable under the policy (alcohol, leisure activities, sport tickets, etc.).
- Add tips to reimbursement when tips were already included.
- Fly first class or use limousines when modest means may be available and more applicable.
- Use inflated mileage totals when seeking reimbursement for auto travel.

Example of additional ideas:

Training

It is not uncommon for employees to be confused as to what activities constitute fraud or misconduct. Some activities may not be regularly called out as significant fraud, they nonetheless misuse the company's assets and resources. Further, it is important to remember that most fraud starts out small. As the fraud scheme continues over a period of time, the typical perpetrator begins to gain confidence in the fraud scheme and may move on to fraud schemes involving larger amounts.

Prevent fraud

Assign an audit committee that is independent of management and is knowledgeable of the company's fraud risk exposure and the steps management is taking to monitor and mitigate those risks.

Fraud risk assessments

A fraud risk assessment can be recurring and systematic, and it can involve various levels of management across all functions of the business. This method can increase the visibility of management's attitudes towards managing fraud risks.

Tools for effective reporting of suspicious or inappropriate activities

A whistle-blower hotline is one of the easiest and least expensive of such procedures. As part of this communication the company should consider identifying the types of activities that should be reported.

Students can also visit: <http://www.inc.com/guides/protect-against-fraud.html>



Activity 6.6

Peter N'doro is an employee gardener at Clean Sweep Garden Services. He is paid a fixed hourly wage of R40,00 per hour, regardless of his performance. When he works longer than the legal or contractually agreed hours of 40 hours per week, he is entitled to overtime remuneration of R55,00 per hour. For the week ending 10 January 2020, Peter worked 44 hours. All employees belong to a pension fund and must contribute 20% of their gross wage to this fund. Income tax is calculated at 10% of taxable income and his medical aid contribution is R60,00 per week. At the end of each week, all employees' wages are paid directly into their bank accounts.

2.2 Steps in using the basic wage system (SB pages 181-186)

1. Calculate the amount for normal hours worked.

40 hours.

2. Calculate the amount of overtime hours worked by Peter N'doro.

4 hours.

3. Calculate his gross wage.

= Gross wage:

40 hours × R40 per hour = R 1 600

4 hours × R55 per hour = R 220

TOTAL GROSS WAGE = R 1 820

4. Calculate his pension fund contribution.

Pension fund contribution is 20% of gross wage:

R1820 × 20% = R 364

Pension fund contribution = R 364

5. Calculate the taxable income amount.

Taxable income = wages + overtime – pension fund

= R1600 + R220 – R364

= R1456

TOTAL TAXABLE INCOME AMOUNT = R1456

6. Calculate the amount that must be paid to SARS for income tax.

INCOME TAX THAT MUST BE PAID TO SARS = 10% of taxable income

= R1456 × 10%

= R145,60

7. Calculate the total deductions.

Total deductions

= Pension fund + medical aid + TAX

= R364 + R60 + R145,60

= R569,60

8. Calculate the net wage of Peter N'doro for the week ended 10 January 2020.

Net wage = Gross wage – total amount of deductions

= R1 820 – R569,60

= R1 250,40

Net wage for week ending 10 January 2020 is R1 250,40.

*NOTE: The example above did not mention UIF.

Module 7: Auxiliary services

After completing this module, students will be able to:

- understand and explain the services rendered by financial institutions
- compare the financial products offered by different banks
- be familiar the telecommunication systems available
- understand the economic role of transport services
- understand the economic contribution of storage facilities
- explain the function of insurance services
- have insight into marketing services
- have an understanding of brokerage.



Activity 7.1

SB page 232

1. **Taking the factors of cost, speed and availability into consideration, motivate why you have chosen a specific means of transport to dispatch a parcel from Johannesburg, where you are employed, to Cape Town. The parcel needs to be delivered within a day.**
2. **Obtain the necessary documentation from the transport service you have chosen.**
3. **Sit with a friend and correctly complete the necessary documentation for dispatching the parcel.**

4.2.5 Courier service (SB page 232)

Students can make use of the Internet to find a suitable option.

The best option will be a courier service of choice.

- Courier services are becoming very popular in South Africa due to the fact that it is a door to door service.
- Cargo/parcels is picked up from the point of dispatch and delivered to its destination.
- The key words with regards to this service are express delivery, and the institutions offering this service guarantees delivery of the cargo/parcel within an agreed period of time.
- Courier services do not only cater for the domestic market but some couriers also offer these services to destinations abroad.
- Cargo/ parcels sent by courier service could reach its destination anything between the same day and four days, depending on the destination, pre-agreed express service and price the client is prepared to pay.
- A parcel sent from Johannesburg to Cape Town can be delivered the same day, or, if the client wishes to make use of the more economical rates, it would reach the destination within 4 days.
- The rates charged for courier services is determined by volume and/or the weight (mass) as well as the time frame in which it has to reach the destination.
- Rates are substantially higher than those charged for rail transport or normal postage. The Post Office renders a courier service that is relatively cheaper than most of the other services.



Activity 7.2

SB page 232

1. **Briefly discuss THREE factors to be considered when selecting a transport system.**

4.2 South Africa's transport network (SB pages 228-232)

Students can choose any three of the following:

Consider the following when deciding which transport to use:

- The most suitable way of transport
- The charges for specific services

- The speed of delivery
- The availability of the service
- The procedure to follow
- The documentation involved.

2. Name FIVE reasons why a bank may refuse to pay a cheque.

2.3.6 Non-payment of cheques (SB page 209)

Students can choose any five of the following:

Some of the reasons for non-payment of cheques:

- Refer to drawer – The drawer does not have sufficient funds in the bank.
- Payment stopped – The drawer has given instructions to the bank not to pay the cheque.
- Irregularly drawn – The name of the payee and the amount in words has been switched. – The cheque was made out to cash, but ‘or bearer’ was crossed out. – The payee’s name was omitted. – The amount in words or in numbers was omitted.
- Account closed – The account has been closed for whichever reason.
- Alterations requiring the drawer’s full signature – Alterations have been made to the cheque and were not signed by the drawer. Every mistake corrected on a cheque must be fully signed by the drawer. An initial next to a correction is not sufficient.
- Amounts differ – The amounts in words and figures differ.
- Stale – The cheque is older than six months. Treasury bills (issued by the SARB) are older than three months.
- Signature required – The cheque was not signed by the drawer.
- Signature differs from specimen held – The signature of the drawer does not correspond with the specimen signature held by the bank.
- Not signed in terms of mandate held – Signatures on the cheque differ from the mandate/ authority given to the bank by the drawer.
- Damage requiring drawer’s confirmation – The cheque has been torn or damaged and needs the signature of the drawer on the back to confirm that the drawer knows about the damage.
- Effects not cleared – Cheques deposited by a drawer have not been cleared yet; the waiting period for deposited cheques has not lapsed.
- Death – The drawer passed away before the cheque was presented for payment.
- Insolvent – The drawer was declared insolvent before the cheque was presented for payment.
- Postdated – The date appearing on the cheque is still in the future.
- Payee account not credited – The cheque bears a restrictive crossing and it was deposited into a third party account.
- Payee endorsement required – The cheque was deposited into an account of a third party without an endorsement by the payee.

3. State THREE conditions under which a bank will grant an overdraft.

2.4 Applying for an overdraft (SB pages 209-210)

Criteria for granting an overdraft facility to a client:

- The client must be financially sound.
- The client must be able to repay the debt in the future.
- The client must be able to offer acceptable security.



Activity 7.3

SB page 236

1. **Work together in groups of 3 or 4.**
2. **First study and understand the activities in a warehouse. Then visit any wholesale or retail business in your town.**
3. **Ask the warehouse manager to explain to you how the system works and what documentation they use to retrieve stock from the warehouse.**
4. **Compare your results with the other groups in the class.**

5.3 Warehouse activities (SB pages 235-236)

Students should compare their results with other groups in the class, and combine their results to create a comprehensive list.



Activity 7.4

SB page 236

1. **List NINE roles of transport services in the economy.**

4.1 Economic role of transport services (SB page 227)

- Industrial settlement –
 - It plays an important role in the settlement of industries.
 - It is to the advantage of businesses to be settled as close as possible to an existing, well-developed and efficient transport service.
- Increased product turnover – The easiest way to increase the demand is to increase the availability of a product at the point of sale. To achieve this, transport is essential.
- Geographic specialisation – When raw materials, products or specialised production is only available at one specific place, transport is of the utmost importance.
- Mass production – It is much more profitable for the manufacturer to produce on a big scale, as the production cost per unit will be reduced. If a well-organised transport service is available, manufactured goods can be transported to points of sale as required.
- Social – The better the transport service, the more people will make use of it for travel.
- Political influence – Transport brings people closer together.
- Distance – Time is valuable. Perishable products must reach their destination without any delays to prevent losses. With effective transport, the world becomes smaller and distance less important.
- Labour – A better transport service allows many South Africans to offer their services where remuneration is the highest.
- Employment – The transport industry employs hundreds of thousands of people. Transnet alone has a labour force in excess of 150 000.

2. **Briefly discuss FIVE disadvantages of air transport.**

4.2.4 Airport and airlines (SB page 231)

Students can make use of the Internet for more disadvantages.

- Volume restrictions
- Destination restrictions
- Extra transport required to final destination (as cargo lands at major airports only)
- Very expensive
- More risks involved – one minor accident or delayed flights can result in significant loss of goods.

*NOTE: SAA has been running at a loss of billions of Rands the past few years and has not been profitable to the country.

3. **Name the TWO companies that control the South African rail network.**

4.2.1 Railways (SB pages 228-229)

Transnet (formerly known as Spoornet)

Metrorail (SARCC merged with Metrorail)

4. Briefly discuss THREE facts of economic importance of the JSE.

8.2 Functions of a stock exchange (SB pages 248-249)

Students can also visit the JSE website:

<https://www.jse.co.za/grow-my-wealth/what-is-the-role-of-the-jse>

Three factors of economic importance of the JSE (as researched on the JSE website):

- One of the key roles played by the JSE in the real economy is to provide a platform for companies to access capital from willing investors.
- That capital is critical for economic growth, as recipients of capital use it to expand their companies.
- As companies expand, it creates employment and help to grow the real economy.

More functions of the JSE playing a vital role in the economy include (taken from the SB on pages 248-249):

- The primary function of the JSE is to raise primary capital.
- The JSE is an essential cog in the functioning of a capitalist economy.
- It provides new investment opportunities in the country.
- It helps create more job opportunities.
- The JSE provides an effective and efficient price determination facility and price risk management mechanism.
- It creates a well-controlled and orderly environment for trading in negotiable securities.
- It mobilises capital that contributes towards development and wealth.
- It links investors to entrepreneurs.
- It creates the opportunity for the whole population to share in the success of profitable business ventures.
- It serves as a barometer of a country's political stability and economy.



Activity 7.5

SB page 243

1. Make a list of at least five of the insurance companies with which you are familiar.

Examples can include:

- Sanlam
- Old Mutual
- Outsurance
- 1st for Women
- Santam
- Discovery Health

Students can visit this website for more information:

<http://carinfo.co.za/best-insurance-company-in-south-africa/>

2. Browse the internet, use the Yellow Pages or visit an insurance company to obtain documentation to apply for a medical aid scheme for yourself.

Students can make use of the Internet to obtain an online quote for the best medical aid scheme.

Some websites to visit:

- <http://www.medaidquote.co.za>
- www.insuranceinsouthafrica.co.za
- www.life-insurance-info.co.za
- www.InsuranceHound.co.za
- www.iHound.co.za

3. Sit with a peer and complete the documentation to apply for the scheme.

Students complete the documentation to apply for a medical aid scheme with a partner.



Activity 7.6

SB page 243

1. Name FIVE different insurance products.

6.4 Insurance products (SB pages 241-243)

- Pension or provident funds
- Annuities
- Unemployment insurance
- Workmen's compensation
- Personal accident insurance
- Medical insurance
- Group insurance

2. State clearly the difference between insurance and assurance.

Introduction (SB page 237)

With insurance, a client is promised compensation from the company for a specific, potential future loss e.g. theft, house burglary, etc. Events that MIGHT occur.

Assurance provide coverage for events that WILL occur, e.g. death (life cover).

3. Give TWO reasons why people buy and sell stock and shares.

8.4 Reasons for buying and selling of stocks and shares (SB pages 250-251)

There are two main reasons for buying and selling shares: speculation and investment.

- Speculation – Shares/stocks are bought in anticipation of a rise in the price of the shares in the short term. The return on the investment is calculated to be higher than the return on an investment at a bank. Dividends are also taken into consideration.
- Investment – Shares/stocks are bought with a long-term view, and increase in value over time and the payment of dividends.

4. Discuss the following terms:

6.2.1 Insurance contract (SB pages 237-238) Insurance contract

In the insurance contract, an insurance company promises to protect the other party, who pays a regular premium, against damage or losses as a result of a specific incident.

6.2.2 Parties involved (SB page 238) Insurer

A company selling the insurance is the insurer. It carries the risk against payment of a sum of money – the premium.

Insured

A person/enterprise that insures its assets – the insurable interest – or life against a specific event in the future. It is the policyholder, the person or entity buying the insurance policy.

6.2.5 Premium (SB page 238) Premium

A premium is the amount that a person pays once or regularly to the insurance company for the insurance policy he/she took out from them.

6.2.3 Indemnity (SB page 238) Principle of indemnity

The principle of indemnity means that the person who takes out the insurance is promised that he/she will be paid an amount of money if he/she suffers any damage or loss.



Activity 7.7

SB page 252

1. When the market is generally rising with high economic growth and strong investor confidence, what type of market is it (bull or bear)?

8.3.4 Bull markets and 8.3.5 Bear markets (SB page 249)

Bull market.

2. Name the largest stock exchange in Africa and in which city it is.

Introduction (SB page 246)

JSE Limited is the largest stock exchange in Africa and is situated in Sandton, Johannesburg.

3. Explain the difference between a savings and a current account.

2.1.1 Current account (SB pages 202-203) and 2.1.2 Savings account (SB page 203)

A savings account is a financial transaction account in which money can be deposited at a bank. It offers the account holder a savings mechanism at market-related interest rates.

A current account, also known as a cheque account, offers the client the convenience of a cashless payment instrument in which funds can be deposited.

4. Briefly discuss FIVE advantages of a credit card.

2.9.1 Credit cards (SB pages 210-211)

Advantages:

- Promotes trade and sales
- Convenient – no cash is required
- Only one account received for purchases from a variety of retailers
- Only 10% of revolving credit needs to be settled at first
- A budget facility is available for expensive items
- The outstanding amount on the budget account can be settled over a longer period, up to 48 months
- Accepted means of payment
- Free access to account via ATMs
- More than one card can be issued on the same account number, e.g. for married couples
- Lost card insurance is available at a nominal fee.