GOM S6 02
Exam Code: OM

OFFICE MANAGEMENT

SEMESTER - VI

BUSINESS ADMINISTRATION

BLOCK - 2

KRISHNA KANTA HANDIQUI STATE OPEN UNIVERSITY

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First Print : December, 2019

ISBN No. : "978-93-89559-78-1"

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Printed and published by Registrar on behalf of the Krishna Kanta Handiqui State Open University.

Headquarters: Patgaon, Rani Gate, Guwahati-781017
City Office: Housefed Complex, Dispur, Guwahati-781006; Web: www.kkhsou.in

The University acknowledges with thanks the financial support provided by **the Distance Education Bureau,** UGC for preparation of this material.

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Block 2
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BLOCK INTRODUCTION:

This is the second block of the course 'Office Management". The Block is divided into 7 units and is primarily a learner oriented Self Learning Material, as it satisfies the requirements of the learners in the filed of office management.

This block comprises of the following seven units:

The ninth unit introduces us to Concept and Meaning of Filing, Objectives and Importance of Filing, Classification and Arrangement of Papers for Filing, Methods of Filing, Centralized and Decentralized Filing System, Indexing

The tenth unit gives us a broad idea on the concepts of Concept and meaning of office stationery, Types of office stationery, Control of office stationary and supplies, Standardization of Office supplies, Purchasing Office Stationaries and Supplies,storage and Office Manager and Stationary control

The eleventh unit gives us an idea on the Uses and abuses of Labour saving appliances and Various types of commonly used appliances

The twelvlth unit will help us in knowing Concept of Importance of Correspondence in Business and Government Offices, Essentials of Good Business and Official Correspondence, Routine of Handling Mail and Various forms of Correspondence

The thirteenth unit gives us a broad idea on Meaning of Meeting, Types of Meeting, Secretarial practices relating to holding of Meetings, Minutes Writing, Types of Minutes and Drafting or writing of Minutes

The forteenth unit will help us in understanding the Concept of Human Resource Management(HRM),functions of HRM, Role of HR Executve, The Employment Function, Recruitment and Selection, Job Evaluation, Training and Motivation

The fifteenth unit gives us an idea on Report Writing,Process of Writing a Report, types of Report, Project Report Writing,Criteria of a Good Project, Advantages of a Good Project, Disadvantages of Project Method,Format of a Project Report,precis Writing

The Block is devided into seven units:

UNIT 9: Filing and Indexing

UNIT 10: Office Stationery

UNIT 11: Office Automation

UNIT 12: Correspondence

UNIT 13: Company Meeting

UNIT 14: HRM for Office Management

UNIT 15: Management Reporting.

UNIT 9 : FILING AND INDEXING

UNIT STRUCTURE

9.1 Learning Objectives

9.2 Introduction

9.3 Concept and Meaning of Filing

9.4 Objectives and Importance of Filing

9.5 Classification and Arrangement of Papers for Filing

9.6 Methods of Filing

- 9.6.1 Conventional Method of Filing
- 9.6.2 Modern Method

9.7 Centralized and Decentralized Filing Systems

9.8 Indexing

9.9 Let Us Sum Up

9.10 Further Reading

9.11 Answers to Check Your Progress

9.12 Model Questions

9.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss the concept and meaning of filing system
- describe the objectives and importance of filing
- learn classification and arrangement of papers for filling
- learn the different methods of filling system
- discuss about centralized and decentralized filing systems.

9.2 INTRODUCTION

In this unit we are going to discuss the various concepts related to filing system in office management. A well-planned system contributes significantly to efficiency of operation as well as to the image of an organization. Whether records are filed in a computer or in a cabinet, they have to be readily accessible as and when required. Filling is the practice of

maintaining the records of an organization from the time they are created up to their ultimate disposal. This process includes classifying, storing, securing, and destruction of records. So, in this unit we will discuss the objectives and importance of filing system and will able to get some idea on the classification of papers for filing and the various methods of filing system.

9.3 CONCEPT AND MEANING OF FILLING

To know the concept of filling, first we have to go through the meaning of record management. Records management is the field of management which deals with the aspects regarding systematic control of creation, receipt, maintenance, use, and disposition of records, including processes of maintaining evidence and information about business activities and transactions in the form of records in an organization. Records need to be managed in a meaningful and systematic way so that they can be easily accessed and used in the course of daily business functions in an office. So, filling is a form of record management where documents are filed in a systematic order so that they can be easily available for the future and also to preserve the important documents for future.

According to Zene K. Quible: “Filing is one of the activities in the records management programme which involves systematically classifying, coding, arranging and placing of records in storage”.

9.4 OBJECTIVES AND IMPORTANCE OF FILING

The importance of filing in an organization arises from the fact that large number of papers and documents cannot be preserved and handled without proper arrangement. Filing is an important function of modern office because of the following reasons:

a) Filing is helpful to protect records from dust and dampness.
b) It is very helpful in settlement of disputes because it provides factual information.
c) It facilitates preservation of records to meet the legal requirements.
d) The previous records provides for future reference.

e) It is helpful to exercise a better control over sales and financial position.

f) By providing availability of previous records, it helps in the future planning of the organisation.

The following are some of the objectives of filling :

1) Increases Productivity : A functional office filing system will not only help officials of the organization to become more organized but it will also increase their productivity levels.

2) Document the Program's Activities Effectively : The programmes or the activities that are done in the organization are documented effectively.

3) Identify Records Constantly : Because the files are properly placed in the office, the records can be identified constantly.

4) Retrieve Records Quickly : Filing system helps in retrieval of records quickly and instantly.

5) Link to the Records Schedules : The contents of a file can be indexed for easy access.

6) Time Savings : Faster access and retrieval of information is possible if proper filing is done in an organization that helps in time saving. This leads to higher staff efficiency and productivity of the employees.

7) Integrity and Continuity : Filing helps in integrity and continuity of record keeping despite changes in office personnel

8) Cost Savings : Good filing system helps in using less office space for filing equipment and that helps in saving cost. For good filing, likelihood of litigation and losses resulting from lost documents gets reduced. Moreover, for good filing there is less likelihood of lost documents leading to unfavorable audit findings and penalties. The recovery of important records is likely to be less costly.



CHECK YOUR PROGRESS

Q.1 : What do you understand by is Filing?

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Q.2 : State any three objectives of Filing.

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9.5 CLASSIFICATION AND ARRANGEMENT OF PAPERS FOR FILING

In order to make files promptly available, it is necessary that they should be given proper titles and classified or grouped according to some fixed basis.

Paper filing classification is the process of selecting headings under which documents are grouped or classified on the basis of common characteristics before filing takes place. The following are some of the classification and arrangement of filing.

1) **Alphabetical Filing System :** An alphabetical filing system works well when we need to retrieve names of people, customers, authors, names of movies, books etc. An alphabetical filing system is often the easiest system to use, because if the files are maintained in alphabetical order then it is easy to identify the files. An example of alphabetical filing system may be the telephone directory.

2) **Numerical Filing :** This type of filing system is used for date or number filing. For example, if we have receipts, dated events etc. In this system a number is allotted to each client/customer and the same number is put on all papers or documents relating to transactions with them. If one file contains records of more persons, decimal system may be used e.g., 10.1 denotes one person; 10.2 denotes another and so on. And these are file No. 10. To locate a

particular file, it is necessary to refer to an index. Therefore index cards are prepared and the file numbers are written on them and arranged in alphabetical order.

3) **The Alphabetical-Numerical or Alpha-Numerical Classification :** It is a combination of the alphabetical system and the numerical system. In this system each letter or sub-letter is given its own number and an index card is placed behind the guide card for each alphabetical section. The names and numbers of all the folders are mentioned in numerical order behind each card. The colored guide cards are used to sub-divide for folders into groups to facilitate their speedy location. For instance, the folders and files of XYZ firm can be arranged in a Alpha-Numerical manner and the first group may be 15/CV/O1234, where 04 is the year, CV is the resume and the four digit number may be the employee number (shown in the following figure).

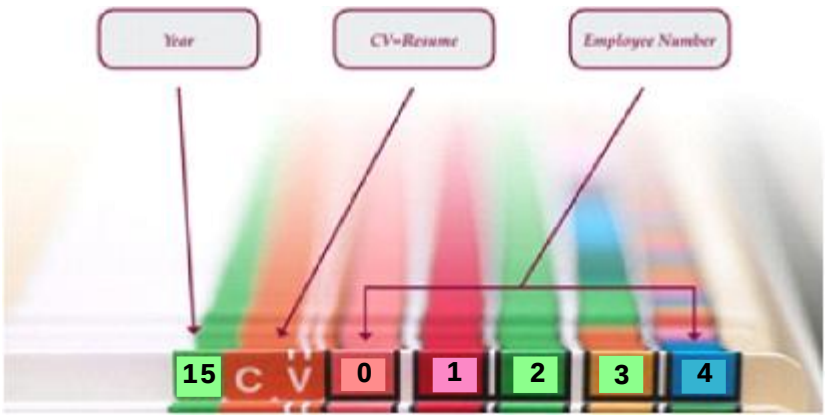


Fig. 9.1 : Alpha-Numerical filing

4) **Geographical Classification :** Geographical filing system is an arrangement of files that are related to countries, towns, other areas in an alphabetical order. It is convenient to use the geographical system for major groupings and then introduction of alphabetical order. The area over which the activities of a firm are spread may be divided into a number of regions and the papers are filed on the basis of locality. The files which contain the correspondence of one locality are arranged state wise, city wise, etc. This system is generally used by banks, insurance, departmental stores, etc.

5) **Subject wise Classification :** In this classification of filing, records are filed according to the nature of their subjects or contents. This system can be efficiently adopted by a concern which may classify correspondence into well-defined groups. Papers are first arranged subject wise and then in alphabetical order. There may be order file, invoice file, complaint file, etc. Papers on a particular subject are arranged and put together, rearranged alphabetically or numerically and filed accordingly.

6) **Chronological Classification :** Various records are identified and arranged in date wise order and also according to the time of the day. For examples, newspapers, current prices, market reports etc. It is a useful system if dates are known.

7) **Topic Order Classification :** This type of classification is useful when in retrieving information when the work or study is in a variety of subject areas. For example, if we work for lawyer, then we could have subject headings of contract, constitutional law, torts, administrative law, international law etc. And according to that the files and folder were classified and arranged.

8) **Color Coding :** This is used for creative filing and is especially effective for those with good visual recall. It can also help with cross-referencing with color coding used for projects.



CHECK YOUR PROGRESS

Q.3 : What is Alphabetical filing system?

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Q.4 : What is Alpha-Numerical classification of filing system?

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9.6 METHODS OF FILING SYSTEM

There are mainly two methods of filing system which are based on different types of equipments used for filing system. The methods of filing system can be described as follows:

a) Conventional method or Old method

b) Modern Methods

   i) Horizontal filing

   ii) Vertical filing

9.6.1 Conventional Method of Filing

The conventional method is the old method of filing system which were commonly used in the offices, but now-a days the conventional methods are been replaced by modern methods. The types of conventional method that are still used in many offices are as follows:

a) Metal Holders : In this method of filing, the papers and documents are held together in metal holders. The papers are placed in chronological order.



Fig. 9.2 : Metal Holders

b) Card Board Files : Card board holders are used in many office organizations. It is made up of foolscap paper with two pieces of stout paper attached on either side in the middle and there is long ribbon attached on the both side to hold the papers.



Fig. 9.3 : Card Board Files

c) **Spike or Pillar and Post Filing :** This type of filing is fitted with wooden stands which may be kept on the table or hung against the wall. A spike is lifted on a wooden disc which may be kept on the table or hung against the wall. The papers are punched into a metal spike and made to rest on the disc. This is the cheapest method of filing. But the method is not suitable where frequent reference to the documents has to be made.



Fig. 9.4 : Pillar and Post Filing

d) **Expanding Files :** Under this method, papers and documents are placed in letter or numbered pockets. This method of filing system is also used in many office organisations.



Fig. 9.5 : Expanding Files

e) **Concentrina Files :** This file is made up of cardboard and has a number of light cardboard pockets and is satisfactory for document under simple alphabetical classification. But it has a drawback of limited capacity.



Fig. 9.6 : Concentrina Files

f) Pigeon Hole Method of Filing : Pigeon hole cabinets featured numerous styles of filing systems. Pigeon-hole files had doors. A cupboard is divided into a number of tiny compartments and each compartment is allotted to letters alphabetically. The letters are folded and a brief description is made on the outside fold.



Fig. 9.7 : Pigeon Hole Method of Filing

9.6.2 Modern Method of Filing

In large organisation it was found that the conventional method of filing system difficult in order to maintain the files and that resulted in newly organised and maintained filing methods. Many sophisticated and improved filing equipment have been developed to the filing system of modern business and large organisation, which are classified as:

A) Horizontal Method

B) Vertical Method

A) Horizontal Method : In horizontal filing system, documents are placed in a horizontal position, one on the top of another in order of date and the latest document is kept on the top. The best example of horizontal filing is flat files and arch lever file. The types of horizontal methods are discussed below:

1) Flat Files : That files are cover of cardboard or thick papers, fitted with metal hinges with which to fasten the papers together. A separate cover (file) is allotted to each customer or subject, and all the correspondence and documents

relating to the customer or subject is placed in that cover in a chronological order. If a letter of paper related to more than one file, copies are made of it and placed in different covers. The paper to be filed is punched with a punching machine and is inserted in the file through the metal hinges. The files are placed horizontally one upon another. An index of files is generally prepared for quick reference. This index is displayed outside the almirah or drawer in which the files are kept.



Fig. 9.8 : Flat Files

2) **Arch Lever Files :** It is a very popular type of horizontal filing system which is used in an organization. It is a strong cardboard folder which contains strong metal arches which can be opened with the help of a lever. Records to be filed are punched with two holes with the help of the punching machine and the papers are then filed on the metal uprights, after the arch has been opened by the lever. The arch lever file facilitates alphabetical division which is done by inserting thick card at suitable places.



Fig. 9.9 : Arch Lever Files

The following are some of the Advantages and Disadvantages

of Horizontal Filing System :

Horizontal Filing has the following Advantages :

a) This system of filing is simple and any one can understand this easily.

b) The papers are kept in order in which they have been filed and these letters are punched and put through a metal hinge so that it cannot be misplaced.

c) This system facilitates speedy reference of letters because here letters are placed according to dates of receipts.

d) This system requires less space because the files are kept one over the other.

e) This method is economical to operate.

Disadvantages of Horizontal Filing :

a) It is unsuitable where volume of records is very high.

b) To take out any paper, other papers have to be dislocated as the papers are kept in the order in which they are received.

c) When a large number of papers are stored in one file, their location becomes somewhat difficult.

d) This system is less flexible and takes more time as compared to vertical system.

B) Vertical Filing System : This is the most modern system of filing. It has grown essentially out of the drawbacks and defects of the horizontal method. Because of its outright superiority to the horizontal method, vertical filing has come to be adopted by most of the modern offices aiming at efficiency in record keeping. Under this method, the papers and the files containing them are placed vertically or in a standing upright position which gives its name vertical files. The following are some of the used under vertical filing system :

a) Folder : Folders are the basic of vertical filing. They are made

of ***Manila*** paper or some other strong paper and are used to hold papers and documents. The back of the folder is slightly higher than the front. The extended back is used to write the contents and necessary details about the subject. When the folders are placed in the cabinet, the extended edges are visible in a sequence so that contents can be easily read.

Manila : A strong paper or thin cardboard.



Fig. 9.10 : Folders

b) Filing Cabinet : Filing cabinet are that where folders are kept vertically in a wooden or steel cabinet which consists of a number of drawers. The drawers are deep enough to permit folders to be placed in a vertical position. Each drawer is fitted with slider which pushes it backward or pulls it forward. In order to divide the drawer into convenient sections, guide cards are inserted at appropriate places.



Fig. 9.11 : Filing Cabinet

The following are some of the advantages and disadvantages of vertical filing.

Advantages of Vertical Filing :

1) Vertical filing allows ready reference of papers and documents.

The heading of each folder is visible from the extended edge of the back-sheet.

2) It is adaptable. The folders can be arranged according to any classification such as alphabetical, numerical and subject-wise.
3) It is economical as compared to the horizontal equipment as it can accommodate more papers.
4) It provides ample scope for expansion. While installing this type of equipment, adequate provision for expansion of the number of folders can be made in the drawers.

Disadvantages of Vertical Filing :

1) Vertical filing is not as fast as the other methods of filing such as visible card filing and rotary card filing.
2) There is always a possibility of folders slipping down the drawers. This may lead to unnecessary wear and tears of various folders.



CHECK YOUR PROGRESS

Q.5 : What is Conventional Method of Filing?

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Q.6 : What is Pigeon hole method of Filing?

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Q.7 : What is Flat File?

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9.7 CENTRALIZED AND DECENTRALIZED FILING SYSTEMS

Centralized Filing System : Centralized filing system places all records of the organization in one central location. The following are some of the features of centralized filing system :

a) All the flies are kept in one place.
b) All the files of general interest are kept by respective departments.
c) Although the files are held by the respective departments but are controlled and staffed from one central point.

The following are some of the advantages of centralized file system:

a) There is greater control over the files.
b) Uniformity and consistency is easier to maintain.
c) All important information is located in a central location.
d) The need for duplicate files is eliminated.
e) Storage of records requires less equipment and space.

Decentralized Filing Systems : Under decentralized filing system the record series are placed in different places within an office. It is most useful when only one individual requires access to a specific record series. The following are some of the advantages of decentralized file system:

a) There is less chance of folders being misfiled into the wrong record series.
b) Limited access to a record series leads to greater security and confidentiality.
c) The record series is physically located closer to the user.

In many organizations both the centralized and decentralized filing system are used as per the convenience. But the majority of the record series may be filed centrally.

9.8 INDEXING

Indexing is an important aid to filing. Filing and indexing are so interrelated that filing without indexing is incomplete and indexing without filing does not exist.

Indexing is the process of determining the name, subject or other captions under which the documents are filed. Index is a guide to records. The main purpose of an index is to facilitate the location of required files and papers. Index helps the staff to find out whether a particular file exists for a party or subject, and its place in the container. It also facilitates cross referencing. Where records are classified in numerical order, or subject wise an index is necessary.

Types of Index

Various types of indexes are used in different offices according to their requirements. The main types of indexes are:

1. Ordinary Page Index
2. Vertical Card Index
3. Visible Card Index
4. Strip Index
5. Wheel or Rotary Index

Let us now discuss the types of Index in the following ways:

1. Ordinary Page Index: It is similar to the subject index given at the end of standard books in which the subject matter is alphabetically arranged and then relevant page numbers are given against each heading or sub-heading. Some times it consists of specially designed pages fitted with a tab indicating an alphabet and on each page the names or subjects starting with that alphabet are written along with the page numbers. This type of index can be (a) Bound Book index, (b) Loose Leaf index, or (c) Vowel Index.

2. Vertical Card Index: Under this system each subject, customer or document is allotted a separate card on which necessary information appears. The cards may be of small size (12.5 cms x 7.5 cms) or as per need. They are classified and arranged alphabetically, numerically, geographically or subjectwise. The alphabetical classification is more popular. In some cases more than one card may be prepared for the same set of information and each card may be arranged in different manner e.g. in library usually two cards are prepared for each book — one is arranged on the basis of author and the other on the basis of title of the book. The cards are filed vertically in steel or wooden drawers. A hole is punched into each card to keep the card in its proper place. Guide Cards may be used to indicate groups of cards in a class. This type of index is very popular in big offices.

3. Visible Card Index: Under this system, the cards are arranged flat in a shallow tray or metal frame. Each card is attached to metal hinge and

overlaps the one before it, so that name address and other particulars are visible without touching other cards. The frames or trays are attached vertically to the metal stands or they can be put horizontally into cabinets. The details of data can be written or typed on the front or back of the cards for reference.

4. Strip Index: In every office there is need for a list of names of parties to be maintained with their telephone numbers, addresses etc. A line entry on a narrow strip of card board can be prepared for a single item. These strips are arranged in a frame in such a way that they can be taken out and replaced with ease. Frames can be hanged on the wall or put on the table in a book form or even arranged on a rotary stand which can be turned round to look at any part of the index. This system is a variation of the visible card index, offers the same advantages and suffers from the same drawbacks.

5. Wheel or Rotary Index: Under this method cards are arranged around the hub of a wheel which may be portable. A single wheel can hold as many as 5000 cards. A card can be inserted or withdrawn without disturbing the other cards. Entries can also be made on the cards without removing from the wheel. The merits of this system are-quick and easy referencing, economy of time and efforts, economy of space, elasticity, etc. This indexing system has gained popularity because it is simple to operate.



9.9 LET US SUM UP

In this unit we have discussed the following :

- Filing is one of the activities in the records management programme which involves systematically classifying, coding, arranging and placing of records in storage
- The objectives of filling are (a) Increases productivity (b) Document the program's activities effectively (c) Identify records constantly (d) Retrieve records quickly (e) Time savings (f) Integrity and continuity
- The classification and arrangement of paper filing are (a) Alphabetical filing system (b) Numerical filing (c)The Alphabetical-Numerical or Alpha-

Numerical Classification (d) Geographical Classification (e) Subject wise Classification (f) Chronological Classification (g) Use a topic order (h) Color coding.

- There are mainly two methods of filing :
  a) Conventional method or Old method
  b) Modern Methods.
- Centralized filing places all records series in one central location in an office. It is most useful when the majority of individuals within an office require access to a majority of the files.
- Decentralized filing physically locates record series in different places within an office. It is most useful when only one individual requires access to a specific record series.
- Indexing is the process of determining the name, subject or other captions under which the documents are filed. Index is a guide to records. The main purpose of an index is to facilitate the location of required files and papers.The main types of indexes are:
  1. Ordinary Page Index
  2. Vertical Card Index
  3. Visible Card Index
  4. Strip Index
  5. Wheel or Rotary Index



9.10 FURTHER READING

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9.11 ANSWERS TO CHECK YOUR PROGRESS

Ans. to Q. No. 1 : Filling is a form of record management where documents are filed in a systematic order so that they can be easily available for the future and also to preserve the important documents for future.

Ans. to Q. No. 2 : a) Time savings, b) Retrieve records quickly, c) Identify records constantly.

Ans. to Q. No. 3 : An alphabetical filing system is often the easiest system to use, because if the files are maintained in alphabetical order.

Ans. to Q. No. 4 : It is a combination of the alphabetical system and the numerical system.

Ans. to Q. No. 5 : The conventional method is the old method of filing system which were commonly used in the offices

Ans. to Q. No. 6 : A cupboard is divided into a number of tiny compartments and each compartment is allotted to letters alphabetically.

Ans. to Q. No. 7 : Flat Files are cover of cardboard or thick papers, fitted with metal hinges with which to fasten the papers together.

9.12 MODEL QUESTIONS

Q 1 : Discuss the importance of filing.

Q 2 : What are the changes in maintenance of files in a large organization in today's context?

Q 3 : What do you understand by filing system and also state its objectives.

Q 4 : Write down the methods of filing.

Q 5 : Write short note on :

a) Centralized Filing

b) Decentralized Filing

Q 6 : Write down the advantages and disadvantages of Vertical filing system.

*** ***** ***

UNIT 10 : OFFICE STATIONERY

UNIT STRUCTURE

10.1 Learning Objectives

10.2 Introduction

10.3 Concept and meaning of office stationery

10.4 Types of office stationery

10.5 Control over office stationary and supplies

10.6 Standardization of Office supplies

10.7 Purchasing Office Stationaries and Supplies

10.8 Storage

10.9 Office Manager and Stationary control

10.10 Let Us Sum Up

10.11 Further Reading

10.12 Answers to Check Your Progress

10.13 Model Questions

10.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss the concept office stationary
- describe the types of ofice stationary
- discuss the selection of supplies and its control
- learn the standardization of office supplies
- discuss about office manager and stationary control

10.2 INTRODUCTION

In this unit we are going to discuss the various concepts related to office stationary. The office stationeries, is a group of commodity which is used to, or which is needed to, do the office job for completing the office job, as per the requirement and specification.

Every office has to maintain certain records, both in the form of filings, and in the way and method of information technology.These records which

has to be filed for a longer duration of time, has to be typed and preserved for a longer duration of time. Thus,the need of office stationeries came into place.

At the end of this unit you will be able to know about types of office stationary, selection of supplies,control of office stationary and supplies,standardization of Office supplies and office manager and stationary control.

10.3 CONCEPT AND MEANING OF OFFICE STATIONARY

Every modern office whether big or small requires a large variety of stationary and other articles in connection with its day-to-day work. Stationery and office supplies are described as “those expendable items which are consumed in daily operations and are usually thought of as items obtained from a stationer”. These includes items like paper, carbon papers , fax rolls, computer sheets and rolls, pens , pencils, erasers, sharpeners, ink, gum, adhesives tape, pins and paperclips, file fasteners, file boards and file boxes, ball pens and refills, paper rolls, cello tape, folders and labels, correction fluid and diluter, type calendar, stencils, paperknife, tags, sealing wax, stamps and stamp pads, envelope, Letterheads, writing pads, registers, file covers and so on. Office stationary and supplies are used by every employee throughout the organisation.

Every office work is performed with the help of office stationery and supplies. In modern office, computer is also used to reduce the need and importance of office stationery and supplies.

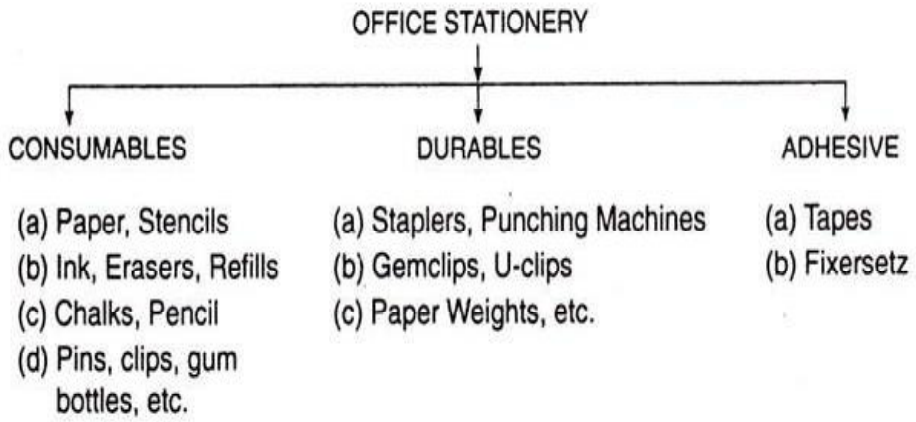
Office stationery and supplies occupies a significant place in office management from cost point of view. Generally, the value of office stationery and supplies is very small but used regularly in any office. As discussed above these includes paper, envelope, latter heads, paper pads, printed forms, rubber, carbon papers, ink, stencil, typewriter ribbons, pencils, correcting fluid, pens, gums, stamp pad, pins, duplicating paper, paper weight, file covers, duplicating ink, tag, clips, sealing wax, glue, and the like.

The effectiveness and efficiency of the office is based on the adequate availability of office stationery and forms. Every office staff must be provided with the best tools of right type in order to enable them to produce the best possible results.

A separate person is appointed to store the stationery and supplies and issue the same to the office employees. He has to determine the standards of supplies, purchase of supplies, storage of supplies; departmental control over supplies etc. Each of the stationery is manufactured by-different firms in different qualities. Each of the stationery is procured according to the needs of an office.

10.4 TYPES OF OFFICE STATIONERY

Office stationeries, broadly, can be divided into three categories:Cosumables, durables and adhesive.



Let us now discuss the types in the following ways:

Paper: Probably more paper is used in an office than any other single items of stationery. Papers are of various types: A4, A3, B4, B3. A4 and A3 paper are mostly used by every office.

Stencils: Stencils are of two types: (a) The back cover stencils (b) Without front cover stencils paper

The back cover stencil has a cover at the back. It has the main

paper, in which certain dimensions are inscribed on the front page, and is supported by a carbon paper in the middle. If any matter has to be duplicated the stencil is inserted into the type-writer for typing. While typing, if there is any mistake of words that has occurred, it can be corrected with a correction fluid and the spelling or the words can be corrected easily.

Once the entire matter is typed then the back cover is torn off and the stencil is put or inserted into the duplicator to get the duplicated copies, The other form of stencil paper is the without front cover stencil. In this the front cover is not there at all and a carbon paper is affixed to the back cover.

This is inserted in a scanning machine to scan the matter of duplication, so that the matter to be duplicated is seen on the paper. After the matter is scanned, the carbon paper is inserted into the duplicating machine, so that the duplicating matters are into our hand. The back cover here is torn off before inserting the paper into the duplicating machines.

Carbons: These are basically a paper which is black in color or blue in color at one side and a silver screen forming layer in the other side. The silver screen side of the paper is inserted into the typewriter, facing the characters of the typewriter, along with the paper in which the impression of the type-writer or the matter to be printed is obtained.

Erasers: Erasers are obtained in two forms:

1. Fluids for correction
2. Whiteners for covering the spelling or words.

Fluids are liquids, made of chemicals, which are sprayed over the stencils, while typing a matter on stencils duplicating.The fluid used over a spelling or a word typed by mistake forms a very thin layer of screen and the layer is microscopic. This cannot be seen by an ordinary eye.

After the fluid dries up, the screen formed used on the word or the spelling typed wrongly also dries up. Then the correct words are typed which are inscribed on the screen. This is how the fluid helps in correction on a stencil paper.

Whiteners are commonly known as “Erax”. These come along with a thinner, which is used to liquidity the whitener, if it solidifies when in contact with the air.Whiteners are spread on the characters wrongly typed, or on

the spelling wrongly typed, and it is allowed to dry. Once dried, the same space is reset in the typewriter for retyping the words or the character correctly.

Durables: In the durables, the commodities like stapler, punching machines, paper weights etc. needs neither any description nor any introduction.These commodities, if seen once, are good enough to understand what are they and what is the mechanism.These commodities are stored, used and maintained for a very longer duration of time, hence they are known as durables.

Adhesives: Adhesive are items like the tapes, quick-fix, etc. These are also made of chemicals and they are used in the office for fixing certain envelopes, parcels etc. which have to go out of the office

10.5 CONTROL OVER OFFICE STATIONARY AND SUPPLIES

One can-not think of running an office without stationeries and office supplies. Office stationeries are those expendable items which are necessary for and consumed in the daily operations but do not generally enter into finished product. Office stationeries and supplies comprise of office forms, letter-heads pads, rough-work pads, envelopes, pencils, pens, erasers, pins, tags, files and folders.

Office stationeries occupy a key position in the office activity because proper and efficient use of stationeries and supplies brings the following advantages to the firm.

(a) It provides better service at lowest cost.

(b) It occupies 30-40% of the non-salary cost and therefore is viewed seriously by the management.

(c) It facilitates smooth functioning of office work. The need for proper control of stationeries arise because it will cause the following difficulties. to the firm.

Control over stationery in stores may be exercised in the following ways:

1. **Fixation of Levels:** The simplest method of ensuring continuous supply of all stationery items is to determine the minimum, maximum and reorder levels of the stationary items. These levels may be fixed on the basis of past experience of the rate if consumption, the time taken for placing an order and arrival of fresh supplies etc.
2. **Two-Bin System:** The two bin system may be employed to keep in Bin-B some quantity of stock to be used to avoid the stock-out position. When the supplies of Bin-A have been exhausted, an order for the fresh supplies may be placed for its replenishment before the "reserved" stock in Bin-B is completely used up.
3. **Stock-Taking:** There are three methods of stock taking, they are: perpetual, continuous and periodic. Under perpetual stock-taking, the continuing of the quantities in stock is made at the time of receipts and issues. The system may be adopted for costly items and for those which are stored in large quantities so that pilferage may be avoided. Under the continuous stock-taking system, a fixed number of items are counted and checked daily so that the whole stock is checked in a fixed period of time. Under the periodic stock-taking system, all the items in stock are checked and counted only at the end of the financial year. Any or a combination of the three methods may be adopted in accordance with the firms requirement.



CHECK YOUR PROGRESS

Q.1 : Define Carbons

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Q.2 : State the three methods of Stock-Taking

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10.6 STANDARDIZATION OF OFFICE SUPPLIES

Standardisation of office supplies is an important job in any big office. Here, it means that stationery items should be identical in terms of quality, size and description. Standards can be laid down for almost every kind of stationery. The process of standardization involves the laying down of the exact size, quality, dimensions and other specification of each item of supplies. Standardisation has the following advantages:

i. It helps the office buyer to know the requirements of his/her office exactly and precisely
ii. It ensures uniformity in the specifications of the items required by the various departments.
iii. It encourages simplicity by eliminating unusual and complicated articles.
iv. It discourages the purchases of substandard supplies which lead to economies in usage and storage.
v. It makes bulk purchases possible, and the economy that flows from bulk purchases.

The criteria for selection of the various items of stationery should be clearly laid down. Due care should be taken before changing from one brand of supply to another. In an item is satisfactory, no purpose will be served by changing it for the sake of trying out a new brand. However, in some cases, a new product may be superior or better in quality. Hence, samples of those products should be tested from time to time under similar conditions; the service and efficiency claimed for them should be analysed; and if the price is higher, an attempt should be made to determine whether the difference in price is justified. This would give an idea whether a particular product should be replaces or continued.

10.7 PURCHASING OFFICE STATIONARIES AND SUPPLIES

Westing, Fine and Zene have enumerated six principles for the purchasing of stationaery and office supplies.Known as the six R's, these principles are:

a. Purchasing of the right quantity
b. Purchasing of the right quality
c. Purchasing from the right source
d. Purchasing at the right time
e. Purchasing at the right place and
f. Purchasing at the right price

While purchasing stationery, the following factors should be borne in mind:

a. The quantity should be sufficiently large to merit a lower price (quantity discount)
b. The cost of storage space
c. The usage of particular items ordered
d. The price in relation to the quantity of the material
e. The availability of funds; and
f. The possible obsolescence of any item that is proposed to be purchased.

A purchase of stationeries is generally done by two methods:

(1) Centralised Purchase or
(2) Decentralised Purchase.

Let us now discuss about the centralised and decentralised purchasing systems.

Under the centralized purchasing system, supplies are purchased by the central purchasing department located in one place, usually in Head Office or Registered office of the organisation. It is an arrangement by which the selection, ordering, receipt, inspection etc, of the supplies are centralised. This method offers the following advantages:

a. Centralized buying means bulk buying which means lower cost.
b. Centralization makes for the specialization of the purchasing function, better utilization of storage equipment and better utilization of stock
c. Centralized purchasing enables the management to have a better budgetary control, for all the purchases are supervised at one point.
d. It helps in the standardisation of supplies, forms and procedures.

Under decentralized purchasing, each branch, division or department of the organisation is allowed to make its own arrangement for the purchase of the office supplies by having its own separate purchase section.

A decentralised purchasing set up has the following advantages:

a. It has flexibility and cuts delays in the procurement of office supplies
b. Purchasing may be made according to the exact quality specifications and requirements of each department
c. The overheads of the centralized system are eliminated
d. The purchasing procedure can be shortened.

10.8 STORAGE

Stationery and supplies are no less important than cash. Therefore adequate attention should be paid to their storage. However, in most office, stationery is often placed on open shelves or in dark and gloomy cupboards; and it may be so badly stocked that it may be difficult to find an item. This attitude may prove very costly. Proper storage should ensure:

a. Minimum losses on account of pilferage, moisture, heat;
b. Issue of stores without any loss of time in searching for them
c. Ease in taking stock; and
d. Instant availability of the stock position and other facts and figures about the stores.

The principal factors to be kept in view with regard to storage are:

a. Location of the storeroom
b. Physical arrangement of the stationery in stock
c. Classification system
d. Storage equipment

Let us discuss these points in following ways:

1. **Location of the storeroom:** The location of a storeroom should be in a central place of the office and within easy reach of the various departments. It should be in a place which is lighted up by daylight; otherwise costly artificial lighting should be installed and used. All the

stocks should be concentrated in one room to save space, travel and labour and to facilitate supervision and control.

2. **Physical arrangement of stationery in stock:** stocks which are well arranged are not likely to suffer loss. A proper arrangement of stationery and supplies is necessary to facilitate easy access, instant issue, and eliminate delay. Stationery may be stored on open shelves, on rocks, in cabinets or almirahs, or in sealed and packed boxes or containers, depending on the value and nature of the items to be stored. In small offices, where the stocks are stored in the main office room cabinets or almirahs with doors should be provided; but in all enclosed stock rooms separated from the office, open shelves should be used because they are less expensive, more readily accessible and offer a larger storage space.
3. **Classification System:** To facilitate the location of any single item, the shelves should be numbered consecutively, and a loose leaf or card index should be kept up to date, from which the relative shelf number of any items may be obtained.
4. **Storage Equipment:** storage equipment includes cupboards, almirahs, bins, shelves, racks, ladders etc. It may be remembered that centralization ensures a better utilization of storage equipment. When stationery is stored in a department , a better looking and consequently more expensive set of shelves has to be provided; and there is some inevitable loss of shelf space.

10.9 OFFICE MANAGER AND STATIONARY CONTROL

The control of office stationery and supplies the office manager includes three things: quality, quantity and cost. Quality is secured through standard specifications, tests and inspection of materials before they are accepted. Only experience can determine the quantities which are to be stored and the quantities which should be ordered. The supplies should be made only on receipt of written requisition, from departments or sections with a view to avoiding waste of the company's property at all levels.

Sometimes it may cost more to put through the requisition for a pencil than the pencil s worth; but if the requisition is not asked for, it is quite possible that half a dozen or a dozen pencil may be taken. At the same time the office manager should keep a check to ensure that the stationery and supplies are purchased at a favorable price.

Since the office work is basically a service function, office manager performs a significant role in the performance of office work. The main functions of an office manager are explained below.

1. **Staffing:** An office manager is requested to recruit and select the office staff by the top management. For this purpose, he determines the number of staff required, their qualification and experience if any, decide the sources of recruitment, receiving applications, conduct the interviews and tests and finally select the right personnel.
2. **Leadership:** He has complete control over the work done in an office. An office manager is necessary for smooth, efficient and performance of office work economically in an organization. Being a leader of office, he is in charge of public relations and helps other departments to achieve their goals set forth.
3. **Training:**The need of training has been decided by office manager. Besides, the training programmes are also devised and imparted to the new recruits as well as existing staff. Orientation training programme has been provided to new staff and refresher course programme is provided to existing staff.
4. **Coordination:** The various activities of office staff are coordinate by the office manager. He has to bring coordination between the top management and the workers. He must please both the parties.
5. **Work Measurement:** An office manager devices method of work measurement in terms of the output of the staff. It is a difficult task. The reason is that the office work cannot be measured in physical terms. Hence, it is the duty of office manager to decide the accepted norms of work measurement.
6. **Motivation:** The efficiency of staff is increased by providing proper motivation. The type of motivation can be decided by the office manager.

The right type of motivation ensures effective and economical performance of work and lead to the promotion of the staff.

7. **Discipline:** The implementation of rules and regulation of office is in the hands of office manager. There should not be personal bias while implementing rules and regulations. He also attends to the grievances of office staff. In this way discipline is maintained.
8. **Accounting:** He/she has thorough knowledge on accounting. Every figure should be kept in finger tips.
9. **Stationery Control:** Office manager has to exercise proper control on stationery purchase and issue. For this purpose, he has to frame clear cut procedure for the purchase, for the issue and storage of office stationery.
10. **Secretarial Services:** All the accounts books are kept under the custody of office manager. An officer manager is responsible to conduct meetings, drafts reports and minutes etc. on behalf of secretary. In this way, he does the functions of secretary.
11. **Costing:** In small organization, an office manager is responsible to maintain costing records and do the costing work.
12. **Organizer:** The office work has been assessed and assigned to office staff according to their knowledge, ability, experience, qualification and the like by the office manager.
13. **Supervisor:** An office manager is head of office. Hence, it is the duty of office manager to supervise the office correspondences, procedures, policy implementation, record maintenance, filing, indexing and the like.



CHECK YOUR PROGRESS

Q.3 : Write the methods of purchase of stationeries

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.....

Q.4 : State the principal factors to be kept in view with regard to storage

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.....



10.10 LET US SUM UP

- Stationery and office supplies are described as "those expendable items which are consumed in daily operations and are usually thought of as items obtained from a stationer". These includes items like paper, carbon papers, fax rolls, computer sheets and rolls, pens, pencils, erasers, sharpeners, ink, gum, adhesives tape, pins and paperclips, file fasteners, file boards and file boxes, ball pens and refills, paper rolls, cello tape, folders and labels, correction fluid and diluter, type calendar, stencils, paperknife, tags, sealing wax, stamps and stamp pads, envelope, Letterheads, writing pads, registers, file covers and so on.
- Office stationeries, broadly, can be divided into three categories:Cosumables, durables and adhesive.
- Control over stationery in stores may be exercised in the following ways: Fixation of Levels, Two-Bin System and Stock-Taking.
- A purchase of stationeries is generally done by two methods:
  (1) Centralised Purchase or
  (2) Decentralised Purchase.
- Proper storage should ensure:
  a. Minimum losses on account of pilferage, moisture, heat;
  b. Issue of stores without any loss of time in searching for them;
  c. Ease in taking stock; and
  d. Instant availability of the stock position and other facts and figures about the stores.
- The principal factors to be kept in view with regard to storage are:
  a. Location of the storeroom
  b. Physical arrangement of the stationery in stock
  c. Classification system
  d. Storage equipment
- The main functions of an office manager are: Staffing, Leadership, Training,Coordination, Work Measurement, Motivation, Discipline, Accounting, Stationery Control, Secretarial Services, Supervisor, Organizer and Costing.

10.11 FURTHER READING

1) Balachandran (2009); *Office Management;* Tata McGraw-Hill Education, India.
2) Bhatia, Dr. R. C. (2005); *Principles of Office Management*; Lotus Press; India.
3) Bhatnagar, S. K. (2011); *Office Management*; Frank Brothers; India.
4) Chakravarti, B. K. (2006); *Concept of Front Office Management*, APH Publishing; India.
5) Dix, Colin and Baird, Chris (2006); *Front Office Operations,* Pearson Education India.
6) Dubey, N. B. (2009); *Office Management: Developing Skills for Smooth Functioning*, Global India Publications; India.

10.12 ANSWERS TO CHECK YOUR PROGRESS

Ans. to Q. No. 1 : Carbons are basically a paper which is black in color or blue in color at one side and a silver screen forming layer in the other side.

Ans. to Q. No. 2 : The three methods of stock taking, they are: perpetual, continuous and periodic.

Ans. to Q. No. 3 : A purchase of stationeries is generally done by two methods:

(1) Centralised Purchase or

(2) Decentralised Purchase.

Ans. to Q. No. 4 : The principal factors to be kept in view with regard to storage are:

a. Location of the storeroom
b. Physical arrangement of the stationery in stock
c. Classification system
d. Storage equipment

10.13 MODEL QUESTIONS

Q 1 : Discuss the problems involved in the control of stationery.

Q 2 : Define office stationery.

Q 3 : Discuss the need for control over office stationery. Whether these should be centralised or decentralised.

Q 4 : Write the main functions of an office manager.

Q 5 : Write short note on :

a) Paper

b) stencils

c) centrlaised purchasing

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UNIT 11 : OFFICE AUTOMATION

UNIT STRUCTURE

11.1 Learning Objectives

11.2 Introduction

11.3 Uses and abuses of Labour saving appliances

11.4 Various types of commonly used appliances

11.5 Let Us Sum Up

11.6 Further Reading

11.7 Answers to Check Your Progress

11.8 Model Questions

11.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss the uses and abuses of Labour saving appliances
- learn the various types of commonly used appliances

11.2 INTRODUCTION

In the previous unit we discussed about office stationaries and supplies. In this unit we are going to discuss about uses and abuses of Labour saving appliances. Modern offices are a reflection of the growing dependence on technology or mechanisation process for getting the job done. In fact the primary purpose of office automation is the minimal dependence on human labour and the optimum control and monitoring of organisation functions. Better known as the time and labour saving devices, these office machines and equipment that enable office automation have become an indispensable part of modern offices. There are several appliances that account for optimising office work, performance and productivity. Some of the common labour saving devices includes typewriters, accounting machines, calculators, franking machines, photocopier, telephones, facsimile, computer, scanner, printer etc. At the end of this unit you will be able to know the various types of commonly used appliances.

11.3 USES AND ABUSES OF LABOUR SAVING APPLIANCES

Office automation process through the use of diverse machines and equipment brings forth several benefits for the organisation, over and above the advantage of saving time and labour. However, the demerits or the disadvantages associated with the use of these labour saving devices cannot be ignored. Some of the uses and abuses have been stated as follows:

Uses of labour saving appliances:

1) ***Increase productivity:*** The labour saving devices relieve the man power from exertion in physical capacity and from limited performing working hours. Devices can be used for longer working hours thereby resulting in comparatively increased productivity.
2) ***Increase efficiency:*** One of the primary uses of labour saving devices is to increase efficiency by getting the job accomplished within comparatively lesser time than in case of being done manually. These devices enable to speed up work thereby increasing the efficiency level of job performance.
3) ***Increase accuracy:*** Office automation helps in minimising errors and thorough checking resulting in increased accuracy of the work done.
4) ***Reduce operating costs:*** Labour saving devices enable the reduced use of manual labour which in turn reduces the cost of engaging manual labour and efforts. Increase in productivity further facilitates reduction in the overall operating costs.
5) ***Better control:*** Since these devices help in minimising errors and allow better monitoring for checking performance, it further leads to better control of operations.
6) ***Breaks monotony:*** The use of devices and equipment in doing office work helps in breaking the monotony of work thereby resulting in increased involvement and satisfaction of the workers in their job performance.

Abuses of labour saving appliances:

1) ***Breaks employee morale:*** The introduction and use of machines and devices tend to disrupt the morale of employees since they fear loss of job and unemployment. Further, the need for skilled workers demotivates the less technically literate employees. This further leads to resistance by the employees and affects the working atmosphere adversely.
2) ***Increase costs:*** The whole process of office automation involves huge costs in the form of initial installation costs for different machines and equipment and also as maintenance costs. Further inadequate use may lead to idle machines resulting in idle costs and also breakdown and repair expenses.
3) ***Adaptation difficulty:*** Adapting the existing organisational system to new machines and devices is a difficult and time consuming procedure. Further, it does not guarantee success as early and easily as it may seem initially thereby leaving the changed system inflexible and rigid.
4) ***Increase in need for skilled employees:*** Use of machines demand highly skilled employees to operate them. As a result it demotivates the employees with lesser technical skills. It further raises the demand and costs of training facilities as well as higher payment to skilled workers.
5) ***Enthusiasm killer:*** Though automation helps to make the work interesting, systematic and organised for the workers, it also tends to make the work more routine and repetitive by nature. This and the too much dependence on machines and equipment eventually kill their enthusiasm and creativity resulting in a loss of spirit and lethargy amongst the workers.
6) ***Threat of obsolescence:*** The organisations that reap the benefits of automation are also under a constant threat of obsolescence of their machines and equipment. Especially in case of expensive ones which have lesser use or turn idle, the threat is of higher magnitude.

11.4 VARIOUS TYPES OF COMMONLY USED APPLIANCES

The commonly used appliances are : Typewriter, Duplicator, Accounting Machines, Addressing Machines, Calculator, Franking Machines, weighting and folding machine,Dictaphone, cash register, Time Recorder, Photocopier, Telephone, Facsimile, Computer, Scanner, Printer, Letter Opener and Time and date Stamps.

Let us now discuss these appliances:

- **TYPEWRITER:** One of the most popular mechanical devices in modern offices is the typewriter that enables easy and quick printing of characters and other written matter on paper by typing individual keys depending upon the requirements, typewriters may be made available in various languages. Typewriters facilitate the typing of letters and documents within very short time. There are different types of typewriters that are available and used depending upon the purpose and facilities offered by each. Some of the most common types are discussed as follows:

a) ***Standard typewriters:*** These are the standard office typewriters that facilitate the neat performance of any kind of paper work, especially in regard to printing of cheques, invoices, staff cards etc.

b) ***Noiseless typewriter:*** This is a special typewriter designed to minimise the noise effect of the typing bar on the paper. Used mostly in case of several typewriters that need to work simultaneously, these are a little costlier than the ordinary typewriters and are not suitable for multicopy work.

c) ***Portable typewriter:*** Meant for creating convenience of carrying around a typewriter, the portable typewriter is popular amongst the travellers and journalist who need to move around for work. These are lightweight and can be easily placed anywhere and carried in a briefcase.

d) ***Electric typewriter:*** The electric typewriter runs on power based motor that minimises the energy intake of the typist and helps to create uniform work despite the erratic fingers of the typist. It involves mere touching of a key to type the desired content and reduces the level of tiredness of the typist.

e) ***Variable type machine:*** These typewriters are suitable for typing matters in variable font sizes depending upon the content size.These machines have a variety of sizes and designs for the typed matter and are suitable for reports that need to vary the emphasis on words and any other content.

f) ***Automatic typewriter:*** These typewriters also run on power and can automatically type content from a previously punched matter. These are helpful in reducing time of producing typed matter and also minimising the level of tiredness of the typists. Depending on the need of non-standard matters like names and addresses, it may be added manually in between the automatic process.

- **DUPLICATOR:** Duplicators or Duplicating machines are office devices that help in preparing circulars, price lists, notices etc. from a master copy in huge numbers as compared to the limited capacity of a typewriter. When several copies of a matter is required and which cannot be catered through a typewriter, the duplicator enables the same in a very short span of time. There are different types of duplicating machines. Some of them have been discussed as follows:

a) ***Gelatine Duplicator:*** One of the oldest duplicating machines is the Gelatine Duplicator which contains a gelatine tray. The master copy is pressed upon this gelatine tray, which is followed by pressing of the copying papers one after another with a dampened roller to take a copy. The master copy must be prepared with a special ink meant for use in case of Gelatine Duplicators. Though this is a comparatively cheaper alternative, the number of copies is very limited.

b) ***Mimeograph or Stencil Duplicator:*** It is one of the most popular duplicators in business offices that make use of stencils. The stencil may be cut by a typewriter or by hand with a stylus pencil. This mimeograph allows the usage of correcting fluid for making corrections. Another major benefit of this machine is that it enables the duplication in thousands with the help of the rolling drum.

c) ***Spirit Duplicator:*** Also known as a hectograph, the spirit duplicator is used to reproduce drawings, handwritten and typewritten matter in a

variety of colours. The method is a simple one where a master copy is prepared on art paper through a hectograph carbon paper. This master sheet is then fit to the duplicator drum and copy papers are fed accordingly into the device. The rotating drum creates an impression on the copy paper with the aid of a spirit under a dampened pad, which dries very quickly leaving behind the image on the paper. It is an economical method that enables the reproduction in several colour formats.

d) ***Photographic Duplicator:*** This is used in case an exact copy of any document is required. This device generally adopts either the contact process or the camera process. It is concerned with taking photographs of the document first and as the produced copyis developed soon after drying, it becomes ready for use.

e) ***Typeset Duplicator:*** This duplicator can be operated either manually or with a motor and takes place with the help of an inked ribbon. Around the outside of a drum, individual pieces of type for each letter are set up and it can produce more than a thousand copies per hour. This is an expensive device and takes time to set up.

- **ACCOUNTING MACHINES:** The accounting machines are an integral part of modern offices, mostly because they provide convenience in terms of handling the increasing accounting work pressure. These machines are a combination of both typewriters and calculators. So they not only give printed records of figures or accounting details, but also do the actual calculating task. Accounting operations like ledger posting, journal records, cash receipts, invoice records, payments, etc. can be easily carried out with the accounting device. These devices promise accuracy and speed in addition to analysis of various types of figures for different organisational objectives. Some of the common accounting machines include the calculating machine, adding listing machine, book-keeping machines etc. However, the cost of these machines and their repair charges are high and power failure cases tend to bring their operation to a temporary standstill.

- **ADDRESSING MACHINES:** These machines are used in case of large organisations that need to despatch a large number of bills, circulars, price lists etc. to thousands of addresses. Writing the addresses on the cover for each recipient is practically impossible and irrational, especially in regard to time and error cases. Hence these addressing machines with embossed or stencilled metal plates bearing the details of addresses enable their printing on each envelope within remarkable time, speed and accuracy. The addressing machines are economic and can be easily operated without much training. But it is crucial to keep the metal plates with the addresses up to date.

- **CALCULATOR:** Calculators are devices that help in calculations and minimise the tedious nature of the job. Calculators are popular office devices owing to their capacity of making calculations ranging from mere addition and subtraction to multiplication, division and percentage calculation also. They further make higher order calculations easier in case of discounts and modern calculators also facilitate statistical and trigonometric calculations as well. Calculators minimise errors and bring in accuracy in addition to cutting down the time involved in making major calculations.

- **FRANKING MACHINES:** This machine is used in the despatch work, and is licensed by the postal office. An advance payment is made to the post office for an agreed total of postage. The purchasing company has to be registered with the post office and on payment of the necessary amount, the franking machine is issued. It relieves the workers from staying back at work very late much after office hours for the purpose of postage stamp work. The franking machine with its meter can print on cards and letters fed into it the amount of stamps as read by it on the basis of the advance payment that is made. Once the amount is exhausted, the machine locks itself till the next advance is made. The franking machine is advantageous since it saves time and in case of

wrongly franked envelopes, the amount can be refunded from the post office.

- **WEIGHTING AND FOLDING MACHINE:** These devices are used for the purpose of handling letters before they are despatched to the requisite addresses. In case of huge number of letters to be placed in envelopes, it becomes tedious and time consuming to do this job manually. So these machines enable the weighing of the letters so as to determine the necessary postage requirement and folding of letters in one or two or three parallel folds with additional cross folds at a greater speed.

- **DICTAPHONE:** The Dictaphones are used to record dictation by the business which is then sent to the typist for further typing. Any number of letters or reports is dictated into the mouthpiece attached to the device. And this gets impressed on a cylinder or a disc which is placed on another device and the typist uses the attached earphone of this machine to type the matter. In case he misses any word, the machine may be stopped and brought to the desired part to type the missed content or word. Once it is done, the messages may be erased with the help of an eraser known as the 'shaver' thereby enabling the repeated use of the cylinder for dictation. Thus the Dictaphone with three parts; the recorder, the transcribe machine and the shaver is a very useful device for modern offices since it can record several dictations at any time at a very high speed. Moreover, the speed of the machine can be adjusted according to the typist's speed and it eliminates the errors of shorthand also.
- **CASH REGISTER:** This appliance is basically used for recording and checking cash receipts in firms where many payments are received. Theamount paid by the customers is shown on the dial and it is also printed on a sheet. Some of the cash registers also issue receipts to customers and state updated total of the receipts. The basic advantage of this device is that it simplifies the jobs of the cashier and brings in more ease and accuracy of cash records. It also ensures effective control over cash receipts and helps in the auditing process as well.

- **COIN SORTER:** The coin sorter device helps in sorting the coins of different denominations in a systematic manner. These devices are used by banks and other such stores and organisations with a view to relieve the cashier from the hassle of finding, arranging or sorting of the coins. The device consists of several trays with holes for keeping coins of different denominations and sizes. These trays are placed one over another and when a large number of coins are to sorted, all coins are placed on the uppermost tray. These trays are then shaken with the help of a mechanical device or by hand, and the coins on the basis of their size get sorted into each tray. The coin sorter saves time and reduces the complicacies of sorting coins, thereby making it easily available as per needs.
- **TIME RECORDER:** The Time Recorders are actually big clock like devices meant for recording the entry and exit of workers in factories. The worker on entering the work premises has to insert his card in the machine slot and turn an lever, which then prints the time and date of entry of the worker on the card. The same process is repeated when the worker is about to exit the work place. This ultimately helps in proper recording of the time of work and the presence of the workers. It further helps in accurate calculation of wages of the workers based on these records and also ensures punctuality of the workers.
- **PHOTOCOPIER:** Popularly known as the Xerox machine, this device is helpful in getting exact photographic copies of original documents containing sketches, diagrams, graphs and pictures apart from the written content. It generally takes about 6 seconds or less than that time to reproduce a copy. The photocopier is useful for reproducing the original in its finest details, both in colour or black and white, and avoids human errors.

- **TELEPHONE:** The telephone is an important device for modern offices. In fact, it is a significant invention for the purpose of oral communication. The telephone facilitates speedy exchange of information both within

and outside the organisation. Basically the Telephone communication can be either internal or external. When the communication is facilitated within the same office or building, it is considered as internal communication. On the other hand, when the communication needs to be conducted by a person from one office in a city with another individual in another location, it is known as external telephone connection. Telephone enables quick sharing of information and orders or instructions across offices.

- **FACSIMILE:** Popularly known as the FAX machine, the facsimile has grown to be an important office device especially for maintaining office communications. This machine helps in instant transfer of documents and matter, whether it is handwritten or typed, and also allows the transfer of charts or diagrams and pictures. Both incoming and outgoing of messages are possible through the FAX machines across the globe. The basic advantage of a FAX machine is that it enables speedy transfer of messages and high quality and originality can be maintained in case of images.
- **COMPUTER:** The computers are a modern office device that carries out the functions of collecting and storing data from several sources at a same time. It further carries out the processing of the data collected or inserted into it to reproduce systematic and crucial information in a simplified manner and easy to understand manner. Computers can store huge data and can make the same available in no time at all. The computer is advantageous for modern offices since it helps in saving of labour cost and brings in more accuracy to the work. Further it reduces monotony of the staff. However, the installation charges may be too high and it also threatens the displacement of employees thereby resulting in strained personnel relations.
- **SCANNER:** This is a modern office device that optically scans almost anything and converts it into a digital image. The commonly used ones include the flatbed scanner that has a glass window for placing the document or the object for scanning. Apart rom this there is the hand

held scanner moved by the hand over the object or matter to be scanned. These scanners are essential in modern offices to reproduce matter and content in a very short span of seconds. Several types of scanners are available in the market depending upon the use and functions.

- **PRINTER:** The printer is an electronic output device that takes input from the data stored in a computer or any other device and prints it in paper. The printer is essential for modern offices since it enables quick and easy printing of any stored data, whether it is in text format or images as well. Basically there are two types of printers, namely the inkjet printer and the laser printer. Depending upon the use or needs of the organisation, the printer is chosen for converting soft copy materials in a computer or other devices into hard copy formats. Preparation of reports or any other statistics through a computer and readying permanent records is well facilitated by a printer.
- **LETTER OPENER:**The letter opener machine with its revolving knife edge slices a very thin part from one edge of the envelope of a letter. It is useful in case of huge mails that are received and when manually opening them turns out to be time consuming. Care needs to be taken to shake the contents of the envelope to the other side so that the use of the letter opener does not cut of the important contents. Opening of letter through this device is a task of just few minutes in comparison to doing it manually.
- **TIME AND DATE STAMPS:** Used in small business concerns, this type of machines affix stamps on postcards and envelopes etc. rolls or strips of stamps are purchased from the post office which is then fed into the machine. The machine also contains a part for water that is used to moisten the stamps automatically and affix the stamp on the envelope. Some machines also have a meter attached which shows the record of total stamps used. The prime advantage of this machine is that stamping can be done quickly and the cost of postage can also be easily determined.



CHECK YOUR PROGRESS

Q1: Write any three uses of labour saving appliances.

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Q2: What is a scanner ?

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Q3: Define photocopier

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11.5 LET US SUM UP

- Office automation process through the use of diverse machines and equipment brings forth several benefits for the organisation, over and above the advantage of saving time and labour.
- **Uses of labour saving appliances:**
  1) Increase productivity
  2) Increase efficiency
  3) Increase accuracy
  4) Reduce operating costs
  5) Better control
  6) Breaks monotony
- **Abuses of labour saving appliances:**
  1) Breaks employee morale
  2) Increase costs
  3) Adaptation difficulty
  4) Increase in need for skilled employees
  5) Enthusiasm killer
  6) Threat of obsolescence

- The commonly used appliances are : Typewriter,Duplicator,Typewriter, Accounting Machines, Addressing Machines, Calculator, Franking Machines, weighting and folding machine,Dictaphone, cash register, Time Recorder, Photocopier, Telephone, Facsimile, Computer, Scanner, Printer, Letter Opener and Time and date Stamps.



11.6 FURTHER READING

1) Balachandran (2009); *Office Management;* Tata McGraw-Hill Education, India.
2) Bhatia, Dr. R. C. (2005); *Principles of Office Management*; Lotus Press; India.
3) Bhatnagar, S. K. (2011); *Office Management*; Frank Brothers; India.



11.7 ANSWERS TO CHECK YOUR PROGRESS

Ans to Q No. 1: Uses of labour saving appliances: 1) Increase productivity 2) Increase efficiency 3) Increase accuracy

Ans to Q No. 2: Scanner is a modern office device that optically scans almost anything and converts it into a digital image.

Ans to Q No. 3: Photocopier is popularly known as the Xerox machine, this device is helpful in getting exact photographic copies of original documents containing sketches, diagrams, graphs and pictures apart from the written content.



11.8 MODEL QUESTIONS

Q 1 : Discuss the the uses of labour saving appliances

Q 2 : Discuss the the abuses of labour saving appliances

Q 3 : Explain the commonly used appliances in an organization

Q 4 : Write short notes on:

a. Addressing Machines
b. Calculator
c. Weighting and folding machine
d Cash Register

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UNIT 12: CORRESPONDENCE

UNIT STRUCTURE

12.1 Learning Objectives

12.2 Introduction

12.3 Importance of Correspondence in Business and Government Offices

12.4 Essentials of Good Business and Official Correspondence

12.5 Routine of Handling Mail

12.6 Various forms of Correspondence

12.7 Let Us Sum Up

12.8 Further Reading

12.9 Answers to Check Your Progress

12.10 Model Questions

12.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss importance of correspondence in Business and Government offices
- describe the essentials of Good Business and Official Correspondence
- discuss routine of handling mail
- learn about various forms of Correspondence

12.2 INTRODUCTION

In this unit we are going to discuss the various concepts related to office correspondence. Correspondence refers to the exchange of written communication between individuals or people on matters pertaining to their common interest. In case of business or government organisations, correspondence holds great significance. Business correspondence is the written communication representing the particular institution or office for any business or official transaction. Though communication is crucial for any organisation, large organisations specifically run business through a

lot of correspondence and to the extent that create separate departments for the same. Smaller organisations however, may not have a separate department for correspondence but nevertheless they do engage in substantial written communication for their business. At the end of this unit you will be able to get a fair idea about

12.3 IMPORTANCE OF CORRESPONDENCE IN BUSINESS AND GOVERNMENT OFFICES

Correspondence for a business or government organisation is like the accelerator that speeds up the vehicle of organisational operation. Written communication enables an organisation to initiate business transactions and further its operations for survival and growth. Correspondence fulfils diverse needs of business and government organisations. The significance of correspondence can be understood from the following:

1) *It facilitates the building and maintaining of relationships:* Business and other organisations operate across the globe. They need to communicate and contact with different stakeholders in different locations. Written communication enables to reach out to these parties for different business requirements thereby paving the way for building new relationships and also for further maintaining it.
2) *It helps in creating and maintaining goodwill of the organisation.* Through letters for correspondence, complains or suggestions of the customers may be enquired to better cater to their needs. Further, this type of written communication also enables to update the stakeholders about any kind of changes or activities of their interest, thereby staying closer and connected with them. This results in cordial relations with the stakeholders and enriching of the organisation's goodwill.
3) *It makes communication convenient in an inexpensive manner.* Communication in any form is crucial for any organisation. However, written communication supersedes the other forms of oral, telephonic, fax or telex based communication since correspondence carries better

scope of detailing in the information or message. It is also convenient to communicate through letters. Further, letters are inexpensive compared to other modes of communication.

4) *Correspondence serves as evidence to all operations and dealings of the organisation.* Office work entails a lot of information with facts and figures which is not possible to memorize.Written communication provides with a record of the transactions which is very helpful for the business or organisation, especially in case of dispute related matters.
5) *It helps in easier expansion of the business.* Through written letters tradesmen can gather market information and also respond quickly to queries and orders from different locations. Responding to every customer or business information need in person takes time, and is practically impossible. So it is through correspondence that the process is made easier and the likely expansion of the business or office work on the basis of timely market statistics and other details is made possible.
6) *It sets up a formal communication ground between the organisation and the different stakeholders.* This set up for communication creates a formal image for the firm and enables the establishment of solid foundation for business. It further reduces the chances of doubts or confusion since correspondence clearly states the necessary fact and details for the business.

12.4 ESSENTIALS OF GOOD BUSINESS AND OFFICIAL CORRESPONDENCE

Office correspondence intends to convey some message or information both within and outside the organisation. It is a very important form of communication because it serves as a record of all official transactions and also enables the growth and expansion of the business in addition to building and maintaining relationships. However, in order to achieve the benefits of correspondence in the desired manner, it is crucial to take note of certain aspects in regard to language, contents and

presentation while drafting the matter. Some of the essentials of successful office correspondence can be stated as below:

1) *Purpose and clarity:* The message to be conveyed must be clearly checked in terms of its purpose and the language used. The definite purpose for which the draft is prepared should be served through the contents of the message and in an easily understandable language. Ambiguity in any form or the use of difficult and fancy words isto be avoided.
2) *Structure:* Successful communication depends upon the structure of the message, especially in terms of how well it can be absorbed and understood by the receiver. A written message should typically be structured into three basic parts, namely, the opening, the body and the closing. The opening introduces the receiver to the topic, its relevance and the sender. The body highlights the detail of the main topic and the closing is like a reminder to what has already been stated with key points to note. It is essential to remember this basic structure so as to draw the attention of the receiver followed by ease of their comprehension as well.
3) *Concise, concrete and consistent:* The message to be written has to be presented in minimal and to the point words, in addition to being very specific. Further, care is to be taken to keep the message consistent both in terms of grammar and perspective. This logical set up is important for building trust and retaining attention and interest of the reader.
4) *Relevancy:* Any correspondence that lacks important information and showcases unnecessary or irrelevant details is most likely to be paid with the least attention by the receivers. The message to be conveyed should contain only the relevant details of the subject and links to further details may be forwarded for further references, if any.
5) *Accuracy and complete:* one must always check for accuracy in the content of the message in terms of facts and figures as well as the grammar and tense. Further, completeness of the message is a must. Care has to be taken to deliver all possible necessary details within the minimal description.

6) *Choice of media and neatness:* The particular media used is also very influential in getting the desired message across. Whether it is a plain paper for the letter, or a plain text for an electronic mail, the right choice does create an impact. Also crucial is the neatness of the correspondence in terms of spacing, indentation or paragraphs used.
7) *Quality and size of paper:* One needs to be careful with the quality of paper used for the message owing to the cost factor. Good quality but inexpensive paper serves the purpose in the best way. The size of paper that is popular for office correspondence is A4. However, based on the need, different sized paper may be used.

Apart from these aspects, successful office correspondence also demands due attention towards matters pertaining to the font used, the folding of the paper or even the envelopes. An ill-fitting envelope or an over folded letter tends to leave a bad impression at the receiving end.



CHECK YOUR PROGRESS

Q1: State any three essential feature of successful office correspondence

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Q2: State any three importance of correspondence.

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12.5 ROUTINE OF HANDLING MAIL

Correspondence concerns with being in touch with the different stakeholders to a firm or organisation. And this is done through letters, notices, enquiry notes, circulars etc. the sending or receiving of such communication is regarded as mail. Mail for a business needs to be handled

very carefully since it acts as the connecting thread between the concerned parties. Generally, mails could be either incoming or outgoing. Sometimes inter-departmental mail is also necessary organisational actions. Handling mail comprises of proper planning of mail services for the business. The basic routine involves the following:

1) *Arranging for the Mailing Department:* A proper set up for handling mail through the establishment of a Mailing Department is a must. In case of small organisations, a single individual may be entrusted with the job of looking into the mail function. However, for large organisations where the volume of mail is high, separate department needs to be created with several staff to work for it. Depending upon the level or volume of work, the department maybe centralised or decentralised.
2) *Associating with the Post Office:* On the basis of the correspondence level, there arises the need to have a strong association with the postal service provider. If the firm is a small one with less correspondence activities, the local post man and the nearby post box serves the purpose of sending and receiving mails. However, in case of large organisations, special arrangements with the post office have to be made in regard to post boxes and post bags for efficiently managing the mail services.
3) *Establishing the mail routine:* There is the need to have a specific routine for handling mails, both incoming and outgoing. The routine helps in creating a better impact upon the receiving parties and ensures efficient operational performance.

The inward mail routine emphasises focus upon the following issues:

a) Receiving and opening the mail after acknowledging the receipt and sorting it. Confidential mails are to be sent immediately to the concerned addressee. Letters may be opened manually or through machines depending upon the volume.
b) The contents of the envelopes are to be scrutinised for the subject of the correspondence and enclosures if any. If any discrepancy is observed, it must be reported to the concerned supervisor immediately.
c) The stamping of date and time is another routine task after opening the mail for record purpose.

d) Recording the details of the correspondence like date and time, serial number, sender's name and address, subject and enclosures in the Inward Mail Register is mandatory for efficient mail handling. The initial of the final recipient of the letter is also recorded in the register.

e) Sorting and distribution of the letters is also done simultaneously, if they are to be arranged department wise. Baskets may be used for the purpose and the initials of the receiving clerks for each department are obtained for record.

The outgoing mail routine is also of significance for the business. The outgoing mail comprises of replies and responses to the incoming mails which have to be sent timely through the despatch section. In order to make prompt delivery of the replies, it is important to clearly specify the receiving address and the sender's address, in case the mail is not delivered or returned back without acceptance. Some of the basic steps involved in handling outgoing mails can be stated as below:

a) Sorting the outgoing letters and entering the details in the outgoing mail register is of primary importance. The first task in regard to handling of outgoing mails is sorting on the basis of destination, and then assigning a serial number, which is further noted along with the contents and address of the receiver in the outgoing mail register. Every outgoing letter is assigned a particular despatch number which is mentioned in the letter. Based on whether the letter is sent through the post office or through the messenger, the records are made in the despatch register or the peon book.

b) Folding and inserting the letters into envelopes follows next.Once the entries are made in the despatch register, the letters are folded and inserted into envelopes. The envelopes are addressed accordingly. This folding and inserting task may be done manually or with the help of machines.

c) Sealing and affixing stamps is the following task.It concerns with sealing the envelopes and affixing appropriate postage stamps with the help of franking machines.

d) Posting the letters. The final step in the routine of handling outgoing

mail is posting the letter and ensuring the delivery of the mail. Depending upon whether the mail is to be delivered locally, or whether it is a registered post, messengers or post boxes facilitate the posting and delivery process.

4) Mechanising the Mail services: Finally, the mail handling department while performing the repetitive operations, may need to take the help of mechanical devices for ensuring speed and accuracy. Some of the modern mechanical devices may include the letter opener, franking machine, stapler, envelope sealer etc.

12.6 VARIOUS FORMS OF CORRESPONDENCE

Depending upon the purpose or need, there may be different forms of correspondence. Even the function of the department that carries out correspondence defines its basic form or type. Generally, correspondence is classified into the following forms:

1) External correspondence: Any written communication between the organisation and the outsiders like individuals, customers, government, suppliers, financial institutions, etc. is regarded as external correspondence. So all letters sent to and received from these outside parties indicate external correspondence.
2) Internal correspondence: The correspondence between the departments of the company, or between branches and head office of the same organisation is considered as internal correspondence.
3) Personalised correspondence: Any letter or form of written content based on personal factors or emotions indicate personalised correspondence. This may be a letter of appreciation or gratitude, letter of recommendation or introduction etc.
4) Routine correspondence: This correspondence concerns with written communication for routine office operations like enquiry letters, reply to inquiries, orders, appointment letters etc.
5) Sales correspondence: Matters relating to sales may also be conveyed through written formats like invoices, sales enquiry, delivery letters, offer and discount letters etc. which is considered as sales correspondence.

6) Circular letters: Sometimes, common matters like change of address, opening of a new branch, launch of a new product etc. need to be sent to a large numbers and business firms. These are sent through circulars.



CHECK YOUR PROGRESS

Q3: State any four forms of correspondences.

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Q4: Write the basic routine of mail handling

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12.7 LET US SUM UP

- Correspondence for a business or government organisation is like the accelerator that speeds up the vehicle of organisational operation. Written communication enables an organisation to initiate business transactions and further its operations for survival and growth.
- The significance of correspondence can be understood from the following:

1) It facilitates the building and maintaining of relationships
2) It helps in creating and maintaining goodwill of the organisation.
3) It makes communication convenient in an inexpensive manner.
4) Correspondence serves as evidence to all operations and dealings of the organisation.
5) It helps in easier expansion of the business.
6) It sets up a formal communication ground between the organisation and the different stakeholders.

- Office correspondence is a very important form of communication because it serves as a record of all official transactions and also enables

the growth and expansion of the business in addition to building and maintaining relationships.

- Some of the essentials of successful office correspondence are:

1) Purpose and clarity 2) Structure 3) Concise, concrete and consistent 4) Relevancy 5) Accuracy and complete 6) Choice of media and neatness 7) Quality and size of paper

- Correspondence is classified into the following forms:

1) External correspondence
2) Internal correspondence
3) Personalised correspondence
4) Routine correspondence
5) Sales correspondence
6) Circular letters



12.8 FURTHER READING

1) Balachandran (2009); *Office Management;* Tata McGraw-Hill Education, India.
2) Bhatia, Dr. R. C. (2005); *Principles of Office Management*; Lotus Press; India.
3) Bhatnagar, S. K. (2011); *Office Management*; Frank Brothers; India.



12.9 ANSWERS TO CHECK YOUR PROGRESS

Ans to Q No.1: Essentials of successful office correspondence are - Purpose and clarity, Structure and Concise, concrete and consistent

Ans to Q No.2: The importance of correspondence are:

1) It facilitates the building and maintaining of relationships
2) It helps in creating and maintaining goodwill of the organisation
3) It makes communication convenient in an inexpensive manner

Ans to Q No.3: Correspondence is classified into the following forms:

1) External correspondence
2) Internal correspondence
3) Personalised correspondence

4) Routine correspondence

Ans to Q No.4: The basic routine of mail handling involves the following:

1) Arranging for the Mailing Department
2) Associating with the Post Office
3) Establishing the mail routine
4) Mechanising the Mail services



12.10 MODEL QUESTIONS

Q 1 : Discuss the importance of correspondence in business and government offices

Q 2: Describe the essentials of Good Business and Official Correspondence

Q 3: Discuss routine of handling mail.

Q 4: Explain the various forms of Correspondence

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UNIT 13 COMPANY MEETING

UNIT STRUCTURE

13.1 Learning Objectives

13.2 Introduction

13.3 Meaning of Meeting

13.4 Types of Meeting

13.5 Secretarial practices relating to holding of Meetings

13.6 Minutes Writing

13.6.1 Types of Minutes

13.6.2 Minute Book and Content of Minute

13.6.3 Drafting or writing of Minutes

13.7 Let Us Sum Up

13.8 Further Reading

13.9 Answers to Check Your Progress

13.10 Model Questions

13.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss the concept and meaning of meeting
- describe types of meeting
- discuss secretarial practices relating to holding of Meetings
- discuss about minutes writing and types of Minutes
- learn drafting or writing of Minutes

13.2 INTRODUCTION

In the previous unit we discussed about correspondences and its different forms.In this unit we will discuss about the concept and meaning of meeting. Meeting can be defined as; any gathering, assembly or coming together of two or more persons for the transaction of some lawful business of common concern". We will also discuss the types of meeting and secretarial practices relating to holding of Meetings.

At the end of this unit , we will get a fair idea about minutes writing and types of Minutes and learn drafting or writing of Minutes.

13.3 MEANING OF MEETING

A meeting is an assembly of two or more persons for discussing matters related to the organisation or the firm. Usually, meetings are an integral element of company form of organisation, but its significance for any other type of entity cannot be ignored. The manager or a concerned individual with the requisite authority in an organisation may call for a meeting to discuss or communicate management problems or decisions. The condition and decision to hold a meeting may prove to be useful or wasteful depending upon the planning and conduct of the meeting.

The following are some of the definitions given by scholars:

Sharp vs. Dawes (1971), defined meeting as "An assembly of people for a lawful purpose" or "the coming together of at least two persons for any lawful purpose."

According to P.K. Ghosh "Any gathering, assembly or coming together of two or more persons for the transaction of some lawful business of common concern is called meeting."

According to K. Kishore, "A concurrence or coming together of at least a quorum of members by previous notice or mutual agreement for transaction business for a common interest is meeting."

From the above definitions of meeting, it can be concluded that meeting is the congregation of several persons in a particular place for the purpose of discussing some important matters and expressing their opinion on the questions raised.

13.4 TYPES OF MEETING

Meetings can be of different types depending upon the purpose and objectives of holding the meeting. However, according to the companies act, 1956, company meetings may be classified into three broad categories:

A) Meetings of Shareholders: These are meetings meant for discussing issues pertaining to shareholders' interests from time to time. Shareholder meetings can be of three types, namely:

i) **Statutory Meeting:** This is the first official general meeting of the shareholders of a public company and is held only once in the life time of the company. A company meeting must be held within a period of not less than one month and not more than six months from the date of commencement of the company. It is held with the objectives of informing the members about the progress of the company since registration and the finance issues in addition to making them familiar with each other. It further enables discussions on future prospects and matters of formation of the company.

ii) **Annual general meeting:** It is the general meeting held once in every year within six months of closure of the annual accounts. A notice convening the meeting is to be given in writing 21 days before the scheduled date of the meeting and it is to be held during the business hours on working days at the registered office. The objective of an annual general meeting is to facilitate the review of the company's performance over the past one year on the basis of annual accounts and reports given by the auditors and directors. Dividend approval and the election or appointment of directors and auditors alongwith fixing up the remuneration are also a matter of consideration in this meeting.

iii) **Extra-ordinary General Meeting:** Certain urgent issues which need immediate discussion and cannot be postponed to the next annual meeting are raised in the extra ordinary general meeting. Such extra ordinary matters may be like increasing the share capital, alteration of the Memorandum or Articles of Association etc.

B) Meetings of Directors: The Directors of the company are entrusted with the managerial tasks of the company and they represent the shareholders as well. So they have their directors' meetings for discussing the management affairs of the company and other such matters related to the company. The meetings of the directors can be of two types, namely:

i) **Board Meetings:** The Directors of a company meet at regular intervals to discuss the day-to-day matters of the business. This interval is usually for three months and the meeting must be held four times a year. The

board meeting entails discussions on confirmation of minutes of the previous meeting and consideration of financial accounts of the company. It further discusses the transfer, transmission or forfeiture and reissue of shares. Debenture related matters are also held raised in the board meetings in addition with profit, dividend and other matters.

ii) **Committee Meetings:** Since it is not always possible for the Directors to attend to every work or aspect of the business, sub-committees are formed to look into these matters. Such committees meet at regular intervals to discuss issues like evaluation of new projects, investigation of matters, etc. These meetings are referred as the committee meetings.

C) Other Meetings: Any other matter that needs proper discussion over and above consideration in the already mentioned categories is classified under other meetings category. These generally include meetings of creditors and debenture holders to discuss and resolve matters affecting their interest.



CHECK YOUR PROGRESS

Q1: Define meeting.

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Q2: Name any three types of meetings

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13.5 SECRETARIAL PRACTICES RELATING TO HOLDING OF MEETINGS

Office communication is a crucial element of organisational success. Proper communicative forms, especially for internal communication provides the initial support for smooth organisational functioning. It is the

responsibility of the concerned secretary for ensuring adequate communication for the exchange of information within the organisation. There are diverse forms of office communication, and the choice of the ideal form depends upon the expertise and knowledge of the concerned individual. An organisation is free to evolve its own style as per its requirement, but the primary factor is ensuring that the chosen form serves the purpose of the communication. Notices, circulars, orders etc. are such important forms of communication which have been discussed below.

- ***Notice:*** In regard to holding a meeting, a proper notice of the meeting should be given for informing the members. Usually, a time span of 21 days or the specific time period as stated in the organisational bye-laws is given to all members for a general meeting with details of the place, day and time of the meeting and the business to be transacted. It may also be attached in a separate list known as an agenda. The secretary prepares the notice in consultation with the chairperson of the meeting taking note of all the rules and regulations of the same.Many notices require signatures of staff or some other indication or agreement with a proposal or policy decision. They are generally pinned on a wall notice board and prove to be an effective way of reaching out to the members for whom they are meant. The following are the essential features of a notice of a meeting:

a) *Contents:* The notice of the meeting must mention the body which is to meet, the day, date, place and time of the meeting in addition to the purpose and signatures concerned.

b) *Enclosure:* A notice usually has some relevant documents attached like the minutes of the previous meeting, agenda of the current meeting, the other documents supporting the decisions of the members etc.

c) *Other information:* The notice may also provide details of duration of the meeting, the refreshment break, travelling expense etc.

- ***Agenda:*** An agenda is a document which outlines the contents, or issues to be discussed at a meeting. It is prepared by the secretary and sent out with the notification for the information of the members. Preparing an agenda is one of the most important duties of a secretary

since it helps the members to come prepared for the meeting and also for the chairperson to conduct the meeting smoothly. The agenda is an official list of the things to be dealt with at the meeting and may also be not circulate in advance, in case the secretary or chairperson does not want the members to know for the larger interest of the business.

The basic features of an agenda demand for the details of the contents in terms of day, date, place and time of meeting and the business to be transacted. It is also accompanied by necessary documents such as copies of budgets, project proposals etc. Items in the agenda are numbered and sequenced in order of their importance, with the most important ones at the beginning and the routine matters at the end. However, certain routine items like the confirmation of the minutes of the previous meeting is made at the start of the meeting and the last item is marked as 'Any other matter' with the prior approval of the chairperson.

Importance of Agenda:

a) It provides with advance intimation to the members about the upcoming meeting and the business to facilitate necessary preparation.

b) It enables the smooth conduct of the meeting in a proper sequence and eliminates the possibilities of irrelevant discussions.

c) It facilitates the preparation of the minutes of the meeting.

Ø ***Quorum:***The minimum number of members essential for constituting a valid meeting is known as the quorum for the meeting. If the quorum is not present within half an hour of the scheduled time of the meeting, the meeting stands adjourned for the next date which is usually the same day and time in the next week. The quorum is generally fixed by the articles of the company.

Ø ***Motions:*** The definite proposal placed before the members in a meeting for discussion and decision is a motion. In fact it is the business of the meeting and must be in writing. It must also be drafted in clear unambiguous terms in affirmative form covering the scope of the business of the meeting and signed by the mover. A motion must be formally placed by a person and seconded by another, following which

the chairman may invite for debate and discussion. On completion, it is put to voting and if it is passed, it becomes a resolution.

- ***Resolutions:*** A motion, after being discussed and passed in the meeting, takes the form of a resolution. It is basically the recorded decision of a meeting on the motion that is placed and accepted. Resolutions must be in writing, recorded in the minute book word by word, and cannot be revoked in that same meeting.

A resolution as specified in the Companies Act can be generally of three types, namely; ordinary resolution, special resolution and resolution requiring special notice. An ordinary resolution is necessary for matters concerned with annual accounts, declaration of dividend, appointment of auditors etc. it is passed by a simple majority of votes, where the votes cast in favour exceeds the votes cast against it. The special resolution is passed by at least ¾ of the members voting by show of hands or poll and the intention to propose the resolution as a special resolution is mentioned in the notice of the meeting. It covers matters pertaining to alteration in the articles or memorandum of the company, reduction in capital or making changes in voting rights etc. There may be resolutions which require a special notice, and they are passed after giving an advance notice of such resolution much ahead of the meeting. It may be in regard to removal or appointment of a director or appointment of an auditor.

- ***Adjournment of meeting:*** Generally, a meeting a meeting, once convened, cannot be postponed by subsequent notice and before the meeting is convened, unless there is a specific statutory provision to this effect or the bye-laws or the regulations constituting the body convening the meeting permit. But once convened, a meeting may be adjourned to continue its unfinished business on some other date or due to want of the proper quorum. The date, place and time of the adjourned meeting are decided on that same meeting. In case of disorder, even if the relevant rules do not give the Chairman the power to adjourn the meeting, he may do so but for no longer than as considered necessary and the same must be communicated to those present in

that meeting.

13.6 MINUTES WRITING

Minutes are official records of the proceedings of a meeting. Minutes writing gives a summary of the discussions, debate or negotiations that take place during a meeting. It is very important for any business organisation to keep minutes of every meeting held. Minutes are a strict record of who said what and how the meeting was conducted, and are kept for years in order to facilitate easy reference as and when needed. However, the benefits of minutes are not limited to commercial organisations alone. Non-commercial entities too can benefit from proper maintenance of their minutes. Companies must maintain the minutes in a formal manner and state the important records for the awareness and information of the other members. Writing of minutes is a crucial part of office secretarial practices. It is usually the secretary of the unit which holds the meeting, who has the responsibility of writing the minutes of the meeting held.

13.6.1 Types of Minutes

Generally, minutes are of two types, namely the minutes of resolution and the minutes of narration.These are explained as below:

a) **Minutes of resolution:** This type of minutes makes a record of only the resolutions passed in the meeting as approved by the participating members of the meeting. No other detailsof the meeting are recorded.

b) **Minutes of narration:** In this type of minutes, a summary of all discussions, actions and decisions taken at the meeting are recorded along with a mention of the names of the participants and the mover and supporter of a resolution. This is a more detailed record of a meeting.

Apart from this classification, minutes are also categorised as:

i) **Verbatim minutes:** This form of minutes makes a word-for-word record of the meeting and is mostly followed in case of a legislative meeting or a Parliamentary meeting.

ii) **Decisions-only minutes:** It is a record of only the decisions taken in the meeting and no other details are noted.

iii) **Anecdotal minutes:** This type of minutes makes a record of the discussions and the decisions as well in a summarised form.

13.6.2 Minute book and Contents of minute

Minute book

The minute book is mostly a bounded book which contains the deliberations or discussions of a meeting. In other words, the minutes of a meeting are maintained in this minute book. It is a must to maintain a minute book for writing the minutes of a meeting. It is specially bound and contains suitable ruled ledger paper with pages that are consecutively numbered. There may be separate minute books for separate members and their meetings.

Contents of minute

The minutes of a meeting is a record of its proceedings and may also provide with details of the initial discussions prior to the final concluding points depending upon the type of meeting and the need of the minutes. However there are certain contents that every minute should contain such as:

i) **Heading:** The minutes of a meeting must have a clear heading that indicates the particular meeting of which they are a record. It must also indicate details of when and where the meeting was held. This is a vital record for any meeting.

ii) **Attendance:** It is very important to mention the attendance at the meeting with details of the names of the people who were present and also of the Chairman or President of the respective meeting. In case of committee meetings the names of the directors and members must be recorded. While the record of names of attendees to a meeting is an important record, it is impossible to record all the names of people present in a meeting of a large scale. Under such conditions, only the total number of people present at the meeting is recorded.

iii) **Previous minutes details:** The minutes also must contain the information of the previous minutes in terms of its approval, corrections and outstanding actions to be taken.

iv) **Action items:** This is a mention of any outstanding actions that need to be addressed from the previous meeting and the current issues as well. It also states the matters and opinions raised along with the mention of the name of the person who raises it.

v) **Announcements:** The minutes also indicate any form of announcement that is made by participants or those who sent their apologies for any matter related to the meeting, including proposed agenda items for the next meeting.

vi) **Notes:** Information pertaining to the date and place of the next meeting is also mentioned in the minutes.

vii) **Signatures:** The minutes must contain the signature of the person recording it or the secretary as the case may be along with the signature of the Chairman of the meeting.

13.6.3 Drafting or writing of Minutes

The writing or drafting of minutes need to be carried out in a careful manner taking note of certain issues and particulars. There are few requisites to be noted in order to attain the purpose of the minutes. Some of the features of an official record of minutes can be listed as below:

a) Minutes to large extent depend upon the skill, judgement and practice of the writer, in regard to which matter or aspect is to be recorded.

b) The record of minutes must be accurate, complete, precise and unbiased.

c) Minutes must be written in third person, indirect speech and in simple past tense.

d) The items in the minutes are to be serially numbered with suitable headings and chronologically set according to the agenda.

e) Minutes must be handwritten and pasting of typed matter must be avoided.

f) Minutes may be presented in a tabular form or a paragraph form, with a brief description of main points of discussion, the conclusions reached and the recommendations made.

g) Dates, figures, reference numbers of documents along with the day, time and place of meeting must be clearly recorded in the minutes. Also essential is the record of the names of members present at the meeting in their diverse capacities.

h) Any form of emotion displayed during the meeting, must be eliminated from record of the minutes and only the crucial facts, figures or discussions based on notes taken by the secretary must be recorded.

i) The minute book must be numbered for each page and signed by the chairperson to secure against any kind of tempering.



CHECK YOUR PROGRESS

Q3: Define minutes of resolution and minutes of narration

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Q4: Define Minute Book

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13.7 LET US SUM UP

- Meeting is the congregation of several persons in a particular place for the purpose of discussing some important matters and expressing their opinion on the questions raised.
- Meetings can be of different types depending upon the purpose and objectives of holding the meeting.They are: Statutory Meeting, Annual

general meeting, Extra-ordinary General Meeting,Board Meetings and Committee Meetings

- Notices, Agenda,Quorum,Motions,Resolutions,Adjournment of meeting are are such important forms of communication
- Generally, minutes are of two types, namely the minutes of resolution and the minutes of narration.
- The writing or drafting of minutes need to be carried out in a careful manner taking note of certain issues and particulars.

13.8 FURTHER READING

1) Herekar, P. M.() *Business Communication.*Phadke Prakashan
2) Pradhan, H., Bhende, D. S. & Thakur, V. *Business Communication.*

13.9 ANSWERS TO CHECK YOUR PROGRESS

Ans to Q. No. 1: An assembly of people for a lawful purpose" or "the coming together of at least two persons for any lawful purpose

Ans to Q. No. 2: The types of meetings are: statutory meeting, annual general meeting and extra-ordinary general Meeting.

Ans to Q. No. 3: Minutes of resolution: This type of minutes makes a record of only the resolutions passed in the meeting as approved by the participating members of the meeting. No other detailsof the meeting are recorded.

Minutes of narration: In this type of minutes, a summary of all discussions, actions and decisions taken at the meeting are recorded along with a mention of the names of the participants and the mover and supporter of a resolution. This is a more detailed record of a meeting.

Ans to Q. No. 4: The minute book is mostly a bounded book which contains the deliberations or discussions of a meeting. In other words, the minutes of a meeting are maintained in this minute book.

13.10 MODEL QUESTIONS

Q 1: What is meant by meeting ?

Q 2: Describe different types of meeting

Q 3: Explain the secretarial practices relating to holding of Meetings

Q 4: Discuss about minutes writing and types of Minutes

Q 5: Write a note on drafting or writing of Minutes

*** ***** ***

UNIT 14 : HRM FOR OFFICE MANAGEMENT

UNIT STRUCTURE

14.1 Learning Objectives

14.2 Introduction

14.3 Concept of Human Resource Management (HRM)

14.4 Functions of HRM

14.5 Role of HR Executves

14.6 The Employment Function

14.7 Recruitment and Selection

14.8 Job Evaluation

14.9 Training

14.10 Motivation

14.11 Let Us Sum Up

14.12 Further Reading

14.13 Answers to Check Your Progress

14.14 Model Questions

14.1 LEARNING OBJECTIVES

After going through this unit, you will be able to :

- discuss the Concept and objectives of Human Resource Management (HRM)
- describe the functions of HRM
- discuss the role of HR Manager
- learn the the employment function
- discuss about Recruitment and Selection,Job Evaluation,Training and Motivation and its theories.

14.2 INTRODUCTION

In this unit we are going to discuss the various concepts related to Human Resource Management.The core of management functions lies in guiding , directing and controlling the efforts of all those human beings

employed in the organisation. Without the productive efforts of human beings, material resources would be meaningless and idle. According to J.C. Denyer: “Materials, machines and even offices themselves can be replaced, any risks involved can be replaced , and any risks involved can be insured against , but a good loyal team of workers cannot be replaced nearly so easily.”Human Resource Management or Personnel Management is concerned with “the procurement, development, compensation, integration and maintenance of personnel of the organisation towards the accomplishment of its major goals.”

In this unit we will get a fair idea about Functions of HRM, Role of HR Manager, The Employment Function, Recruitment and Selection, Job Evaluation, Training and Motivation.

14.3 CONCEPT AND OBJECTIVES OF HUMAN RESOURCE MANAGEMENT (HRM)

Let us first discuss the meaning of each of the term in HRM, **H** for Human can be explained as the skilled workforce in the organization, **R** for Resource that is the limited availability or scarce and **M** for management which can be explained as the maximum or proper utilization and to make best use of limited and scarce resource in the organisation. Human resource management is a management function involving procurement of suitable human resources, train and develop their competencies, motivate them, reward them effectively and create in them an urge to be part of the management team whose aim should be rendered, dedicated, committed service for the success and growth of the organization.

People are an important part of any type of organization. Any organization whether it a religious, social, educational, non- governmental, public or private, people can be regarded as the core resource of the organization. An organization is made up of 4Ms, man, material, money and machine.

Human Resource Management as the name itself denotes is concerned with the people dimension in management of an organization. It is directed towards recruitment and selection, training and development,

motivation and maintenance of the human resources for the long term development and upliftment of an organization. In simple words human resource management can be defined as a process in which human resources are acquired from proper sources and utilized in the best possible manner so that not only the organizational objectives are achieved but also the individual objectives of the human resources are fulfilled. Human resource management helps to ensure that the right man in the right position is placed and at the right time taking into consideration the changes taking place in the internal as well as external environment of the organization. Some important definitions of Human Resource Management given by some eminent scholars and institutions are given below.

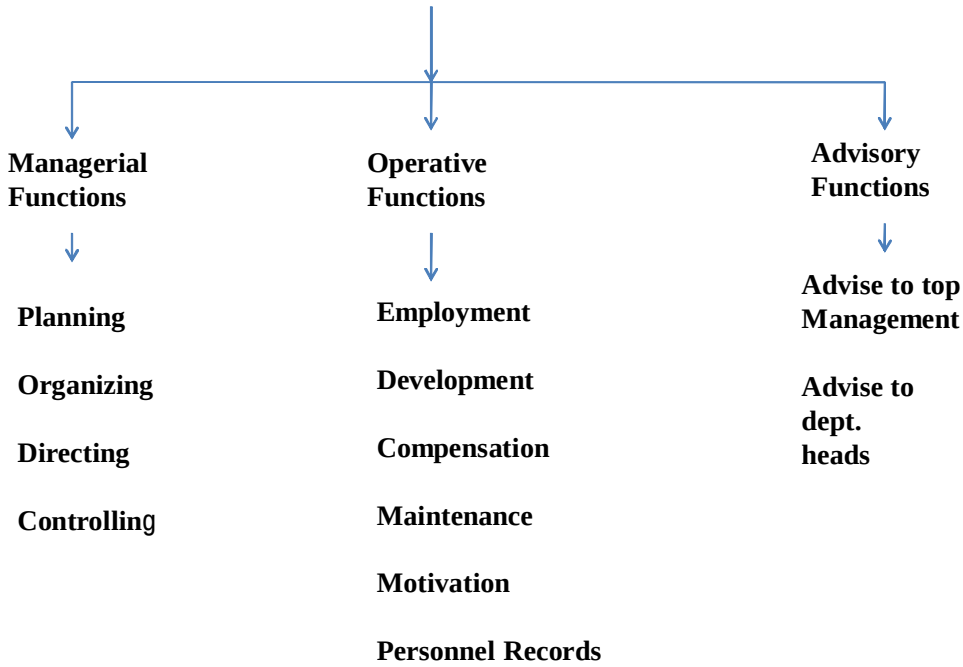
According to Edwin B. Flippo, "Human resource Management is the planning, organizing, directing and controlling of the procurement, development, compensation, integration, maintenance and separation of human resource to the end that individual, organizational and social objectives are accomplished."

According to Decenzo and Robbins "HRM is concerned with the people dimension in management. Since every organisation is made up of people; acquiring their services, developing their skills, motivating them to higher levels of performance and ensuring that they continue to maintain their commitment to the organisation are essential to achieving organisational objectives. This is true, regardless of the type of organisation-government, business, education, health, recreation, or social action".

14.4 FUNCTIONS OF HRM

The major functions of Human Resource Management are broadly divided into three categories which are depicted in the chart below and are followed by a brief description.

Functions of Human Resource Management



Let us discuss the functions briefly as follows:

1. **MANAGERIAL FUNCTIONS:**

a. **Planning:** Planning is a predetermined course of action for achieving organizational as well as departmental goals and objectives. For laying down policies and procedures to reach the goals, planning is required. The human resource manager also needs to plan for his department so that the departmental goals are achieved. For the human resource manager planning is required in the areas of anticipating vacancies, planning job requirements, job descriptions and determination of the sources of recruitment.

b. **Organizing:** It is the responsibility of the human resource manager to develop a suitable organization structure and carry out the various functions and operations of an organization. There should be proper grouping of activities, assignment of the activities, and delegation of authority and responsibility and coordination of the various activities.

c. **Directing:** Direction function is meant to guide and motivate the people to accomplish the personnel programs. This function involves encouraging people to work willingly and effectively for the goals of the enterprise. With the help of techniques such as career planning, proper

salary administration, developing harmonious relations between employer and employee, a manager can motivate and direct the employees towards the achievement of organizational programs.

d. Controlling: Proper supervision and evaluation of the activities so that everything goes in accordance with the plans is termed as controlling. Regulation of activities is very essential to find out any deviation between the standards set in the plans and actual performance. Controlling techniques involve performance appraisal, critical examination of personnel records and statistics and personnel audit.

2. OPERATIVE FUNCTIONS:

a. Employment: Employment of proper kind and number of people in an organization is necessary for the development and achievement of the objectives of the organization. This function can be achieved and involves activities such as proper recruitment, selection, placement, induction etc.

b. Development: The follow up function of employment is development. For the upliftment of the skills of the employees the management has to train its employee to develop them for the higher jobs in the organization.

c. Compensation: Adequate and equitable compensation is essential for satisfying the employees and achieving the organizational goals. Compensation can be both in terms of monetary and non- monetary terms. While fixing remuneration, factors such as basic needs, requirements of jobs, legal provisions regarding minimum wages, capacity of the organization to pay etc should be taken into account.

d. Maintenance: Maintenance functions include measures such as health, safety, physical and social well-being of the workforce, facilities such as provision of cafeteria, rest rooms, counseling, group insurance, education of children of employees etc. Proper maintenance of workers along with good working condition is essential for the development of employees along with achievement of organizational goals.

e. Motivation: Motivation is to inspire the employees to work and fulfill the objectives of the organization. Until and unless the employees in the

organization are well motivated, it becomes harder for the organization to push them forward for the achievement of the objectives. The HR manager helps the various departmental managers to design a system of financial and non financial rewards to motivate the employees.

f. **Personnel Records:** The HR department maintains the records of the employees working in the enterprise. It keeps full records of their training, achievements, transfer, promotion, etc. It also preserves many other records relating to the behavior of personnel like absenteeism, labour turnover of the organization.

3. ADVISORY FUNCTIONS:

a. **Advice to Top Management:** For formulation of personnel programs, policies and procedures and maintaining good and harmonious human relations, the personnel manager advises the top management from time to time.

b. **Advise to Departmental Heads:** Personnel manager gives advice to the various departmental heads on matters of manpower planning, job analysis and design, recruitment and selection, placement, training, performance appraisal etc.



CHECK YOUR PROGRESS

Q1: What is meant by HRM?

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Q2: State two managerial functions of HRM.

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Q3: State two advisory functions of HRM.

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14.5 ROLE OF HR EXECUTIVES

An HR Executive performs all the basic functions relating to human resources starting from recruitment till separation in an organization. An HR executive is the key member in the HR department and plays a very important role in the organization. Some of the major roles played by the HR executives are stated below.

1. ***Recruitment:*** The following are some of the major roles played by HR executive in recruitment.

- Understanding the manpower requirement from the concerned department.
- Understanding the requirement and accordingly drafting a job description and getting it approved from the concerned department.
- Securing candidates that match the desired skills.
- Screening the candidates by conducting telephonic or personal interviews as the case may be.
- Arranging for an interview and coordinating with the person concerned.
- Communicating the employment status to the applied candidates.
- Maintaining and updating the database of the candidate.
- Doing a background verification of the shortlisted candidates.

2. ***Induction and On-boarding:*** The following are some of the major roles played by HR executive in Induction and On-board training programme.

- Giving offer letter and issuing appointment letter to the selected candidate.
- Communicating the policies, procedures and culture followed by the company.
- Introducing the new joinee to the team and supervisor or manager.
- HR policies and HR Manual:
- In the absence of any HR manual, drafting and preparing the same for the company.
- Making or amending the existing policies and procedures.

3. ***Attendance and Leave Records:*** The following are some of the major roles played by HR executive in keeping attendance and leave records.

- Keeping a track of the attendance of the employees.
- Feeling the leave forms and keeping a track of the leaves taken.
- Seeing to it that there is not much absenteeism on any given day.
- Seeing that every employee is regular and if there is any irregular employee, taking corrective and preventive measures.

4. ***Performance Management:*** The HR executive helps the appropriate authorities in doing the performance appraisal of the employees.
5. ***Employee Involvement:*** The following are some of the major roles where the HR executive are involved:

- Maintaining a record and track on employee turnover and exit rate.
- Taking necessary steps to engage and involve the staff to their work.
- Planning events or activities regularly and getting those approved by the senior management and implementing those.

6. ***Workforce Management:*** The following are some of the major roles played by HR executive in workforce management:

- Handling the staff properly so that people are satisfied with one another.
- Handling cross culture things.
- Monitoring that there is no groupism in the organization due to which dissatisfaction arises.

7. ***Conducting Exit Formalities:*** HR executive has a major role in conducting the exit formalities:

- Conducting exit interviews of the candidates those who are resigning.
- Trying to get proper feedback for the company and trying to take and implement corrective measures.
- Helping the person to be released properly.
- Issuing releasing letter and letter of experience.
- Doing all the official work for full and final settlement for the outgoing person.

8. ***Compensation and Benefits:*** The following are some of the major roles played by HR executive in compensation and benefits of the employees.

- Designing the salary structure for the employees.

- Helping employees save tax by advising them on tax benefits plans and other investment. Calculating the gratuity, handling PF accounts etc.

14.6 THE EMPLOYMENT FUNCTION

Employment function of the human resource management is concerned with the maintenance of an adequate apply of qualified employees / workers. It should ensure that the organisation has the right number of people and the right kind pod of people in right places and at the right time and they are doing the right things. The following activities are the integral parts of the employment function:

1. **Classification of Employees:** Employee classification is the process of assigning to each employee the title of the job which hw/she performs. The classification of each employee should be made on as highly on the basis of the objectives of the organisation. The basic policy of the management should be to classify its employees properly and to change each employee's classification whenever he is assigned a different job.
2. **Job grading:** In addition to the classification of employees, jobs in an organisation should be properly graded. Job grading can be defined as the process of comparing jobs inan organization to measure levels of responsibility, often used for deciding levels of pay. Job grading refers to the classification and analysis of the jobs which are performed in an organisation and to their relative levels. It is one of the methods of Job Evaluation. According to J. C. Denyer: "Job grading consists of a scientific study of all the jobs and then the placing of these jobs into broad categories called job grades."
3. **Job Analysis:** Job Analysis is a process to identify and determine in detail the particular job duties and requirements and the relative importance of these duties for a given job. Job analysis is a process where judgments are made about data collected on a job. The purpose of job Analasis is to establish and document the 'job relatedness' of employment procedures such as training, compensation, selection, and performance appraisal review. Job analysis is the foundation for both

job description and job specification. Job description is a broad statement of the purpose, duties and responsibilities of a job or position. A job description is based on a detailed job analysis and usually summarises the essential information gathered through job analysis. They describe the main tasks and responsibilities of the job clearly and concisely in order to facilitate the systematic comparison of jobs for evaluation purposes. Job specification includes stipulation of desired behaviour attributes at a job viz. skills requirement, knowledge of the job, behavioural and mental attributes required on a job. Hence job specification is a description of the qualifications necessary for a job, in terms of education, experience, and personal and physical characteristics.

14.7 RECRUITMENT AND SELECTION

In this section we will discuss the concept of recruitment and selection.First let us discuss about recruitment.

Recruitment is the process of identifying the prospective employees, stimulating and encouraging them to apply for a particular job or jobs in an organisation. It is a positive action as it involves inviting people to apply. The purpose is to have an inventory of eligible persons from amongst whom proper selection of the most suitable person can be made. Recruitment is essentially a process to discover and identify sources to obtain employees and to employ effective measures for contacting those employees, which will be forming an efficient workforce.

Flippo has defined recruitment as “a process of searching for prospective employees and stimu-lating and encouraging them to apply for jobs in an organisation”. According to Bergmann and Taylor “Recruitment is the process of locating, identifying, and attracting capable applicants”.

Recruitment is subject to influence of several factors. There are two sets of factors namely: Internal forces and External forces. They can be discussed as follows:

A. External Forces: The following are some of the external forces that influences recruitment

- **Unemployment Rate:** Recruitment can be influenced by unemployment rate. If the unemployment rate is high, the company's recruitment process becomes simpler. The number of unasked applicants is greater and the company gets better opportunities for attracting qualified applicants.
- **Labour market:** For the recruitment of middle-level management positions, supervisory positions or for non-managerial positions the labour market conditions in the local area are of primary importance.
- **Political - Legal:** Political - legal is one of the main factor that influence recruitment. The reservations of jobs for ST, SC, other backward class (OBC) etc are the political decisions. Preferences are given to the applicants coming from less-advantages section of the society.
- **Company's Image:** Another factor to influence recruitment is the company's image. If a company is a ***'Blue chip'*** company, it will attract a large number of applicants.

B. Internal Forces: The following are some of the internal forces that influences recruitment

- **Recruitment Policy:** One of the important internal forces of recruitment process is the recruitment policy. A firm can recruit internally or externally. Internal recruit means recruitment from own employees and external recruitment is the recruitment from outside the organization. Generally, an organization goes for internal recruitment, because the employees know the company well and is well adjusted to the company's culture. External recruitment helps in bringing new culture to the organization.
- **Size of the firm:** Size is again a factor that influences the recruitment process. The firm with more numbers of employees find it less troublesome to recruit than the firm with a fewer number of employees.
- **Growth and Expansion:** The firm showing growth and expansion will have more recruitments than the firm which are in its diminishing stage.

Sources of Recruitment: The sources of recruitment can be categorized as:

1. Internal Sources
2. External Sources

A. Internal sources: Internal sources of recruitment helps searching the applications for the vacant position from those who are already working in the organization. Internal sources include employee referrals, present employees, and previous employees.

a. Employee Referrals: Employee referral is one of the sources of internal recruitment. Here, the employees give reference of their friends or relatives who are eligible for the required post of the company. When the employees give successful referrals, they are paid with monetary incentives which are called “finders fees”.

b. Present Employees: Present employees are another internal source of recruitment. Promotion and transfer are two good source of recruitment. Promotion means shifting of employees to a higher level of position carrying higher responsibilities, facilities, salaries etc. Transfer is the change in job assignment. It may be a promotion or demotion or no change in terms of status, responsibilities, etc.

c. Previous Employees: By previous employees we mean the retired employees or the employees who left jobs for some reason etc. Some retired employees willing to come back and want to work on part time basis in the companies. The employees, who left the company for other job, might come back for higher salary package or compensations.

B. External sources: External sources of recruitment are the recruitment of potential applicants from outside the organization. The different types of external sources that we are going to discuss are advertisement, employment exchange, campus recruitment, consultants and e-recruiting.

a. Advertisement: Advertisement in the newspapers and other periodical magazines is one of the most important external sources of recruitment. The companies who are in search of employees, advertises in the newspaper about the job, job description, salary, qualification, etc.

b. Employment exchange: There is government as well as private employment exchange that provide jobs to the desiring candidates. The

main function of the exchange is to notify the vacancies before they are filled. The employment seeker get registered themselves with the employment exchanges.

c. **Campus recruitment:** Campus recruitment is the recruitment of the prospective employees by the companies. Companies have been using a variety of methods to employ and select personnel to work for them and campus recruitment is one of the newest methods used by most companies today. In campus recruitment, companies / corporate visit some of the most important technical and professional institutes, universities, colleges to hire young intelligent and smart students at source. In campus recruitment process, instead of the job seekers approaching employers, the employers come to the most suitable prospective candidate with a job offer.

d. **E-recruiting:** e-recruitment is also known as online recruitment. For e.g. Cisco Systems recruits employees only through e-recruiting. E-recruitment has many benefits like the candidate can apply online, reduced cost for traveling distances, administrative workload decreases etc.

Recruitment process: Recruitment process is the main and the first step towards creating the competitive strength and the strategic advantage for the organizations. Recruitment process involves a systematic procedure from sourcing the candidates to arranging and conducting the interviews and requires many resources and time. The following is the process of recruitment:

1. Identify vacancy
2. Prepare job description and person specification
3. Advertising the vacancy
4. Managing the response
5. Short-listing
6. Arrange interviews
7. Conducting interview and decision making

Selection is a process that comes into action immediate after So, by recruitment we mean the process of attracting the deserving candidates for a vacant post and by selection we mean choosing the right candidate from the prospective candidates who applied for that vacant post.

Let us now discuss about Selection. Selection is the process of selecting the eligible applicants out of the large number of applicants through different tests. Selection involves rejection of the unsuitable candidates.

The following are some of the definitions of selection:

According to Weihrich and Koontz, “Selecting a manger is choosing from among the candidates who best meets the position requirements”.

In the words of Dale Yoder, “Selection is the process in which candidates for employment are divided into two classes -those who are to be offered employment and those who are not.

Selection process has two aspects i.e. those who are offered with the job and those who will be rejected. Selection is the process of choosing the qualified and deserved candidate to fill specific jobs in the organisation. It needs to be go through a procedure so that right personnel can be selected. So, now we will be discussing the selection procedure.

The main steps in selection procedure are as follows:

1. Receipt of Application
2. Preliminary interview or screening
3. Application Blank or Application Form
4. Employment test
5. Interviewing
6. Reference Check
7. Medical examination
8. Selection

1. **Receipt of Applications:** in this step the applications are received from the candidates fro the vacant post.
2. **Preliminary interview or screening:** In many organisations, preliminary interview is done in order to choose right candidates. The preliminary interview is generally brief and its main aim is to eliminate the unsuitable candidates.

3. **Application Blank or Application Form:** The candidates who are chosen in the preliminary interview are given with an application blank or form where the data of the candidate is recorded. The application blank is a written record which contains the following information:

a. Identifying information such as name, age, sex, marital status, family background etc

b. Educational information which includes academic career, division obtained in various school and degree level examination etc

c. Information regarding experience such as details of previous job, job responsibilities, designations, salaries etc.

d. Information regarding extracurricular activities, hobbies etc.

4. **Employment test:** The employment test is used to measure the qualities and abilities of the prospective candidates. This test is used to draw conclusions about the future behaviour or performance of the candidate. The following are some of the employment tests which are used as a selection tool:

a. Intelligence test

b. Personality test

c. Aptitude test

5. **Interviewing:** After clearing the employment test, the candidates now have to face the next step in selection procedure. For selection of deserved candidate, interview is very important. The main objective of interviewing is

i) to measure the applicant against the specific requirement of the job

ii) to find out the suitability of the candidate

iii) to seek more information about the candidate.

6. **Reference Check:** Before the final selection, reference check is done of the prospective candidate. The candidate is asked to give the name and address of the former employer and also of two or three persons known to the candidate but not related to him.

7. **Medical examination:** After clearing the above step, the candidate is asked to go for medical examination. Medical examination is very important because a person with an ill health cannot do his

responsibilities efficiently and the money invested by the company on him will go waste. So, the medical examination is very important.

8. **Selection:** when a candidate overcomes all the above steps of selection procedure, he is then declared selected. The candidate is given with an appointment letter mentioning the terns of employment, salary, incentives, designation etc.



CHECK YOUR PROGRESS

Q 4: Define Recruitment

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Q 5: Define Selection.

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Q 6: What are the main steps in slection procedures?

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14.8 JOB EVALUATION

Job evaluation is a systematic method of appraising the value or worth of one job in relation to other jobs in organisations. It specifies the relative value of each job in an organisation. It basically serves the purpose of compensation procedures. There are different methods for job evaluation. Different organisations use different methods for evaluation of any particular job. The method to be followed for job evaluation depends to a large extent on the job analysis and job description. The methods provide essential information on which the job is related or evaluated. Any method of job evaluation involves comparison of one job against the one of others or by comparing them against a scale that has been developed for this purpose.

Major objectives of job evaluation is to establish logical & accurate relationship of each job to other jobs within organisation, to regulate the wage rate for each job in relation to other job in the organisation, to select employees accurately and train, promote or transfer them impartially, to encourage employee goodwill, strengthen morale and provide an incentive and to provide management with a basis for proper control.

The following are the methods of job evaluation:

1. **Ranking Method:** Under this method each job is given a rank. The ranking is done in the order of importance of each job. A list, beginning with the most important job and ending with the least important, is then prepared, and the importance of each job is determined .This method is suitable for small organisation, where jobs are few.
2. **Factor Comparison Method:** In this type of procedure, the jobs are ranked in the following way: Common key elements of different jobs are selected. These selected key elements are weighted and ranked. A monetary value is assigned to each element of all jobs. Then these monetary values of individual jobs are weighted. Then total value of each job is available. The major benefits if this methods are that it is more accurate and systematic as compared to simple ranking method. Different jobs also can be rated on the basis of common factors. The drawbacks of this method comprise that it is complicated, not easily explainable and expensive. Application of weightage and monetary values may involve bias of rankers. It is difficult to install hence not used extensively.
3. **Point Rating Method:** In this method, each job is appraised separately, considering each of the job factors such as skill, effort, responsibility and working conditions and combining them into a single point score for each job. Main advantages are that it is analytical in its approach, it gives a quantitative value for each job. Basis and guidelines of valuation are standardized and codified in a user manual. Disadvantages include, manual used for rating the jobs needs periodical revision and update. It is difficult for application and unintelligible for workers.

4. **Classification Method:** We have already discussed about the job classification or job grading method in the previous section i.e section 14.4.

14.9 TRAINING

Meaning of Training:

After recruiting and placing the employees in the right place the next step is to train and develop the Human Resource collected recently. Training is an organized activity aimed at imparting information and/or instructions to improve the recipient's performance or to help him or her attain a required level of knowledge or skill.

It is vital part of every employee and manager. Many authors have defined training as follows:

According to Jack Halloran, "Training is the process of transmitting and receiving information related to problem solving.

According to Mathis and Jackson, "Training is a learning process whereby people learn skills, concept, attitudes and knowledge to aid in the achievement of goals.

However training must be imparted to employees for the following benefits to organizations :

1. **Easy performance:** Training makes an employee learn to perform the job in an effective way. Without wasting much time, through training they acquire the required skills and knowledge to do particular jobs quickly.
2. **Increased productivity:** An employee gets an opportunity to update the skill through training, which results in better performance of a particular job. An increase in skill helps increase in both quantity and quality of output.
3. **Standardisation of procedure:** With the help of training, the best possible methods of performing the work can be standardized and taught to all the employees. Employees therefore can work systematically and will make less mistakes, when they will possess a better understanding of their jobs.

4. **Less supervision:** Training to employees reduces constant supervision, as the employees become skillful to perform their respective jobs.
5. **Confidence building:** When the employees are able to perform better by undergoing training, then confidence level becomes higher. Higher confidence boosts up their morale, resulting in organizational efficiencies.
6. **Less wastage:** Wastage of any kind will be less if the trained personnel perform their jobs. Also the rate of accidents and damages to machineries will be low, which will be low, which will lead to less cost of production.
7. **Goodwill:** Training enables the employees to perform better resulting in increased productivity which directly makes an organisation grow and goodwill is built.

Different methods of training have been used and any one method or a combination of any two or more of these can be used depending upon the training requirements and level of people to be trained..

All the training methods can be broadly classified as:

A. On the job training methods

B. Off the job training methods

A. ***On the job training methods:*** Under this method the principle of learning by doing is used. These methods are described as:

1. On the job training: A newly appointed employee is instructed how to perform his work. It tries to develop the skills and habits practiced in the organisation. All the new employees are helped by giving instruction by skilled trainers. A large number of training aids and techniques are used such as procedure charts, lecture manuals, sample problems, demonstrations etc.

2. Training centre training: A training centre is arranged near the main office of the organisation where all equipments and identical machines used in the factory are kept. The theoretical training is given in the classroom while practical work is conducted on the production line. This type of training is given to the lower level workers.

3. ***Simulation:*** It is an extension of training centre training. The trainee works in closely duplicated real job conditions. Here an attempt is made to safeguard the valuable materials during the training period.
4. ***Demonstrations and Examples:*** In this method, the trainee shows how to do a certain work through demonstration. Step by step all activities are described by the supervisor. The demonstrations are often used in combination with lectures, pictures, text manual, discussions etc. The principles and theory of the job is taught by some other methods.
5. ***Apprenticeship:*** An apprentice is given a programme of assignments according to a predetermined schedule which provides for efficient training in trade skills. The period of apprenticeship is determined considering the nature of job and its performance.

B. Off the Job Training or Class Room Methods: Training on the job is not a part of everyday activity. Under this method, the location of training centre may be a company classroom, and outside place owned by the organisation, an educational institution or association which is not part of the company office. Under this method employees are not attending their regular works. They are allowed to attend the training centre for specific period. The methods of training here as follows:

1. **Lectures:** The employers organise lectures with the help of an instructor on specific topics. This method is very much fruitful when all the theoretical problems, concept and behavioral attitudes have to be discussed. The lectures are supplemented with discussions, film shows, case studies, role playing, video audio, etc. The different topics relating to job performance are discussed which require active participation of the trainee.
2. **The conferences and seminars:** The different organisations hold conferences and seminars on specific issues. On some occasions the employees associations arrange some conference with the permission of the employer. All these issues relating to the job performance are discussed and try to solve long standing issues. This method is ideally suited for analyzing problems and issues and

examining them from different view points. It helps in developing conceptual knowledge, reducing dogmatism and modify attitudes. In case of seminar, employees learn through discussion of a paper on a selected subjected. The papers are distributed in advance to the trainees. All queries are answered by the experts. This helps the trainees to acquire knowledge on the subject.

3. **Case studies or case discussions:** In this method a real (or hypothetical) business problems or situation demanding solution is presented to the group and they are to identify the problems present in the case. They are to suggest various alternatives for solving the given problem. The trainer guides the discussion and the process process ensures that no relevant aspect is left out of discussion and adequate time is spent on each aspect. This method promotes analytical thinking and problem solving ability.
4. **Role playing:** This method is also called 'Role Reversal', 'social drama' or psycho-drama'. Under this method trainees are given some role as they would in a stage play. There are not written lines to be said and naturally, no rehearsals. The role players have to respond to the situation that is ever changing and to react to it as they would in the real situation. It is a method of human interaction which involves realistic behavior in an imaginary or hypothetical situation. Role playing mainly refers to the employee-employer relationships, hiring, firing , discussing a grievance problem, conducting a post appraisal interview or a salesman making presentation to a customer. This method is also applicable in case of management training.
5. **Program Instruction:** This method requires two essential elements as

a. A step by step series of bits of knowledge, each building upon what has gone before, and
b. A mechanism for presenting the series and checking on the trainees knowledge. The questions are asked in proper sequence and indication given quickly whether the answers are correct or incorrect.

This programme may be carried out with a book, a manual or a teaching mechanism. It helps in the teaching of mathematics, physics etc.

14.10 MOTIVATION

The term 'motivation' is derived from the Latin word 'mover' which means to move and represent the force that moves people, and causes them to act. So, motivation can be defined as a process of channelling a person's inner drive so that he wants to accomplish the goals of the organisation. Motivation is a behavioural concept by which we try to understand why people behave as they do. A human being is an organic and not a mechanical system. He or she is a self-activated person. The force of motivation lies within our mind. It is dynamic force, setting a person into motion or action.

In this context, we can discuss some of the definitions of motivation given by management experts. Robert Dubin has defined motivation as "The complex of forces starting and keeping a person at work in an organisation" Moreover, Dalton E. Mc Farland said "The concept of motivation is mainly psychological. It relates to those forces operating within the individual employee or subordinate which impel him to act or not to act in certain ways." On the other hand, Koontz and O' Donnell define motivation as "Motivation is a general term applying to the entire class of drives, desires, needs, wishes and similar forces". According to Edwin Flippo "Motivation is the process of attempting to influence others to do your will through the possibility of gain reward"

Out of the above discussion, it can be understood that motivation is highly individualistic. It is the essence of human behaviour. Motivation consists of three parts.

They are :

a) Motives *i.e.* need ideas, emotions or organic state

b) Motivating factors and

c) Attainment of objectives. In an organisation motivation implies a planned management process, which stimulates people to work to the best of

their capabilities for the relation of the common goals of the enterprise.

Motivation is an important function of management. All managers should induce their employees on the job to extract performance by motivating them. Below, we discuss some important aspects of motivation.

i) Utilisation of human resource
ii) Use of material resources
iii) Willingness for work
iv) Good labour relations
v) Develops cooperation
vi) Improve skill and knowledge
vii) Boosts Morale
viii) Facilitates change
ix) Sense of belongingness
x) Achieve organisational objectives

Motivation is a huge field of study. There are many theories of motivation. Some of the famous motivation theories include the following:

1. Maslow's hierarchy of needs: Abraham Maslow postulated that a person will be motivated when his needs are fulfilled. The need starts from the lowest level basic needs and keeps moving up as a lower level need is fulfilled. Below is the hierarchy of needs:

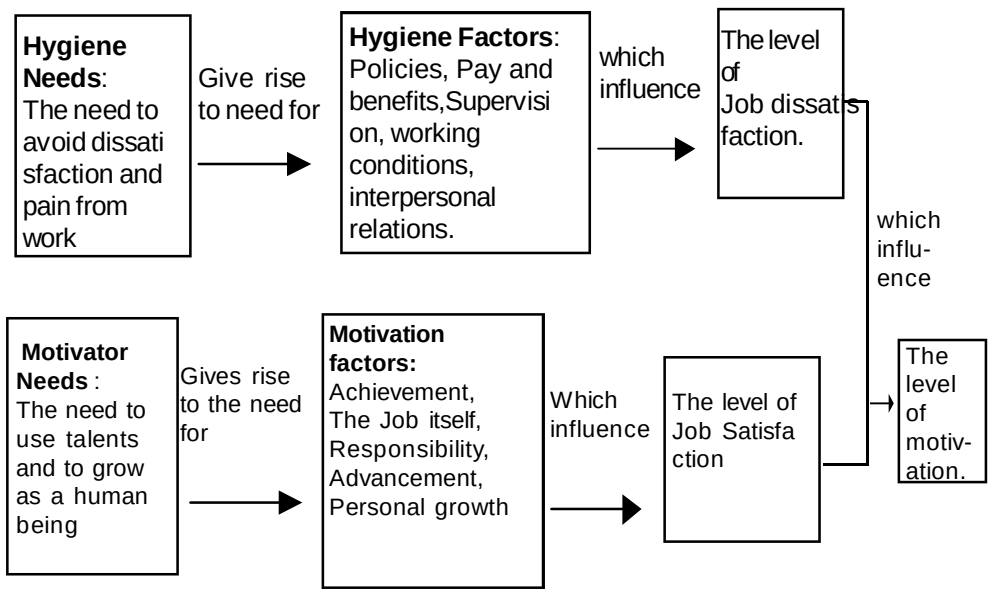
- Physiological: Physical survival necessities such as food, water, and shelter.
- Safety: Protection from threats, deprivation, and other dangers.
- Social (belongingness and love): The need for association, affiliation, friendship, and so on.
- Self-esteem: The need for respect and recognition.
- Self-actualization: The opportunity for personal development, learning, and fun/creative/challenging work. Self-actualization is the highest level need to which a human being can aspire.



The employer will have to understand the specific need of every individual in the team and accordingly work to help fulfil their needs.

2. **Herzberg's two factor theory:** Herzberg classified the needs into two broad categories namely hygiene factors and motivating factors.

Hygiene factors are needed to make sure that an employee is not dissatisfied. Motivation factors are needed for ensuring employee's satisfaction and employee's motivation for higher performance. Mere presence of hygiene factors does not guarantee motivation, and presence of motivation factors in the absence of hygiene factors also does not work.



Motivational Factors: These factors are mostly related to the job itself. The availability of these factors create a highly motivating situation. On the other hand, absence of these factors does not cause dissatisfaction. According to Herzberg, there are mainly six motivational factors, such as Achievement, Recognition, Advancement, possibility of growth and responsibility. Motivational factors are the primary cause of job satisfaction. The employer can increase the performance of employees by providing these factors. These factors differ from individual to individual.

Hygiene or Maintenance factors: Hygiene factors are mostly related to environment outside the job. Though, the availability of hygiene factors do not significantly motivate the employees, yet the absence of these factors cause serious dissatisfaction. These factors are necessary to maintain a reasonable level of satisfaction among the employees. According to Herzberg, various hygiene factors are company policies, and administration, supervision, interpersonal relationships, salary, job security working conditions, job status, personal life etc.

3. **McClelland's theory of needs:** McClelland affirms that we all have three motivating drivers, and it does not depend on our gender or age. One of these drives will be dominant in our behaviour. The dominant drive depends on our life experiences.

The three motivators are:

- **Achievement**: a need to accomplish and demonstrate own competence People with a high need for achievement prefer tasks that provide for personal responsibility and results based on their own efforts. They also prefer quick acknowledgement of their progress.
- **Affiliation**: a need for love, belonging and social acceptance People with a high need for affiliation are motivated by being liked and accepted by others. They tend to participate in social gatherings and may be uncomfortable with conflict.
- **Power**: a need for control own work or the work of others People with a high need for power desire situations in which they exercise power and influence over others. They aspire for positions with status and authority

and tend to be more concerned about their level of influence than about effective work performance.

4. **Vroom's theory of expectancy:** Victor Vroom stated that people will be highly productive and motivated if two conditions are met: 1) people believe it is likely that their efforts will lead to successful results and 2) those people also believe they will be rewarded for their success.

People will be motivated to exert a high level of effort when they believe there are relationships between the efforts they put forth, the performance they achieve, and the outcomes/ rewards they receive.

5. **McGregor's theory X and theory Y:** Douglas McGregor formulated two distinct views of human being based on participation of workers. The first is basically negative, labelled as Theory X, and the other is basically positive, labelled as Theory Y. Both kinds of people exist. Based on their nature they need to be managed accordingly.

- **Theory X**: The traditional view of the work force holds that workers are inherently lazy, self-centred, and lacking ambition. Therefore, an appropriate management style is strong, top-down control.
- **Theory Y**: This view postulates that workers are inherently motivated and eager to accept responsibility. An appropriate management style is to focus on creating a productive work environment coupled with positive rewards and reinforcement.



CHECK YOUR PROGRESS

Q.7: Define 'Training'

.....

Q.8 : Write any two benefits of training to an organisation

.....

Q9: What is Vroom's Expectancy Theory

.....



14.11 LET US SUM UP

- Human resource Management is the planning, organizing, directing and controlling of the procurement, development, compensation, integration, maintenance and separation of human resource to the end that individual, organizational and social objectives are accomplished.
- The major functions of Human Resource Management are broadly divided into three categories:managerial functions, opertaive functions and advisory functions.
- Some of the major roles played by the HR executives are: Recruitment, Induction and On-boarding, Attendance and Leave Records, Performance Management, Employee Involvement, Workforce Management, Conducting Exit Formalities and Compensation and Benefits.

Recruitment is the process of identifying the prospective employees, stimulating and encouraging them to apply for a particular job or jobs in an organisation.

- Recruitment is subject to influence of several factors. There are two sets of factors namely: Internal forces and External forces.

The sources of recruitment can be categorized as:

1. Internal Sources
2. External Sources

- The steps in the process of recruitment are : Identify vacancy, Prepare job description and person specification, Advertising the vacancy, Managing the response, Short-listing, Arrange interviews and Conducting interview & decision making.
- Job evaluation is a systematic method of appraising the value or worth of one job in relation to other jobs in organisations. It specifies the relative value of each job in an organisation.
- The methods of job evaluation: **Ranking Method, Factor Comparison Method, Point Rating Method and Classification Method.**
- **Training** is the process of transmitting and receiving information related to problem solving.

- All the training methods can be broadly classified as: On the job training methods and Off the job training method.
- Motivation is the process of attempting to influence others to do your will through the possibility of gain reward.There are many theories of motivation: Maslow's hierarchy of needs,Herzberg's two factor theory, McClelland's theory of needs, Vroom's theory of expectancy and McGregor's theory X and theory Y.



14.12 FURTHER READING

1. S.S. Khanka (2007), *'Human Resource Management: Text and Cases'*, 1st Edition, S. Chand and Company Ltd, New Delhi.
2. K. Aswathappa (2013), *'Human Resource Management: Text and Cases'*, 7th Edition, McGraw Hill Education (India) Private Limited.
3. K. Aswathappa (2005), *'Human Resource and Personnel Management'*, 4th Edition, Tata McGraw Hill Education.



14.13 ANSWERS TO CHECK YOUR PROGRESS

Ans to Q. No. 1: Human Resource Management is the planning, organizing, directing and controlling of the procurement, development, compensation, integration, maintenance and separation of human resource to the end that individual, organizational and social objectives are accomplished.

Ans to Q. No. 2: Two managerial functions of HRM are: a. Planning and b. Organizing

Ans to Q. No. 3: The advisory functions of HRM are: a. Advice to Top Management b. Advice to Departmental Heads

Ans to Q. No. 4 : Recritment is the process of searching for prospective employees and strimulating them to apply for jobs in the organisation.

Ans to Q. No. 5: Selection is the process of selecting the eligible applicants out of the large number of applicants through different tests.

Ans to Q. No. 6: (a) Reciept of Application (b) Screeing (c) Application form (d) Employment test (e) Intervieweing (f) Reference

check (g) Medical examination (h) Selection.

Ans to Q. No. 7: Training is the process whereby people learn job related knowledge, skills, attitudes for acheivement of goals.

Ans to Q. No. 8:

(i) Easy performance: Training makes an employee learn to perform the job in an effective way.

(ii) Increased productivity: An employee gets an opportunity to update the skill through training, which results in better performance of a particular job.

Ans to Q. No. 9: According to Vroom's Expectancy Theory, motivation is a product of the anticipated worth to a person of an action and the perceived probability that a person's goals would be achieved.



14.14 MODEL QUESTIONS

Q 1 : Discuss the Concept and objectives of Human Resource Management

Q 2: Explain the different functions of HRM

Q 3: Define Recruitment

Q 4: Define Selection.

Q 5: Explian the steps in selection process

Q 6: discuss the role of HR Manager

Q 7: Write a short note on the employment function

Q 8: Define Job Evaluation,

Q 9: Write the importance of Training

Q 10: What is Motivation?

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UNIT 15 : MANAGEMENT REPORTING

UNIT STRUCTURE

15.1 Learning Objectives

15.2 Introduction

15.3 Report Writing

15.3.1 Process of Writing a Report

15.3.2 Determining the purpose of the report

15.3.3 Determining the factors

15.3.4 Gathering the information needed

15.3.5 Interpreting the findings

15.3.6 Organizing the report information

15.3.7 Writing the report

15.4 Project Report Writing

15.4.1 Criteria of a Good Project

15.4.2 Advantages of a Good Project

15.4.3 Disadvantages of Project Method

15.4.4 Format of a Project Report

15.5 Precis Writing

15.6 Let Us Sum Up

15.7 Further Readings

15.8 Answers to check your progress

15.9 Model Questions

15.1 LEARNING OBJECTIVES

After going through this unit you will be able to –

- write a report on any event or an experience
- explain different types of report
- interpret your report
- prepare project report for different organization
- explain precis writing

15.2 INTRODUCTION

In this unit, we will discuss how to write different types of reports, project report, executive summaries and business presentations etc.

A report is an account of an event or an experience. Reports are of many types, like- news paper reports, scientific reports and business reports. Again, a project report describes the purpose of the project and how it will be organized and managed. When we talk about executive summaries, it provide the essence of the report. And business presentations are basically required to present their project work in a colourful manner.

You will find this unit very interesting and important to study, because all professionals need to write project reports, executive summaries etc in their job. Most business students will have to do this in some form, so making presentations a part of your lesson will be useful and may lead to some worthwhile productive lessons.

15.3 REPORT WRITING

Before going to write a report, let us first define a report.

A report is a formal communication written for a specific purpose which includes description of procedures, analysis of data, their significance, conclusions and recommendations if required.

We can define professional report as an orderly and objective communication of factual information that serves a specific purpose.

Report writing is an essential skill for professionals. A report aims to inform a definite topic or incident as clearly and succinctly as possible.

While writing a report, one should first prepare the rough draft and then with careful revision he/she can gradually improve the quality of the report. Good report writing needs lot of effort. So one should consider the following points before writing a report.

15.3.1 Process of writing a report

- Before writing the report, you should carefully go through the entire topic, and then express it in your own words.

- The report should be in a logical order with accuracy in facts and figures, correlation of illustrations with the text and paper documentation and cross referencing.
- One should include only relevant points leaving out what is considered to be less relevant or less significant.
- After you have prepared a rough draft of the entire report, check the outline and notes once more to ensure that you have not missed any points or facts. Also try to see if you can make necessary additions and alterations.

15.3.2 Determining the purpose of the report

Ones work on a report starts logically with identification of a need (or a problem), for which he/she prepare the report. The need should be logical to prepare a report.

The next step is the preliminary investigation, where the investigator will gather information from different sources. We can gather information either by direct contact with the source (which is known as primary source of data collection) or we can collect information from secondary sources like- earlier published material, books, survey reports and web sites etc.Then we should express the problem clearly, preferably in written form.

15.3.3 Determining the factors

The next task of the investigator is to determine the factors which are responsible for the problem (need). The problem factors may be of three types:

1. First, they may be the subtopic of the overall topic about which the report is concerned. For example; if our report is on the production of any company, then the sub topic will be on the sales, inventory, demand and capacity etc.
2. Another problem factor may be the hypothesis which must be tested. Once formulated, the hypothesis needs to be tested and their applicability to the problem is then either proved or

disproved. Suppose we assume that we have the problem of determining why sales at a certain store have declined. Our task will be to explain the reasons through brainstorming.

3. Another factor is the comparison. In the problems that involve comparison, there may be the bases on which the comparisons are made.

15.3.4 Gathering the information needed

Before preparing the report we need to investigate the problem personally and should collect the necessary information before writing the report. For example, a sales problem might require collecting information through discussions with customers and sales personnel. A computer problem might require talking to both end users and programmers.

15.3.5 Interpreting the findings

After completing the research, the next step is to prepare the findings for the presentation. While preparing the findings it depends on the type of reader to whom you will give the presentation. Some readers may want only facts and some may want more analysis. Based on their preferences we need to prepare our findings.

15.3.6 Organizing the report information

Organizing a report is very important because if the process of organizing is not logical then people will not be able to understand it.The main aim of organizing the report is to communicate the information in the best possible way to the reader. From the introduction to the conclusion, the organization of the report should be in a logical order.

15.3.7 Writing the report

The last step in this process is the writing of the report. While writing the report we need to communicate clearly and what we want to convey. Good report writing presents facts and interprets them logically. It avoids presenting the writer's opinion, biases and attitudes.

A well written report reads as one continuous story, so different parts of the reports need to connect smoothly.

A few model reports are given below. Read it carefully:

1. Write a report on a blast that has occurred recently.

4 killed, 50 hurt in Jonai blast

By A Staff Reporter(source: The Assam Tribune, March-17, 2008)

GUWAHATI, March 16 – In the worst ever incident of militant violence in Dhemaji district since 2004, at least four persons were killed and more than 50 others including women and children were injured in a grenade blast in Jonai last night. Official sources said that about 15,000 people gathered in a field near the Jonai circuit house last night to celebrate Ali-Aye-Ligang, a festival of the Mising community, when suspected militants lobbed a grenade at the crowd. Four persons were killed in the incident

Sources said that at least 50 persons were injured in the incident and 14 of them have been shifted to the Assam Medical College Hospital, Dibrugarh, this morning. Those shifted to Dibrugarh included two children and their condition is stated to be serious. Altogether 36 injured persons have been shifted to Dhemaji town for treatment.

2. Write a report on emerging trends in tourism Management in Assam.

   (Source: The Assam Tribune, March-6, 2008).

   Read them carefully:

IT ENABLED TOURISM MANAGEMENT IN ASSAM

Information Technology (IT), which is a key component of every industry and trade in the present day context, plays a very

important role in the tourism industry. The use of new IT tools and techniques has facilitated the efficient netting of information and communication system in present-day travel and tourism management. The internet, website, e-mail, mobile, tele-text, videotext, telecopy etc have revolutionized the communication system as it has enabled organizations to demonstrate their offerings globally using multimedia interfaces. Consumers are also empowered through the new tools and techniques to search for their required information and to undertake online services like booking of airline/rail/bus tickets, hotel/resort reservations, car rentals, fixing a business meeting in a hotel/resort, participating in a particular festival or event, enjoying a match (cricket/football etc) and also negotiating a price, asking for discount, making online payments, exchanging of queries and ideas, interactions etc. In addition, the use of some of the newly developed management tools and technologies like Customer Relationship Management (CRM), Value Chain Integration Tourism (CVIT), and Knowledge Management System (KMS) etc helps efficient netting of information and communication systems.

Tourism on the other hand is one of the largest and fastest growing industries in the world with an enormous potential for further growth. It is forecasted that by 2020 the tourism industry would be the single-biggest industry in the world

The North-Eastern region on the other hand has tremendous potential for developing the tourism industry. The rich natural beauty, serenity and exotic flora and fauna of the region serve as invaluable resources for the development of tourism in the region.

ACTIVITY



1. Read the following news story and make a good report with a head line.

GUWAHATI, March 12 – The Opposition today charged the State Government with according little importance to agriculture, industry and employment generation in the Budget, and also said that the budgetary provisions did not address the issue of inflation.

2. Suppose you, are attending a workshop on painting. About 50 prominent artists are participating in it. The place is at Kalakhetra, Guwahati-37.

Write a report of the workshop for the cultural page of a daily paper.

15.4 PROJECT REPORT WRITING

In this section we will discuss how to write a project report. One of the most important aspects of good technical writing is to be concise, yet remain informative. The ability to select what is essential, and to omit what is merely an incidental detail, is a skill every scientist needs.

The following points should be considered while writing a project-

- Concentrate on getting the information over the reader as clearly as possible.
- Do not use unnecessary jargons.
- Don't make the report too lengthy.
- Spelling, punctuation and grammar should be perfect.

15.4.1 Criteria of a Good Project

A good project should follow the following criteria:

Feasible-Capable of being done with means at hand and circumstances as they are.

1. It should be purposeful.

2. It should impart gainful learning experiences.
3. It should cater for the activities of pupils.
4. The students should get full freedom to work according to their own interest and abilities.
5. Project must be selected by the active participation of both pupils and the teacher.
6. It must be economical in term of time and money.
7. It should keep time constraints controlled.
8. It should be challenging.
9. It should be feasible.

15.4.2 Advantages of Project Method

1. It promotes co-operative activity and group interaction.
2. It adopts a democratic way of learning.
3. It supports the theory of correlation among different subjects.
4. It promotes scientific attitudes in students.
5. It supports learning by self- activity.
6. It stimulates creative thinking.
7. It enhances the educational value of the content.
8. It enriches the mental horizons of the students.

15.4.3 Disadvantages of Project Method

1. It is a time consuming method.
2. It over- loads the teacher with work.
3. It believes the teacher to be -a scientist or an encyclopedia having an all-round knowledge of every subject.
4. It is a syllabus- hampering method.
5. It provides superficial knowledge to students.
6. It is an expensive method.

15.4.4 Format of a Project Report

Though there is no specific format of a project report writing applicable for all kinds of projects, there are some sections which need to be present in a project report. These are explained below:

- **Title:** This must contain:

1. the report title which clearly states the purpose of the report
2. full details of the person(s) for whom the report was prepared
3. full details of the person(s) who prepared the report
4. the date of the presentation of the report

- **Table of contents:** This is a list of the headings and appendices of the report. Depending on the complexity and length of the report, you could list tables, figures and appendices separately. Make sure the correct page numbers are shown opposite the contents. Up-to-date word processing packages can generate a table of contents for you.
- **Introduction:** In introduction, give enough background information to provide a context for the report. State the purpose of the report. Clarify key terms and indicate the scope of the report (ie what the report will cover).
- **Experimental techniques and methods**: This section varies depending on the type of the project. Here first we include the methodology we have used for the study followed by the statistical and mathematical techniques to find the result of the project.
- **Results and discussion**: In this section we explain the result of our findings.This findings can be represented either in writing or in graphical representation.
- **Summary/conclusions:** At the end of the report, we sum up the main points of the report based on our observations. The conclusion should clearly relate to the objectives of our report. No surprises please! (that is, don't include new information here.)

- **Recommendations**: These are suggestions for future action. They must be logically derived from the body of your report.
- **Abbreviations and/or glossary:** If necessary, we should provide an alphabetical list of the abbreviations you have used in the report, especially if they may not be familiar to all readers of the report. If we have used a lot of technical terms, we should also provide a glossary (an alphabetical list of the terms, with brief explanations of their meanings).
- **References** : References are the list of books and different sites which reader can access from different sources. With the help of references we can further go in details of the topic.
- **Appendices** (if used) an appendix contains material which is too detailed, technical, or complex to include in the body of the report (for example, specifications, a questionnaire, or a long complex table of figures), but which is referred to in the report. Appendices are put at the very end of the report, after everything else. Each appendix should contain different material. We need to number each appendix clearly.

Generally a project can be segmented into five basic parts including the above mentioned sections, which are described as follows:

The **first part** should contain the title, the name of the author(s) and the date. This should convey the area and scope of the project.

The body part should include the detailed work carried on in the project. The **second part** should consist only of the abstract. The idea of the abstract is to provide a brief summary of the report. The reader should be able to pick up from the abstract what it entailed, how it was undertaken and an indication of what was found out. The **third part** should comprise a **table of contents**, indicating the page numbers of the different sections.

Fourth part onwards the report should include- the introduction, results and discussion, summary and conclusion,

reference etc.

This is where we need to outline the underlying concepts (and if required a brief version of any theory) needed to discuss the project. You need to present your results in a logical sequence, highlighting what is important and how the data you obtained have been analyzed to provide the results you discuss. You should discuss what you infer from the data. **Make sure that all diagrams, graphs etc. are properly labeled and have a caption.**

And the final component or **fifth part** of the project (Summary/ conclusions) must relate closely to the first. In the Summary and conclusion section, you need to put it all together. Coherently you should include a concise version of your discussion, highlighting what you have found out, what problems you had, and what might be done in the future.

Your report should be sufficient to indicate to the reader what you have done, what you have found out and also provide enough information for them to repeat the work if they so wished. You will have made use of information from a variety of sources; in these cases you must include a reference to such sources.

By including a reference to the source others can check your work and reduce the time taken to make further advances.

There are generally three types of reference according to the source- journal article, book, and web site.

how it will benefit the company. If appropriate, you may recommend its purchase.



ACTIVITY

Visit any nearby organization and prepare a project report for the organization as per the given format. (Your project may be in any of this field- IT, Marketing, H.R., Finance etc)

15.5 PRECIS WRITING

In this section we will discuss about precis writing. Precis is a short summary of a paragraph. But writing Precis is more than just making the paragraphs short. A precis is the gist of a passage expressed in as few words as possible. A precis should give all essential points so that anyone reading it will be able to understand the idea expressed in the original passage.

Writing precis requires skill so that the writer do not miss out a point and capture all the main essence in one single small paragraph. Therefore, for writing a precis you need to follow a particular set of rules and that is why it is important to understand the Rules of precis writing.

The motive of writing a precis is to make the reader understand the main essence of the paragraph in a shorter format. For precis writing there are certain do's and dont's which will guide you into writing a better precis. Below are do's and dont's of precis writing.

Do's of Precis Writing

- Start your precis with the main idea so that reader can quickly understand the essence of the precis.
- As a precis is concise, compress it and make sure that the length is available for you to retain the important data, keywords, and the concept.
- Removing the irrelevant data or sentence is as important as writing the relevant points. Thus, identify the superfluous data and facts and keep the core idea of the work only in the precis.
- If you are mentioning anything related to history or any historical data than make sure that it is written in the past tense only.
- Also, remember to put the purpose as to why you are writing a precis in the writing piece.

  This will help the reader understand what you wrote in the precis.

Dont's of Precis Writing :

- A precis writing is a formal way of writing a shorter form of the given paragraph. So, even though you have read and understood the Precis well, do not form your own opinions.
- You cannot insert your own remarks and criticism in a precis.
- Always take the fact and data that is given in the paragraph only.
- Also, during a precis writing, you cannot insert a question. If for any reason you need to insert make it in the form of a statement.
- For a precis writing, avoid using contractions and abbreviations.
- Write the full form of any given words only.
- Avoid being jerky. This will show that you have not understood the passage properly and have started writing a precis.



CHECK YOUR PROGRESS

Q 1: State two advantages and disadvantages of Project writing.

.....

.....

Q 2: What is Precis writing?

.....

.....

Q 3: What is table of content?

.....

.....



15.6 LET US SUM UP

In this unit we have learnt about how to write a report. While writing a report we should concentrate on the content. It has to be in a logical order and should include the basic concepts. Then we have learnt how to prepare a project report, which should include the background of the topic. We have also described the procedures used; dentified the major sources of error

and explained how they are dealt with. The final results should be presented clearly and concisely; it should include an analysis of errors, but omit details of arithmetical manipulations. The interpretation of the results must be discussed, and improvements and possible extensions of the work suggested. You should give references to any books, articles or other sources of information (e.g. web sites) that have proved useful in preparing the report, or carrying out the work. At the end of the unit we have discussed about how to write a precis.



15.7 FURTHER READING

1) R.C. Sharma, Krishna Mohan," Business Correspondence and Report Writing," 3rd edition.

2) Lesikar, Flatley "Basic Business Communication" 10th Edition. Web site: www.assamtribune.com



15.8 ANSWER TO CHECK YOUR PROGRESS

Ans. to Q. No. 1 : Advantages:

1. It promotes co-operative activity and group interaction.
2. It adopts a democratic way of learning.

Disadvantages:

1. It is a time consuming method.
2. It over- loads the teacher with work.

Ans. to Q. No. 2 : A precis is the gist of a passage expressed in as few words as possible.

Ans. to Q. No. 3 : This is a list of the headings and appendices of the report.



15.9 MODEL QUESTIONS

Q 1: Define report writing.

Q 2: What is project report writing? Mention its advantage and disadvantages.

Q 3: Explain the format of a project report.

*** **** ***



REFERENCES FOR ALL UNITS

1) Balachandran, V. and Chandrasekaran, V. (2009), *Office Management,* Published by Tata McGraw Hill Education Private Limited.
2) Balachandran (2009); *Office Management;* Tata McGraw-Hill Education, India.
3) Bhatia, Dr. R. C. (2005); *Principles of Office Management*; Lotus Press; India.
4) Bhatnagar, S. K. (2011); *Office Management*; Frank Brothers; India.
5) Chakravarti, B. K. (2006); *Concept of Front Office Management*, APH Publishing; India.
6) Chopra, R. K. and Chopra, Ankita (2009), *Office Management,* Published by Himalaya Publishing House.
7) Dix, Colin and Baird, Chris (2006); *Front Office Operations,* Pearson Education India.
8) Dubey, N. B. (2009); *Office Management: Developing Skills for Smooth Functioning*, Global India Publications; India.
9) S.S. Khanka (2007), *'Human Resource Management: Text and Cases'*, 1st Edition, S. Chand and Company Ltd, New Delhi.
10) K. Aswathappa (2013), *'Human Resource Management: Text and Cases'*, 7th Edition, McGraw Hill Education (India) Private Limited.
11) K. Aswathappa (2005), *'Human Resource and Personnel Management'*, 4th Edition, Tata McGraw Hill Education.

Name of the Paper: **Course Code:**

Centre for Internal Quality Assurance (CIQA)
Krishna Kanta Handiqui State Open University
City Office, Housefed Complex, Guwahati- 06

Learner's Feedback on Course

Dear Learner,

Regarding the course as mentioned above, we would like to know your opinions and comments so as to improve the quality of self learning materials in future. Please respond to the following statements by ticking the number you feel most reflect your opinion. After completion of the additional comments, please detach the page and send/mail the same to us at the address given below.

The Director, Centre for Internal Quality Assurance, KKHandiqui State Open University
Housefed Complex, Dispur, Guwahati- 781006
(E-mail id: ciqa@kkhsou.in)

1. Approximately how many hours did you spend for studying the units in the course? | | | |
2. Please give your opinions (by √ mark) to the following items based on your reading of the block:

Sl. No.	Statements	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
I.	The SLMs of the course fulfil the learning objectives set out in the beginning of each unit					
II.	The units of the SLM could satisfy my academic needs and expectations					
III.	The Unit writers have excellent knowledge about the course contents					
IV.	Language and contents of the units were presented at a level which I could readily understand					
V.	Ample opportunity for participation in the activities provided in the units					
VI.	Used enough Illustrations (Diagrams, tables etc.) for conceptual clarity					
VII.	Quality of content is engaging, relevant, and up-to-date					
VIII.	The self check questions are very helpful					
IX.	The Possible/model questions and the answers to check my progress have benefited me a lot					

Additional Comments: *(Please feel free to provide your open comments)*

1. Which aspects of the SLM, according to you, worked well?

   ---

2. What sort of changes/improvements do you feel KKHSOU could implement to improve the overall quality of the SLM?

Thank you for taking the time to complete this form.

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