



## DEPARTMENT OF EDUCATION

### GRADE 12 BUSINESS STUDIES

### MODULE 1 COMMUNICATION SKILLS AND MANAGEMENT



## FODE DISTANCE LEARNING



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## **GRADE 12**

## **BUSINESS STUDIES**

## **MODULE 1**

## **COMMUNICATION SKILLS AND MANAGEMENT**

**TOPIC 1: INTERNAL RETAINING COMMUNICATION**

**TOPIC 2: TELECOMMUNICATION**

**TOPIC 3: TYPES OF WRITTEN COMMUNICATION**

**TOPIC 4: COMMUNICATION STYLES AND STRAGIES**

**TOPIC 5: TYPES OF OFFCIE EQUIPMENT**

**TOPIC 6: CREATING AND MAINTAINING RECORD SYSTEM**

**TOPIC 7: RECORDS AND DISPOSAL**

**TOPIC 8: MEETINGS AND PROCEDURES**



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We acknowledge the contributions of all Primary Teachers who in one way or another helped to develop this course.

Our profound gratitude goes to the former Principal, Mr Demas Tongogo for leading FODE team towards this great achievement. Special thanks to the staff of MAL and Business Studies Department of FODE who played an active role in coordinating writing workshops, outsourcing lesson writing and editing processes.

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**DIANA TEIT AKIS**

PRINCIPAL



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Papua New Guinea

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**SECRETARY'S MESSAGE**

Achieving a better future by individuals, students, their families, communities or the nation as a whole, depends on the curriculum and the way it is delivered.

This course is part and parcel of the new reformed curriculum. Its learning outcomes are student centred and written in terms that allow them to be demonstrated, assessed and measured.

It maintains the rationale, goals, aims and principles of the National Curriculum and identifies the knowledge, skills, attitudes and values that students should achieve.

This is a provision of Flexible, Open and Distance Education as an alternative pathway of formal education.

The Course promotes Papua New Guinea values and beliefs which are found in our constitution, Government policies and reports. It is developed in line with the National Education Plan (2005 – 2014) and addresses an increase in the number of school leavers which has been coupled with a limited access to secondary and higher educational institutions.

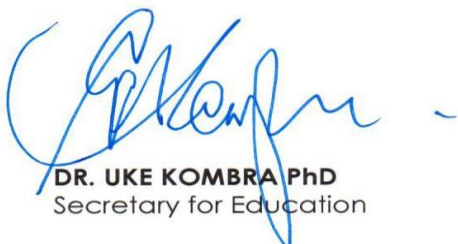
Flexible, Open and Distance Education is guided by the Department of Education's Mission which is fivefold;

- to facilitate and promote integral development of every individual
- to develop and encourage an education system which satisfies the requirements of Papua New Guinea and its people
- to establish, preserve, and improve standards of education throughout Papua New Guinea
- to make the benefits of such education available as widely as possible to all of the people
- to make education accessible to the physically, mentally and socially handicapped as well as to those who are educationally disadvantaged

The College is enhanced to provide alternative and comparable path ways for students and adults to complete their education, through one system, many path ways and same learning outcomes.

It is our vision that Papua New Guineans harness all appropriate and affordable technologies to pursue this program.

I commend all those teachers, curriculum writers and instructional designers, who have contributed so much in developing this course.



**DR. UKE KOMBRA PhD**  
Secretary for Education



## STUDY GUIDE

Below are the steps to guide you in your course study.

- Step 1:** Start with Topic 12.1.1, study the first sub-topic notes and do the Learning Activities as you go along. Turn to the back of your module to correct the answers of your learning activities
- Step 2:** When you have completed the first sub-topic notes, then, you can move on to the next sub-topic. Continue to do the Learning Activities as you go along. Turn to the back of your module to correct the answers of your learning activities.
- Step 3:** If you make any mistake, go back to the notes in your module and revise the notes well and try to understand why you gave an incorrect answer.
- Step 4:** After completing your 12.1.1, then, complete the Topic Test in the Assessment Book.
- Step 5:** Go to topic 12.1.2 and repeat the same process in steps 2, 3, and 4 until you complete your second topic. You will also repeat the same process until you complete your third, fourth, fifth, sixth, seventh and eighth topics.
- Step 6:** After you have completed your eight (8) topics, do also the Module Examination in the Assessment Book.
- Step 7:** Check through your Assessment Book, when you are satisfied, then submit your Assessment Book to your provincial centre for marking.

Here is a Study Schedule. It will guide you to complete your module and its assessment.

WEEKS	TOPICS/SUB-TOPICS	ASSESSMENT	COMMENTS
1-2	Topic 1.1 & 1.2	Test 1 & 2	
3-4	Topic 1.3 & 1.4	Test 3 & 4	
5-6	Topic 1.5 & 1.6	Test 5 & 6	
7-8	Topic 1.7 & 1.8	Test 7 & 8	
9-10	Revision	Module examination	
10	Submit your assessment Book 1 to your Provincial Centre for marking		

Remember

**As you complete each lesson, tick the box on the contents' page. This shows what you have done and what you still have to do in each topic.**

All the best and enjoy your studies with FODE-Business Studies



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TIME	MON	TUE	WED	THU	FRI
8:00-10:00	F O D E S T U D Y				
10:00-11:00					
1:00-2:00					
2:00-4:00					
6:00-7:00					
7:00-9:00	Listen to or watch current affairs programmes. Write your diary or read a book.				

A timetable will help you to remember when you should be doing your FODE studies each day.

**All the best and enjoy your studies with FODE – Business Studies**



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## MODULE 1            COMMUNICATION SKILLS AND MANAGEMENT

### MODULE INTRODUCTION

In this module unit, you will learn about business communication skills and management. The unit discusses the links between the internal structure of a business, the specific skills of its employees and efficient management. In particular, this unit examines the significance of high-order oral and written communication and systematic forms of record-keeping. The unit further emphasizes the effective and efficient use of communication methods both verbal and non-verbal as essential in all business transactions.

You will further explore different management strategies that enable businesses to promote and improve communication within a business, from business to business and from business to the wider community. You are given an opportunity to identify and demonstrate the use of a wide range of communication technologies for specific purposes in different business settings.

---



#### **Learning outcomes;**

On the successful completion of this unit, you will be able to:

- communicate ideas and information using business terminology in a range of modes of communication
- apply the knowledge and skills of business management in practical settings
- demonstrate an understanding of the different aspects of communication styles and strategies, operation management and human resources

To achieve the learning outcomes, you can:

- describe the use of communication strategies and terminologies.
  - describe the different forms of office communication.
  - describe research skills in communications available in an organizational setting.
  - explain the significance of a set of identified communication skills and strategies in a range of settings.
  - from a set of case studies of large businesses, suggest modifications to improve the identified communication strategies.
-



## Time Frame

This module should be completed within 10 weeks.

If you set an average of 3 hours per day, you should be able to complete the module comfortably by the end of the assigned week.

Try to do all the learning activities and compare your answers with the ones provided at the end of the unit. If you do not get a particular exercise right in the first attempt, you should not get discouraged but instead, go back and attempt it again. If you still do not get it right after several attempts then you should seek help from your friend or even your tutor. Do not pass any question without solving it first.



### 12.1.1 Internal Communication

#### Introduction

In this module unit, you will study the concept of Internal Communication, its concept will cover aspects of internal and external communication and the different methods that are used. As you progress through, it will give you an insight of the high-order oral and written communication and its systematic form of record keeping. You will also learn the importance of effective and efficient use of communication methods both verbal and non-verbal as an essential tool for all businesses

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#### Learning outcomes;

On successful completion of this module unit, students will be able to,

- define and explain communication and describe the down ward, upwards and sideward methods of communication
  - discuss and explain external communication, its scope, type, purpose and the benefits of effective communication.
-



### 12.1.1 Communication

#### What is communication?

**Communication** can be defined as the purposeful exchange of facts, ideas, opinions or emotions. Communication comes in different types, forms and methods. It can be **oral**, **written**, and **gestural**. It can even be electronic or manual and can be long-distance or face-to-face.

Communication is a process - always a two-way process. It involves a sender, a receiver and a message. The message is usually coded or composed by the sender and decoded or interpreted by the receiver. A feedback or response is usually sent back by the receiver. This is also part of the process. The feedback determines whether the message was received in the intended form. Sometimes communication can end with the receiver, but usually communication flow is constant. The subject may change at times but the flow of communication is continuous. The diagram below shows the communication process being described.

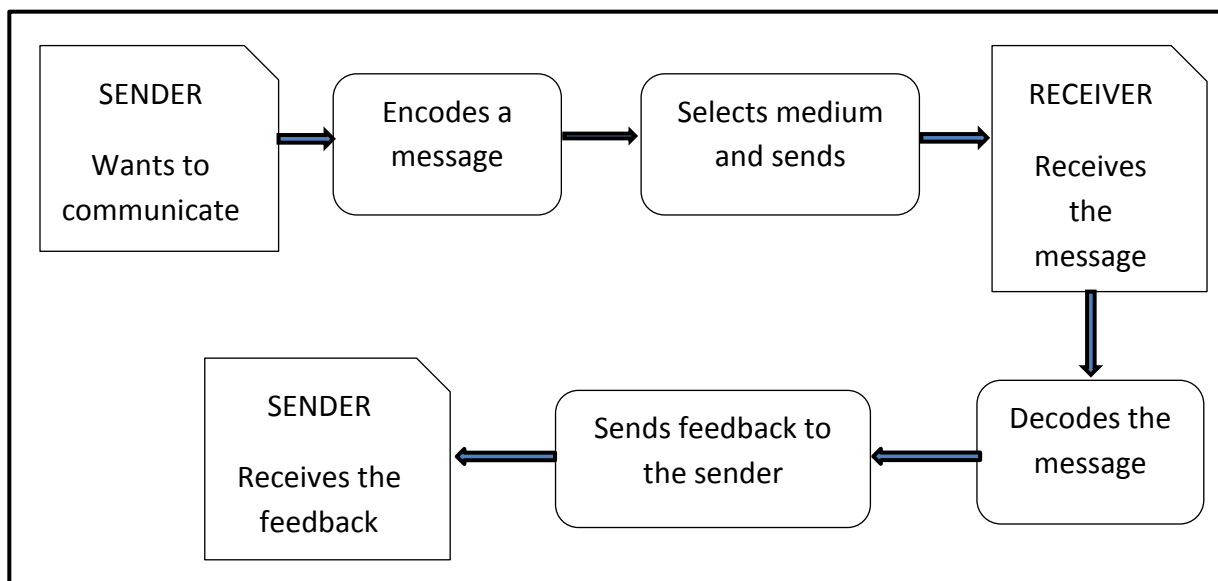


Figure 1.1. Simple communication model.

Messages can be sent in a variety of ways, through our gestures such as smiling or nodding. Even making eye-contact with another person is a way of communicating. So senders **encode** the message in speech, in writing or through body language. Receivers receive the message. A feedback usually confirms that the message has been received. In oral communication, for instance, the listener can work out the emotions or feelings of the sender by knowing the tone of the voice.



### Communication Routes

Communication flows through approved channels. Formal routes are the official communication channels that the organisation has set up. Written documents such as memoranda and reports flow through these channels.

A communication **by-pass** happens when one or two recipients are overlooked. Sometimes individual workers can choose to bypass formal communication channels for some specific reasons. For example, because an urgent decision is needed a committee may be by-passed and a decision is made by a superior officer for the benefit of the organisation.

Not all communication that goes on is formal. Formal communication, however, must follow the rules of communication. **Informal** communication is the type that does not follow the normal rules and conventions.



### 12.1.1.1 Internal Communication

There are two (2) ways of communicating, internal and external. **Internal** communication takes place inside the organization. It flows either upward, downward or sideways. **External** communication is also very necessary as it enables an organization to communicate with external parties. As you read further you will find out who these external parties are.

**Internal communication** takes place inside an organization. It is undertaken by the workers and between workers and managers. Workers must be given the proper instructions and be guided along to perform their jobs. Individual workers in a business, for example, must have a shared goal and communicate regularly to work towards achieving that goal.

It is important that constant communication is promoted inside the organisation. The need for communication will certainly bring staff together to communicate. Sometimes, it is important that the management encourages or facilitates internal communication.

In broad terms the flow of communication within organisations can be grouped under two (2) headings – vertical (*downward/upward*) or *horizontal*. These headings indicate the direction of the flow of information. A range of practices fall under these headings and they are explained in the table on the next page

**Communication that takes place within an organization is called internal communication. It can be vertical – top-down and bottom-up (downward/upward) or horizontal (lateral).**

#### Organisational Channel

By far the most important aspect of business communication is that which takes place between and within organisations, and between individuals and organisations. Within organisations there are many ways of describing how communication takes place. Communication channels can be either formal or informal within an organisation. Formal channels of communication can be either vertical (upward/downward) or horizontal (lateral).

Let us look at and study these channels of communication.

#### 1. Formal Communication - Vertical channels

##### a. Top-down

Top-down communication flows from the top of the organisation, through the hierarchical layers of its structure to various recipients. This is also the traditional approach to communication where subordinates or workers are given selected information. The selected message communicated is meant to assist workers in their daily work routine.

Also, traditionally, the perception or thinking is that those at the top of the organisation know what is good for the organisation. Therefore, communication should always start



with them. The top level managers control their subordinate workers by limiting them to selected messages. Top-down communication can take the form of briefings, in-company newsletters and company reports. Other types of downward communication include: job instructions; job descriptions; policy and procedure manuals; job performance evaluations; corporate information activities; and annual reports to employees.

The effectiveness of top down communication can be affected by the size of the organisation. A message can be distorted if the route it takes is a long one without various stop-overs along the way. **Distortion** is a common problem faced in organisational communication. Sometimes a message can be misinterpreted by the subordinate worker at the bottom of the organisation. As a result incorrect actions can be taken, which leads to further communication problems.

The top management must ensure that as the message flows through the organisational structure, the original intent of the message is maintained and administered.

#### b. Bottom-up communication

You have learnt from the previous section that most organisational communication starts and flows down from the top. However, with the changes in communication methods, strategies and technology, bottom up communication is beginning to play a much larger role now than before.

Bottom up or upward communication is always initiated by subordinate workers. It could start from the bottom of the organisation or from the middle of the organisation. Typical types of upward communication are requests, submissions, reports and recommendations.

Below are some specific examples of upward communication are:

- a. Applying for sick or special leave,
- b. Informing a superior of a problem such as pay deduction,
- c. Suggesting a change to a policy or practice,
- d. Submitting a progress report, and
- e. Requesting for further instruction or clarification.

From the examples presented above, it becomes clear that the subordinate's style of communication with the managers takes the form of requests, submissions, comments, suggestions and applications.

## 2. Formal Communication - Horizontal channels

Horizontal or lateral communication is played out on a level playing field. Usually, individuals on the same level of the organisation, such as people in the same team, section or department communicate among themselves. We can confidently conclude that horizontal communication flow freely and is a regular form of organisational communication.





Examples of horizontal communication are when fellow workers are;

- a. interacting socially at the work place.
- b. working together on a joint project.
- c. interacting with each other while performing routine duties.
- d. consulting each other on work related matters.
- e. offering emotional support in times of distress or need.

### **Informal communication**

**Informal** communication can also take place inside an organisation. Informal communication is important since it allows discussion of issues outside of the formal lines of communication. This is where friendly relationships are built between workers. Colleagues or fellow workers can learn to sympathise with and trust each other. Social problems can also be resolved informally. Even bright and new innovative ideas for production or service delivery can be discussed or generated from informal discussions.

Informal communication usually takes place at coffee/tea breaks, over lunch or at social occasions. Colleagues tend to socialize with each other rather than with superiors or subordinates. You will find that at a social gathering, for instance, people holding similar positions tend to socialise well with each other.

**Informal communication has no rules and can take place anywhere. It is important for relationship building and emotional support for workers.**

### **Media**

A **medium** is anything that is used for communication. Businesses use a variety of media in order to communicate with the outside world.

A letter is the common medium of communication. A letter serves as a permanent proof of communication. This makes it easy for future reference or follow ups. However, it can be time consuming to write. There is also some cost involved such as the cost of printing and mailing.

Since its invention in 1876, the telephone has become a popular and central part of modern communication. Both fixed and wireless telephones are very important for business today. However, there is no written evidence of communication. Communication expires after it has taken place. Also, it costs money to make telephone calls.

The third common medium is the **Internet technology**. The wide-spread use of the internet technology is making communication even faster and very effective. Many organisations have their own **websites**. Corporate websites display product information as well as generic information. Websites are designed by IT specialists and uploaded onto the Internet.

Built into the Internet is the **email** system. Email communication is fast and provides a written record of communication. Additional electronic information can be attached to the

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email message for the receiver. Every day countless business transactions are conducted over the Internet.

### **Overcoming barriers to communication**

Communication is the nerve system of an organisation. It is most effective when it moves speedily and smoothly in an uninterrupted flow.

However, communication is not always successful in many cases due to various communication barriers. Not every message is effectively transmitted or received. Blockages or bottlenecks, called **barriers** to communication, distort or twist the message. Use of a foreign language in communication is an example of a communication barrier. Another example is the use of highly technical words in a simple conversation with someone. Communication barriers, when not corrected, leads to ineffective communication flows. A communication barrier is anything that can affect the smooth flow of communication.

The following are nine effective ways that management can apply to overcome barriers and maintain effective communication.

#### **1. Brevity (short and brief)**

The message must be well-planned, well-constructed and to the point. The flow of information should be regulated to avoid too much information (information overload). Unnecessary repetition should be avoided.

#### **2. Active listening**

The receiver should pay complete attention to the message. He/she should listen properly with an open-mind to grasp the message.

#### **3. Honesty**

The message sent must be in line with the policies of the organisation. Actions taken must not contradict the line of communication. Both must be consistent so people can believe them.

#### **4. Feedback**

Since communication is a two-way process, it is complete when the receiver sends a feedback as a sign of receiving and understanding the information or message.

#### **5. Language**

Technical terms or jargon should be minimised. Words should be selected to suit the level of understanding of the receiver.



## **6. Clarity**

Use of simple words and clear expressions helps to make the message clear. The contents of the message should be suitable. The purpose of communication itself should be clearly defined before deciding on the message.

## **7. Media**

The media should be appropriate, suitable, and cost-effective and fit for the message. The medium and method of communication should be chosen carefully. Equipment and mechanical devices must be well-maintained to prevent breakdowns.

## **8. Developing relationships**

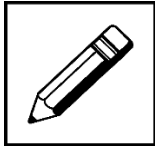
Good relationship-building is essential among people. This will automatically reduce or eliminate behavioural barriers to communication. A manager should respect the dignity, rights and expertise of his or her subordinates. Subordinates should also trust their superiors. This will lead to good inter-personal relationships.

## **9. Gestures**

Gestures such as blinking of an eye, a smile or a handshake convey sometimes more meaning than words and letters. The main reason is that action and deeds often speak louder and clearer than words.

Before you proceed to study the next topic, you will need to do some activities to help you recap on what you have learnt so far in the first topic.

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**Learning Activity 12.1.1.1: Complete the activities given below.**

1. Define the term 'communication'.

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2. Define these words:

a. Encode:

b. Decode:

c. Message:

d. Feedback:

3. Write down the difference between internal and external communication.

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4. State two (2) reasons why internal communication occurs.

a. \_\_\_\_\_

b. \_\_\_\_\_

5. How does informal communication benefit an organization? Write down two (2) of these benefits.

a. \_\_\_\_\_

b. \_\_\_\_\_

6. What is a possible reason for bottom up communication? (Can be either formal or informal)

\_\_\_\_\_

\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.1.2 External Communication and Benefits of Communication

#### External communication

**External** communication flows from the internal environment to the external environment. Examples of external parties include: customers, potential customers, suppliers, investors, shareholders and others.

A well-thought out communications plan not only defines the target audience, but also focuses on how to reach them effectively. The goal of external communication is to promote the organisation to its' external parties. External communication focuses on spreading news and information about the organisation to the public or external stakeholders. Figure 1.3 helps you to understand who the external parties are.

There are many different ways of external communication. Common examples of external business communications include direct mailings, financial records, press releases and newsletters.

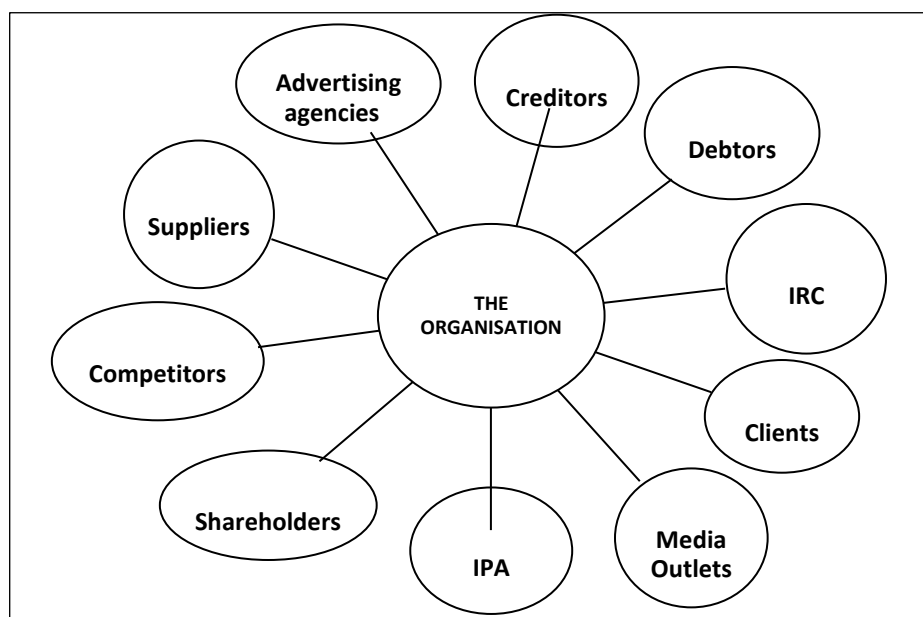


Figure 1.2. External-based communication parties.

Many businesses, for instance, focus on sales as a measure of business success, but public perception is just as important. Communication is one way to present a favourable image of the organisation to the community, clients, and potential investors. External communications such as newsletters, media stories and press releases let the public know about how the organisation cares for the society it operates in. All these things serve to strengthen the **public relations** efforts of an organisation.

Traditional print methods of communication are still commonly used. However, modern technology has changed external communications, and the Internet has become a valued resource and a tool in reaching new customers. Organisations create websites to let people



know of their products. Social media such as Facebook and blogs are an easy and cost-effective way to reach target consumer groups. In the long run, the benefits far outweigh the risks, as technology allows an organisation to communicate with audiences all over the world.

The public impression of an organisation can define the success or failure of the organisation in the long-run. One misplaced quote, or badly worded letter will ruin an expensive external communications plan. It also has the potential to affect corporate revenue. Therefore, managers need to undertake and implement external communication carefully.

### **Benefits of effective communication**

Organisational success depends on communication. All organisations must communicate effectively. Outlined below are the key benefits that can be derived from effective communication.

#### **1. Organisational effectiveness**

The effective management of an organisation totally depends on an effective communication system. Communication serves the management and makes everyone aware of what the organisation requires. Effective communication therefore enables managers to achieve organisational goals by working through other people in the organisation.

#### **2. Effective planning and coordination**

Effective communication is essential for quick and successful implementation of the management decisions. Effective communication is essential for solving managerial problems such as allocation of resources, measurement of performance and delegation of duty.

#### **3. Exchange of information**

Communication helps managers and workers acquire more knowledge and skills. It helps managers to share the acquired knowledge with their subordinates. It also helps in understanding the problems so that better solutions can be found.

#### **4. Human relations**

Many conflicts arise due to the misunderstanding of motives and ignorance of facts. Proper communication helps to minimise friction or conflicts. It increases mutual understanding and cooperation. A good interpersonal relation can be created with the help of an effective method of communication. Good communication skills lead to effective management. Workers do their job satisfactorily as their relationship with management improves.

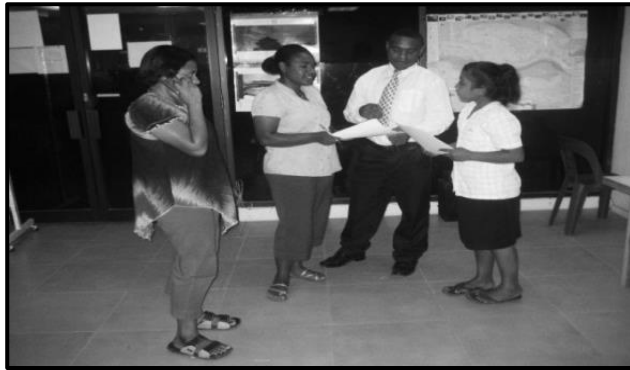


Figure 1.3. Oral communication in progress

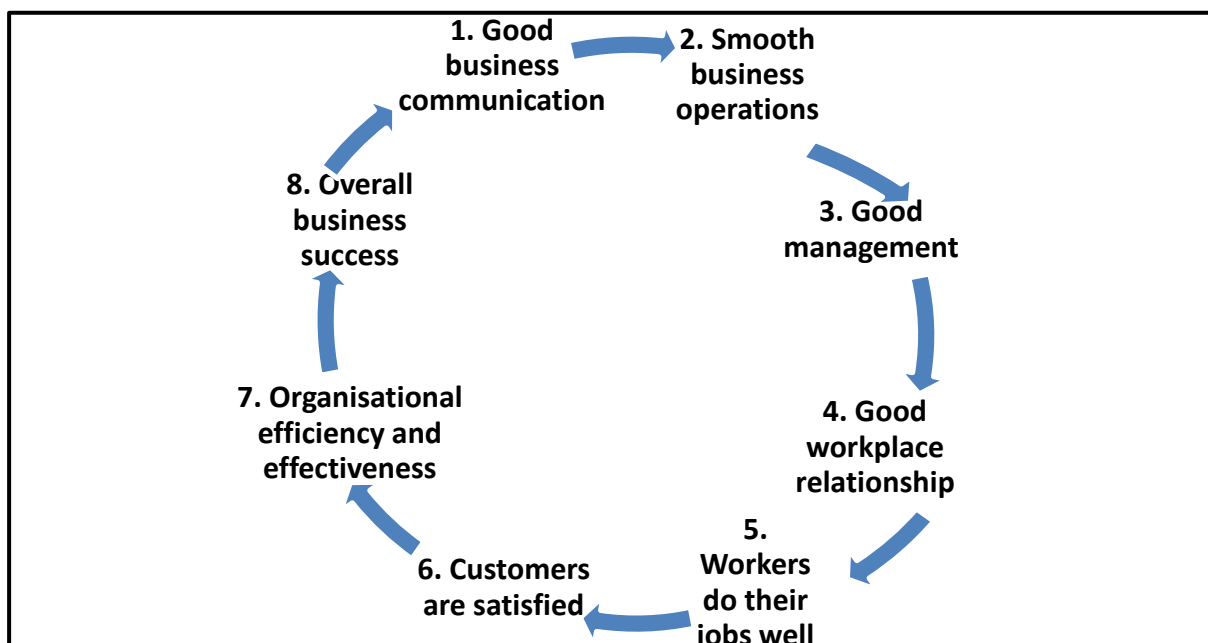


Figure 1.4. How communication benefits a business.



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**Learning Activity 12.1.1.2: Complete the activities given below.**

---

1. Explain the importance of communicating with these external parties.

- a. Shareholders \_\_\_\_\_
- b. Suppliers \_\_\_\_\_
- c. IRC (Internal Revenue Commission) \_\_\_\_\_

2. What is 'public perception', and how can a positive image be created?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**





### 12.1.1.3 Methods of Communication

There are three common methods of communication which you will learn in this section. They are: (i) Oral, (ii) Written, and (iii) Non-Oral. We begin by looking at what oral communication is.

#### Oral Communication

Oral communication may take place in a face to face conversation or through the use of **mechanical devices**. Talking and listening effectively are very important in oral communication. Good speaking and listening skills are needed to build and maintain good business relationships.

The need to present a good public image is vital. The written word is not always the best means of communication. Oral, non-verbal or visual communication is also vital

Oral face-to-face communication is the fullest kind of communication that we experience because we notice all forms of expressions, see the person, and hear the voice when we communicate.

In oral communication we respond to the speed of speech and patterns of eye contact. We can therefore decide how to respond to these things. Looking and listening for feedback is the key to success in oral communication. Oral communication involves the use of words. It can be face to face or distant using mechanical devices.

#### Advantages of oral communication

1. Face to face is the most natural way of transmitting a message because the communicator can make the listener to understand the message not only by the spoken words but also by body language.
2. Face to face communication saves time and money. Also, it is effective and quicker than any other method.
3. It is easier to measure the effect of communication on the spot. It can even lead to greater understanding and improve interpersonal relationship.
4. Because a response is received on the spot, it promotes further communication.

#### Disadvantages of oral communication

Face to face communication, however, has some disadvantages.

1. It is less reliable, and provides no record for future reference.
2. It is less accurate and unsuitable for lengthy messages.
3. It does not provide enough time for thinking before participating in an oral communication. That is why it is unreliable sometimes.



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## Non-verbal Communication

In communication body language is also known as **kinesics** and the physical distance is referred to as **proxemics**. Non-verbal communication includes facial expressions, the **tone** and **pitch** of the voice, gestures displayed through body language, and the physical distance between the communicators. These non-verbal signals can give clues and additional information and meaning, over and above spoken communication.

Non-verbal messages allow people to:

- Reinforce or modify what is said in words. For example, people may nod their heads in agreement or shrug their shoulders in disagreement.
- Convey information about their emotional state
- Reinforces the relationship between people
- Provide feedback to the other person
- Regulate the flow of communication, for example by signaling to others that they have
- finished speaking or wish to say something.

**Non-verbal communication includes facial expressions, the tone and pitch of the voice, gestures displayed through body language and the physical distance between the communicators.**

Interpersonal communication is further complicated in that it is usually not possible to interpret a gesture or expression accurately on its own. **Non-verbal** communication consists of a complete package of expressions, hand and eye movements, postures and gestures which should be interpreted along with speech (verbal communication).

Inter-personal communication includes:

- Body language or movements (Kinesics)
- Posture
- Eye contact
- Closeness or Personal space (Proxemics)
- Facial expressions
- Physiological changes

## Body Language

Body language or movements include gestures, posture, head and hand movements or whole body movements. Body movements can be used to reinforce or emphasis what a person is saying and also offer information about the emotions and attitudes of a person. Research work has identified the different categories of body movement that are detailed below with each category describing the purpose they commonly serve:

- **Emblems:** Gestures that serve the same function as a word. For example, the hand movement used when stopping a PMV bus.



- **Illustrators:** Gestures which accompany words to illustrate a verbal message. For example, nodding the head in a particular direction when saying 'over there'.
- **Affect Displays:** These are facial expressions or gestures which show the emotions we feel.
- **Regulators:** Gestures used to give feedback when conversing. For example, head nods and short sounds such as 'uh-huh', 'mm-mm'.

### Posture

**Posture** can reflect people's emotions, attitudes and intentions. Research has identified a wide range of posture signals and their meanings such as:

- **Open and Closed Posture:** An open posture can be used to communicate openness or interest in someone and a readiness to listen. Closed posture might imply discomfort or disinterest.
- **Mirroring:** 'Mirroring' indicates interest and approval between people and serves to reassure others of interest in them and what they are saying.

### Eye contact

Eye contact is an important aspect of non-verbal behavior. In interpersonal interaction, it serves three main purposes:

- To give and receive feedback: Looking at someone lets him/her know that the receiver is concentrating on the content of his/her speech.
- To let a partner know when it is his/her 'turn' to speak. Eye contact is more likely to be continuous when someone is listening, rather than speaking.
- To communicate something about a relationship between people. For example, when you dislike someone, you tend to avoid eye contact and pupil size is often reduced.

### Closeness and Personal space (Proxemics)

When someone violates an 'appropriate' distance, people may feel uncomfortable or be defensive. Their actions may well be open to misinterpretation. In Western society, four distances have been defined according to the relationship between the people involved, the study of personal space is termed proxemics. Four main categories of proxemics are:

- Intimate distance (touching to 45cm)
- Personal distance (45cm to 1.2 meters)
- Social distance (1.2 meters to 3.6 meters)
- Public distance (3.7 meters to 4.5 meters)

These four distances are associated with the four main types of relationship – intimate, personal, social and public. These distances are considered the norm in the Western society.

### Written Communication

Written communication is where transfer of information is done in writing. It is one of the most significant means of communication.

There are many forms of written communication as shown below in table 1.2.



Type	Its purpose
Telephone message	A written record on paper for a person not present at the time a call is received
Letter	Used to communicate with parties outside of the organisation
Memo	Used to communicate information with workers and managers within the organisation
Notice	Used internally as a constant reminder to attract attention
Circular	Used in large organisations with many branches and sub branches. It is usually sent from the head office to branches and sub branches.
Advertisement	A written message used to make a product known to the public through the media.
Minute	A written record of the proceedings of a meeting and is used internally as a record.
E mail	A written message transmitted through the internet.
Fax message	A written message transmitted from one fax machine to another.
Reports	A formal narration of a phenomenon of interest, which will include all relevant facts, alternatives, their analysis, and conclusions and recommendations.
Manuals	Written reference materials and instructions on how to correctly undertake a particular task.
Proposals	Written offers to undertake a job or project, specifying scope of work, tangible outputs, activities, timetables, costs, terms of payment, and responsibilities of both sides.

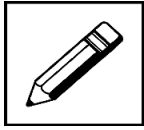
Table 1.1. Types of written communication and their purpose.

**Advantages of written communication**

1. It allows for permanent records. This written record can be useful for making references as it carries more weight than spoken words.
2. It is very useful as a defence during legal battles.
3. It is more precise. It can be stored, analysed and used for various other purposes such as decision-making.
4. What is written on paper can be copied to other recipients located in distant places.

**Disadvantages of written communication**

1. Written communication costs time and money to produce and feedback is not always immediate.
2. Illiterate people cannot read it.
3. It is not flexible; it cannot be changed once written down. Written communication can take some time to produce.
4. Poor writing skills can affect communication, leading to misunderstanding



### **Learning Activity 12.1.1.3: Complete the activities given below.**

1. State an advantage and a disadvantage of face-to-face communication.

a. Advantage:

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b. Disadvantage:

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2. Why is oral communication considered as the 'fullest' form of communication?

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3. Define in your own words the terms 'kinesics' and 'proxemics'

a. Kinesics:

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b. Proxemics:

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4. Give appropriate examples of:

a. Emblems:

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b. Illustrators:

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c. Affect displays:

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d. Regulators:

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5. Write down an advantage and a disadvantage of each of the following methods of written communication.

No.	Method	Advantages	Disadvantages
1.	Email		
2.	Telephone Message		
3.	Fax Message		

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<b>CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE</b>
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## 12.1.2 Telecommunication

### Introduction

In this module unit, you will study the concept of Telecommunication. It will cover aspects of the telephone itself, telephone etiquette and teleconferencing. As you study, it will give you an insight of the techniques of answering the telephone, greetings, identifying, introducing and responding and also the impact of the use of the telephone in an organization, its proper use with the advantages and disadvantages of oral communication. This concept and the whole communication network is an important part of today's commercial world.

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### Learning outcomes;

On successful completion of this module unit, students will be able to,

- Define telecommunication and explain its purpose and importance in communication and also demonstrate an understanding of knowledge and skills of the different aspects of communication styles and strategies in operation management.
  - Identify and explain telephone etiquette, its importance and explain the advantage and disadvantages of its usage too.
-



### 12.1.2.1 The Telephone

The telephone was invented by Alexander Graham Bell in 1876. Today it is one of the most widely used communication **media** the world over. It comes in many shapes and sizes, ranging from your hand-held mobile phones to the land line telephones used in offices and homes.

The word 'telephone' is widely used in PNG. It is a very familiar communication device. As simple as it seems, it is not at times easy to define. Therefore, you need to dissect this word to find out its real meaning. Doing so will help you to appreciate the word and other related words with the same prefix.

'**Tele**' means far, distance, or from afar. '**Phone**' means sound. When you put them together it means 'distant sound'. Other words also have tele; for example, telegraph, and telescope. **Graph** means writing. So a telegraph is a written message that is sent a long distance by Morse code. **Scope** means seeing. So a telescope is something that allows someone to see things from a distance. Let us now consider the word 'microphone', which contains phone. **Micro** means small. So a microphone is something that captures a small voice (sound) and makes it larger in volume.

#### Purpose of the telephone

A telephone converts sound and electrical waves into audible relays and is used for communication. It consists of two most essential parts; a *microphone* and a *speaker*. A person can speak into the device and also hear transmissions from other users.

#### Parts of a Telephone

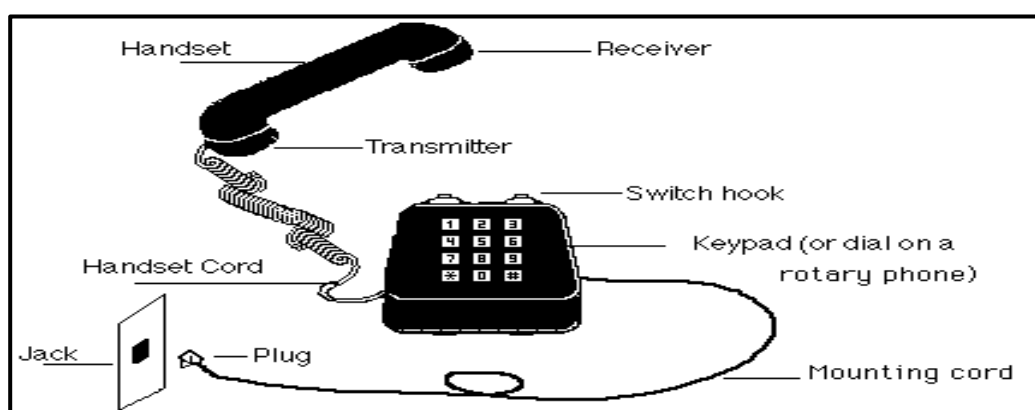


Figure 1.5. Diagram of a fixed-line phone.

**Satellites** circle the globe transmitting messages and carrying mail. New technological developments, such as **fibre optics** technology and computerised telephone exchanges, are making telephone links cheaper and more efficient every day.

Due to technological improvements, Subscriber Trunk Dialling (STD) is available for all trunk calls. Under STD, a telephone subscriber may dial any number directly, without referring to





the local telephone exchange. A caller must first dial the code number of the area, before dialling the desired number.

Such communication links can also provide fax facilities to transmit and receive printed messages. In a facsimile process, printed images on a whole page can be transferred faithfully from one place to another using fax machines.

**A telephone is an electronic device that converts sound and electrical waves into audible relays.**

### **Telephone - Call Centre**

A call centre is usually associated with large organisations such as companies and key government departments that handle thousands of telephone calls each day. It is a centralised office used for the purpose of receiving or transmitting a large volume of requests by telephone.

An **inbound** call centre administers incoming product support or information inquiries from customers. **Outbound** call centres are operated for telemarketing, asking of charitable or political donations, debt collection and market research.

A call centre is operated through an extensive open workspace for call centre agents. Each agent has a work station that includes a computer, a telephone set and one or more supervisor stations. It can be independently operated or networked with other call centres.

A **contact centre**, also known as customer interaction centre is a central point of any organisation from which all customer contacts are managed. Through contact centres, valuable information about the company is given to appropriate people. It is generally part of a company's customer relationship management. Today, customers contact companies by telephone, email, online chat, fax and instant message (SMS).

**A call centre is a centralised office used for the purpose of receiving or transmitting a large volume of requests by telephone.**

### **The Impact of Telephones in Organisations**

Telephone communication has had a positive influence on society since its invention. Here are some of the most common ones.

#### **Instant communication**

The telephone was an improvement on the system of letter writing and delivery. The telephone eliminated communication delay, which positively affects government, journalism, business, agriculture, interpersonal relations, and emergency response time.

#### **Economic growth and increased profits**

The telephone improved the way businesses could deliver its goods to fulfil customer orders, and gave farmers a way to find the most up-to-date price for their crops. Its development gave companies the opportunity to expand their operations to other countries and to speed



up the trading of stocks and bonds. This has vastly increased wealth generation for a greater number of people. Mobile telephone technology also expands the opportunity for individuals to work from any location.

### **Mobile phones**

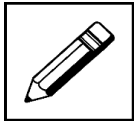
Mobile phone technology has taken Papua New Guinea by storm since the entry of 'Digicel Ltd' into the PNG telecommunication market in 2007. The country's own telecommunication network called TELIKOM has been providing these services to its population since 1975. The introduction of DIGICEL Ltd services and its products has greatly improved and impacted the local market.

Mobile phones are very handy. They can be easily carried in pockets, bags and bilums. With the increase of back up services such as battery (cell) charger facilities and prepaid card outlets many of us find it very convenient to use mobile phones for personal and business purposes.

A distinct advantage of mobile phones is that it enables many people in the rural parts of PNG to communicate easily. The cost of owning a mobile phone and maintaining it is very high.

Mobile phone users have the option of sending short, written messages in the form of Short Messaging Service (SMS). This function enables the written code of communication to be used. Recently, this practice has come under fire from the education authorities due to the drop in the standard of written English. The areas of poor spelling words and sentence structure have been signalled out and these are the areas directly associated with Short Messaging Services. With Short Messaging Services people invent shorter, new and even mixing English and pidgin words together.

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**Learning Activity 12.1.2.1: Complete the activities given below.**

1. Make a list of those characteristics you know about the telephone. Pick one of them from the list and state why you think this is important.

This question has two parts: Part 1 requires you to list the parts and aspects of telephone. Part 2 requires you to pick out one aspect or part of the telephone and elaborate further.

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2. Do you think there are organizations in PNG that operate call centers? If yes, name at least two of those organizations, and state their main line of business.

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3. List three (3) ways that a small business person benefits from 'mobile phones'.

- a. 

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- b. 

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- c. 

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4. What is the difference between a '*subscriber trunk dialing*,' and '*operator assisted dialing*'?

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5. B Mobile and Digicel have entered into an 'interconnectivity' agreement. Explain what that means, and how does it help businesses?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.2.2 Telephone Etiquette

The use of telephones for organisational communication is guided by what is called '**telephone etiquette**' or 'manners'. These simple but vital rules serve a very important purpose in communication. Some of the key rules are discussed below.

#### Making calls

Remember that no telephone call is ever free, even if you don't pay for the bill directly. Therefore, prepare well before making a call. Always know who you wish to speak with and what the call is specifically about. Have on hand the files you might need and also have on hand a note pad to take note if needed. Always get to the point quickly, and use polite words such as 'please' and 'thank you'.

#### Techniques for Answering the Telephone

Many people take their telephones for granted. But the telephone is an important communication tool in our hands. Therefore we must know the right ways of using it.

Most people are unaware of their body language in their daily communication and social interactions. Words only account for less than 10% of all oral communication while a larger portion is made up of our body languages.

Most **body language** is lost on the telephone. So make sure the message given is verbally positive. It can reveal your attitude towards the caller. Remember! 'It is not what you say, but the way you say it' that matters. Also bear in mind that not all body language is lost over the telephone. Although you can't be seen, the person who you are talking to has a mental picture of you.

You need to convey a genuine desire to help. The mood will be conveyed in the tone of your voice. Always sound natural. Always ask this question: 'How do I want my business contacts to feel after talking to me on the phone'? The following steps will help you adopt a professional telephone attitude or manners.

1. Prepare carefully what to say, and note down objectives of the call.
2. Sit upright to avoid constricting your voice.
3. Speak clearly, pace yourself, keep the tone neutral.
4. Remember to be polite, and make sure you always leave your contact with a good impression.
5. Be warm, friendly and consistent.
6. Choose your words carefully, avoiding any form of jargon and slang expressions.

**Be enthusiastic, genuine, and cheerful and convey a positive attitude when talking on the phone.**



### Receiving calls

Firstly, pick up the phone promptly when it rings. Say 'hello' with a smile. Secondly, identify your company or organisation and offer to help;

*Example; 'Good morning, Tropical Books, Sales department, How can I help you?'*

You should pause, listen to the response, and decide what to do or say next. If it requires someone else to deal with the caller, then transfer the call to that person. Otherwise, deal with the caller's query on the spot.

### Listening and Responding Effectively to Telephone Calls

Listening is a skill, and therefore it can be developed and improved with **self-awareness**, **discipline**, and **practice**. Lack of concentration is one of the main barriers to effective listening when on the telephone.

When answering a telephone call your sense of sight is not being fully utilised, therefore, it can stray and bombard you with distracting information. The following will help you to remain respond effectively:

1. Assess meaning behind the words - You have plenty of time to assess what the speaker is trying to get across. The average rate of speaking is around 125 to 150 words per minute, while the rate of listening is around 400 to 500 words per minute. So time is on the side of the listener. Try not to switch off if the subject is complex or boring. Ask questions where appropriate, trying not to interrupt the speaker too many times as this will spoil the flow. Making notes will help you to remember what was said after the call.
  2. Remain focused - Getting bogged down in trivial matters and details will only irritate the caller. Tune into what the caller is trying to convey. Effective listeners hear everything that is said, not just the parts they agree with. In doing this they gain valuable insights as well as the cooperation and respect of the person they're talking to.
  3. Keep cool - Sometimes you may have to deal with a caller who is upset, irrational and wants to complain. Do not be tempted to get into an argument. Remain neutral and try to offer constructive advice. In the same way, when it's your turn to lay a complaint over the telephone consider the person on the other end of the line. Try to keep calm – you will get a better response. In either situation it is important to prevent your emotions from getting in the way. Stay calm and cool and never just hang up the phone.
  4. Promoting good hearing skills - During the conversation, write down key words as a reminder for later questions; make a note of what is being said. Try to assess the caller and encourage him or her to talk. He or she should express their inner feelings. During this process of assessment, try to stay neutral. You might like to make a note of the key points and think about them while the speaker continues.
  5. Hear the message - It is useful to test your understanding occasionally by asking questions. Check the meaning of technical terms, especially in an unfamiliar subject.
-



6. When doing this you should remember to ask 'open' questions. They are much more effective than a question requiring a simple 'yes' or 'no' answer. Making supportive noises and words of encouragement lets the speaker know that you are listening. Gently challenge any ideas you are unhappy with allowing the speaker time to explain.

**Telephone etiquettes are telephone manners which stand to guide us when using a telephone.**

When the conversation is coming to an end, make sure that you have understood everything correctly by making a quick summary of what was said. Allow the speaker to clarify any doubts and ask questions when necessary. Below are some activities and situations that will prevent effective telephone conversation from taking place.

Physical Barriers	Other Barriers
Room temperature: - too hot/too cold	Jargon:- Technical terms
Air Con:- Too stuffy/unventilated	Accents:- Unusual/Verbal habit
Lighting:- Too bright/dim	Complexity:- of information
View:- From window/around the room	Speed/volume of delivery
Furniture:- Uncomfortable/badly positioned	Monotone:- boring delivery
Noise:- Internal/external	Psychological barriers:- Anxiety; frustration; fear; status; prejudice; background difference; expectations.

Table 1.2. Common barriers to effective listening.



### Advantages and disadvantages of telephones

Advantages	Disadvantages
<ol style="list-style-type: none"><li>1. Instant communication takes place.</li><li>2. Hear the voice and gain some ideas about body language and mood.</li><li>3. A message can be taken.</li><li>4. It allows for the smooth flow of communication.</li><li>5. Calls can be made and received from anywhere and at any time of the day.</li><li>6. Mobile phones can be carried around to any place for easy communication.</li><li>7. Encoding and decoding of messages is easier. It is more personal than written communication.</li></ol>	<ol style="list-style-type: none"><li>1. People can hide behind the telephone to conceal their real mood.</li><li>2. Telephone abuse is high.</li><li>3. Cost of telephone calls can be high.</li><li>4. The receiver may not always be around to answer the call.</li><li>5. If the telephone number has changed it is difficult to maintain contact.</li><li>6. Language differences, speed and complexity can hinder communication.</li><li>7. Message can be misunderstood due to poor listening. Because sight is not fully utilised receiver can be distracted.</li></ol>

Table 1.3. Advantages and disadvantages of telephones.

### Effective Questioning

Effective questioning will keep you focused during a telephone **conversation** and help you obtain the information you need. There are different types of questions which will help you to deal with different situations and be in control of the communication process. The different types of questions are:

#### 1. Open questions

This type of question requires a fuller answer than a simple 'yes' or 'no'. By asking open questions the caller can gain enough information. Take for example this question: 'How may I help you?' This question requires a full explanation of a problem and the solution required.

#### 2. Specific Questions

Specific questions help to clarify specific points or require very brief answers. There are two types of specific questions: those which request a piece of information, and those which simply require a 'yes' or 'no' answer. Take for example this first question: 'Who was it you spoke to yesterday?' This question requires only a name of a person. Here is a second question: 'Did you speak to Mr Iso yesterday?' The answer expected for this question is either 'yes' or 'no'.

**Effective listeners hear everything that is said, not just the parts they agree**



### 3. Closed Questions

Closed questions will usually produce a 'yes' or a 'no' answer. Take for example this question: 'Have you confirmed your flight already?' Here is a second question: 'Have you got any further questions to ask?' To both these questions, the answer will be either 'yes' or 'no'.

### 4. Multiple Choice Questions

This type of questions provides alternatives to choose from. Ask the caller what they would like you to do for them, but provide them with the alternatives that also suits you. Take for example this question: 'Which flight do you prefer; morning, midday or afternoon?' The answer will be only one out of the three choices.

### 5. Leading Questions

A leading question is asked to speed up conversations when dealing with people who have difficulty making a final decision. A leading question can help another person to confirm the information easily and quickly. Take for example this question: 'You would like to fly out in the morning, right?' The answer will be either 'yes' or 'no'. If it's 'no', then an alternative can be indicated.

### 6. Hypothetical Questions

By asking a hypothetical question you can test the opinion of someone, particularly in a conflicting situation. Take for example this question: "If I were to purchase my ticket a month in advance, would you be able to give me a discount of 10%?"

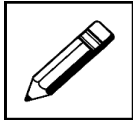
### 7. Taking Telephone Messages

Every time keep a message pad on your desk in case you will be required to take messages over the phone. Check numbers and names for accuracy, and pass the message onto the person concerned. Be brief and avoid changing the original message or its intent.

To: _____		Time: _____	
Date: _____			
<b>WHILE YOU WERE OUT</b>			
Mr/Ms _____		Of: _____	
Phone No. _____			
Telephoned		Please Call	
Was in to See You		Will Call Back	
Wants to See You		URGENT	
Returned Your Call			
Message: _____		Message taken by: _____	
_____		_____	

Figure 1.6.Telephone message pad.



**Learning Activity 12.1.2.2: Complete the activities given below.**

1. How can you remain calm and cool when someone starts to become frustrated over the telephone?

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2. If you are a public servant and you have access to a 'free' telephone, should you make full use of the free telephone? Explain your answer.

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3. Differentiate between 'closed' question and 'hypothetical' question.

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4. Write an example of a 'leading' question.

(Clue: a question is asked in such a way that the first answer will be a 'yes' or a 'no'. An alternative will be suggested following the answer. Use the following examples as guides to write your own questions.)

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5. Develop a telephone message from the following scenario.

*"A caller named Peter Pan from Gerehu wants to talk to Andrew Bill, your co-worker. Andrew is out of the office. Peter urgently wants Andrew to repay K100 he borrowed or else he will have Peter arrested by the Police. The call came in at 10:00 am, on Friday 5 December 2014." Use the message pad format shown in figure 1.6.*

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.2.3 Teleconferencing

The word '**teleconferencing**' is made up of two words; 'tele' and 'conferencing'. It means a long-distance conference. This type of conferences is made possible by **technology**. Teleconferencing can take place at various levels. **Audio** is the simplest, least expensive and most passive kind of teleconferencing. It may involve only audio transmission or may also incorporate graphics of some form.

The new systems have varying degrees of **interactivity** – the capability to talk back to the user. **Satellites**, computers, tele-text, cassettes, cable, video-discs, etc. all fit the same emerging pattern. They provide ways for individuals to step out of the mass audience and actively engage in the process of communication. The new technologies ensure that a specific message can be exchanged with each individual in a large audience. They are the opposite of mass media.

Many are **asynchronous**, which means that they can send or receive a message at a time convenient for individuals without being in communication at the same time. This overcomes time as a variable affecting communication. A video, data and voice delivery system reduces travel costs. When the material is retrieved and saved to a video tape or disc, the material can be used at any time or anyplace.

**Teleconferencing means an electronic conference that is attended by people based in distant locations, without having to come together physically.**

#### Types of Teleconferencing

There are at least six methods of teleconferencing: **audio teleconferencing, audio graphics, computer, video, business television (BTV), and distance education**. The methods used in teleconferencing differ but there are common factors that contribute to teleconferencing. These factors are very important as they enable individuals, organizations and businesses to communicate easily and effectively at an economical cost. The factors are that teleconferencing;

- Uses a telecommunications channel.
- Links people at multiple locations.
- Is interactive and provides a two-way communication.
- Is dynamics and require the users' active participation.

The five common methods of teleconferencing are discussed below.

1. **Audio Teleconferencing** - having telephone conferencing using the telephone line is cheaper and effective. It is sometimes called **conference calling**. A telephone conference occurs for interviews or meetings involving an individual or groups of individuals, and a panel of people in a conference room. The conference room usually has a few telephone lines connected to a loud speaker. There are people prepared to meet or interview the person calling in from outside. When the outside person rings, those who are at the



meeting have their conversation with him or her. The person ringing in can literally hear people talking to him or her at the conference room.

2. **Audio-graphics** – **this** method uses narrowband telecommunications channels to transmit visual information such as graphics, documents, and video pictures to aid voice communication. The common devices used in audio-graphics teleconferencing include: electronic tablets/boards, freeze-frame video terminals, integrated graphics systems, fax, remote-access microfiche and slide projectors, optical graphic scanners, and voice/data terminals.



Figure 1.7. Video Teleconferencing in progress.

3. **Audio-graphy** - is the use of audio recording equipment and techniques to capture, edit, preserve and distribute a variety of sounds, such as soundscapes, life stories, oral histories, and family tales.
4. **Computer teleconferencing** - this method is closely related to electronic mail systems. Participants use computers to read the comments of others and type in their own comments. Participants can reply at their own time and convenience. *Facebook* and *Twitter* are examples of mediums where participants enter, make a comment, read others' comments, upload pictures and leave or sign out at will. Another important development is the use of computers with **web cameras** that are able to transfer image and voice at the same time between two personal computers. It is very much like video conferencing as long as they both have the required web cameras on their computers.
5. **Video Teleconferencing** - uses the familiar **broadcast** type of television with audio. Participants from each end can see every movement (according to the position and number of cameras), see all gestures or body language and hear each other. It is a combination of audio and video in which both voice and image are transmitted between two computers or TV terminals. It can be a one-way video/two-way audio or two-way video/two-way audio. It can display anything that can be captured by a TV camera - it is live television. In two-way audio/video systems, a common application is to show people. This creates a social presence that resembles face-to-face meetings and enables participants to see gestures and physical appearance of participants at remote sites. Video conferencing is used globally by businesses, governments and institutions

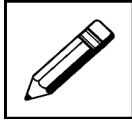


such as schools and universities. It is an effective way of meeting without having to travel at all in education, video conferencing is an effective way to use one teacher who teaches to a number of remote, distant sites. So it can be applied to distance education. Rural areas benefit particularly from classes provided through video conferencing.

### Advantages and Disadvantages of Teleconferencing

Advantages	Disadvantages
<b>Interactivity:</b> It promotes interactivity. Participants can participate actively with each other.	<b>Highly technical:</b> Requires technical skills and backup team to be on standby to ensure that teleconferencing works. Technical faults can disrupt a good meeting, thus causing delays and frustration.
<b>Time:</b> For time-critical information, sites can be linked quickly. An audio or point-to-point teleconference can be convened in less time.	<b>Demanding:</b> It requires the users' active participation. Unprepared participants will find it difficult to participate in a conference bound by technology and time.
<b>Lower Costs:</b> Costs (travel, meals, lodging) are reduced by keeping employees in the office, speeding up productive development cycles, improving performance through frequent meetings with timely information.	<b>Limited exposure:</b> Depending on the location of the video cameras, not every participant will become visible in the conference room. Even each person's full body language may not be clearly seen.
<b>Efficiency:</b> Content presented by one or many sources is received in many places simultaneously and instantly.	<b>Lack of socialization:</b> Because teleconferencing is limited by time and cost participants only deal with business matters and have no time for socialization – something as equally important as formal gatherings.
<b>Larger Audiences:</b> More people can attend. Cost per person is reduced and you can see and hear each other as if you are in the same room.	<b>Resentment:</b> Constant use of teleconferencing may disappoint some business executives who may feel deprived of their entitlement to travel and benefit from traveling allowances and other such benefits.
<b>Unity:</b> Provides a shared sense of identity. People feel more a part of the group, more often. Individuals or groups at multiple locations can be linked frequently.	<b>Leader dominance:</b> Usually the leaders of the pack dominate discussions and at times act as dictators and mere disseminators of information. This can suppress team work and participation.
<b>Flexible:</b> With a remote receive or transmit device, transmit or receive sites can be located anywhere. It is also accessible from any location on the planet.	<b>Documents:</b> Apart from the agenda list, bulky documents such as plans, financial reports and proposals can only be transferred by the electronic file transfer protocol (ftp) such as Google Docs.

Table 1.4. Advantages and disadvantages of teleconferencing.



**Learning Activity 12.1.2.3: Complete the activities given below.**

1. What is the meaning of the word 'Teleconferencing'?

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2. Which of the six (6) types of teleconferencing is considered to be the simplest, and why is that so?

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3. Except for audio teleconferencing, the other forms of teleconferencing are not common yet in PNG. Why do you think that is so?

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4. Which of the different forms of teleconferencing described do you prefer? Why?

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5. What two (2) advantages does a mobile phone have over a fixed, landline phone?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.3 TYPES OF WRITTEN COMMUNICATION

#### Introduction

In this module unit, you will study the concept of Types of Written Communication covering areas such as Introduction to Written Communication and Memorandum, Computer, Email, Internet, Telex, Fax, Telephone Messages, and Correspondences. As you progress in this study, it will give you an insight of the importance of such medium not only the commercial world today both for personal usage purpose too. This concept and the whole topic is a necessary tool in business and formal institution today.

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#### **Learning outcomes;**

On successful completion of this module unit, students will be able to,

- Define the two main types of written communication and state their usage and importance in formal organizations
  - describe the communication mediums used in organisations, today, its differences of each one and their advantages and disadvantages.
-



### 12.1.3.1 Introduction to Written Communication & Memorandum

Communication by means of written **symbols** – either printed or handwritten – is called written communication. Written symbols can come in the form of letters, pictures, diagrams or a combination of any three. Written communication has been practised for centuries since man first discovered writing and painting techniques. Cave paintings, for example, date back to the prehistoric times. So the early humans developed their own writing styles to communicate important messages within their groups and to other groups competing for the same territory or resources.

#### The need for written communication

1. Maintaining a proper business relationship

Letters and business correspondence documents are part of everyday business activities, of getting in touch with new clients and old ones too. Files are created and referenced whenever they are needed or required.

2. Serves as proof

All written letters or receipts of payments are copied in duplicates or triplicates and are kept in files as strong proof of communication.

3. Creates and maintains goodwill

Correspondences between organisations are regular and written communications are good source of communication amongst businesses and formal organisations. By doing this they can maintain their network and increase sales and find new ones too.

4. Inexpensive and convenient

Keeping hard copies are a very convenient and cheap way of keeping records of sales, orders, payments, quotations, or just plain letters of introductory new goods and services on offer.

5. Formal communication

Written communiqués (letters, reports) are evidences of formal communication between businesses and other organisations.

6. Independent of interpersonal skills

This is an important way of keeping in touch with individuals and businesses or vice versa. Firms with good communication skills are able to maintain their relationship through this very inexpensive method of communication with their clients.

Written communication has great significance in today's business world. It is an innovative activity of the mind. Speech came before writing, but writing is more unique and formal than speech. Effective writing skills involve careful choice of words, their organisation, sentence structuring and unified composition of paragraphs. Also, writing is more valid and reliable than speech. But writing causes delay and takes time as feedback is not immediate.



There are many forms of written communication; for example – newsletters, letters, memos, books, articles, reports, advertisements, circulars, posters, and notices. Some of these are used more often while the use of others is restricted to certain organisations.

The two categories of written communication are;

1. Non-verbal written communication.
2. Verbal written communication.

### 1. Non Verbal – Written Communication

Written words are the usual **code** or means through which written communication is carried out. However, sometimes, a written message can take the form of pictures, diagrams and symbols instead of words. When words are used, written communication can become very long. This is because people try to explain ideas and concepts, some of which are difficult or technical.

Words are related to the oral form of communication while pictures, diagrams and symbols represent **visual** communication. When words and numbers are written on paper it takes the written form. Likewise, when diagrams, pictures and symbols are drawn or presented on paper, they also take the written form. They both convey messages, but are done differently.

Words, numbers, symbols, pictures and diagrams are codes. We use codes in communication. The communicator will have to decide what code to use to communicate a certain message. Also, language consideration is important.

English is the dominant language of communication globally. However, some countries continue to use their own language. Japan, China, Germany, Spain, France, Saudi Arabia and Russia, among many others, still use their language. In PNG English, Tok pisin or Motu are the official language for most communication purposes.

The English language has its writing system which is the alphabetical structure. The Japanese, Koreans, Chinese, Arabians, Indians and Russians are among countries have their own writing system. Their writing systems are well-developed and compliment their languages.

Another way to communicate is through the use of internationally recognised symbols and signs. Already there exists a long list of internationally recognisable symbols and signs. Symbols are of two types; **traffic safety signs** and **industrial signs**. Industrial signs include safety notices in factories, cargo handling signs, and chemical signs. Traffic safety signs include: road traffic signs, disability signs and signs on public toilets.

Because many symbols such as those presented in figure 1.8 do not contain words, it is easy for anyone from any language background and with no education to interpret the meanings.





Figure 1.8. Some internationally recognised symbols.

That is why picture symbols or signs are considered to be the international language, just like common gestures such as waving, nodding, and hand-shaking.

Let us briefly look at the four symbols shown in figure 1.8.

1. The first image clearly tells people not to touch or remove something. This sign could be used to indicate a dangerous or poisonous object or item.
2. The second image shows a person running towards an opened door. Usually, this sign is placed at the emergency door of a building.
3. The third sign has the word 'stop'. This sign warns people to stop. Example; when placed at an intersection, motorists have to stop, look left and right, and proceed if the way ahead is safe and clear.
4. The final picture or sign is a human figure throwing a piece of paper into a rubbish bin. If this sign appears on the package of a product, we know straight away that the package has to be disposed in a rubbish bin.

There are many such signs, symbols and pictures used around the world today. These pictures and symbols are multilingual; they can be understood by people of any language group.

**Communication by means of written symbols either printed or handwritten on paper as words, numbers, diagrams, pictures and symbols is called written communication.**

### Verbal-Written Communication

Verbal-written communication refers to the type of written communication that can be verbalised. Words are directly translated into the written form. Therefore, it is also easy to read out those same words from the paper. It is also easy to read out a written message. Letters, fax messages, memos, newsletters, etc. are all forms of verbal-written messages. They can be read out easily from the paper because words are used.

The encoding of the message is as important as the decoding part. That means whoever writes the message must understand the message to be communicated. Also the message must be communicated using appropriate words, in a language which is understood by the intended receiver.



## Memoranda

**Memos** or **memoranda** (plural) are used for internal communication. Memos can be sent in any direction – up, down, sideways (*needs explanation*). Managers can use them to communicate suggestions, reminders, call for action, motivate workers and give direction. They serve the same purpose as letters, except that they are used inside an organisation.

### Purpose Of memoranda

There are two types of memoranda – minute and memorandum. A **minute** is used to communicate with someone in the same branch or section. It is different from meeting minutes. A **memo** is used to communicate with someone in the same department but in a different section or branch. Both forms of memoranda represent written communication and are used for internal communication.

Two different sizes of memo pads are used. The A5 size is used for less formal and usually handwritten memos while the A4 size, which is for more formal communication within the organisation, is usually type-written.

### Format and structure

The format of a memo is basically the same for all organisations. Organisations usually have their logo information on the top, just like the letter head. However, somewhere at the top the words 'Internal Memo' is written to show that it is different to the letter head. The memo head will also have pre-typed labels such as: 'To', 'From', 'Date', 'Cc' identifying the recipients' of copies and the 'Subject'. *Statement needs elaboration*

Usually, the structure is similar to letters. The structure and style depends on 'what' you are writing and 'to whom' you are writing.

Part	Description
Subject heading	States the subject matter of the memo
Introduction	One or two sentences explaining the purpose of writing
Body	Important points of the message are stated either in point form or as paragraphs.
Conclusion	A sentence reminding the reader for action required or points to note.

Table 1.5. Parts and description of a memo.

### Style

The receiver of the message influences the style, tone and structure of the memo (this statement does not make sense). It is often the **tone** and **style** and not the content that influences the recipient. Therefore, the way you write has much effect on your recipient as what you write.

All business communication needs a formal style especially in terms of its tone. The tone of writing should be polite and friendly. In addition, proper vocabulary should be used as well.



### Vocabulary

When writing a memo, it is vital to use simple language. Avoid **jargon** or technical language unless it is necessary. Also, avoid using street or informal slang as well as abbreviations except common-use abbreviations such as COD (Cash on Delivery), FIFO (First In, First Out), etc. if the writer is sure that the reader understands them.

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**Learning Activity 12.1.3.1: Complete the activities given below.**

1. Define 'written communication' in your own words.

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2. Have you ever been involved in any written communication before? If yes, specify the nature of the communication, when it was undertaken and if the outcome was achieved.

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3. Why do you think written communication is important to businesses?

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4. You are a supervisor of the production unit, and you wish to request the maintenance supervisor to supply a spare part to a production machine. What type of memo will you use, and will it be formally or informally communicated?

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5. What are some characteristics of a good correspondence. *Better to give a number.*

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.3.2 Computer – Email & Internet

#### Internet and the Computer

The Internet was a by-product of the computer technology. It developed out of the concept of computer networking.

A computer is a complex electronic device. It is not possible to study the whole subject of computing. A computer undertakes input, processing and output of data. It is a very powerful tool to use because of its speed, reliability and high storage capacity. These characteristics of computers can now be found on a computer **silicon chip** called a '**microprocessor**'. A microprocessor is a complete computer on a silicon chip. A computer chip is so tiny that it can be fitted in any electronic device from as small as children's toys to as large as aeroplanes and ships.

A microprocessor does the following things:

1. Stores data and instructions waiting to be used
2. Follows changeable instructions
3. Does input, processing and output.



Figure 1.9. A Desktop Personal Computer.

Modern computers are **digital**, that means all information or data is stored as strings of zeros or ones. The computer processes – thinks – by manipulating these digits. Every command and input is converted into **digital data** – a string of zeros and ones.

Microsoft and Apple Macintosh are currently two of the world's leading computer software companies. All computers used in the world are therefore using either Microsoft operating systems or Apple Macintosh operating systems. An operating system is like a bridge that enables the user to communicate with the **computer hardware**.

Microsoft computer operating systems such as Windows 2003, Windows 2009, Windows Vista, Windows XP, Windows 7 and Windows 8 are fitted with the **Internet Browser**. This is a tool that enables users to connect to the internet and access it. Apple Macintosh also sells its



operating systems such as 'Mac OS9', that allow for Internet access. Most computers are fitted with a component called '**network card**'. This enables computers to be hooked onto a local area network (LAN).

### **What is the Internet?**

The Internet is the worldwide connection of millions of computers connected to thousands of different networks. It is commonly referred to as the **world-wide-web** (WWW). These computers 'communicate' or share, exchange and transmit data between each other on the same network or another network. A network is created when computers are physically linked to each other.

Tim Berners, a Swiss Physicist, first discovered the Internet in 1989. But this technology was first used publicly by the United States Defence Department during the Cold War era. Today, no one really owns or controls the Internet. It is a global information super highway. It is similar in some respects to the telephone networks that allow any person to call any other number anytime and anywhere. Each network is run by its own operating centre and guarded by the laws in their country and international laws.

The principle of Internet technology is sending and receiving data in the shortest time possible from anywhere in the world. The Internet therefore knows no boundaries such as geographical, political, and cultural

### **Internet Browser (search engine)**

An Internet browser is a program that lets you navigate the world-wide web (WWW). A browser displays web pages. More and more information becomes available over the Internet every day. You can buy books, check your bank account, buy and sell stock, order groceries or even read the newspaper on the internet. But you need to have internet connection and a browser to do it.

Google Chrome is by far the most popular browser now. Other equally popular search engines are 'Yahoo', 'Firefox', 'MSN' (Bing), and 'Yippy'. Google, MSN and Yahoo also allow users to create e-mail accounts.

### **Internet Addresses**

For messages to be transmitted every computer in the Internet must have a unique and specific address. An **Internet protocol** (IP) address consists of four numbers separated by periods. These numbers are only recognised by computers while humans use what is known as **Domain Name Systems** (DNS).

The national education department's domain name, for example, is <http://www.edu.gov.pg>. This naming structure will give you clues about the address. '*http*' stands for 'Hyper Text Transfer Protocol'. '*www*.' stands for world-wide-web, '*edu*.' is the initial of the organisation - education, '*gov*.' stands for government and '*pg*.' is the country suffix for Papua New Guinea.



To gain access to the internet most people open an account with an internet service provider (ISP) in their local area. To connect, they 'dial-up' to their ISP's server and 'log-in' with their account name and password. Daltron and Datec are two of the few private ISPs in Papua New Guinea. ISPs must first obtain a license to gain access to the information 'super highway'. In PNG the authorising body is called 'NICTA'. It is an agency of the National Government.

### Websites

A **website** is a collection of pages in the web. Homepage, as the name suggests, is the main or opening page of a website. All internet-based firms, organisations and government departments develop their own website linked to a homepage. This **homepage** is developed and hosted by an internet service provider. Daltron and Datec can host a website for a fee.

A website offers the public useful information about an organisation. It also enables the public to interact or communicate with the organisation through the internet. The URL or **Uniform Resource Locator** is the specific address of a webpage, like <http://www.edu.gov.pg>.

### Electronic Mail (E-Mail)

**Electronic mail** or E-mail, so far, is still the most popular service of the Internet. It is better than the traditional 'snail mail' by post and telephones. E-mailing is cheaper than long distance phone calls. E-mailing is better than fax as people can send forms, documents and even coloured pictures as attachments.

Electronic mail is perhaps the most frequently used form of business communication in urban centres. It is well suited to business communication.

Let us take a hypothetical company called BizMark. Its branch office in Rabaul develops a marketing plan that must be approved by head office in Port Moresby. The plan is keyboarded on a word processing machine in the Rabaul office and then transmitted electronically to a compatible word processor in Port Moresby. No paper is used, BizMark loses no time waiting for the mail to be delivered. When the plan is received in Port Moresby, it can be read from the screen, or printed out if a hard copy is needed. A response is equally speedy and straightforward.

Accessing the Internet through a mobile phone is a new experience here in PNG. This is a result of the information and communication technology (ICT) revolution taking place every day. With the advent of 'Smart-phones' the Internet is now at our fingertips.

Internet cafes have sprung up in urban centers to make Internet access possible for the public. This is a commercial service which people pay for.

### E-mail Format

The format of an e-mail is similar to that of a memo. To send and receive e-mail, you must have access to the Internet. When you click '*write message*' on your computer, a format or message pad will show up. You start by inserting the e-mail address of the recipient and the



subject matter. After the message is typed in you click where it says 'send', to send the message.

<p><b>To:</b> <a href="mailto:jeffwama1@gmail.com">jeffwama1@gmail.com</a></p> <p><b>Subject:</b> Request for quotation</p> <p><b>Message:</b> Dear Jeffery, please quote me the following items:</p> <p>Business in Melanesia – Book 1</p> <p>Business in Melanesia – Book 2</p> <p>Thank you,</p> <p>Dr. John Evans</p> <p>UPNG Bookshop Manager</p>
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Figure 1.10. Sample e-mail message.

An e-mail message pad appears when you click to write an e-mail. Its layout is similar in many ways to a memo format. The e-mail address of the original recipient is the first one that appears at the top. If the message is to be copied to other recipients then the titles 'Cc' and 'Bcc' are used. Cc applies to other email addresses of recipients copied in. Bcc is used for other addresses copied in but not visible to the original recipient.

The reader will know the nature of the e-mail from reading the subject. The main message is typed in following the subject line. E-mail messages are usually kept as brief as possible. Only the key points are written. If a full letter is required to be sent, it is better to type out the letter separately, than send it as an email attachment.

### Netiquette

The tone of e-mail is informal, like a polite, friendly telephone conversation. Remember, however, that business e-mail must always be professional. There is a set of rules which guides the use of the e-mail service. They are the manners which you need to know and follow. These is what we call '**netiquette**'. Below are ten (10) email rules to help you when Using the email system.

1. Respond promptly to your e-mail; do not let it pile up in your inbox.
2. When you send out an e-mail, send it only to people who will be interested in it.
3. Make sure the tone and grammar of your message is correct. Do a spell check before you punch the 'send' button.
4. Do not send long attachments without obtaining the recipient's permission.
5. Do not type in all capital letters. Keep paragraphs and lines short.
6. Put the most important part of your message first, since some people receive a lot of e-mail and may read only the first few lines.
7. Use a concise, direct subject line to gain your reader's attention.
8. Do not write in telegraph style; use an easy, natural tone. Construct full sentences.
9. Avoid unfamiliar abbreviations.
10. Finally, keep e-mail messages relatively short.





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## Requirements of Accessing the Internet

### Wireless Internet Access – Mobile Phones

The Internet is no longer a restricted place for a select group as it once was a few years ago. Mobile phone companies have introduced smart phones which are 'Internet ready.' These smartphones are fitted with microprocessors. The microprocessor ensures that mobile phones link to the Internet through wireless technology. Mobile phone companies such as Digicel and B Mobile can easily configure your mobile phone to access the Internet. In PNG these two mobile phone companies are also our '**Mobile Broadband Networks**'. They can provide wireless broadband Internet service to mobile phone users as well as computer users.

Regardless of your location you can access the Internet any time of the day. Once configured, you are online. A simple click on your Internet browser icon on the phone will open to 'Google' or another search engine. Type in a keyword', then click 'search' to bring up a number of related Internet sites. There can be thousands of results from your search. Open each site to check out data, video, or audio files. It is that easy.

### Mobile Broadband Wireless USB

The mobile broadband wireless USB plugs into your laptop computer and connects to the Internet regardless of your location. You can browse the Internet, read e-mails, watch videos and download files without visiting an Internet 'hotspot' or 'Internet café'. The plug and play technology provides a quick and easy setup process to immediately connect your computer to the Internet.

In PNG, Digicel and Telikom PNG are selling Internet wireless USB sticks or modems. When you shop for an Internet stick for laptops, ensure you know what functionality you require. Various Internet sticks connect you to your home network, and other Internet sticks connect to mobile broadband networks. Usually, the price depends on the capacity of the USB Internet stick. For example, 2 GB Internet sticks will cost less than a 3 GB Internet sticks. Therefore, the larger the memory size, the higher the price of the wireless USB modem.



Figure 1.11. A Telikom PNG Wireless USB Modem.

PNG is well and truly online with the number of Internet users surging every day. Soon, a large size of PNG's population will be online, surfing the Internet. The information and The Internet has so many advantages and disadvantages. If used unwisely it will cause many problems for us as individuals and as a nation. Communication (ICT) age is already here now at our fingertip.



## Netiquette

According to Encarta dictionary, netiquette means rules of acceptable behaviour. The rules and conventions governing correct or polite behavior in society in general or in a specific social or professional group or situation. It dictates that wedding invitations should be acknowledged in writing.

Below are seven (7) important points to guide the use of the Internet.

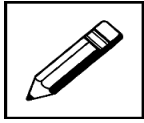
1. **Illegal content/Porn/Adult sites** - Internet content is varied – some content is helpful but not all. When accessing the Internet DO NOT access sites that contain pornographic or illicit content. Pornography disturbs the mind and leads to moral and ethical problems. Another area to avoid is content relating to cult practices. This is yet another evil which can destroy your future.
2. **Copyright violation** - Artists like musicians in PNG complain about illegal downloading of their work. Also, recording studios like CHM continue to appeal to people not to buy pirated music. Copyright law is a weak area that still has to be improved. Because of this weakness in copyright law people are taking advantage of it.
3. **Plagiarism** - The content that you find on the Internet has been authored or written and uploaded by individuals and organizations. Therefore, always acknowledge the author or source. Do not copy everything as it is, as this will amount to plagiarism.
4. **It costs money** - If you are using Internet services provided by an organization such as a government department, company, school or university, do not abuse it. You should use it for the right purpose. Unnecessary Internet browsing costs money. If you are paying for your own Internet access, you should be cost conscious. It costs money to access the Internet.
5. **Time waster** - Whether you are a self-employed person or an employee of a firm, you must know that time is money. You are paid based on the time you spend at the work place. Therefore, you should spend your time doing the work you are paid for. Use the Internet as a tool to help accomplish your work.
6. **Intrusion of privacy** - Social Media sites such as Facebook, Twitter and Online Chat Rooms) benefit many users. The popularity is therefore rising. But, a growing number of users are abusing the social media. They lack netiquettes or Internet manners. Users should not bully or intimidate other users. They should not use indecent or improper language online.
7. **Cybercrime** - Cybercrime refers to any illegal activity conducted over the internet. The most common forms of cybercrimes around the world are: spam, fraud, cyber bullying,



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drug trafficking, cyber terrorism and piracy. Other illegal activities worth our attention are: hacking, money laundering and theft, identity theft, child sexual exploitation and pornography. You should steer clear of any of these activities related to cybercrime.

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**Learning Activity 12.1.3.2: Complete the activities given below.**

1. Develop the Internet Domain Name for the following organizations;

a. Tourism Promotion Authority

\_\_\_\_\_

b. University of Papua New Guinea

\_\_\_\_\_

c. Mainland Holdings

\_\_\_\_\_

2. You are an accounts clerk of PNG Trading. You are to draft an e-mail message, asking your Accounts' supervisor when the next company budget meeting will be held. The accounts Supervisors' name is Jo Lei.

**TO:** \_\_\_\_\_

**SUBJECT:** \_\_\_\_\_

**MESSAGE:** \_\_\_\_\_

\_\_\_\_\_ (Your Name) \_\_\_\_\_ (Your Position)

3. List one (1) advantage and one (1) disadvantage of the widespread Internet access in PNG.

Advantage \_\_\_\_\_

Disadvantage \_\_\_\_\_

4. Why is it important to promptly reply email correspondences?

\_\_\_\_\_

\_\_\_\_\_

5. Why do you think some e-mails are never read or responded to by the receiver?

\_\_\_\_\_

\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.3.3 Fax and Telephone Messages and Correspondences

The verbal-written communication method takes mostly the form of **correspondences**. A correspondence is any written or digital communication exchanged by two or more parties. Correspondences may come in the form of letters, memos, text messages, emails, voicemails, notes and postcards. Correspondences are important for businesses because they serve as a paper trail of events from point A to point B.

Correspondence usually takes place between senders and receivers of messages. It can be internal or external to an organisation. Some correspondences are a follow up of verbal communication. Others are initiated by one party to generate further correspondences.

Prior to the invention of telephones, telex and telegrams, letters were the only means of correspondence. Letters served both business and personal interests. Even today, letters, memos, circulars and other written forms of correspondence are still very valuable.

**A correspondence is any written or digital communication exchanged by two or more parties.**

Below are some common correspondences which you should know.

#### Letters

Letters continue to play an important role in the conduct of business. Letters provide the most personal contact that people make with organizations. Frequently, letters are an organization's main contact with the outside public.

It is very important that letters written for a firm are of a high standard. The way a letter is presented and written should be given careful consideration. A badly written letter will give people a bad impression of the firm.

All good letters are as accurate as possible. Dates, figures and facts should always be checked for accuracy. Secondly, the expressions used should be as clear as possible, to avoid any chance of misunderstanding. Always use simple words. Finally, courtesy and politeness are golden rules for all letters, just as they are when talking to a person.

#### Electronic Messages

**Electronic messages** are those which are transmitted through electronic equipment such as telephone, fax and Internet. Some of these technologies are new and many people in PNG are coming to terms with it.

We will now consider the common forms of electronic messages. What you should understand is that these messages are sometimes referred to as verbal-written communication or messages.



### Telephone Message

Telephone messages are initially transmitted using voice. A telephone message can be written down by the receiver if it is needed. This is done using a message pad. The important information found on the message pad include: *time of call; name of caller; date when call was made; importance of the call; and the message itself*. It must also be indicated somewhere if a return call is necessary or not. A telephone message must be as brief as possible and never lose the original intent of the message. The message must be passed onto the person concerned. You should learn more about the functions of a telephone in unit 12.1.5. Also, refer back to unit 12.1.2 for a sample telephone message pad.

### Fax Message

A fax message is transferred using a fax machine. Written messages called fax (**facsimile**) can be transferred across normal telephone lines as fast as they possibly can. A fax cover sheet is usually prepared and sent together with the message. You will learn more about the fax technology in unit 12.1.5.

### E-mail

The e-mail technology enables us to transmit written messages on the internet. Email messages are usually short, and can include attachment of electronic files. An email message can be printed out by the receiver using a standard printer and kept as a '**hard copy**'. Refer to the sample e-mail message given earlier on in this unit.

An e-mail is originally meant to be a short form of communication. It should not be very long like a report or a two-page letter. But, the advantage of e-mail is that you can still send other long documents as attachments to the receiver. The receiver can save them onto the computer and access or read it later at his/her own time.

### Short Messaging Service (SMS)

Short Messaging Service (SMS) is common in PNG today with mobile phone users. SMS are usually short and are charged by the communication companies. Both B Mobile and Digicel provide this service at a fee. A SMS service is usually limited to a few characters or lines. So senders normally use shortened words to save space. For example, the word 'thank you' may be written 'thnks'; or the phrase 'good bye' may be written 'bye' only. From this we can conclude that a SMS is not part of the official list of correspondences used by businesses. However, it still serves its place in communication.

### Importance of Business Writing

Writing is a basic management skill. Good writing skills are needed by a manager, whether senior or junior. Writing well improves a manager's chance of further promotion. However, Writing badly can lead to wrong decisions, confusion and costly mistakes.

Middle managers are expected to cope with different types of writing such as technical reports, circulars, advertisements, press releases, promotional materials, speeches and in-house journal or magazine articles.



Good management writing has the following characteristics;

- **Readable** – as easy as possible for the reader to understand.
- **Appropriate** – suitable for your purpose, message and receiver.
- **Mechanically sound**- uses correct spelling, grammar, punctuation and business formats.

### Advantages & Disadvantages of Written Communication

The table below summarizes the common advantages and disadvantages of written communication. You should go through each of them and try to identify additional advantages and disadvantages if you can.

Fax Message	
Advantages	Disadvantages
<ol style="list-style-type: none"><li>1. Written messages can be transferred as fast as they possibly can.</li><li>2. Provides written proof in case of a dispute.</li><li>3. Written communication is more precise. Can be stored, analysed and used for future reference.</li><li>4. What is written on paper can be copied to other recipients in distant places.</li></ol>	<ol style="list-style-type: none"><li>1. It may take a while to get to the intended recipient.</li><li>2. It costs money to send a fax.</li><li>3. Blind people cannot read what is on paper unless another person reads to them.</li><li>4. Time consuming – coding and encoding takes time.</li><li>5. It is not flexible; it cannot be changed once it is written and sent.</li><li>6. Poor writing skills can affect communication, leading to misunderstanding.</li><li>7. Lack of secrecy. Once it is on paper, anyone can read it.</li></ol>

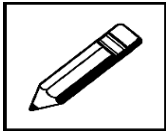
Turn to page 61 and continue reading the advantages and disadvantages of the other types of written communication.



E-mail Message	
Advantages	Disadvantages
<ol style="list-style-type: none"> <li>1. No need for personal contact.</li> <li>2. E-mailing is cheaper than telephone calls</li> <li>3. Provides written proof in case of a dispute.</li> <li>4. Can be stored, analysed and used for future reference.</li> <li>5. An e-mail can be copied and forwarded to other recipients in distant places.</li> <li>6. E-mail messages are usually short, and can include attachment of electronic files.</li> <li>7. An e-mail message can be printed out and kept as a 'hard copy'.</li> </ol>	<ol style="list-style-type: none"> <li>1. Communication is only possible if Internet is available.</li> <li>2. Delay in communication if the receiver does not open the 'inbox' to read</li> <li>3. Costly. The Internet costs money.</li> <li>4. Blind people cannot read unless another person reads to them.</li> <li>5. It is not flexible; it can't be changed once written and sent.</li> <li>6. Poor writing skills can affect communication, leading to misunderstanding.</li> <li>7. Time consuming – encoding and decoding takes time.</li> </ol>
Short Messaging Service (SMS)	
Advantages	Disadvantages
<ol style="list-style-type: none"> <li>1. Saves time and effort.</li> <li>2. An SMS costs less than a telephone call.</li> <li>3. A SMS provides a written proof in case of a dispute.</li> <li>4. A SMS can be stored and used for future reference.</li> <li>5. A SMS can be copied and forwarded to other recipients.</li> <li>6. SMS are usually short and effective.</li> <li>7. SMS can be sent from any location through the mobile phone.</li> </ol>	<ol style="list-style-type: none"> <li>1. Only possible with a mobile phone.</li> <li>2. May delay communication if the phone is off, or if the recipient does not check the message 'inbox.'</li> <li>3. Costly. It still costs money.</li> <li>4. Blind people cannot read the message.</li> <li>5. Time consuming – coding and decoding takes time.</li> <li>6. Can lead to misunderstanding if message is poorly coded.</li> <li>7. Doesn't allow for long messages.</li> </ol>
Telephone Message	
Advantages	Disadvantages
<ol style="list-style-type: none"> <li>1. A message can be taken for the intended recipient of the call by another person.</li> <li>2. It allows for the smooth flow of communication.</li> <li>3. Provides written proof that an incoming call was received.</li> <li>4. Callers feel confident when a message is taken by the receiver.</li> </ol>	<ol style="list-style-type: none"> <li>1. It may take a while to get to the intended recipient.</li> <li>2. Poorly written message can lead to misunderstanding.</li> <li>3. Lack of secrecy. Once it is on paper, anyone can read it.</li> <li>4. Time consuming – encoding and decoding takes time.</li> </ol>

Table 1.6: Advantages and disadvantages of the different types of written communication





**Learning Activity 12.1.3.3: Complete the activities given below.**

1. Define the term 'correspondence' in your own words.

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2. What is the main purpose of a correspondence?

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3. In business communication, why is 'writing' more reliable than 'speech'?

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4. Why is it important for business people to be conscious of the cost of communication?

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5. What is the difference between a fax message and a telephone written message?

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6. Why do you think the 'SMS' is not a very suitable medium of business communication?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



## 12.1.4 COMMUNICATION STYLES AND STRATEGIES

### Introduction

In this module unit, you will study the concept of Communication Styles and Strategies which covers areas such as types of communication styles and their strategies. As you progress, it will enable you to get an insight of the whole communication style and how they strategize and impact lives daily.

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### Learning outcomes;

On successful completion of this module unit, students will be able to,

- Identify and describe the different styles of communication .
  - discuss case studies on communication between individuals, managers, to employees or between businesses.
-



### 12.1.4.1 Types of Communication Styles and their Strategies

How we communicate is a product of who we are and how much we are influenced by our external environment. Not many people know what their **communication style** is. They just simply engage in the same communication pattern throughout their lives.

Not all communication styles are useful and effective. That means some styles are counter-productive to the individual and the group or organization he or she is part of. Here we will consider the four main communication styles which we can identify with. After considering all of them you will realize which style of communication truly fits you.

#### 1. Dominant Communicator

Dominant communicators tend to **'run over'** people in interpersonal communication. Such people believe they're never wrong and their opinions are more important than those of others. Because of their misguided beliefs, they tend to;

- publicly criticize others.
- blame others when problems arise.
- use verbally aggressive and threatening language.
- fail to appreciate the achievement of others.
- always interrupting others in communication.
- dismiss new ideas without listening to their reasons.

Because of the above beliefs, a dominant communicator would;

- provoke fear in others.
- invite resistance, defiance, strikes, lying, covering up behaviors.
- damage corporate or group culture and morale.

#### 2. Passive Communicator

The passive communicator tends to turn people off by being indirect and gentle in his/her interpersonal communication. Passive communicators often believe you should not express your true feelings, make waves or disagree with others. They often think other people's opinions are more important than their own. For a passive communicator, these beliefs often lead to the following behaviors;

- Remain quiet even when treated unfairly.
- Ask for permission unnecessarily.
- Frequently complain rather than act.
- Delegate personal choice to others.
- Retreat from interpersonal conflict.
- Agree rather than question direction.

Passive communicators would have the following effects on others;

- Frustration and mistrust because of not knowing where they stand.
  - Presume they lack the courage to be a leader.
  - Open communication is hindered.
-



### 3. Passive-Aggressive Communicator

Passive-aggressive communicators tend to believe you should 'go behind people's backs' instead of dealing with people directly. These unhealthy beliefs often lead to undesirable behaviors such as;

- Appearing to agree with others when they really do not.
- Making sarcastic remarks and taking subtle digs at others.
- Sending critical and unprofessional messages via email or SMS.
- Holding grudges and valuing 'getting even'.
- Refusing to help others.

Because of the above behaviors a passive-aggressive communicator would have the following effect on others;

- Increased factions or groupings and favoritism.
- Increased negative gossip or 'back-stabbing'.
- Low interpersonal trust.
- Low job performance.

### 4. Empathetic Communicator

The empathetic communicator interacts effectively with others to maintain healthy long-term relationships. Empathetic communicators generally believe that;

- personal opinions and the opinions of others are important.
- collective decisions are important.
- getting input from others boosts morale and generally leads to better decision-making.

These beliefs generally lead to the following desirable behaviors;

- Communicating expectations instead of demands.
- Focusing of proactive and action-oriented conversation.
- Communicating in a honest and direct manner.
- Working to achieve goals without compromising others.

Empathetic communicators have the following effects on others;

- Increased perception of autonomy or personal control.
- Increased self-motivation.
- Improved sense of appreciation and respect.
- Increased level of interpersonal trust, respect, honesty and openness.

### Communication Strategies

Communication **strategies** serve as the blueprints for communicating with the public, stakeholders, or even colleagues. Communication strategies should;

- Outline the objective/goals of the communication.
- Identify stakeholders.
- Define key messages.
- Identify communication methods suitable for a specific purpose.



- Specify how to obtain feedback.

All forms of communication have objectives to be accomplished. Objectives may include;

- Providing information.
  - Increase awareness and participation.
  - Encourage action.
  - Changing behavior.
  - Resolving conflict.
-



**Learning Activity 12.1.4.1: Complete the activities given below.**

1. From the four different personal styles explained above, which one fits you? Explain briefly the one that matches your personal style of communication.

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2. Empathy is a skill that some people are born with'. Do you agree with this statement? Explain your answer.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



## 12.1.5 TYPES OF OFFICE EQUIPMENT

### Introduction

In this module unit, you will study the concept of Types of Office Equipment. It covers topics such as telephone, fax machines, photocopiers, scanners, printers, electric staplers, binders, guillotines, shredders, calculators, numerical keyboards and transcribing machines. As you progress through, it will give you a sight of the range of office equipment in use today both at school, home and work too. You will also from a set of case studies of large businesses, suggest modifications to improve identified communication strategies.

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### Learning outcomes;

On successful completion of this module unit, students will be able to,

- Identify and Describe the different types of office equipment, their usages, reliability and functions too.
  - Research skills in communications that are available in formal organizational settings.
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### 12.1.5.1 Telephone & Fax Machines

#### The Telephone

By now you should be aware of what a telephone is because it was covered in module 12.1.2. We discovered that the words '**tele**' and '**phone**' are combined to make one word – telephone. Tele means distance, and phone means sound. A telephone is an electronic device used for communication over long distances. There are several types of phones but the common categories are landline fixed phone and mobile phone. Here in this section we Once again consider the function of the telephone.

The first telephones also used **analogue** signals to transmit sounds, but this has changed. Today, telephone calls are placed over digital networks.

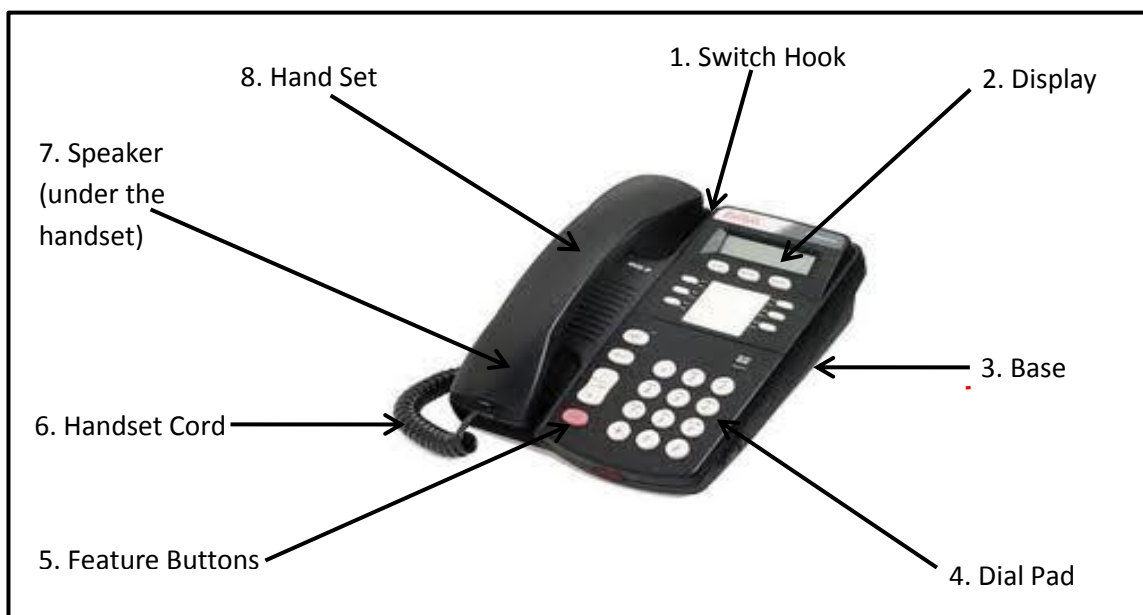


Figure 1.13. Parts of a telephone.

#### Parts of a telephone

Part	Function
1. Switch hook	This is an automatic switch that is activated when the handset is lifted. When the handset is placed on the phone incoming calls can come through. When it is in use, the switch is off and the telephone is in the engaged mode.
2. Display	This is a visual display unit (VDU) which displays telephone numbers and other information.
3. Base	The bottom part of the telephone.
4. Dial pad	Contains digits from '0' to '9' and the symbols '*' and '#' are used to dial a telephone number.
5. Feature buttons	Contains special features on the telephone.





6. Handset cord	This is the cord which links the phone to the handset, making it possible for telephone conversation to be held.
7. Speaker	For the ringtone and other sounds to be heard.
8. Hand set	Contains the speaker and microphone.

Table 1.8. Parts and functions of a telephone.

**A telephone is a device that converts sound and electrical waves into easy to hear sounds, used for communication.**

### Facsimile (fax)

**Fax** technology dates back more than a hundred years. Its development was influenced by another similar technology called the telegraph. A **telegraph** is the first technology that allowed people to send written information instantly through electrical wires.

A fax machine is still an important piece of technology, despite the advances of email and internet technology. It is still found in many offices and even in some homes. It once was the core of office technology.

A fax machine allows people to exchange printed information as fast as they can across the telephone lines.

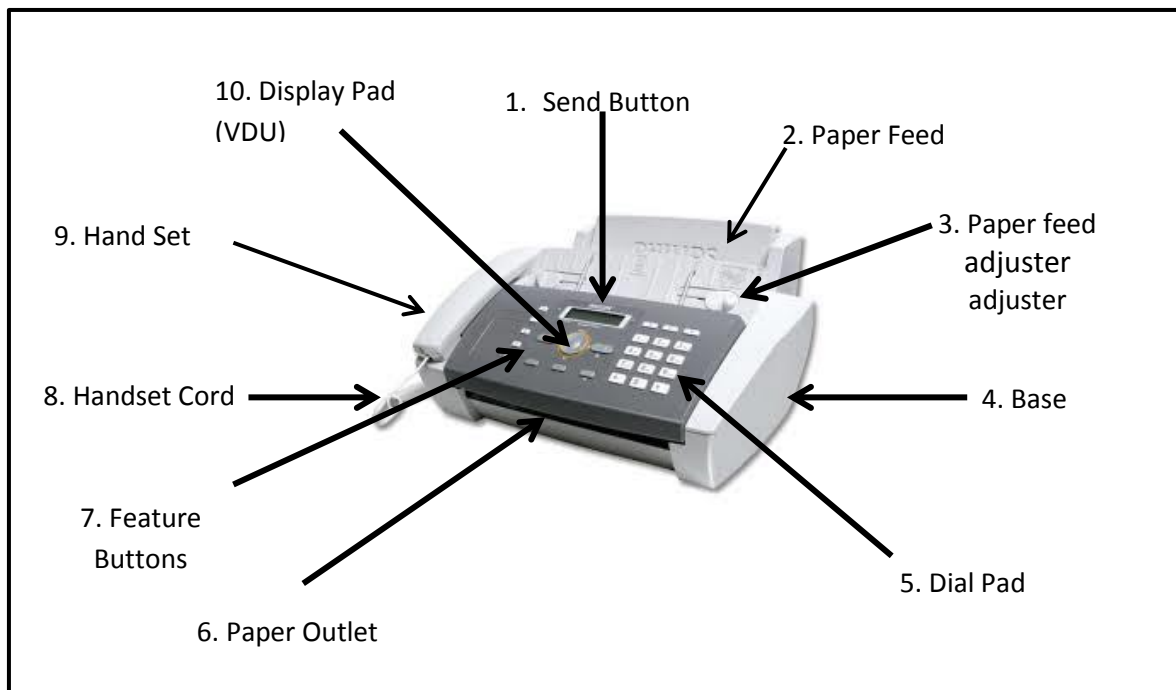


Figure 1.14. Parts of a fax-machine machine.

Turn to the next page to see the functions of a fax machine.



### Parts of a fax machine

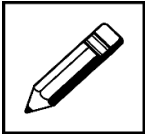
Part	Function
1. Send button	To be pressed after the receiver's fax number has been pressed. This action will transmit the outgoing fax message.
2. Paper feed	Used for A4 papers needed to print out incoming fax. Also it can be used to place an original document prepared as an outgoing fax message.
3. Paper feed adjuster	Used to adjust the paper from A4 to A5.
4. Base	Bottom part of the machine that rests on a table surface.
5. Dial pad	Contains numbers from 0 to 9 used for dialing telephone/fax numbers.
6. Paper outlet	All incoming fax messages are printed out through that tunnel.
7. Feature buttons	Other additional buttons which have specific purposes and can only be used at times when needed.
8. Handset cord	Connects the fax/phone machine to the handset.
9. Hand set	Used to receive and make telephone calls.
10. Visual display unit (VDU)	Shows if a fax is sent or received, and also the fax/telephone numbers for incoming and outgoing messages.

Table 1.7. Functions of a fax-phone machine.

### Internet fax technology

Technology has developed so much that it is possible now to transmit documents between a fax machine and a computer. This is commonly referred to as **Internet fax**. Email to fax technology is emerging as an alternative to the conventional fax machine. This is made possible by new developments in communication technology, especially advanced networking technology.

It is now possible to send an email instantly at minimal cost. Apart from the cost advantage and speed, Internet fax allows staff to access fax messages even when they are out of the office. As long as one can access the World Wide Web, one can receive fax messages instantly. Important faxes will not be missed.



**Learning activity 12.1.5.1: Complete the activities given below.**

1. (a) Write down one (1) similarity and one (1) difference between a telephone and a fax machine.

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- (b) Which one of the two (2) communication tools would you prefer to use if you were in a large organization? State your reason(s)

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2. What is the first technology that allowed the transfer of written documents?

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2. Why do you think many people prefer a fax over the telegraph technology?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.5.2 Photocopiers

#### Photocopiers – making copies of business documents

**Photocopying** may be defined as ‘the reproduction of an exact copy of an original using light, heat or electrostatic charge’. Despite the use of the word exact, most photocopiers produce in terms of black and white copies. Only color copiers can reproduce in color.

There are three significant advantages in the use of photocopying;

1. Accurate copies are produced quickly and, most important, they need no checking because there can be no copying errors.
2. Most methods lend themselves to systems work and will produce masters for some types of duplicating.
3. Drawings, graphs and, in some cases, photographs can be copied direct from the original.

#### Photocopying methods

Photocopying has its origins as long ago as 1839 though it was not developed seriously for office use until after the Second World War. At first all methods available were based purely on photographic techniques requiring photosensitive paper and wet development. Such methods are the **reflex**, **diffusion transfer** and **direct positive processes**. These have become obsolete or out of use because of major disadvantages.

#### Electrostatic copying

The term ‘**electrostatic**’ involves two words: ‘electro’ and ‘static’. We can define it as the use of electricity to produce exact copies of documents steadily. The advancement of electronic photocopiers has enabled organisations to achieve great results. Today, heavy-duty copiers are capable of producing up to 120 copies per minute. These fast machines are often called **duplicator**.

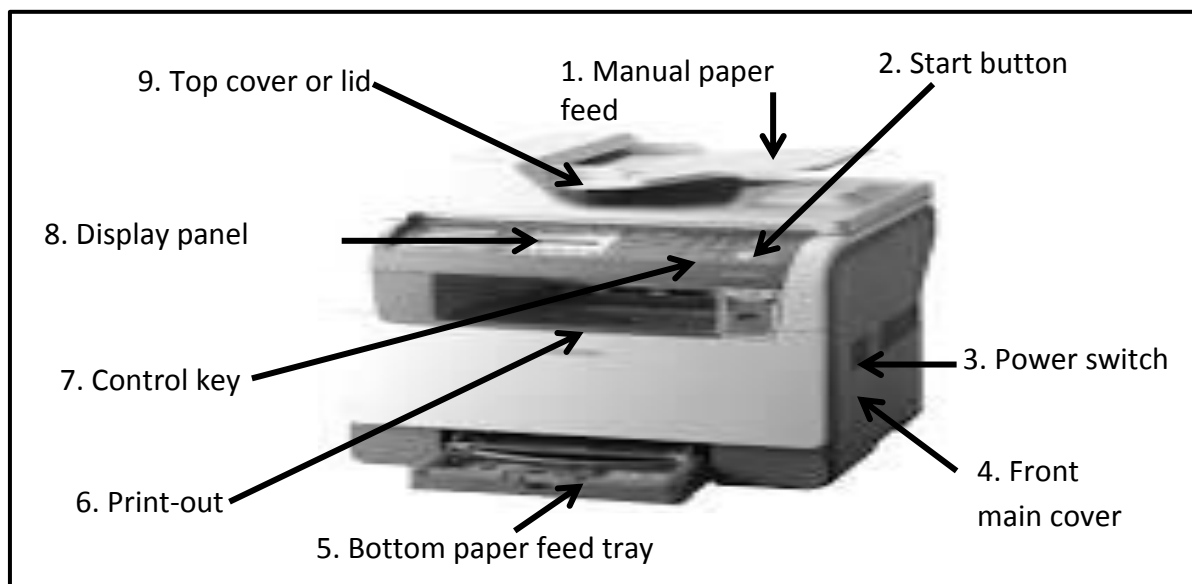


Figure 1.14. Parts of a standard photocopier.



Initial copiers used a **plate** or **drum** to receive the static charge and the inked image ultimately formed is transferred from this to the copy paper. Such machines are commonly known as plain-paper copiers. The second line of copiers use special coated copy paper, which itself receives the charge and on which the final copy image is formed.

### Parts of a photocopier

NO	PART	FUNCTION
1	Manual paper feed	This is where papers are fed into the machine manually for photocopying.
2	Start button	Usually green in color, this button is pressed to start photocopying.
3	Power switch	This is the on/off switch. It is used to turn the power on and off
4	Front main cover	This front cover is opened when the printing cartridge or toner is to be replaced. Also, if there is a paper jam this front cover is opened to remove the jammed paper.
5	Bottom paper feed tray	This is where blank papers are inserted for the machine to use in photocopying. There is one tray for A4 papers and another for A3 papers.
6	Print-out tray	Here printed papers come out and await collection.
7	Control key pad	A variety of buttons can be found here. These are used to provide instructions to the photocopier, For example; number of copies needed.
8	Display panel unit	This digital feature shows the number of copies printed and also other features such as back-to-back copying.
9	Top cover	This cover is lifted to place the original paper on top of the glass panel. Direct photocopying is done after closing the lid and pressing the copy button.

Table 1.14. Parts of a photocopier.

These direct copiers are usually called electrostatic copiers even though the electrostatic process is common to both.

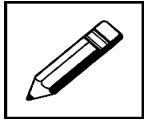
The main advantage of both these methods is that they are fast and dry. Other advantages include the ability to copy colors and photographs. In theory, there is no limit to the number of copies obtainable from an original because the whole cycle is performed for each and every reproduction.

The electrostatic copier has become obsolete. The **plain-paper copier** is becoming commonly used. Many modern plain paper copiers offer additional facilities beyond mere copying. Examples include: double-sided copying, copying in colors other than black, sorting (with add-on equipment), enlarging or reducing the copy image and multi-copying from one original by simple dialing or key-in.

**Multi-purpose photocopiers**

Some photocopiers and **duplicators** perform multiple purposes apart from their traditional role of photocopying. These modern, state-of-the-art photocopiers can be networked and can perform other functions like color scanning, printing and fax transmission direct from the computer. They are very fast. Some such as the 'Sharp MX-2640N Copier' are wireless, and are networked to many computers in the organization. Modern offices can now save money and time by purchasing multifunctional copiers.

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**Learning Activity 12.1.5.2: Complete the activities given below.**

- 
1. List down one (1) advantage and one (1) disadvantage of a photocopying machine.
    - a. \_\_\_\_\_
    - b. \_\_\_\_\_
  2. Why is the photocopier an important office machine?  
\_\_\_\_\_  
\_\_\_\_\_
  3. Do you think it is good investment for a large organization to buy a photocopy machine?  
Explain your answer.  
\_\_\_\_\_  
\_\_\_\_\_
- 

<p><b>CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE</b></p>
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### 12.1.5.3 Printers and Scanners

#### Printer

A printer is a piece of equipment commonly seen in any office today. Printers come in varying sizes and play an important part in the modern office. A printer basically prints or produces a hard copy of the work done on the computer or **word processor**.

In order to activate the printer a computer such as desktop or personal computer must be turned on. Also, the computer must be able to read the printer through the printer driver which has to be installed in the computer. Furthermore, the printer cable must be hooked up with the computer. As soon as the print command is given through the computer, the printer will respond by printing the selected document.

Printers use light (laser) to create dots on a light sensitive drum over which ink or toner sticks on. When paper is pressed with heat against the drum the toner melts onto the paper. The printed paper comes out with the exact imprints designed on the computer. All these actions happen within a short time, usually less than a minute.

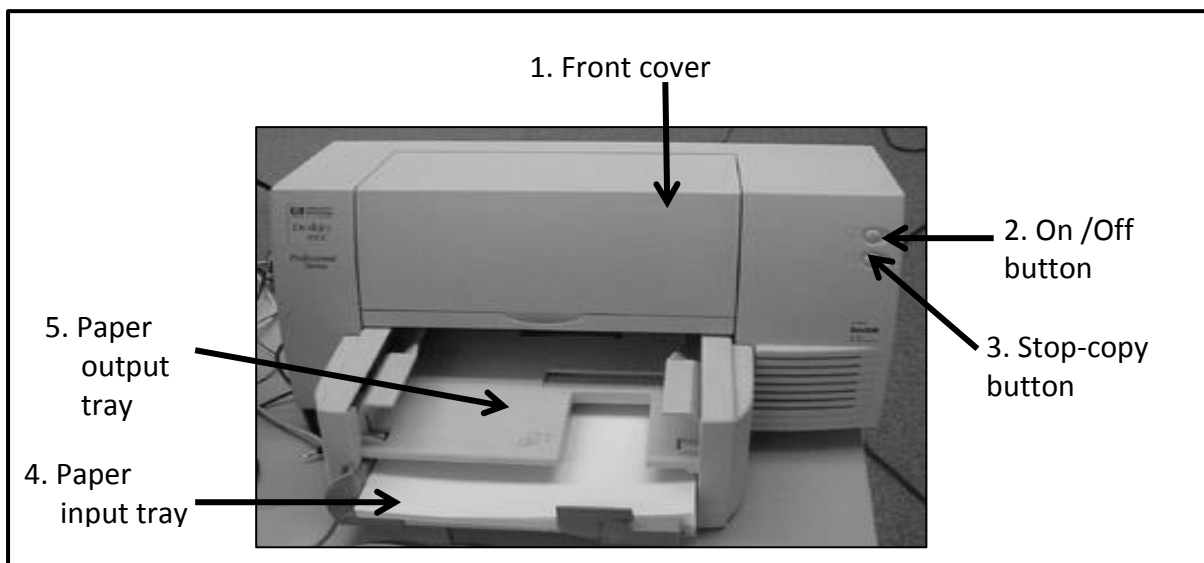


Figure 1.15. Parts of a ink-jet printer.

#### Parts of an ink-jet printer

No	Parts	Function
1	Front cover	Allows the paper to be inserted or released
2	On/Off button	For starting and stopping the printer
3	Stop-copy button	To cancel any printing
4	Paper input tray	For putting the paper in preparation for printing
5	Paper output tray	For the printed paper to be picked up

Table 1.9. Explanation on parts of a ink-jet printer.





### **Ink jet printers (non-compact printer)**

This printer uses drops of **magnetic ink** to produce dots on paper to produce text or images. The print quality is almost the same as a laser printer's. Its main problem is that the ink is very expensive. A second problem is that the ink is water soluble and will run if the paper gets wet. Also, of all printers, it has the highest cost per page. Its advantage is that colour prints are of the highest quality at a reasonable cost.

### **Laser printers (non-impact printer)**

The laser printer is commonly used today and comes in various sizes. It is preferred over others because of its quality. For black and white printouts, the cost per page is very low. Some manufacturers such as HP (Hewlett Packard) have come up with smaller office printers which are selling at a price of as low as K150. However, the toner (ink) is usually expensive, and it runs out quickly. So a smaller printer is not suitable for a busy office.

Explained here is how the printer produces an image.

- A laser makes dots on a light sensitive drum.
- Toner (very tiny particles of plastic) sticks to the drum where the dots were made.
- Paper is pressed against the drum and the toner is placed on the paper.
- The paper is heated and the toner melts into the paper.

**Printers use light (laser) to create dots on a light sensitive drum over which ink or toner sticks on. When paper is pressed, with heat, against the drum the toner melts onto the paper. All these actions happen within a short time, usually within seconds.**

### **Scanner**

A scanner takes a hardcopy of a document – word, picture, or graphic and converts it to an **electronic file** copy. This electronic copy or '**soft copy**' can be saved in the computer's hard disk.

The basic functions of a scanner are:

1. Put printed pictures, diagrams and text into a computer.
2. Convert an image into dots that the computer can understand.

In order to activate the scanner a computer such as desktop personal computer must be turned on. Also, the computer must be able to read the scanner through the scanner drive. This driver or program must be installed in the computer. The scanner is connected to the computer through a cable. When the scan command is given through the computer, the scanner will start its operation.

You can scan any document such as photographs, maps, letters, letterheads, diagram and certificates. Once a soft copy is saved in the computer you should make sure to create a file for it for easy retrieval. These files are stored so that the organisation can have a;

- back-up electronic file.
- printed hard copy when needed.



- copy that can be easily transferred into another computer or electronic device.
- copy transmitted to another computer on a network – For example; via the Email.

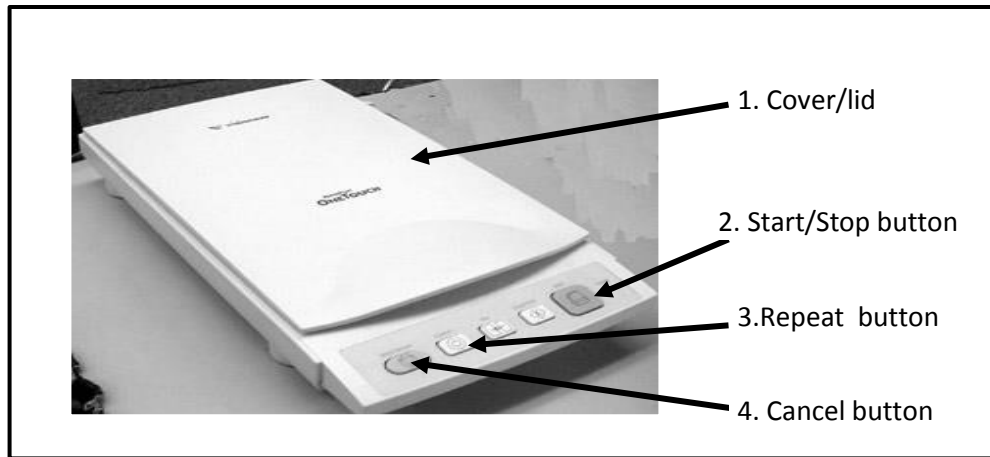


Figure 1.16. Parts of a scanner.

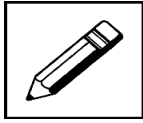
No	Part	Function
1.	Cover/lid	This protects the machine from dust and other unwanted objects
2.	Start/Stop button	This enables the machine to start and to stop too.
3.	Repeat button	This button allows the machine to repeat the process again.
4.	Cancel button	This button stops any work that is not needed or wanted.

Table 1.9. Explanation on parts of a scanner

### How to use a scanner

1. Lift the scan cover.
2. Place the paper or document on the glass pane.
3. Close the top cover.
4. Press the green button and begin the scan.
5. Use the computer to monitor the progress of the scanner.
6. Then follow the computer instructions to complete the scanning process.
7. Once it is done, the computer will give an indication on the screen.

**Printers and scanners are very important and useful office equipment that enables an organisation to communicate information quickly and efficiently, internally and externally.**



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**Learning Activity 12.1.5.3: Complete the activities given below.**

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1. Hard copy is a term used to describe.....

**Select one option from the answers provided.**

- (a) writing on a hard board
- (b) printed output
- (c) storing information on the hard disk

2. Another name for output is.....

- (a) input
- (b) printout

3. List one (1) 'advantage' and one (1) 'disadvantage' of scanning.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.5.4 Binder and Electric Stapler

#### The Binding Machine

A binding machine is a regular feature of most modern offices today. Most of them are light duty machines that can serve the paper binding needs of an office. A light duty binding machine can punch holes, usually up to 15 sheets at a time. It can bind up to 200 pages into one document using a binding strip. A paper binding machine enables offices to achieve efficiency. It also helps in the filing process, as papers of a similar nature can be bound together.

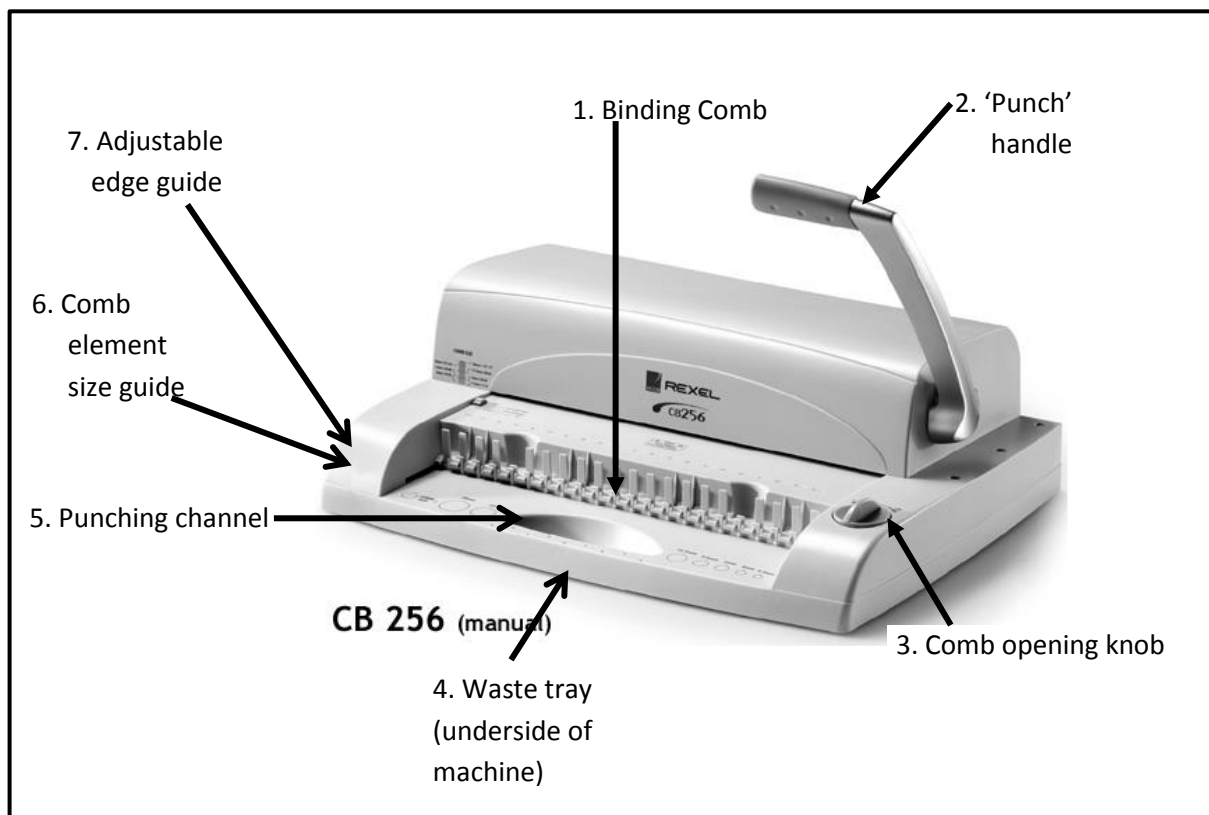


Figure 1.17. Parts of a binder.

Now turn to page 82 and read on the functions of the parts of the machine.



### Parts of a binding machine

No	Part	Function
1	Binding Comb	This holds each page in place before the binder is inserted to hold each page in place
2	Punch' handle	The handle enables one to make the perfect holes for the binding strips to be inserted
3	Comb opening knob	This opens up the binding strips in preparation for the paper binders to be inserted
4	Waste tray (underside of machine)	This tray holds all the small pieces of waste paper cut by the machine
5	Punching channel	Papers are inserted here for the holes to be cut
6	Comb element size guide	This sets the size of holes to be cut in order to insert the binder
7	Adjustable edge guide	This guide enables the paper to be held and released as the user uses the machine

Table 1.10. Explanation on the parts of a binder.

To punch the holes, papers will have to be inserted into the section labeled 'punching channel'. Once the papers are inserted the punch handle is pulled down with pressure. This cuts out the holes in the papers.

For binding of the paper an item called a '**binding strip**' is inserted into the area labeled '**comb**'. Once inserted, the 'comb opening knob' is used to open the binding strip in preparation for inserting of the punched papers. After the papers are inserted, the 'comb opening knob' is turned anticlockwise to close up the binding strip. The completed document can be removed from the 'binding comb'.

### The Electric Stapler

A stapler is a very common office item used to create a document by combining two or more papers using hand-pressure. An electric stapler is a bonus for repeated stapling of pages to large documents. Law firms, for instance, deal with many reports which have to be stapled on a routine basis. It is easy to staple a few pages, but stapling; say 100 times per day can lead to stress and mental fatigue. The electric stapler can be an advantage to the clerical worker and the organization. Fewer tiresome motion injuries mean more worker productivity, lower absentee and lower stress disorders.



Figure 1.18. An electric stapler



An electric stapler uses a solenoid switch to duplicate the motion of a worker's hand bearing down on the top. One advantage of an electric stapler is uniformity. The stapler delivers the same amount of pressure every time. The last punch is therefore as solid as the first one.

Another advantage is volume- how much this machine can do at one point in time. An electric stapler can usually power through a thick stack of papers without jamming the staples.

**The Binder and the Electric Stapler are office machines that enable an effective and efficient way of putting together papers such as reports and other documents.**

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**Learning Activity 12.1.5.4: Complete the activities given below.**

1. Is a binding machine very necessary for every modern office? How?

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2. Do you think it is a worthwhile investment for a school to buy an electric stapler? Explain.

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3. A law firm is deciding whether or not to invest in an electric stapler. What would be your advice to the law firm, and why is your advice good?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.5.5 Guillotine, Calculators, Numerical Keyboards and Shredder

#### The Guillotine

A 'guillotine' is a specialist piece of office equipment that can be found in many modern offices. This machine is manually operated and is used for a specific purpose – cutting of papers.

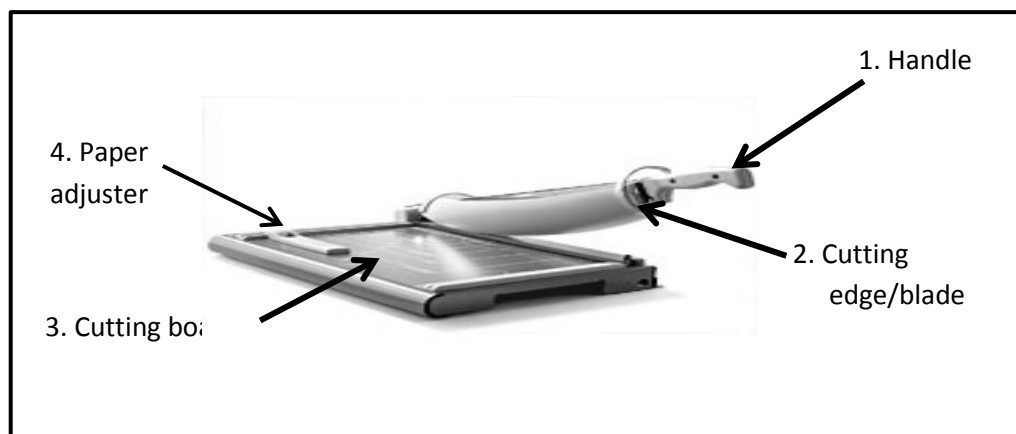


Figure 1.19. Parts of a Guillotine.

The labeled diagram above shows that a guillotine has four (4) main parts:

- (1) Handle
- (2) Cutting edge
- (3) Cutting board
- (4) Adjuster

#### Parts of a Guillotine

NO	PART	FUNCTION
1	Handle	For holding the paper (s) in place to cut or release after cutting.
2	Cutting edge	Sharp edge used for cutting the paper(s).
3	Cutting board	This area holds or keeps the papers flat and in order in the process of cutting.
4	Adjuster	This enables one to put the paper according to the size needed or wanted.

Table 1.11. Parts of a Guillotine.

If for instance, you would like to reduce the size of an A3 paper to a smaller size like A4 or A5, you can use the guillotine board. Lift the 'handle' vertically before placing the paper on the 'cutting board'. Use the 'adjuster' to adjust the paper to the required size. Once that is fixed, lower the handle to cut the paper to the required size. *All of the above be tabulated as parts and functions.*

Apart from reducing paper sizes, the guillotine board is very handy when it comes to trimming identification photos, business cards, invitation cards and certificates.





## Electric Shredder

An electric shredder is an office waste management tool that can be utilized by any organization that handles large amounts of paper files. Shredding helps to reduce the paper waste into a by-product which can be put to other uses. Shredding is also an effective way of managing confidential information from being retrieved and read by someone else.

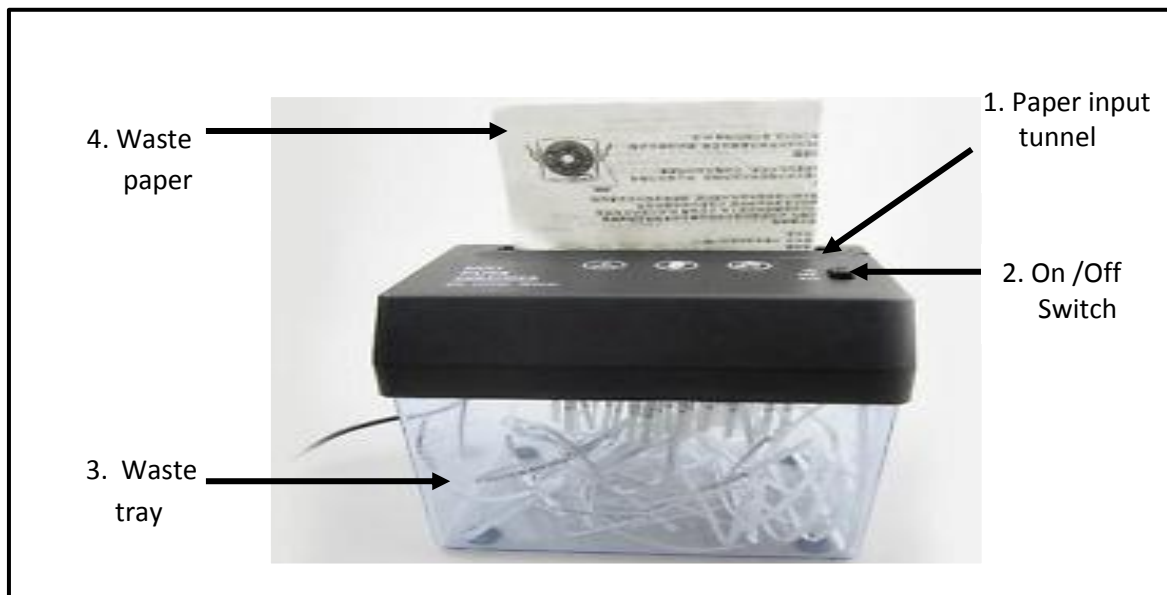


Figure 1.20. Parts of an electric shredder.

There are four main components of an electric shredder. They are;

1. Paper input tunnel.
2. On/Off switch.
3. Waste tray.
4. Waste paper.

### Parts of an Electric Shredder

No	Part	Function
1	Paper input tunnel	This area is for putting the waste paper to be shredded.
2	On/Off Switch	This is the switch that controls this machine.
3	Waste tray	This tray collects all the shredded strips.
4	Waste paper	This is the paper tat is not needed in the office anymore.

Table 1.12. Explanation on parts of a shredder.

The shredder is turned off using the on/off switch on the top right hand side. While it is on, waste papers are fed into the paper tunnel individually. As the paper goes through it is shredded into thin strips. The shredded pieces are collected in the waste tray which sits at the bottom of the machine. When the waste tray is full the waste is disposed of in the rubbish bin. All of the above be tabulated as parts and functions.

**Shredding is an office waste management tool that can be utilized by any organization that handles large amounts of paper files.**



A numeric keypad is a section of a keyboard intended for entry of numbers and similar characters. Numeric keypad can also refer to a standalone numeric keypad connected to a compact keyboard that lacks the number pad area. Some keypads such as those on IBM personal- computers present additional functions such as navigational keys.

The standard numeric keypad is a cluster of keys on the right-hand side of the keyboard. The exact keys found in this cluster varies between computer types; in addition to the digits 0-9 and the decimal point, 'calculator keys (+, /, -, and \*) are typical, along with an additional 'enter' key.

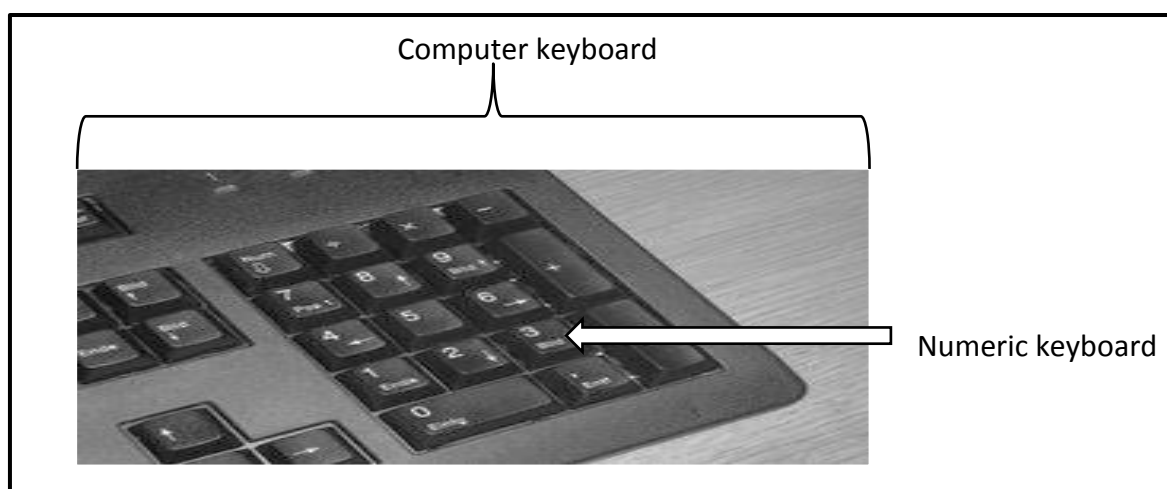


Figure 1.21. Parts of a numeric keypad.

Numeric keypads can also be found as standalone units. These are designed to supplement laptops, and have an advantage that they can be placed on either side of the keyboard.

### Calculator

A calculator is very basic office equipment you'll find in every office. It is even possessed at the individual level by students, business people, accountants, lawyers, etc. Calculators come in various models and types but they all aim for one thing – achieving maximum efficiency. As the name suggests, a calculator is used for mathematical calculations. Casio and Canon are the popular brands we know of, but there are many other brands on the market now.

Turn to page 88 to see pictures of common types of calculators.



Below shows pictures of some common types of calculators.

1. Scientific calculator
2. Graphic calculator
3. Simple calculator
4. Printing calculator

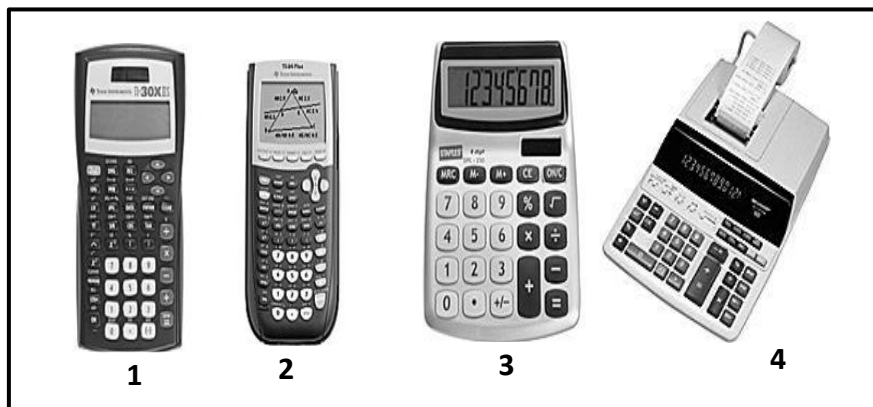
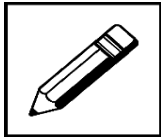


Figure 1.22. Types of calculator.

A basic calculator would have the following features;

1. **Multiple functions** – every calculator is designed for a specific purpose. So the user can choose one which fits his/her needs. For students a simple calculator will do, but most prefer a scientific calculator. An engineer may prefer a graphic calculator. Scientific calculators are ideal for teachers that deal with fractions, grade 11 and 12 students as well as university and college students. Models with built-in printers can help accountants or business owners with accurate record keeping.
2. **High visibility** – Most calculators have a high-contrast screen that increases visibility. They can be used indoors and outdoors, sometimes under poor lighting such as dimly lit rooms.
3. **Easy operation** – Each button on a calculator is clearly labeled with high-contrast text. Many models have more than one function key to save space. The same key can be used for multiple functions by pressing the 'shift' key.



**Learning Activity 12.1.5.5: Complete the activities given below.**

1. What is the main purpose of a guillotine?

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2. How useful are numerical keyboards?

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3. Describe a basic calculator.

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4. The electric shredder is a useful machine, but it produces a lot of paper waste. Suggest a use for the paper waste produced by the shredder.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.5.6 Transcribing Machines

A **transcribing** machine is available in most offices in the world. It has the ability to record conversations at the work place. A speech can be very useful in the professional area. Voice is usually recorded onto a cassette and is stored. It can be played back at a later time. An agreement signed between two parties can be captured on both video and audio and stored for future reference. It is a source of evidence too.

A **cassette** is the cheapest technology available to make an audio recording. Cassettes do offer an easy and durable hard copy which can be stored and used repeatedly. But the advent of new technology is quickly changing the cassette technology. There are now digital transcription machines. These kinds of recordings offer a number of advantages. For example, they have the ability to load easily onto a computer, and thus not required to replace tapes and other out dated sources with latest storage devices like DVDs, CDs and SD cards.

#### Common Users of Transcriber Machines

This technology is commonly used by journalist. A journalist working out in the field is equipped with a still camera and a dictation transcriber, sometimes referred to as 'Dictaphone'. Images and voice play an important role in journalism.

They are also used in hospitals and schools as voice recorders. For instance, at the time of an operation, transcribers are used to record every detail of it as doctors explain in words or discuss the procedures involved. It serves as an important file for future reference. Medical students can have access to such files during their training too.

#### Use of transcribers in business;

1. A transcriber can be used to capture important client or internal meetings.
2. Taking note by hand can get tiring after a while. So recording a conversation will afford you a permanent record of the experience.
3. Business deals and agreements can be recorded and kept as a file copy.

#### Recording Equipment

A digital transcriber is a handheld device that users can take on the road or use in the office. Prices may range anywhere from K200 to K500. Most digital recorders will come with a USB cable that connects to a computer. From there, users can upload the files, and then send them off to be transcribed. Surgeons, pathologists, radiologists, scientists and other professional often benefit from specially made dictation systems.



### Digital recorder categories

All digital recorders are of two types;

- (1) Dictation recorders.
- (2) Conference recorders.

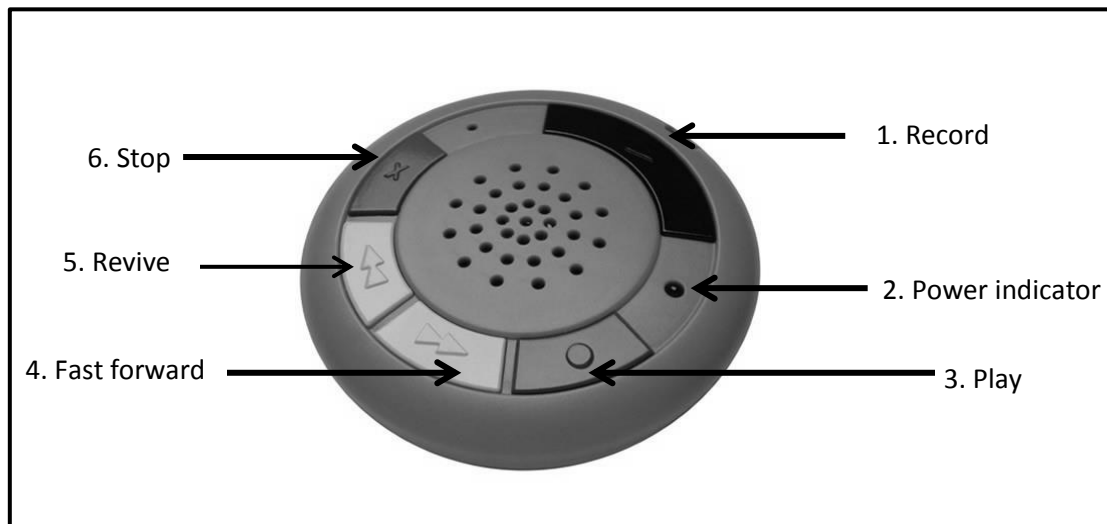
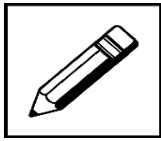


Figure 1.23. A voice recorder.

NO	PART	FUNCTION
1	Record	This button is to play the recorded message or information
2	Power Indicator	This area is to show that power is on or not on
3	Play	This button enables the equipment to be played
4	Fast forward	This button is for fast forwarding or moving forward to other items
5	Revive	This button is for going back to previous recordings
6	Stop	This button is for ending or stopping of recordings

A **dictation recorder** is used in an office environment. Conference recorders will come with various recording modes to create a higher quality recording in a noisier or larger setting such as a conference or public place.

**Transcribing machines are purposely used to record voice or sound in big seminars, conferences and lectures and reviewed at a later date.**



**Learning Activity 12.1.5.6: Complete the activities given below.**

1. Explain in your own words why a dictation recorder is useful to a businessperson.

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2. What other professions would require the services of a dictation recorder or transcriber?

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3. What other professions would require the services of a dictation recorder or a transcriber? Do you think the Internet will one day put telephone and fax technology out of business? and why? There were many office machines covered in this unit. Should an organization equip its' office with all of these machines? Explain your answer.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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## 12.1.6 CREATING AND MAINTAINING A RECORD SYSTEM

### Introduction

In this module unit, you will study the concept of Creating and Maintaining a Records System

The topic covers concepts such as managing records and accountability, record clerk, managers, and standard guidelines, establishing the records systems, computerized system, file classification system, indexing, and colour corded system. As you progress through, it will give you an insight of the need for such office equipment, their costs, how they need to care for and most importantly the maintenance of it. You will also learn the importance of effective and efficient use of Creating and Maintaining a Records System



### Learning outcomes;

On successful completion of this module unit, students will be able to,

- define and explain Creating and Maintaining a Records System
- explain the purpose and importance of following set guidelines in creating and maintaining record systems
- discuss the advantages and disadvantages of following set guidelines in creating and maintaining record systems





### 12.1.6.1 Managing Records and Accountability

#### What are Records?

No organization can survive without keeping records of its activities. Records, and more specifically the information they contain, are a vital resource needed to conduct an organization's operations effectively.

**Records** come in a variety of forms, such as documents, files, registers, maps, photographs, electronic files and microfilms. Records are the products of a business' activity; hence they present a historical perspective. It is not their format that is important; rather it is the evidence of activities contained in records that is important.

A record is evidence of a past transaction or event written down so that it can be accessed again. Records are able to convey information that human memory cannot recall. To serve their purpose in providing reliable evidence, records in both paper and electronic form must be accurate and complete.

A record gives **data** or information meaning, by linking it to the activity or transaction, which it documents and from which it arose. Only records serve as evidence of the conduct of business.

In this unit, the term '**document**' is used in the sense of a single discrete unit of recorded information, in hard copy or electronic form. It may be a physical and intellectual item (such as letter, memo, or report) or as a document held in electronic form on a computer.

#### What is Records Management?

**Records management** controls the creation, maintenance, use and disposal of records so that the right records are provided to the right person at the right time, in the right way and at the least possible cost. Proper management of records will lead to efficiency and effective decision-making for the organization. The entire organization depends on their records for various purposes. Therefore, record keeping is an essential area of concern by the management.

Organizations rely on efficient access to information. Records management is central to policy preparation, decision-making, business operations and organizational accountability. The process of records management collects evidence of transactions, documents, their activities and decisions and provides ready access to their evidence.

#### Purpose of Records Management

Records management enables an organization to create, maintain, use, store and dispose of its records efficiently. It helps the organization conduct its business, deliver its product and meet **regulatory** and **accountability** requirements. It promotes the pooling and sharing of information and helps make good use of organizational experience. It also enables an organization to control the volume of records being created, received and stored.

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1. Account of progress kept in orderly manner - To measure the progress of a business, a history of the firm is needed. And the past records provide that history.
2. Proper study of the success of an organisation – Use records of past transactions are the basis for further study.
3. Comparison of past and present performances of the business with those of other businesses – the use of present and past records make it possible to compare the performances of the business over time and with other businesses
4. In case of disputes - The need for referring to these records or documents often arises for the settlement of disputes in transactions.
5. Policy making - Past records and events decide future policies and plans.
6. Legal requirements - Certain records must be kept for some years as required by law.
7. Evidence - Records are good evidence in the court of law.
8. Detect errors and waste - Past records help in locating errors and wastages occurring in the organisation.

The following are the key purposes of managing records as described above and shown in diagram form below.

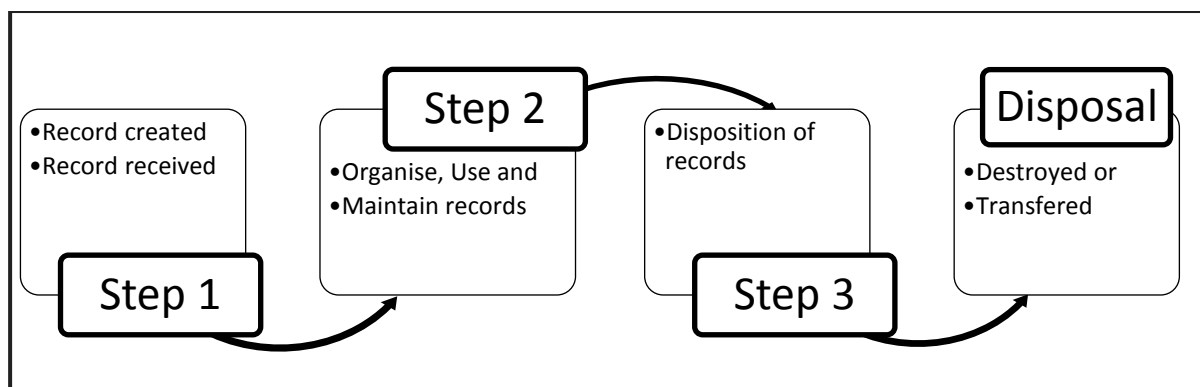


Figure 1.24. The life cycle of records.

### Categories of Records within an Organization

Figure 1.27 below clearly shows that records are of two categories: **correspondences** and **non-correspondences**. There are paper as well as electronic correspondences. Letters, reports and minutes represent paper-based correspondences while fax, email and audio are examples of electronic-based correspondences. Non-correspondences come under four categories. These are: paper, microfilm, audio-visual and electronic. Once the non-correspondence records are created, they remain in one location as files.

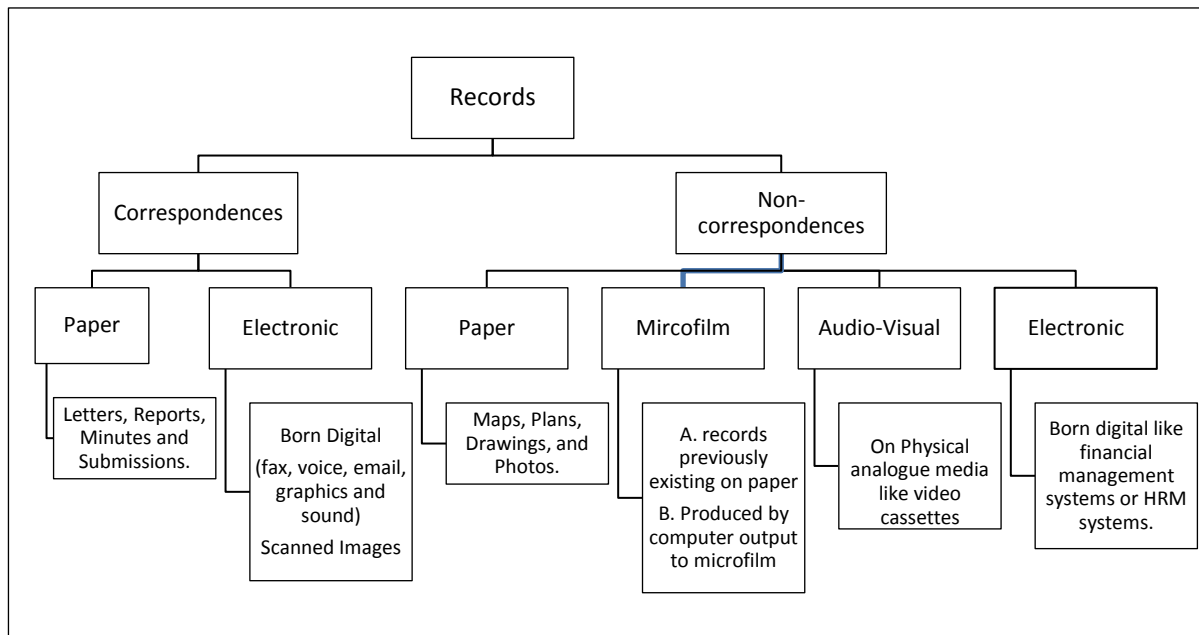


Figure 1.25. Distinction between correspondences and non-correspondences.

### Records and Accountability

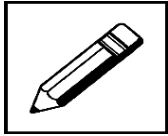
**Accountability** is established when evidence can be provided about what employees knew, when they should have known about it, what action they took and the outcome of their activities. Records document compliance with laws, rules and procedures. Reliable records can serve as evidence to identify abuses of position, misuse of resources and non-compliance with laws, rules and procedures. Records provide verifiable evidence of fraud and can lead investigators to the root of corruption.

When record systems break down, there are major consequences. Consider the following examples:

- Managers are forced to make decisions on an ad hoc basis.
- Fraud cannot be proven and audits and reporting cannot be carried out meaningfully.
- Actions of decisions-makers will not be transparent.
- Customers and employees cannot claim or protect their rights

Evidence contained in records, are the tools by which organizations can promote trust and show accountability. The foundation for accountability is a well-managed records system.

**A record is evidence of a past transaction or an event written down or recorded for easy access at a later date.**



**Learning Activity 12.1.6.1: Complete the activities given below.**

1. Define the term 'record' and (b) write down at least three (3) different reasons records are important in business.

(a) \_\_\_\_\_

(b) \_\_\_\_\_

2. Name two (2) past business records which are needed in order to calculate profit.

3. What would happen to an organization if there are no records?

4. How do records promote accountability in an organization?

5. What is records management?

6. What is the life-cycle concept of records management?

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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### 12.1.6.2 Records Clerk, Managers and Standard Guidelines

#### Functions of a Records Office

The Records Office exists in order to provide a service to the organization, its staff, and particularly action officers who need to use the records. The Records Office is responsible for the collection, organizing and storing of past records of the organization. It is an ongoing activity which is undertaken by records specialists, known as **filing clerks**.

**The Records Office is responsible for the collection, organizing and storing of past records of the organization.**

#### Responsibilities and Records Staff

The essential duties of the records office staff are:

- to receive, record and distribute incoming and internally created mail of all categories such as letters, memoranda and faxes.
- Open and index files, attach relevant papers and pass the files to action officers.
- Build up and control all officially registered files and other documentation in their care, so that they can be produced quickly when needed.
- Record and arrange for the efficient and timely dispatch of all correspondence.
- Review and dispose of all outdated files or other records in accordance with retention periods as agreed.

#### Records Manager

The **records manager** is responsible for planning, controlling, directing, leading and monitoring the entire records management process. The manager also liaises with internal and external parties. Internal parties include senior managers, policy makers and information specialists. External parties include external records storage facilities such as independent archives and libraries.

The records manager must plan, develop and implement an efficient records service that meets the needs of the organization. He/she must also promote a culture of reliable and accessible records. It is the job of the records manager to develop and revise policies and establish standards.

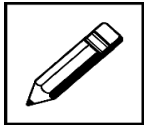
#### Principles of Record Management

In order to be successful, the records management must be based on the following principles:

- 1. Verification:** Records can be verified whenever needed.
- 2. Justification:** Records must be maintained with some justifiable purpose.
- 3. Classification:** Records must be classified according to their use, or chronology or subject.
- 4. Information:** The required information must be available whenever needed.



5. **Elasticity:** The system must be elastic so that expansion or contraction of records is possible.
  6. **Reasonable cost:** The cost of record management must be reasonable.
  7. **Security:** Records must be kept in a safe and secure place
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**Learning Activity 12.1.6.2: Complete the activities given below.**

1. Write down some possible consequences or effects of mismanaging records belonging to a business.

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2. What is the role of the records manager?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.6.3 Establishing the Records System

The records system of any organization must always be linked to its records creation, retention and disposal schedule. Also, the types of records created or accumulated and the usual method of retrieval may also determine the filing system. For example, a numeric system would work well for purchase orders retrieved by number. An alphabetic system, on the other hand, would make more sense for a school's assessment records.

The volume of records can help determine whether an **alphabetic** or a **numeric** system of record keeping is used. Organizations with limited records volume can use an alphabetic system. Large volumes of records usually require numeric or alphabetic systems. Large organizations, especially those with multiple branch offices, may use an alphanumeric central filing system.

#### Organizing and Controlling Record

The first step in managing records throughout their life-cycle is to organize and control records at the point of creation. The purpose of managing current records is to ensure efficiency and economy in office operations. Also, it involves the control, creation and use of information, and to protect valuable information against loss or damage.

The steps involved in organizing and controlling current records include:

- Analyzing information requirements
- Developing and implementing a classification system
- Maintaining records systems
- Developing and implementing records schedules
- Appraising records, retaining those with continuing value and disposing of non-current records.

#### Upgrading Established Process of Records and System

Here are some key questions to ask about any system you are considering. These same questions can also be used to evaluate an existing system. Evaluating the existing system will help you to know which areas need upgrading. These questions are;

1. Is the system **logical**?  
Logic speeds learning, so staff members do not have to rely on memory.
2. Is the system **practical**?  
Avoid lengthy and overly complex classifications.
3. Is the system **simple**?  
The system should be as straight-forward as possible, with little (or preferably no) room for interpretation.
4. Is the system **functional**?  
Does it relate to the function of the records it addresses? Classification terms should reflect the function of the records.
5. Is the system **flexible**?  
Your filing system should be able to accommodate growth and change.
6. Is the system **standardized**?





Filing system terms should be standardized to avoid confusion. You should also have a written set of rules to avoid lost files, misfiles, and unplanned duplication of records and filing locations.

### The Different Systems of Recording

There are two (2) different systems of recording. Let us look at each of these systems;

1. **Centralised Filing** - Centralised filing is when only one common file room serves the entire organization and its divisions, and branches.

This file room offers the following advantages and disadvantages:

a. advantage

- One place to go for information on the records that the organization has
- A single point of contact in the department for all records management activities
- A greater degree of consistency between different divisions in the organization
- Greater control over the creation and distribution of information
- More efficiently managed records.

b. disadvantages:

- employees do not have files available at their fingertips
- employees feel a loss of control over their files when they don't have easy access
- it requires a high level of cooperation from all divisions or sections of the organization – not clear!
- may meet some resistance from some employees who prefer keeping their own files.

2. **Decentralised Filing** - Decentralised filing is when filing is done in more than one location, possibly in different filing stations of the same organization. The main advantage of this system is

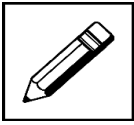
This file room offers a main advantage and some disadvantages:

c. *advantages:*

- employees can file and retrieve their records because the records are close at hand.

d. *disadvantages:*

- security and control over confidential and classified records is usually lower
  - workers are likely to have problems with duplicate records being stored in filing stations around the organization. This happens because no one else knows that the same information exists somewhere else too.
  - there is a lack of records management knowledge across the organization.
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**Learning Activity 12.1.6.3: Complete the activities given below.**

Explain the difference between a 'centralised' and a 'de-centralised' filing system?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.6.4 Computerised System

#### What is a Computerized Records Management System?

**Electronic** documents are records just as much the same as paper documents. Their creation, use, maintenance, and disposition must be managed properly. The most common types of document-based electronic records are word processing files, spreadsheets, presentation files and e-mail messages.

All systems require that new files be given names in order for the computer system to save them. The document name usually consists of a **drive identity**, a **directory**, **subdirectories**, the **file name**, and a **software extension**. Let us look at the document name;

F:/Administration/Budget/1998/Final.doc.

F = drive

Administration = directory

Budget = subdirectory

1998 = sub-subdirectory

Final = file name

doc = software extension

There are many advantages to standardizing the naming conventions for electronic documents. Standardised file names allow agencies to;

1. access files easily and rapidly.
2. reduce redundancy of files.
3. avoid loss of information.
4. name files quickly and easily.
5. share files easily.

Naming conventions should be based on business processes, retention requirements, location of users and retrieval requirements.

#### Advantages of computerized records management

Computerised records management has a number of advantages as listed below.

1. **More space**

Computerising a paper system can create additional space, as there is no longer a need to store large volume of paper records or files. This free space can be used for other purposes such as storing additional equipment. The freed-up space can be even ideal for business expansion

2. **Legibility and accuracy**

Over time paper documents can become damaged, leading to information loss. Hand written documents can become very hard to read or illegible after a very long time. Misfiled documents will be hard to find when they are needed most. A computerized system can eliminate these issues, resulting in a more accurate and organized method of document management.



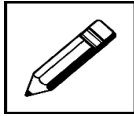
### **3. Speed and efficiency**

A computerized system offers greater speed than a paper system. It enables the user to find what is needed in just a few keystrokes or mouse clicks. Greater speed and efficiency results in greater productivity and less time wasted.

### **4. Environmentally friendliness**

Computerising paper files is one more way to 'go green', as the need for less paper can help preserve more trees. Computerising the records will only be beneficial to the organization if the files are managed and protected well. Everyone concerned should be disciplined enough to protect and manage the constant creation of files by computers. The system must be well structured and organized so that accurate source data can be sourced for filing.

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**Learning Activity 12.1.6.4 Complete the activities given below.**

1. Use the example of a computer filing method on the previous page to write the full document file name for the Preliminary Marketing Research Results completed and entered in 2014. The document is recorded in the Local Drive (C) of the computer.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.6.5 File Classification System

Finding records can be a real problem and takes up too much time. The object of classification is to enable the manager to select any one paper from among all the papers stored in the office, without loss of time. In order to make files promptly available, it is necessary that they should be given proper titles and classification. Files must be grouped according to some fixed basis.

The following are the main methods of classification of files.

#### 1. Alphabetical Classification

Under this system documents are filed in the **alphabetical** order of the names of parties. Files containing letters are arranged according to the alphabetical order. The first set of files may contain the papers of customers whose names begin with A; those having their names beginning with B, in another file and so on. If there are more names under 'A' the dictionary method will be followed, for example, **Africa, Alotau, Arawa, Australia**, and so on. In this example you can see that all words start with 'A' so we arrange them according to their second letter in the alphabetical order.

#### 2. Numerical Classification

In this system a number is allocated to each customer and the same number is put on all papers or documents. The file is also numbered and the papers are filed on the basis of numbers. Thus, the number allocated to each correspondent becomes the file number. If one file contains records of more persons, decimal system may be used e.g., 21.1 denotes one person; 21.2 another and so on. And these are file No. 21. To locate a particular file, it is necessary to refer to an index. Therefore, an electronic index will be more efficient to use.

#### 3. The Alphabetical – Numerical or Alpha – Numeric Classification

This is a combination of the alphabetical system and the numerical 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 coloured guide cards are used to sub-divide folders into groups for quick access. A computerised system will automatically sort and group together according to the defined alphanumeric key.

For instance, all files are arranged alphabetically and the first group is **Aa-Ag**. The folders of **ABC firm and Agra book** stores are first and second in order within this group; the first folder will bear the number **A/1** and the second folder will bear the number **A/2** and so on.

#### 4. Geographical Classification

**Geographical** filing is an arrangement of countries, cities, towns and other **place names** in an alphabetical order. It is convenient to use the geographical system for major groupings followed by the alphabetical order.



This is a good system and is being adopted by many organisations. The area over which the activities of a firm are spread may be divided into regions and zones and documents are filed on the basis of locality.

### 5. Subject-Wise Classification

Here records are filed according to the nature of their subjects or contents. This system can be profitably adopted by a business to classify correspondence into well-defined groups. Documents are first arranged subject-wise and then in alphabetical order. There may be **order file, invoice file, complaint file**, and so on. Papers on a particular subject are arranged and put together, rearranged alphabetically or numerically and filed. This system is more important where subject-matter will be given more weight than the name of the correspondent.

### 6. Chronological Classification

Various records are identified and arranged in strict date order and sometimes even according to the time of the day – **chronological** order. Newspapers, current prices, and market reports, are usually arranged in this order. For this system to work the dates must be known.

### Filing categories

To make a filing system more useful, we can group files into ‘categories’. A category is a group/collection of things that belong together. When we file by categories, we try to file in a logical way. We put files together because they belong together; not just because they start with the same letter.

“Correspondence” could be one category that takes up a whole drawer of our filing cabinet. Inside that drawer we could have sub-categories. For example, sub-categories of the file category named “correspondence” could be:

- Fundraising *correspondence*
- *Correspondence* with other organisations
- *Correspondence* with members of the public.... and so on.



### How to form categories

1. Sort all your documents out into piles that you think belong together.
2. Give each pile a category name.
3. Make a list of categories.
4. Look at your list critically: Ask yourself: 'Can we combine any categories?' 'Should we break up a category into two categories?' 'What sub-categories do we need?' 'Do we need to have alphabetical files within a category?'

Make sure you do not have too many categories to avoid confusion.

### Filing Key

Once you have decided on your categories, you need to draw up a filing index so that everyone can understand the system you used and find the information they want. This index is called a *filing key*. Write up a filing key by listing all the categories and subcategories in the order they are filed in. Make sure it is laid out so that everyone can understand it. Put a key for each file category on the front of the drawers. Give everyone a copy of the whole filing key. Make sure that everyone who does filing understands the key and uses it for filing.

### Filing Correspondence - Letters

All letters must be filed in two places:

#### *a. Incoming mail*

1. The original letter together with a copy of your answer goes into the 'subject file'
2. A second copy of the letter goes into the 'correspondence in' file.

#### *b. Outgoing mail*

1. One copy of the letter goes into the 'subject file'. Any letters in answer to your letter must go into this file; and all future correspondences about the subject.
2. One copy goes into the 'correspondence out' file.

### Finding and Retrieving Information

Finding information that is in the files is called **retrieving** information. Everyone who needs to use the files should be able to find information quickly and easily. This means that they must know the method of filing we use. A filing method book could be a small book that we use to explain how we file documents. For example;

- All letters are filed under correspondence.
- All membership cards are filed under number.
- Reports are filed by subject.

An **index** book can also help us to find files. The name of each file can be written on the page with that letter. For example: The MINUTES file is written on the M page. Then we can write where that file is: "MINUTES - filing cabinet 1 drawer 2 or lever arch file 4"



**Filing procedure**

It is equally important to make sure files are created carefully and documents are filed correctly under each heading created. A time should be set each day to file things especially in the afternoon when there is fewer disturbances.

**Step 1: Receiving the document**

If it is a letter or document that came through the mail, you record it in the "mail received" register and write the date received or stamp it.

**Step 2: Taking action**

Forward the letter or document to the person that has to deal with it.

**Step 3: Carrying out a follow up**

Check that the letter has been dealt with.

**Step 4: Collecting documents to be filed**

All documents and two copies of the replies must be collected in a filing tray.

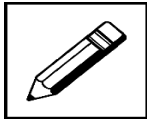
**Step 5: Filing**

Choose a regular time for filing every day so that documents and letters are put away safely for future retrieval. This also minimizes the accumulation of documents and letters in the incoming filing tray. Use a sorter to help you file and remember to file by date order.

**Maintaining the filing system**

One of the most important reasons for filing is document safety. Keep documents that are waiting to be filed in trays; do not leave them lying about on desks or shelves. File documents away at least once a day, or if your organisation is very small you can do it once a week. Do not put too much in files or folders. Never allow filing drawers or shelves to become too full. Acquire new filing cabinets when necessary.

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**Learning Activity 12.1.6.5 Complete the activities given below.**

1. Name the appropriate file classification for the following records;
  - a. The branch offices of PNG's Internal Revenue Commission (IRC). \_\_\_\_\_
  - b. Class list of FODE students taking Business Studies. \_\_\_\_\_
  - c. Birth dates of FODE students taking Accounting Studies. \_\_\_\_\_
  - d. Prisoner Identification Numbers of prisoners held at Baisu Jail, outside Mt. Hagen.  
\_\_\_\_\_
2.
  - a. Write a list of all your personal records, for example, Grade 8 and 10 school certificates, birth certificate, baptism certificate, and so on.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - b. develop a simple filing index. Come up with a simple filing key, using any one of the file classification systems covered earlier above.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. Differentiate between 'alphabetical' and 'numerical' file classification systems.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. What is a 'geographical' file classification system?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
5. What does 'chronological' filing mean?  
\_\_\_\_\_  
\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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### 12.1.6.6 Indexing and Color Coded System

#### Coding System

Standard subject **coding** provides a uniform system for organizing files. These files are arranged by subject as a standard practice.

A standard subject coding system consists of selected main or primary subject titles with related subjects grouped in outline forms as subdivisions. These subdivisions are known as secondary subjects, tertiary subjects, and quaternary (fourth level) subjects.

A standard coding system with its complete list of subjects may also be referred to as the master outline. This master outline is useful in managing information.

#### Colour Coding

The use of colour coding and colour-coded filing systems is now very popular. The human eye can usually distinguish thousands of colour variations. In filing systems, the assignment of colour for each number and letter helps filing and retrieval of files. When these patterns of colour are broken, it is easy to see that a 'misfile' has occurred. Colour coding of files almost eliminates hidden misfiles, confirms accuracy in filing and offers fast filing and retrieval. It works with any filing sequence and allows rapid pre-sorting by colour recognition.

Colour codes can be used to distinguish one series from another, one year from another, or case working papers from case history files.

There are several different ways to use colour in a filing system. The most common methods include colour signals, colour charge-out cards, colour file folders, and colour labels.

#### Types of Colour Coding

1. **Colour Signals** (plastic clip-on or adhesive tags) - are attached to files requiring special attention. For example, you can use a red signal to flag a file for review, or a blue signal to identify files that require quarterly review by management.
2. **Colour Charge-Out Cards** - can serve as easy reminders that files have been signed out and not returned. Different colours can be used to show when a file was charged-out. For example, you could use different colours to represent the day of the week, the week, or the month that the file was charged-out of the filing station. By looking at the colours, you can easily tell if the file is overdue or not.
3. **Colour File Folders** - may be used instead of plain white or manila folders. Different colours can be used to identify different functions, series of records, or dates. For example, blue folders could be used for 'Finance' and yellow folders for 'Human Resources'.



4. **Colour Labeling** - is used to represent the numbers or letters that you use to code the files in your filing system. For example, in a numeric system, each number from 0 to 9 is represented by a different colour. The letters of the alphabet, months and years can also be assigned colours. A strip of labels is added to each file, creating a colour representation of the file code.

**Colour labeling is not the filing system. It is a way to identify file folders within a filing system. The filing system must be created before you start adding colour labels.**

### Indexing and Index Filing

The decision about where to file a record is called indexing. Some common suggestions for selecting indexing references are;

- the name of the firm or individual.
- subject or name within the body of the letter.
- special file section title where maintained, for example, Job Application.
- for personal letters, the name of the writer.

Standards for filing should be developed and followed for active records control.

### Types of Index Filing

When setting up a good filing system, one of the most important decisions to make is the indexing method to be used to identify each file. These can be also called the **finders**; and include file headings, names, account numbers, transaction dates, category names, and so on. The use of the primary document indexing depends on the nature of the documents, workflow process, the amount of files in the particular system and the number of people who need to access the files. It usually comes down to the choice of filing by name (alphabetic indexing) or a number (numeric indexing).

### Alphabetic Indexing

Use alphabetic indexing to identify files by a descriptive heading, such as:

- Business names
- Names of people
- Geographic region
- Subject categories

Indexing alphabetically is easy to learn because anyone who can read knows the order of letters in the alphabet. You know you have the right file simply by reading its heading. Unlike numeric indexing, no cross-reference system is needed, so users of the system can find files simply by looking them up in the filing system.

There are disadvantages to alphabetic filing when the number of files grows to several thousand. The more files there are, the greater risk of having the same name on more than one file. There is also a higher risk of misfiled records if users don't follow certain rules for alphabetizing, such as filing by a person's last name, or ignoring the word 'The' at the beginning of business names or titles.



### Numeric Indexing

Very large filing systems use a numeric indexing method. A file that is indexed by a number has only one possible location in the filing system. Many times, a number is already being used as an identifier such as:

- Account numbers
- Transaction numbers
- Product or part numbers
- Case numbers

Users must have a way to look up file numbers quickly and make sure they are indeed the records that they need. The numbers are often assigned or tracked by computer software to identify the records wanted through search queries. Certain industries use numbers for security and privacy issues, such as keeping medical or financial information confidential.

### Index Filing – Advantages and Disadvantages

Generally speaking, the wider the range of material covered by an index, the greater the risk that the index will lose precision. For example, if one index is created for an entire information system the index may provide many irrelevant references when used to search for a subject. Indexes based on subject or business activity are likely to be effective if the terms used are controlled.

A **keyword list** will rapidly lose its usefulness and reliability if there is no control over the addition of new keyword terms. For this reason, keyword lists and controlled vocabularies should be managed by records management professionals.

In a typical file management system, for example, when a new file is registered, it is placed within its appropriate category or series and given a title that represents its contents. In the keyword code system, the index terms themselves are used to generate the file reference, which is assigned at the time of file creation.

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**Learning Activity 12.1.6.6: Complete the activities given below.**

1. Explain the difference between alphabetic indexing and numeric indexing.

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2. What is index filing and how does it help an organisation's filing system?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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## 12.1.7 RETAINING AND DISPOSAL OF RECORDS

### Introduction

In this module unit, you will study the concept of Retaining and Disposal of Records. This unit covers areas such as preparing Files and Actioning Records, Managing Active and Inactive Records, File Housing, Micrographics and Disposal of Records. As you progress through, it will give you insight of the different methods of retaining records and maintaining them, especially now when the old method of keeping records in filing cabinets is now being phased out and soft copy filing is introduced into the formal organisations.



### Learning outcomes;

On successful completion of this module unit, students will be able to,

- define and explain the purpose of retaining records and eventually disposing them.
- identify and describe the process of creating and maintaining records and outline how these have utilized and transmitted.
- Analyse the role of business documents in the flow of information and also the different roles they play.



### 12.1.7.1 Preparing Files and taking Action on Records

#### File Plan

A **file plan** shows how records are to be organized once they have been created or received. It provides a '**roadmap**' to the records created and maintained by an organization. It also specifies how inactive records are to be disposed of. The file plan provides a standardized records classification scheme that improves filing disposition schedules.

The **hierarchical** style of file plan is common as it follows the functions of the organisation. The following represents a basic, two-level file plan outline:

- 100 – Assets
  - 100.1 – Fixed or Non-Current Assets
  - 100.2 – Current Assets
- 200 – Liabilities
  - 200.1 – Long-term Liabilities
  - 200.2 – Short-term Liabilities

In the file plan example above, the functional categories (Example; 100, 200) represent a **folder** (in an electronic filing system) or a **filing guide** (in a paper based system). The subcategories then become **subfolders** (in an electronic filing system), or paper folders (in a paper based system).

A comprehensive office file plan provides a 'location' for every record in an electronic or paper filing system. Understanding the file plan helps users know where to file their records and helps others know where to find records they need.

**The file plan provides a standardized records classification scheme that improves filing disposition schedules and assists in filing, accessing, and disposing records.**

**File manuals** may be needed for a large quantity of records that requires a greater level of detailed records management. Information provided in a file manual includes the following information;

- a. Location – Where the electronic files or hard copies are kept.
- b. Custodian – The person responsible for filing the record copy.
- c. Content – A description of the documents that should be filed.
- d. Arrangement – How documents are organized within the folders.
- e. Labels – Instructions on how to identify the electronic or hard-copy folders.
- f. Disposal – Transfer of information from the records disposition schedule.

#### Preparing Records for Filing

The **originator** or receiver should write the proper '**file code**' in the top right corner of a document. Ordinary officers do not normally deal with the filing of correspondences on a regular basis. Even if they do, the final authority for filing rests in the hands of managers and supervisors.





It is very important that the staff of an organization know the filing system and its index in order to mark documents for filing. This will enable the filing clerk to place the files in the correct folders. Filing clerks also misplace files or misfile them out of ignorance. But the originator should be partly blamed if the filing decision was a mistake or was inaccurate.

When a file is not in its' proper place, locating it can become very time consuming and frustrating. Some files of a very crucial nature cannot be misfiled. Medical files, for example, must be filed properly. If misfiled, a patient's health is at risk, leading to possible complications or death may occur. Likewise, businesses can lose money when files are not in order.

### Basic Filing Procedure

The steps given below helps a filing clerk to file records of an organization accordingly;

1. **Inspecting:** Each document is inspected to see that it has been released for filing.
2. **Marking:** Determine under what name or caption the paper is to be filed.
3. **Follow-up and Cross-reference:** If the letter is marked for follow-up, then a record should be made and placed in the follow-up file.
4. **Sorting:** Sorting is the preliminary arrangement of papers according to the first filing unit of the name or number. Documents should be arranged in sequence so they can be placed in the proper folders quickly.
5. **Filing:** Filing is the actual placing of documents in folders in a pre-determined plan. Check the caption of the document and folder to avoid misfiling.
6. **Evaluation:** Assess the documents to determine if they are still active. In-active files should be marked 'closed', in preparation for disposal.

### Cross Referencing

A **cross reference** is necessary if there is more than one place in which to file the document. It also makes it easy for file users to find it. If a document being coded by subject matter involves more than one subject, a cross reference should be prepared as a finding aid. Avoid making and filing unnecessary cross reference forms, as they take up valuable space and time.

Extra copies may be used as a cross reference. Select the file designation for an additional subject and write it directly below the file designation for the main subject or case. Mark an 'X' by this file designation to show that a cross reference is required.

A cross reference form is also used for preparing cross references of records maintained in all types of files. A cross reference is also used to indicate that a record has been moved from one place to another.

### Linking of Files

When two or more current files are linked, the printed slip bearing '*please see also the linked file*', should be pinned to the cover of the topmost file. The number of the linked file should



be given on the slip. Files should be consolidated, whenever possible. Only in those cases where many pages have to be referred to, files should be linked.

**A cross reference is a means of referring to a document by file identification.**

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**Learning Activity 12.1.7.1: Complete the activities given below.**

1. Define the term 'file plan' and write down at least three different reasons for file planning.

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2. ABC is an imaginary Business College offering standard business studies courses. Identify its main filing categories and sub categories. Give a numbering system to this file plan. Use the hierarchical structure.

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3. You were recently employed as a junior records clerk at a Department store.

- a. What are some regular documents you think you will handle daily?

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- b. List and explain the four (4) most important tasks you will undertake each day at work.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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### 12.1.7.2 Managing Active and Inactive Files

Identifying and managing **active** and **inactive** records is an important step in the maintenance of a successful filing system. Here you will look at ways of managing two categories of files, active and inactive files. It is important to firstly distinguish between the two categories of files to make the filing task easier and manageable.

#### 1. Managing Active Files

**Active files** are those files that are still needed by the organisation. These are the kinds of files that workers routinely consult at work. They could be minutes of the last meeting, or purchase orders.

One way of knowing whether a file is active or not is by looking at its date of creation or filing. Most recently-dated files have more need than very old files. Active files must therefore be stored in a location closer to workers who need them.

There are many factors to consider when managing active files. These include secure storage, organization, and scheduled destruction of dead records.

File management systems **archive** existing files by way of indexing, labeling or creating databases. An active file management system will provide unlimited access and storage capacity. It will also lead to better protection of records.

#### 2. Managing Inactive Files

All records have a life span. After they serve their useful term records become inactive. To determine when records become inactive it is a usual practice to decide on a **cut-off point**.

The cut-off point or time can refer to a specific event such as the termination of employment, end of funding period, termination of contract, graduation, etc. Usually, the cut-off point is tied to a period of time: end of the quarter, end of the calendar year, end of the fiscal year and end of the academic year.

Instead of destroying inactive files, many organisations prefer putting them away in a secured location. That is because some of these records may be needed later. The transfer of inactive files to another location must be undertaken carefully.

Organisations usually develop file plans which, among others, include a policy regarding inactive files. This policy helps guide the handling of inactive files.

#### Inactive Files Storage Procedures

Once records are moved to 'inactive storage', procedures must be established to manage them. Intellectual and physical control must be maintained at all times. Forms are to be used to keep track of;

- Records transferred to storage.



- The storage location assigned for each box.
- Authorised access.
- Records retrieval for reference.
- Records returned for re-filing.
- Records that have reached the end of their retention period and are ready for destruction.
- Records that are destroyed.
- The manner and date of records destruction.

### **Advantage of Relocating Inactive Files**

Many organisations need more space for their **core activities**. Removing old files is one way of freeing up space. Another related advantage is cost saving. Indeed, there is always cost involved in record keeping. Larger organisations have large volumes of records which require separate budgeting to maintain. By reducing the volume of records, money can be saved. A third advantage is efficiency. Workers, particularly **record clerks**, can easily move about doing their jobs. The environment becomes organized, cleaner and attractive for workers. File retrieval or access becomes a lot easier in a spacious environment.

### **Disadvantages of Relocating Inactive Files**

There are some disadvantages in the relocation of inactive files and these are explained below;

1. *Cost* - It costs money and time to manage inactive files. If additional space is needed then that will mean an extra cost on the organisation.
  2. *Mistakes* – this happens when a file is declared inactive when it is still useful. This can lead to bad decisions and lost business opportunities. It can also put the organization at risk if the files are of a classified nature.
  3. *Disagreements* – these may arise between staff over a decision to declare a file inactive. Such disagreements can lead to frustrations and disruptions to the normal flow of work. This often happens when there is little or no consultation between key workers.
  4. *Transition period* - during this movement period some important or classified files may be lost or stolen. Stolen files may represent a risk to the organization if the information contained is of a classified or sensitive nature. Military records, for example, are highly classified so it will be a national risk if some of these files land in the hands of enemies.
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**Learning Activity 12.1.7.2: Complete the activities given below.**

1. Moving files to the 'inactive' category is very necessary for every organization. In your opinion:
  - a. How long should a file remain active before it is considered inactive?  
\_\_\_\_\_
  - b. What should happen if a records clerk mistakenly removes an active file and moves it to the inactive section?  
\_\_\_\_\_  
\_\_\_\_\_
2. Why do some organisations permanently store their inactive or dead files in archives and other permanent storage facilities rather than destroying them?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.7.3 File Housing

After determining what method will be used to protect records, determining where and how to store the records is crucial. The location you choose will need to be accessible within seconds to 24 hours after a disaster. Records can be stored on-site, off-site or in specialized equipment.

#### On-site Storage

On-site storage means records are housed in the same vicinity as the office, such as in a closet or storage area in the building. The drawback to choosing on-site storage is that if a major disaster strikes there is very little chance of retrieving the files.

Precaution must be taken to prevent a disaster from spreading to the records storage area. This could range from installing fire doors and walls, to following basic best practices to protect your records.

The following tips are recommended for an on-site storage location;

- Check for potential fire, water or sewer hazards.
- Staff members should know the location of the records, and access to materials should be restricted to authorized workers.
- Corridors, walkways and doorways should be kept clear at all times.
- Inactive records should be transferred regularly to a safe location or archive.
- Staff members should know the location of all fire extinguishers.

#### Off-site Storage

Storing records away from the office, in another building or at a different location is called **off-site** storage. There are several options for off-site storage, including **hot sites**, **cold sites**, and **records centers**. Both hot and cold sites are for offices that rely heavily on electronic records for their normal operations.

A hot-site is usually fully equipped with the necessary equipment and computer system. It is a stand-by facility which will spring into action soon after a disaster. A hot site is preferred by organisations such as military, police, and communication.

A cold-site is also a back-up facility in case the original office is unusable after a disaster. However, there isn't any equipment or systems in place. Although less costly, re-establishing operations at a cold site involves more time and effort than moving operations to a hot site.

#### Providing Physical Protection for Records

If records are not well protected physically, the media (paper, digital tapes and films. will not survive long enough. The key steps in providing physical protection for records include;

- Implementing and maintaining preservation measures.
- Developing and testing emergency plans to protect records.



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Preservation conditions will naturally vary depending on the stage of the record's life-cycle. Some common requirements include;

- Controlled temperature and humidity.
- Controlled lighting.
- Adequate shelving for all records.
- Adequate storage containers.
- Secure access to storage areas to prevent loss or damage to records.

The best modern archive buildings are purpose-designed and built. They provide a suitable physical environment by using the principle of **thermal inertia**. Thermal inertia means the environmental conditions are always within acceptable limits because of the insulation and building materials used.

**If records are not well protected physically, the media (paper, digital tapes and films) will not survive long enough.**

### **Specialised Equipment**

The use of specialized equipment such as **vaults, fire-resistant cabinets and fire-resistant safes**, represents another type of on-site storage. It provides some initial protection against fire damage but not against water damage.

Fire-resistant cabinets and vaults are rated according to the maximum number of hours they can withstand fire and maximum temperature. Generally, the most highly protective equipment is not totally safe from extreme heat or destruction.

### **Building Attributes**

An archives and record storage building must be designed for these requirements;

- Flexible for change.
  - Fire protection of the stored materials.
  - Safe for staff and visitor occupants.
  - Required level of temperature and humidity.
  - Controlled access to archives storage areas.
-





**Learning Activity 12.1.7.3: Complete the activities given below.**

1. In a country like PNG where incidence of fire is high, what kind of filing equipment would you recommend for each of the following organisations? Provide an explanation for each one.

a. Bank

\_\_\_\_\_

b. School

\_\_\_\_\_

c. Hospital

\_\_\_\_\_

2. Make a list of those important safety tips for a building constructed to store files.

\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



#### 12.1.7.4 Micrographics

**Micrographics** is a process of photographically producing a physically reduced exact-image copy of written or graphic records. Images are created by cameras or by COM (computer output micrographics) units that accept computer output directly. The documents are magnified for human viewing or reading.

##### Importance of Micrographics in Recording

**Microfiche** and **microfilm** have always been an economical alternative for high-volume data and picture storage. Although optical discs have taken over, fiche and film is still the only medium that can survive continual upgrading of electronic technologies. Film is analog and can always be read by magnifying it. In some cases, digital data are converted to microfilm so they can be preserved and accessed decades into the future without regard to the changing digital formats.

##### Direct Access Storage Media

Direct access storage media such as compact disks, and network drives are to be stored in accordance with industry recommendations and information technology standards.

##### Microform

**Microform** is the generic term for the different formats that microfilm comes in. Microform is film that allows the reduction of small-size graphics and text to micro-images many times smaller than the original. Microforms generally fall into one of two broad categories; unitized microfilm and roll microfilm.

Microforms help to save space. Libraries usually use this method to store thousands of newspapers, journals or government documents in a few cabinets. They can be used in transmission, storage, reading, and printing. Because microform images are reduced to about one twenty-fifth of the original document size, a lot of space can be saved.

##### Types of Microforms and their Functions

###### Microfilm

Microfilming, also called **microphotography**, is a process of reducing images to small sizes that can be read using optical readers. This photographic compression often results in a 99% saving of space.

There is an increased use of microfilming activities since a large portion of books, periodicals and newspapers are deteriorating because of the poor quality of paper and print. Using this technology and climate-controlled storage vaults, many organisations have produced images that will last for hundreds of years.

Normally, the title and other identifying indexes are typed across the top for indexing. Aperture cards may be stored in drawers or in freestanding rotary units. The process of creating aperture cards is the same as for 35mm roll film.



It involves;

- Preparation of the documents.
- Filming onto 35mm roll films.
- Processing the film.
- Checking the film.
- Indexing information is typed onto the card in sequence film was taken.
- Frame that matches the title on the card is cut from the roll of film and inserted into the slot in the aperture card.
- The frame is quality checked to ensure that it matches the card title.

### **Microfiche**

A microfiche is a flat film of 105x148 mm in size. The most commonly used format is a portrait image of about 10 x 14 mm. Microfiche are stored in open- top envelopes in drawers or boxes as file cards.

Microfiche is produced on a step-and-repeat camera, or by making a contact duplicate of a microfilm jacket. Like roll microfilm, microfiche has a high information storage density and the retrieval equipment for microfiche is inexpensive. However, it lacks file integrity because fiche can be lost or misfiled. In addition, step-and repeat cameras are more expensive than rotary and planetary cameras.



Figure 1.26. A microfiche reader.

### **Computer Output Microfiche (COM)**

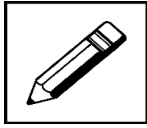
Computer Output Microfiche (COM) or Microfilm Archiving provides a safe and reliable way to store and archive historical data. It is not vulnerable to computer viruses, software upgrades or latest media change.

COM is the ideal method for inexpensively storing large amounts of data in permanent film format. Files are directly converted from a computer system to microfiche. COM can be produced as microfiche or as 16mm-roll microfilm. It is a combination of the computer, microphotography, and electronics. This process is usually faster. Also, the information produced is more accessible and occupies less space than paper records.

**Disadvantages of Microfilming**

Delays, mechanical breakdown, quality control problems and the instability of the medium itself are problems associated with microfilm. Some information provided by vendors has been at times overly simplistic and misleading. As a result, expectations of microfilm have sometimes been unrealistic. A prudent examination of your records and retention period must be made. If the usage rate is low and the retention period is short, it is probably not worth the time and money to microfilm these records.

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**Learning Activity 12.1.7.4: Complete the activities given below.**

1. Differentiate between 'micrographics' and 'microform'.  
\_\_\_\_\_
2. Which of the three (3) micrographic media outlined above do you think is popularly used by many organisations today? Explain your answer.  
\_\_\_\_\_
3. List one (1) advantage and one (1) disadvantage of microfilming.  
\_\_\_\_\_
4. What is computer output micrographics (COM) and why is it good for organisations?  
\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



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### 12.1.7.5 Disposal of Records

When records have reached the end of their retention period, they can either be destroyed, or transferred to the organisation's archives permanently. Paper records destined for destruction are either **recycled** or **shredded**. Records which are not confidential should be recycled.

Electronic records should be deleted as soon as their retention period has ended. If possible, the entire drive or directory should be wiped out.

Micrographic files must also be disposed of properly at the end of their active or useful period. Recommended destruction methods include burning, shredding and dump site burial.

#### File Destruction, Efficiency and Effectiveness of the Office

By deleting the electronic files, the computer memory is freed up for new files to be created and filed. Remember that not all computers have the same memory capacity. Also, a computer's memory is fixed at the time of its manufacture.

**When records have reached the end of their retention period, they can either be destroyed, or transferred to the organisation's archives permanently.**

A computer can slow down if its records registry is clogged up with so many files. File management becomes much easier when only the active and semi-active electronic files are stored. Retrieving electronic files can be very fast on any computer if filing has been done regularly and correctly.

#### Process of Destroying Files

A **disposal schedule** is the control document that prescribes disposal action. Once records have been classified and scheduled, their care should become a matter of routine. Procedures should then be developed for managing the records in the office, transferring them out or destroying them on the disposal date.

The common file destruction methods include: burning, soaking in water, pulping, shredding or other secure methods.

#### Appraising and Disposing of Records

**Appraisal** is a process of determining which records will be kept and which will be destroyed. Appraisal is made easier if records are controlled systematically throughout the life-cycle. The records manager and archivist must determine which records should be retained for their ongoing value and which may be destroyed. It's an assessment of the continuing value of the records for administrative, operational or other uses. A flow chart diagram should be used to show which stage the records are in, based on their value and use.



## Data Security

Data security is very important since data loss can be very devastating for any organization. Data loss can be caused accidentally or willfully. **Willful destruction** of records is caused by dissatisfied staff or external users. It can also be the work of thieves or smugglers who poach confidential documents for ransom.

On the other hand, **accidental loss** of records can happen through fires, earthquakes and building collapses. Many organisations put in place fire prevention mechanisms. They also keep **back-up files** and records in a safe place or building in another location. There is fire-safe filing equipment such as 'safes' which can withstand up to 5 hours of extreme heat before giving way.

Human error or carelessness can also be a cause of file loss. Active and semi-active files are meant to be used by people. In fact, the whole purpose of recordkeeping is for people to use them. It is during the regular use period that files can be misplaced or lost. To prevent this loss organisations have in place a system called '**out card**', which basically records the movement of files in and out of the filing location.

## Taking Files Out

When people take files out of the filing system, or documents out of a file, care must be taken to bring them back. To keep track of files we need a record of all the files or document that people borrow.

To do this we can use a file-out book. A file out book is simply a book in which we write;

- Who borrowed the file or document.
- Name of the file or document.
- When they borrowed it.
- When they returned it.

See the example below.

NAME OF STAFF	DOCUMENT	DATE TAKEN OUT	DATE RETURNED
Ms Aiwara	Reports file	10-02-2014	12-02-2014
Mr Wanbel	Finance file	23-01-2014	

Table 1.13. Example of filing system.

## Controlling Charge Out

Requests for records should be written, preferably on a prescribed charge-out form. **Charge-out** cards/forms are used to replace papers or folders being removed. They identify the borrowers of a file and note the location where the file can be found. The charge-out card should be placed in the removed records locations. An effective charge-out control system eliminates the need for individuals to maintain personal copies of documents and reduces the need for file searches.



### Charge-out Forms

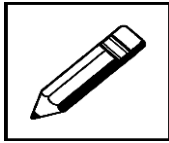
There are several optional forms that may be used to charge out files. When the document or folder is returned, it should be checked for completeness before refilling. The charge card is removed from the file, the entry lined out, and the document/folder is placed in the file. Periodic follow-ups should be made on any item that has been charged out for an unreasonably long time.

### Importance of 'Out card' in Manual Filing System

The '**out card**' system works well in a **manual** filing system. The record clerk constantly monitors this system to ensure that records are safely returned by the users. The users also are made to take responsibility for the files they borrow. Any abuse or mishandling of the files can be pinpointed. If a defect or loss of file is detected it can be traced back to the very recent user of the file.

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**Learning Activity 12.1.7.5: Complete the activities given below.**

1. For each of the following organisations, recommend the most appropriate file destruction method.
  - a. Bank  
\_\_\_\_\_
  - b. Hospital  
\_\_\_\_\_
  - c. School  
\_\_\_\_\_
2. Many people in Papua New Guinea do not know how to properly and effectively do filing. It could be their own documents or documents belonging to organisations they work in. Identify at least two (2) reasons for this situation.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



## 12.1.8 Meetings and Meeting Procedures

### Introduction

**In this module unit, you will study the concept of Meetings and Meeting Procedures and processes.** It covers areas such as types of business meetings, and names of documents used. Then it flows on to modern methods like electronic meetings, and the roles that the chairperson and minute secretary plays. Electronic meeting is the more modernized method of discussing important issues of institutions especially when local organisations try to cut costs on various spendings. For example, accommodation, meals and allowances for potential employees coming in to Headquarters for job interviews. They simply conduct interviews using Phone conferencing and they are recruited or not.

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### Learning outcomes;

On successful completion of this module unit, students will be able to,

- Define meeting, give example of different types of meetings held, purposes of the meetings and name the main document used in all meetings, and further differentiate between an agenda and meeting minutes.
  - Define article of association and memorandum of association and do role play in conducting meetings and finally explain the purpose and importance of using electronic meeting technology in conducting meetings.
-



### 12.1.8.1 Types of Business Meetings

A **meeting** is an occasion where two or more people come together to discuss, consult, make decisions and find new direction for future action. Meetings can be either formal or informal. Formal meetings are guided by established rules and procedures. All participants must know them and practice or apply them in the meeting. For example, a **Chairperson** is appointed to control the meeting. Some meetings such as **Board** meetings can be very highly formal than others.

Meetings can be either effective or ineffective, depending on the way they are conducted. Effective meetings contribute towards the successful implementation of an organisation's strategy or plan. Poorly conducted meetings will become less effective for all participants and can affect important decisions that must be made for the organisation.

#### Reasons for Meetings

In most **democratically** run organisations meetings are held to discuss issues and make collective decisions. The purposes of these meetings vary but there are some things they all have in common.

#### Range of Formality

Some meetings are extremely formal while others are very informal. The larger the meeting, the more formal it tends to be, although this is not always the case. If a meeting has many participants, it is important that the rules of meetings are strictly observed. Therefore, the rules are very important as they enable the meeting to be conducted smoothly and the purpose of the meeting be achieved. (Have changed the last statement from negative to positive)

The level of formality can vary according to the kind of meeting and preference of various organizations but there must be some rules established. This is because meetings need rules in order to be successful. The rules are laid down in order for meetings to be held in the most effective way. In order to be an effective participant you must know the meeting rules.

#### Rules of Meetings

**Formal** meetings have strict rules. These rules are written down and are specific. The rules can be found in an organization's **bye-laws**, in the **Constitution** of an Association or in Company Regulations.

Before you attend a meeting, you should make sure that you observe how particular meetings are conducted and read any written rules concerning them.



Rules	Explanation
When, Where, How often	• When a particular meeting should be held
	• Where a particular meeting should be held
	• How often meetings should be held
Membership	• Types of members; For example; full, associate and co-opted.
	• Particular office bearers required: For example; President, Secretary and Treasurer.
	• Minimum number to attend a particular meeting (quorum)
	• Voting rights
Notice of meetings	• Minimum notice period be made known
Terms of Reference	• What type of business the meeting can deal with
	• What powers the meeting has example; legislative and executive, advisory.

Table 1.14: Rules of meetings

**A meeting is ‘the pooling of brain power’ for a specific purpose. It is when two or more people come together to discuss, consult, make decisions and find new direction for future action.**

There are various types of meetings, whose functions and types of formality vary in different organisations. You should know from the description of a meeting, what type of meeting it is and what its main purpose is.

Types of meetings will vary in different organisations. For example, staff meetings for schools are regular events every year, but a mining company or oil refinery doesn’t entertain that many meetings. Some common meetings are explained below:

### 1. Annual General Meeting (AGM)

This is a formal type of meeting and is normally held annually (once a year). In the case of a company, those responsible for conducting it (the **directors**) meet with those who own it (its **shareholders**). An AGM may be open to media scrutiny for the public at large, therefore, will require a lot of careful thought and planning.

**Minutes** should be taken at an AGM. In terms of style and format, you should check the requirements regarding layout and level of detail. It is helpful to study examples from previous years, particularly if you’re taking minutes of an AGM for the first time. Usually the style will be succinct (brief) and formal.

### 2. Extraordinary General Meeting (EGM)

This is a general meeting which is usually called to deal with urgent matters between AGMs. Usually, EGMs are called when there is a crisis or when an unusual event strikes prior to the calling of an AGM.



### 3. Board Meetings

The directors of a company are responsible for overseeing the way the management team runs the business on a day-to-day basis. The board is responsible for governance matters. The minutes of board meetings provide evidence of the decisions taken. The minutes should record the decisions taken and provide sufficient background to those decisions. Therefore, the minutes of board meetings will be lengthier than the minutes of general meetings.

### 4. Committee Meetings

A committee is a group of people drawn from a larger group to manage specific issues. There are many different types of committees within organisations. Their powers will vary according to the nature of the committee. For example, a staff committee meeting deals with only staffing matters and a student disciplinary committee deals with student discipline.

### 5. Management Meetings

Management meetings can take many forms. These meetings involve managerial decision making. For example, some meetings will involve the **senior management** team; others involve **middle management**. This type of meetings may also include junior officers acting on senior capacities.

### 6. Departmental Meetings

These are meetings attended by all departmental staff to discuss and address departmental matters. Staff members meet for various reasons such as reviewing performance, setting objectives, reporting on the outcome of actions taken and other matters. These types of meetings are usually conducted regularly for the staff to be well informed with internal matters relating to their tasks and how this affects their organisations. The head of the department is responsible for organization and conducting these meetings.

### 7. Steering Group Meetings

A steering group is formed to take a high-level overview of a project. The group is usually composed of senior executives, project leaders and possibly external advisors to the organization.

### 8. Project Team Meetings

Projects are a part of every organization. Therefore project management requires teams. In a large organization many different projects may be carried out at the same time. Large projects, such as a new IT system, would require the establishment of sub-groups to handle different aspects of the project.

### 9. Team Briefings

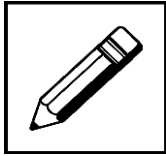
These are meetings held by the **team leader** to discuss issues with members of the team. Team briefings cover progress reviews, allocation of tasks, setting objectives, performance and motivational issues. The emphasis is more on actions needed to be taken by the team members.



### **10. One-off Informal Meetings**

One-off, informal meetings can take place anywhere at any time. They may be informal discussions between one or two employees or a small group. It would be very unusual for any minutes to be taken at gatherings like this, but this does not mean that such meetings carry no value. Some of the most creative ideas are often generated over a cup of coffee or during cigarette (smoking) and buai (betelnut chewing) breaks.

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**Learning Activity 12.1.8.1: Complete the activities given below.**

1. Have you ever attended a formal or an informal meeting? If your answer is 'yes', write a list of things which you observed about that meeting?

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2. In your opinion, which two (2) rules do you consider to be the most important rules? Why do you think so?

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3. List down at least two (2) items or matters which are usually discussed in the following types of meetings:

i. Annual General Meeting (AGM) for a Company:

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ii. School Board Meeting:

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4. Why are meetings important for every organization?

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5. Some people think meetings should be held regularly. What is your opinion on this?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.8.2 Types of Meeting Documents

Meeting documents are documents that are prepared and given before, during and/or after a meeting. These documents are explained below:

#### 1. Notice of Meeting

A **notice of meeting** is usually issued days, weeks or even months before a meeting is convened. This notice is issued to all members by the secretary of the organization. The notice therefore serves the following purposes:

- Informs participants or members of an upcoming meeting. Information such as time, venue and date are contained in the notice.
- Informs participants or members of the nature of the meeting and what matters are likely to be discussed at the meeting.
- Invites participants or members to submit their agenda items or notice of motion for inclusion on the meeting agenda.
- It serves as a proof for record purposes.

#### 2. Agenda

The **agenda** is a list of items or points which will be discussed at the meeting. It comes in writing and can be either handed to members at the meeting or some days prior to the meeting. If it is given out some days in advance, members or participants will have enough time to read through and prepare in advance for the meeting. This will enable them to participate actively at the meeting. When there is active participation the meeting will become very successful at the end.

#### 3. Meeting Minute

A minute is a record of a meeting. It is taken by a **minute secretary** for a meeting. The two common types of meeting minutes are: **resolution** minute and **narrative** minute. A resolution minute only records the resolutions or decisions reached at the meeting. A narrative minute provides details of discussions and includes decisions and resolutions of the meeting.

#### 4. Legal Documents

There are four (4) types of legal documents and these are:

- Memorandum of Association** – This document describes the aims of the business or organisation. For instance, its aims might be to publish a book, to serve as a shipping agent or to freight retail supplies. This document also regulates the way in which the company deals with outside parties. The range of activities the business engages in should also be stated broadly.

A company's Memorandum of Association should include;

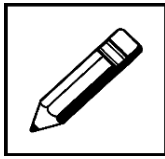
- The name of the company - the word 'Limited' or 'Ltd' must always be included after the Company's name. This word must appear on all documents of the company such as letter heads.





- The amount of capital – known as the Authorised Capital that the company has obtained or plans to obtain. It will also state the division of this capital into shares. For example, K1 000 000 may be the authorised capital, divided into shares of K2.00.
- b. Articles of Association** – This document contains rules on how the day to day activities of the company should be managed. Articles of association cover;
- The way in which shares of the company can be issued and transferred.
  - Procedures to be followed at meetings.
  - Powers of the Board of Directors.
- c. The Constitution of the Corporation** - Under section 27 of the PNG Companies Act (1997) a company can choose whether or not to have a **constitution**. If it does not, the company, directors and shareholders have all rights, powers, duties and obligations set out in section 29 of the Act. A constitution may modify certain powers, duties and obligations set out in the Act. Other powers, duties and obligations are fixed. A final point to note is that the constitution is binding between the company and its shareholders. The constitution has no effect if it breaches the law.
- d. Standing Orders** - A committee may compile additional rules or bye-laws for the conduct of business and meetings; these are known as **standing orders**. It is also important that the purpose and objectives of committees and sub-committees are clearly understood. Details regarding a committee's membership, the scope of its duties and the extent of its powers should be clearly defined in the **terms of reference** document.

**A Memorandum or Association is a document that regulates the way in which the company deals with outside people and organisations. An Article of Association is a document that outlines how the daily activities of the company should be handled.**



**Learning Activity 12.1.8.2: Complete the activities given below.**

1. Why is it important to keep a written record (minute) of every formal meeting?

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2. Why is listening attentively important for a minute taker or secretary?

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3. How does a 'Memorandum of Association' help a company?

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4. List some specific times when a company Constitution is really needed.

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



### 12.1.8.3 Process of a Formal Meeting

#### Chairing a Meeting

The Chair or **Chairperson** is the title of the person who runs a meeting. The role of the chairperson in any meeting is crucial as it determines whether a meeting is successful or not. The table below contains hints to guide the chairperson to conduct a meeting effectively.

Hints	Description
1. Preparing the agenda	Ensure that the secretary has compiled the agenda and that participants have a the change to include their agenda for discussion in the meeting.
2. Be sure of all participants' know the purpose of the meeting	Be absolutely certain all participants are aware of the purpose of the meeting and their expected role. Set the tone before the meeting starts.
3. Start the meeting on time	Always start on time. Punctuality is important
4. Keep the meeting on track	Encourage all participants to contribute meaningfully in the meeting.
5. Be open to members	Establish an open atmosphere for all members to participate freely.
6. Control the meeting	Encourage people to confront issues that upset them, but without heated, emotional arguments. Encourage participants to discuss issues to the satisfaction of everyone.
7. Balanced participation	Give every member a fair chance to participate in the meeting. Avoid discrimination or favoritism as it will lead to feelings of resentment.
8. The freedom presumption	While silence should be tested, meetings where people feel forced to talk are as threatening as those where people feel afraid to.
9. Interpretation of members' silence	Silence isn't to be trusted until it has been checked out. When some persons in the group remain silent, other members sometimes force their opinions and views on them.
10. Decision-making rules	Use consensus as a decision rule. All members must agree to some extent with the decision reached by the group.
11. Perils of group think	Members of a group may develop a group way of thinking (groupthink) that decreases their neutrality. Members' ensure that no one 'rocks the boat' by going against the group's way of thinking. This group culture must always be discouraged.
12. Balanced leadership	Effective meetings are characterized by participative leadership. All members are encouraged to get involved in the meeting.
13. Open communication	Silence is not encouraged but participation is not forced. Members are encouraged to participate equally and honestly.

Table 1.15. Tips for the chairperson.



### The Secretary's Role

The **Secretary** or any designated person prepares and sends out the meeting minutes. The other roles of a secretary include; sending out the 'notice of meeting', and 'compiling and distributing' the meeting agenda. A notice is usually sent out in advance to alert members of an upcoming meeting.

An **agenda** is a list of matters or 'business', to be considered by a meeting. For formal meetings, the agenda must be properly prepared and distributed to members well before the meeting commences. This gives them time to read and prepare for the meeting.

The secretary must be familiar with the rules governing each of the meetings. For example, in a board meeting, the meeting must be **quorate** for each business item. That means the required **quorum** must be maintained throughout the meeting. A business or agenda cannot be allowed for discussion if the meeting does not have a required quorum. Therefore, the minute-taker, in agreement with the chair, needs to keep a check that a quorum exists at all-times.

The purposes of the meeting minutes are;

- to provide a written record of discussions and decisions for later reference.
- to remind participants of what has gone on before, so that they are properly informed.
- to act as a check on hasty emotional comments. Emotional comments should be omitted from minutes unless the minute's secretary is clearly asked to include them.

Minutes are sent soon after the meeting or together with the agenda for the next meeting;

- If the next meeting will not be held soon enough, the minutes are sent out soon after the meeting.
- For most meetings, the minutes of the meeting are sent together with the agenda for the next meeting.

### Meeting Quorum

A quorum refers to the number of members who must be present to formally start the meeting. A two-thirds majority is a common rule in many organisations. A quorum gives formality to the meeting. Also, based on the principle of democracy, decisions made by the majority become official for the organisation.

### Notice of Motion – AGM

A **motion** is a proposition put to a meeting for consideration. The Constitution of an association or the Articles of Association should clearly set out the manner in which a '**notice of motion**' is given. A member who wishes to bring any business before a general meeting should give notice to the association or organization secretary.

In most cases the Constitution states that a member should submit a written notice of the matter to be raised at a general meeting. The secretary must include that matter in the next notice calling a general meeting. A notice of motion must be given in on time.



### Voting

Voting is done either by **secret ballot** or by **show of hands**. A secret ballot means that the vote is cast secretly. A show of hands means that hands are raised openly indicating votes. When two sides of an argument have an equal number of votes and are therefore deadlocked, the deciding vote is called the **casting vote**. The Chairperson usually has the casting vote.

A **unanimous** vote means that all are in favor. A **consensus** means that the issue has been agreed by general consent without having to take a formal vote.

### Point of Order

A **point of order** is an objection made by a member about the conduct of the meeting. A point of order is a direct challenge to the Chair of the meeting. A point of order can be called for various reasons. For example, if the Chairperson or a speaker is going off-topic or is using improper language then a point of order can be called. Also, if a meeting rule is being broken then a point of order can be called.



### Generic Meeting Structure

If a meeting is to be effective, it must have a clear sense of direction. A meeting without structure is likely to veer off-track. The meeting structure will vary depending on the nature of the meeting. Below is a common meeting structure:

1. Introduction
  - a. Welcome by the Chairperson
  - b. Minute taker notes the names and any changes
  - c. Introduction usually not recorded in the minute
2. Apologies for absence
  - a. Create an accurate list of attendees on the day
    - i. Substituting
    - ii. Not arrived
    - iii. Apologies
    - iv. Present
3. Minutes of the previous meeting
  - a. To approve the minutes as an accurate record
  - b. The only discussion should relate to: 'Are the minutes accurate?'
  - c. Concentrate on errors of fact
  - d. Minutes should have been read by members before the meeting
  - e. The filed set of minutes should NOT be altered
  - f. The Chair to sign the last minute
4. Matters arising
  - a. A quick review
  - b. A confirmation that agreed actions have been completedAn update from an item(s) in previous minutes
5. Information only
  - a. Not for discussion or debate
  - b. If need for major discussion, incorporate as part of a main agenda
  - c. Papers should be circulated with the agenda
  - d. A written report can be attached to the minutes. Verbal reports are allowed.
6. Agenda items
  - a. The key topics for discussion at the meeting
  - b. All topics must be listed with attachments if necessary
  - c. Name of sponsors of items must be listed beside
7. Any other business (AOB)
  - a. Any fresh items that arise during the meeting
  - b. Items must be called for by the Chairperson any time before moving onto the 'minutes of last meeting' section.
  - c. The Chairperson has the power to defer AOB items if out of time.
8. Date of next meeting
  - a. Confirm the date of the next meeting



## Formal voting procedures

### *Motions*

A motion may be submitted in writing in advance of the meeting or proposed at the meeting. The wording of the motion should be clearly written. Once a motion is submitted or registered, the usual requirement is for motions to be '**moved**' or '**seconded**'. The Chairperson may, if necessary, rule a motion out of order if it conflicts with the rules of the group or organization. Once a motion is approved by the meeting, it becomes a '**resolution**'.

### *Amendments*

An amendment is a proposal to change the wording of the motion; e.g. addition or deletion of words. A motion can be amended at any point after it has been proposed and prior to voting. In order to amend a motion, it requires a 'mover' and a 'seconder'. If accepted, the new motion replaces the original and becomes the substantive motion.

### *Voting*

If a motion or amendment requires a vote the Chairperson calls for it. The Chairperson introduces the motion or amendment and then asks for those who are '**in favour**' of it. Voting is done by show of hands, and the Minute Secretary records the votes in favour. The Chairperson then asks for those '**against**' it to vote. Again the minute secretary records the votes. Finally, the Chairperson asks for '**abstentions**' – those who do not wish to vote - and the Minute Secretary records their vote.



When members vote, either for or against the motion, the vote is said to be '**unanimous**'. When a majority of members vote in agreement, either for or against, with no votes in the opposite direction, the resolution is passed. Most resolutions require a simple majority to be approved. For example, in accordance with the Companies Act 1997, an ordinary resolution may be passed by a simple majority (over 50%). A specific resolution, on the other hand, must be passed by a majority of at least 75%.

**Minutes are the written record of a meeting.**

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**Learning Activity 12.1.8.3: Complete the activities given below.**

1. What is a 'point of order?'

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2. How can the chairperson avoid a point of order in a meeting?

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3. What can you say about the member who raises a point of order?

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4. How does groupthink negatively affect a meeting?

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5. When do you think is the right time for the meeting minutes of an AGM to be finalized and set to all members?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



#### 12.1.8.4 Electronic Meeting

Electronic meetings are those that are held through a telecommunications medium such as telephone and Internet. These meetings are attended by people in distant locations but are linked through a common telecommunication medium.

**Teleconferencing** is the common method of electronic meeting technology available to businesses, government organisations and learning institutions globally. It is a meeting facilitated by a telecommunications medium.

**Electronic meetings are those that are held through a telecommunications medium such as telephone and Internet.**

The methods used differ in technology, but common factors contribute to the shared definition of teleconferencing;

- Use of telecommunication channel.
- Link people at multiple locations.
- Interactive to provide two-way communications.
- Dynamic to require users' active participation.

There are many different types of teleconference equipment currently on the market. These are broken down into three categories: **audio, video and web-based**. This distinction, however, is not very clear cut. For example, a video-based system can also incorporate audio, while a web-based system may include audio and video features. It is a popular way to conduct business meetings, academic seminars, and political meetings. Many business experts note that the overall costs of teleconferences are less. Teleconferences are also sometimes referred to as **teleseminars**.

An audio conference, also known as a '**conference call**', uses telephone wires and a public communications network to allow parties to communicate. The main party typically calls the other parties, allowing them all to hear and participate in the conversation. FM 100's Talk-back Show is an example of such technology in action here in PNG.

Video teleconferencing involves different **interactive communication technologies** allowing two parties to interact via two-way audio and video transmissions. Older versions of video conferencing used televisions that received direct signals.

Due to extensive use of the Internet, **web-based** conferencing has become very popular. The advent of digital telephone technology in the 1980s allowed audio and video transmission to be more easily compressed. This has made the way for the web-based model.

Internet telephony is the web-based version of teleconferencing. This system is also known as '**Voice Over**' **Internet protocol** (VoIP). Voice and voice messages are often used in this type of conferencing, along with video. High-speed connections allow for these conferences to be carried out in an efficient manner, and without much delay.



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### Advantages of Teleconferencing

Video-conferencing increases efficiency and results in a more profitable use of limited resources. It is a very personal medium for human issues where face-to-face communications are necessary. When you can see and hear the persons you talk to on a television monitor, they respond as though you were in the same room together. With videoconferencing, you never have to leave the office. Documents are available, and experts can be on hand. A crisis that might take on major proportions if you were out of town can be handled because you are on the job. Videoconferencing maximizes efficiency because it provides a way to meet with several groups and people in different locations at the same time.

### How to prepare the Minutes

#### *Before the Meeting:*

**Step 1:** Prepare a copy of the Agenda with large spaces under each item for your notes. Take extra paper in case you need more space.

#### *At the Meeting*

**Step 2:** Record the time the meeting starts.

**Step 3:** Make a list of those present. Order the names either by order of importance or in alphabetical order or list the executives first and the rest in alphabetical order.

**Step 4:** Make a list of those absent.

Write in brackets the reason for absence. Example; (sick), (on business) and (on leave).

**Step 5:** Listen and make notes.

- Write your notes under the agenda item heading.
- Summarise the main points and the resolution. DO NOT write down every word. WAIT until something has been discussed and then jot down notes to summarise the point.
- If you are not sure of something – ask! Example, Excuse me, could you tell me exactly what you would like me to record? Or I am not quite sure of the details of the final resolution. Could you please repeat it? Ask afterwards to check your record.

**Step 6:** Record the time the meeting closes.

**Step 7:** Check that you have the correct spelling of names that you need to include.

#### *After the Meeting*

**Step 8:** Draft the Minutes as soon as possible after the meeting.

- Keep the record as objective as possible.
- DO NOT include heated statements.

**Step 9:** Check the draft with the Chair, or with another reliable member of the meeting.



**Step 10:** Write the final version.

**Step 11:** When you have finished, proofread using the 'Checklist for Minutes of Meetings'. The only way to learn how to write good minutes is to practice. You will find that taking the Minutes of a real meeting is harder than looking at a page of notes, as you have just been required to do. It is a good idea to take the Minutes of every meeting that you attended, just for practice.

### **What is a Group and how does it affect a Meeting?**

A group comprises of people with shared interests. It is more than simply a crowd of people. There are certain things that make a group special.

The three important characteristics of groups are listed and explained briefly below.

#### **1. A sense of identity.**

People who belong to a group know their group and its membership. People are pleased to belong, to be part of a group. It makes them feel good and safe.

#### **2. A sense of loyalty.**

People feel that the group will protect them and they, in turn, feel loyal to the group. Certain kinds of behavior are acceptable to the group and the group members conform. Organisations encourage their members to feel part of the group and encourage group loyalty.

#### **3. A sense of purpose.**

Groups have a sense of common purpose. The purpose may be informal and not consciously expressed. Or the purpose may be formally expressed as a set of aims and objectives, as with a soccer team, a school or a trading company.

#### **4. Groupthink**

Meetings are always attended by people who belong to a group. So they come with their group **culture** – a way of doing things. Group culture can either be an advantage or a pitfall for a meeting. A group culture can hinder progress of a meeting and even affect the final outcome of a meeting if not controlled well.

After people meet together for a while, they may develop a group way of thinking that decreases their openness to other viewpoints. Members' statements begin to be monitored or controlled by fellow members to ensure that no one goes against the group's way of thinking or group-culture.

The following are some typical problems that can lead to groupthink:

- a. Lack of free expression** – Members find it hard to disagree with the group because of poor superior-subordinate relationships. If the leadership is poor members may feel threatened and agree to anything. Also, if the group is judgmental, members may become fearful of being evaluated.



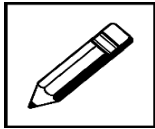
- b. Self-censorship** –Members know how the group thinks and they do not want to be different. So they often stop themselves from thinking in a different way.
- c. Tunnel vision** – Frequently members seem able to look in one direction only. They fail to examine carefully all the relevant options.
- d. Anxiety avoidance** – People like to avoid anxiety. Members are often scared of challenging ideas and decisions that are proposed by managers or superiors. As a result they conform to the superior members.

How does one prevent or decrease groupthink?

- **Legitimate disagreement** – The leader should promote an atmosphere in which members feel free to disagree.
- **Encourage diversity of viewpoint** – Encourage members to think ‘outside of the box’ to help point out hidden risks of proposals.
- **Generate ideas instead of inviting them** – Encourage members to speak freely. Do not evaluate their views and suggestions instantly.
- **Think through an idea or a proposal more than once** – Make it a habit to review decisions after enough time has lapsed. Have as many people as possible to participate in decision-making.

**A group’s way of thinking is called ‘groupthink’. It becomes their culture.**

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**Learning Activity 12.1.8.4: Complete the activities given below.**

1. Do you think video teleconferencing is used in Papua New Guinea? If yes, provide an example. If no, why do you think so?

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2. Taking meeting minutes can be a headache for anyone without any solid experience. Explain in your own words why it is difficult task, and how this task can be made easier.

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3. What is one (1) disadvantage of teleconferencing?

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4. What is one (1) advantage of teleconferencing?

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5. Should large organisations in PNG adopt technology to convene their important meetings?

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**CHECK YOUR WORK. ANSWERS ARE AT THE END OF THIS MODULE**



## Summary

In this module we have learnt the various communication skills, technologies and management of communication systems and processes. Communication is therefore critical to business success. All organizations such as businesses cannot do without communication.

Traditional forms of communication such as oral, written, pictorial and gestural are a constant feature of every organization. Organizational success depends on the effectiveness of organizational communication.

Communication technology has changed so much since the invention of the telephone. Throughout history the wave of technological innovation has been constant. Telex and fax technology have played a huge part in the process of modernization. Computer technology has also led to the wide spread use of the computer in modern organizations. The Internet technology represents such a massive change which was made possible by the computer technology. This ongoing process of change seems unending as new technology continues to come out as old ones become obsolete. The rate of change is responsible for success for some organizations and failure for others.

Today, technology is at the forefront of organizational change. From communication tools to office equipment to recording and transmission technology, the changes are permanent. The challenge is on managers and workers to embrace the technological revolution and transform their organizations continually.

While technology continues to change, some fundamental practices such as meeting, managing systems and processes, record keeping and filing remain unchanged. In fact, these areas of organization have been maintained over time with some changes.

Technology is now available to improve many systems and processes. The internet provides vast opportunities for businesses to tap into new markets. Technology is also available for organisations to convene meetings without having to travel at all. Important business records can be stored permanently and safely with the help of technology.

What is certain is that technological innovation will continue to affect organizational communication. Managers and workers must be prepared to adapt to these changes. Businesses need managers who are flexible and able to adapt to change. Changing with technology appears to be the key to surviving through these changing times.



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## Answers to Learning Activities

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### 12.1.1

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#### 12.1.1.

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1. Define the term 'communication'.

*Communication can be defined as the purposeful exchange of facts, ideas, opinions or emotions. Communication comes in different types, forms and methods. It can be oral, written, and gestural.*

2. Define these words.

- a. Encode: To compose or put a message together*
- b. Decode: To read, interpret or view the message to gain understanding*
- c. Message: Is what is being communicated (coded and decoded)*
- d. Feedback: A response sent back by the receiver to the sender*

3. Write down the difference between internal and external communication.

*Internal communication usually takes place inside or within an organization.*

*External communication usually takes place between an organization and another organization or individual or such other external parties.*

4. State two (2) reasons why internal communication occurs.

*Manager:*

- delegate work*
- inform staff of policy*
- carry out staff appraisal*
- motivate workers*
- inform staff of problems and solutions*

*Workers:*

- suggest to manager certain changes that are necessary*
- inform manager of problem*
- report on work carried out*
- request for more information or resources*

5. How does informal communication benefit an organization? Write down two (2) of these benefits.

- Workers use it for emotional support purposes*
- Workers feel at ease when communicating informally*
- Workers can express their feelings and emotions better informally*
- Workers can interact or socialize with one another*
- Through socialization workers can share valuable ideas for the organization, particularly on how the organization can improve on some processes and systems.*





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6. What are possible reasons for bottom up communication? (Can be either formal or informal)
- *inform superior of problems, grievances and queries.*
  - *inform superior of general problems in company*
  - *comment on organizational policies and practices (negative or positive)*
  - *suggest changes in practice or philosophy*
  - *report on what has been done*
  - *request for more information or resources*
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#### 12.1.1.2

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1. Explain the importance of communicating with these external parties.

*a. Shareholders: This group provides capital to the business/company. Therefore, they need to know if the company is progressing well. They also need other information such as Annual General Meeting dates and date of dividend payout.*

*b. Suppliers: Suppliers need to know from the firm what particular materials are needed, when they are needed and the quantity needed. Suppliers also need to provide price information.*

*c. IRC: The Internal Revenue Commission (IRC) must know how much profit a business makes in order to collect the right amount of tax. The IRC also informs all organizations about important policy or law changes.*

2. What is 'public perception', and how can a positive image be created?

*This is what the public thinks about an organization. It is also the public opinion. This opinion or perception can be a positive one or negative one depending on how the organization presents itself to the general public.*

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#### 12.1.1.3

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1. State an advantage and a disadvantage of face-to-face communication.

*a. Advantage:*

- 1. Oral communication is more personal than written communication,*
- 2. If time is limited to make a quick business decision, face-to-face or telephone is ideal,*
- 3. More flexibility in oral communication; much can be covered in short time, decisions can be made quickly,*
- 4. Effective in addressing conflicts or problems,*
- 5. Talking things over is the best way to settle disagreements or misunderstandings,*
- 6. A great way to promote employee morale, boost energy and enthusiasm, as it is personal.*



*b. Disadvantage:*

- 1. Some important information which need written documentation cannot be done orally,*
- 2. A lot of transaction in our business world requires some type of record for evidence purposes. Oral communication does not provide a strong evidence back-up,*
- 3. Oral communication is less detailed, and is subject to misunderstanding,*
- 4. Does not allow time for thinking purposes, if technical issues are involved.*

**4. Why is oral communication considered the 'fullest' form of communication?**

*Oral face-to-face communication is the fullest kind of communication that we experience because we notice all forms of expressions, see the person, and hear the voice when we communicate. In oral communication we respond to the speed of speech and patterns of eye contact. We can therefore decide how to respond to these things. Looking and listening for feedback is the key to success in oral communication.*

**5. Define in your own words the terms 'kinesics' and 'proxemics'.**

- a. Kinesics: Body language in non-verbal communication.*
- b. Proxemics: Physical distance between the speaker and the listener in non-verbal communication.*

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**12.1.1.4**

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**1. Give appropriate examples of: 'emblems', 'illustrators'.**

- a. Emblems: Circular hand-movement meaning 'over-and-over', Finger pointing for direction (Example; up, down, left, right)*
- b. Illustrators: 'Punching' action with hands, or hand movement for 'eruption'.*
- c. Affect displays: 'Raised eye-brows', 'Smiling face', 'Sad face', 'Jaw dropping',*
- d. Regulators: Head nodding, Hand-shaking, Shaking head,*

**2. Write down an advantage and a disadvantage of:**

**i. E mail**

<b>Advantages</b>	<b>Disadvantages</b>
<i>1. No need for personal contact.</i>	<i>1. Communication is only possible if Internet is available.</i>
<i>2. E-mailing is cheaper than telephone calls</i>	<i>2. Delay in communication if the receiver does not open the 'inbox' to read</i>
<i>3. Written proof. Provides written proof in case of a dispute.</i>	<i>3. Costly. The Internet costs money.</i>
<i>4. Written communication is more precise. Can be stored, analysed and used for future reference.</i>	<i>4. Blind people cannot read unless another person reads to them.</i>
<i>5. An e-mail can be copied and forwarded to other recipients in distant places.</i>	<i>5. It is not flexible; it cannot be changed once it is written and sent.</i>
<i>6. E-mail messages are usually short, and can include attachment of electronic files.</i>	<i>6. Poor writing skills can affect communication, leading to misunderstanding.</i>
<i>7. An e-mail message can be printed</i>	<i>7. Time consuming – encoding and decoding takes time.</i>



*out by the receiver using a standard printer and kept as a 'hard copy'.*

ii. Telephone Message

<b>Advantages</b>	<b>Disadvantages</b>
<ol style="list-style-type: none"><li>1. <i>Instant communication takes place.</i></li><li>2. <i>Hear the voice, gain some ideas about body language and mood.</i></li><li>3. <i>A message can be taken if someone else receives the call.</i></li><li>4. <i>It allows for the smooth flow of communication.</i></li><li>5. <i>Calls can be made and received from anywhere and at any time of the day.</i></li><li>6. <i>Mobile phones can be carried around to any place for easy communication.</i></li><li>7. <i>Encoding and decoding of messages is easier as long as the language is understood.</i></li><li>8. <i>It is more personal than written communication.</i></li></ol>	<ol style="list-style-type: none"><li>1. <i>People can hide behind the telephone to conceal their real mood.</i></li><li>2. <i>Telephone abuse is high where there is little supervision.</i></li><li>3. <i>Cost of telephone calls can be high.</i></li><li>4. <i>The receiver may not always be around to answer the call.</i></li><li>5. <i>If the telephone number has changed it is difficult to maintain contact with others.</i></li><li>6. <i>Language differences, speed and complexity of information can hinder communication.</i></li><li>7. <i>Message can be misunderstood due to poor listening.</i></li><li>8. <i>Because sight is not fully utilised receiver can be distracted.</i></li></ol>

iii. Fax Message

<b>Advantages</b>	<b>Disadvantages</b>
<ol style="list-style-type: none"><li>1. <i>Written messages can be transferred as fast as they possibly can.</i></li><li>2. <i>Provides written proof in case of a dispute.</i></li><li>3. <i>Written communication is more precise. Can be stored, analysed and used for future reference.</i></li><li>4. <i>What is written on paper can be copied to other recipients in distant places.</i></li></ol>	<ol style="list-style-type: none"><li>1. <i>It may take a while to get to the intended recipient.</i></li><li>2. <i>It costs money to send a fax.</i></li><li>3. <i>Blind people cannot read what is on paper unless another person reads to them.</i></li><li>4. <i>Time consuming – coding and encoding takes time.</i></li><li>5. <i>It is not flexible; it cannot be changed once it is written and sent.</i></li><li>6. <i>Poor writing skills can affect communication, leading to misunderstanding.</i></li><li>7. <i>Lack of secrecy. Once it is on paper, anyone can read it.</i></li></ol>



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## 12.1.2

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### 12.1.2.1

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1. Make a list of those characteristics you know about the telephone. Pick one of them from the list and state why you think this is important.

This question has two parts: Part 1 requires you to list the parts and aspects of telephone. Part 2 requires you to pick out one aspect or part of the telephone and elaborate further.

*Part 1: Remote oral communication, **Instant communication**, oral communication, Landline (fixed), mobile phone, Communication tool,*

*Part 2: For example; **Instant communication**:- this characteristic states that telephone communication is instant. The voices on the phone lines come on live, and the actual speakers are speaking to each other live as if they are physically talking to each other. This is important because important messages get transmitted instantly in real time, without any delays. It speeds up further processes and actions and is good for business and personal communication.*

2. Do you think there are organisations in PNG that operate call centers? If yes, name at least two of those organisations, and state their main line of business.

*Yes. Digicel has a call center. Also, Air Niugini.*

3. List three (3) ways that a small business person benefits from 'mobile phones'.

- a. Business owner can buy and sell while on the move.*
- b. Business person can do mobile banking.*
- c. Business person can save money by sending text messages instead of calling or traveling. He/she can make use of free SMS and save money.*
- d. Business person can pay bills while on the move.*

4. What is the difference between a 'subscriber trunk dialing,' and 'operator assisted dialing'?

- a. Operator assisted calls are those that are assisted by an operator who links calls to a receiving number, particularly with overseas numbers.*
- b. STD (subscriber trunk dialing) calls are those that do not need an operator. The calls can be made direct to the receiver's phone. It's easier, faster and saves time.*

5. B Mobile and Digicel have entered into an 'interconnectivity' agreement. Explain what That means, and how does it help businesses?

*It simply means that these two independent telephone networks have allowed for interconnection. This now makes it possible for users of Digicel and B Mobile services to Communicate with each other.*



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**12.1.2.1**

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1. How can you remain calm and cool when someone starts to become frustrated over the telephone?
  - a. *Listen patiently,*
  - b. *Empathize or 'put yourself into the other person's shoes', and show some*
  - c. *Direct the caller to the main issue and try to find a solution rather than becoming reactive,*
  - d. *Accept some responsibility in order to ease the tension over the phone and provide a remedy or solution if one is needed.*
  
2. If you are a public servant and that you have access to a 'free' telephone, should you make full use of the free telephone? Explain your answer.

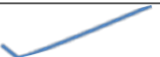
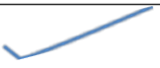
*The word 'free' is misleading here. Really there is nothing free. Everything costs money. Whether it is a company phone or a government phone, or a friend's phone, they still end up paying for the service. So you must use the phone entirely for business or official purposes and not for personal reasons. Also, plan your calls well before you make them so that you get the message across in as little time as possible. This will help save some cost.*
  
3. Differentiate between 'closed' question and 'hypothetical' question.

**Closed Questions:** *Closed questions will usually produce a 'yes' or a 'no' answer.*

**Hypothetical Questions:** *A hypothetical question is meant to test out possible reactions from a person. By asking this type of question you can test the opinion of someone, particularly in a conflicting situation, where you are trying to suggest a solution.*
  
4. Write an example of a 'leading' question. (Clue: a question is asked in such a way that the first answer will be a 'yes' or a 'no'. An alternative will be suggested following the answer. Use the following examples as guides to write your own questions.
  - a. *You would like to fly economy class, right?*
  - b. *You said you are hungry, right?*
  - c. *You have heard the new already, right?*



5. Develop a telephone message from the following scenario. A caller named Peter Pan from Gerehu wants to talk to Andrew Bill, your co-worker. Andrew is out of the office. Peter urgently wants Andrew to repay K100 he borrowed or else he will take the Police after him. The call came in at 10:00 am, on Friday 5 December 2014

To: <i>Andrew Bill</i>		Time: <i>10:00 AM</i>	
Date: <i>5/12/14</i>			
<b>WHILE YOU WERE OUT</b>			
Mr/Mrs/Ms: <i>Mr. Peter Pan</i>		Of: <i>Gerehu, POM.</i>	
Phone #:			
Telephoned		Please call	
Was in to see you		Will call back	
Wants to see you		URGENT	
Returned your call			
Message: <i>Peter Pan warned that he will bring the Police after you if you do not repay the K100 you borrowed from him.</i>			
Message taken by: <i>(Write your full name, and sign on above it)</i>			

### 12.1.2.3

1. What is the meaning of the word 'Teleconferencing'?

Teleconferencing means a conference or meeting that is attended by people based in distant locations, without having to come together physically at a physical location to meet. This type of conferences is made possible by technology.

2. Which of the six (6) types of teleconferencing is considered to be the simplest, and why is that so?

Audio or telephone conferencing is the simplest, cheapest and effective. A telephone conference room is pre-arranged with a few telephone lines connected to a loud speaker. People can hear each other except that they don't see each other. It saves traveling time and cost, though face-to-face communication does not take place.

3. Except for audio teleconferencing, the other forms of teleconferencing are not common yet in PNG. Why do you think that is so?

There could be other reasons also, but the following are common:

- Not many people are aware or interested in them,
- Smallness of our economy does not require such technology to be widely used,
- They appear too technical to try out,
- The need for such technology is not felt yet.



4. Which of the different forms of teleconferencing described do you prefer? Why?  
*Your answers must try to explain or cover one or two of the following points.*
- a. Cost consideration*
  - b. Convenience*
  - c. Technically possible or not*
  - d. Relevance to PNG needs*
  - e. Future direction of technology development in PNG*
5. What two (2) advantages does a mobile phone have over a fixed, landline phone?
- a. Mobile – can call from anywhere*
  - b. Widecoverage- Digicel for instance has a wider coverage so people can call from even the remotest part of PNG*
  - c. Voice, data, text and image can be transmitted.*
  - d. Access Internet using smart phones.*
  - e. Telephone contacts are recorded and used.*
  - f. Can use camera, play music and watch video.*



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### 12.1.3

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#### 12.1.3.1

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1. Define 'written communication' in your own words.

*Communication by means of written symbols – either printed or handwritten – is called written communication. Written symbols can come in the form of letters, pictures, diagrams or a combination of all three.*

2. Have you ever been involved in any written communication before? If yes, specify the nature of the communication, when it was undertaken and outcome was achieved.

This question can be answered in many different ways and no one particular answer is correct.

a. If you answered 'No' to the question, then you don't need to write anything further. However, for many of you, your answer will be 'yes'.

b. If you answered 'yes', check to see that your answer contains these key ideas or points below:

- Nature of communication: simply explain the purpose of your communication. For example, it could have been a letter you wrote to a company asking for part time employment.
- State the date when you wrote that letter or note.
- State whether our letter was responded to, and if yes, what was the response.

3. Why do you think written communication is important to businesses?

*Writing is important to any business. A business owner needs to write to customers, suppliers, workers, shareholders, etc. These outside parties need some form of written communication for important business matters concerning them. Also, these outside parties communicate in writing to the business owner at times. The calculation of business profit, for example, requires written records too. Therefore, written records and Written communication is important for a business to function effectively.*

4. You are a supervisor of the production unit, and you wish to request the maintenance supervisor to supply a spare part to a production machine. What type of memo will you use, and will it be formally or informally communicated?

*Because communication involves two people in two different divisions of the firm, a memo will be used. It has to be written formally, using the organisation's memo head Because it is part of the formal communication process.*

5. What are some characteristics of a good correspondence.

*Dates, figures and facts should always be checked for accuracy. Secondly, the expressions used should be as clear as possible, to avoid any chance of misunderstanding. Always use simple words. Finally, courtesy and politeness are golden rules for all letters, just as they are when talking to a person.*





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**12.1.3.2**

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1. Develop the Internet Domain Name for the following organisations:

- a. *Tourism Promotion Authority: www.tpa.gov.pg*
- b. *University of Papua New Guinea: www.upng.ac.pg*
- c. *Mainland Holdings: www.mainlandholdings.datec.pg (note: Datec is the name of the Internet Service Provider in PNG)*

2. You are an accounts clerk of PNG Trading. You are to draft an e-mail message, asking your accounts supervisor when the next company budget meeting will be held. The accounts supervisor's name is Jo Lei. *See sample email message below.*

*TO: Jo Lei*  
*SUB: Next PNG Trading Budget Meeting?*  
*MESSAGE:*  
*Hi Jo, I am wondering when the next company budget meeting will be convened.*  
*I need to know the details of the meeting date so that I can prepare in advance for the meeting.*  
  
*Cheers!*  
  
*Mary Tura (Accounts Clerk)*

3. List one advantage and one disadvantage of the widespread Internet access in PNG.

*Advantage:*

- 1. Promote e-commerce (buying and selling online)*
- 2. Access information for educational research or learning purposes*
- 3. Increase general knowledge of different subjects of interest*
- 4. Social media participation for many young people*
- 5. Can send and receive email through the internet.*

*Disadvantage:*

- 1. Can access illegal sites such as pornography*
- 2. Can cost a lot of money to access the internet*
- 3. Can promote plagiarism and copyright violation*
- 4. Can cause people to waste time*
- 5. Can encourage or lure people into cyber-crime*

4. Why is it important to promptly reply email correspondences?

- 1. It will promote further communication*
- 2. It will lead to better business or personal relationships*
- 3. It will create a good/positive image of the business, organization or individual*



5. Why do you think some e-mails are never read or responded to by the receiver?
1. *Maybe the receiver's email account is closed*
  2. *Maybe the receiver is no longer on the internet*
  3. *Maybe the content of the email was not appropriate for the receiver to reply to*
  4. *Maybe the content of the email was irrelevant to the reader*
  5. *Maybe the receiver does not like the sender of the message.*
  6. *Any other similar and suitable reasons you may have.*
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### 12.1.2.3

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1. Define the term 'correspondence' in your own words.  
*A correspondence is any written or digital communication exchanged by two or more parties. Correspondences may come in the form of letters, memos, text messages, emails, voicemails, notes and postcards.*
  2. What is the main purpose of a correspondence?  
*Correspondences serve as a paper trail of events from point A to point B. It is a process that usually takes place between senders of messages and receivers of messages. It enables organisations and individuals to maintain a true record of communication that takes place. Therefore, it is a historical record that provides evidence of communication.*
  3. In business communication, why is 'writing' more reliable than 'speech'?  
*Businesses depend on written proof or evidence. Especially if there are legal documents, they have to be in written form and filed away. Speech, on the other hand, does not provide any form of record or evidence unless voice recorders are used to record the conversation. For a business, written records are important source documents for accountants to determine the profit and loss for a trading period.*
  4. Why is it important for business people to be conscious of the cost of communication?  
*Because if the cost is high, the business will make a loss. Businesses are there to make money – profit. It's that simple – if income is less than cost, the result will be a loss. So, all businesses must control and minimize cost to make a profit each year.*
  5. What is the difference between a fax message and a telephone written message?  
*A fax message is always in a written form. A message is prepared and transmitted through the fax machine. A telephone is merely an audio transmission device. Some phones have voice recording function, but generally, a phone only permits verbal communication. So, if a caller calls but the intended receiver is unavailable, another person can take a message. This message is not always exactly the same, but at least it is translated into the written form for intended receiver to respond to later.*
  6. Why do you think the 'SMS' is not a very suitable medium of business communication?  
*A SMS is not an official and formal business communication medium. It is limited in terms of space, so messages are presented using an informal format. Initials, abbreviations and shortened words are commonly used, which makes SMS an informal type of medium. Businesses always need formal correspondences and the SMS does not fulfill the requirement. So the SMS is not a suitable medium of business communication.*
-



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**12.1.4**

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**12.1.4.1**

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1. From the four different personal styles explained above which one fits you? Explain briefly about it and how it matches your personal style of communication.

*Here you should study your personal style of communication and match it against each one of these styles below and pick the one that matches you.*

- a. Dominant communicator
- b. Passive communicator
- c. Passive-aggressive communicator
- d. Empathic communicator

*When you have identified your style, write a statement explaining how your style matches the style which you picked from the above list. Through this exercise you should become aware of your own style of communication.*

2. 'Empathy is a skill that some people are born with'. Do you agree with this statement? Explain your answer.

*The answer is both 'yes' and 'no'. Yes because empathy is attached to peoples' personalities. Some people, through their personalities, are naturally empathetic than others. Also, there are some cultures which promote empathy more than others.*

*No because, not all people are empathetic. Some cultures even do not promote empathy. Therefore, empathy, like any other communication skill, can be learnt. So long as you know what it is you can develop your empathetic skills to become a good communicator.*

3. How can you form a realistic self-concept?

*Firstly, know the data from the public arena and hidden squares of the Johari Window. You must always become aware of your feelings and be aware of who you are. You should also know your feelings towards yourself and others. Your perception and the perception of others on you is also important. You must understand those perceptions. Finally, you should be clear on who you are, what you want to be and where you want to end up in life. All these credentials will enable you to develop a realistic self-concept.*

4. If you are not already an empathetic person, outline the steps to be taken to become one. Below are some recommended actions to take in order to be more empathetic:

- a. Consider the opinions of other people as important as yours
- b. Always put yourself in other peoples' shoes
- c. Always listen to others and allow them to express themselves fully. Do not impose your ideas and opinions on others.
- d. Let other people know that important decisions have to be made based on consensus
- e. Allow other people to make their input when making decisions.
- f. Communicate in an honest and direct manner
- g. Be less demanding and more facilitative
- h. Motivate other people to be in control of themselves
- i. Respect other people and encourage openness



- 
- 
- j. *Appreciate other people*
    - k. *Be meaning centered and not message centered.*
    - l. *Understand other peoples' needs and problems.*
  5. Briefly explain the four areas covered in the 'Johari Window'.
    1. **Public arena** is made up of information known personally and to others.
    2. **Hidden square** represents things that we know about ourselves that other people do not know. We may try to make sure they do not find these things out.
    3. **Blind spot** represents things known to others but not to us.
    4. **Unknown spot** contains things that are not consciously known to us or our associates.
  6. How can a poor 'self-image' affect our inter-personal communication?

*Our **self-image** is based on data in the public arena and hidden squares. Our self-image will shape our behavior towards ourselves and towards other people. If we have a negative or poor self-image, we can develop negative attitudes towards others and even to ourselves. Negative attitudes include: becoming aggressive, being withdrawn physically from others or avoiding others, developing hatred for other people, and distrusting other people.*
  7. Do you think your society enables you to express yourself freely? Explain.

*Answers to this question will depend on your respective cultures. Traditionally, in many parts of PNG such as in the Highlands, which are patrilineal in nature, women and children are not allowed much space to express themselves. They are mere takers of decisions. However, in matrilineal societies women and children have certain rights and can express themselves freely. You answer should explain clearly how your society promotes or discourages freedom of expression.*
  8. Do you think it is easy to form positive interpersonal relationships in a multicultural society like PNG? Explain your answer.

*The answer to this question can be varied. However, generally, judging from our experiences and the experiences of many other multicultural societies, cultural tolerance is often a problem. Developing and maintaining interpersonal relationships is always challenging in such societies like ours because of our own cultural influences. Many people in PNG live with this belief that their culture is the best or is better than others. So, with such beliefs it creates an uneven environment for interpersonal communication. However, this is changing also as many PNGeans become educated and learn to tolerate each other and their cultural differences.*
  9. Why do you think people react differently to each other?

*We must remember that each person has a unique interaction with his or her environment. We all see things, feel, value and think differently to others. Your views do not invalidate other people's experiences of reality, nor do their views invalidate your views. We simply disagree because we see the same thing or issue differently.*
- 
-



10. From the 'Bill of Rights' list above, identify those rights which you are currently practicing. *For this question, your answers should reflect your personal preference based on who you are and what you are experiencing now. The main idea is to enable you to cross check with what you are practicing now against the 'bills of rights.' There is no correct or incorrect Answer to this question.*
11. List those rights which you are not totally aware of or practicing now. *This question is a follow up on question 10 above. So you should realistically check yourself out against the bill of rights. So there is no correct or incorrect answer to this question. Just be honest with yourself*
12. Develop a 3-part self-assertive message for the following situations.
- You make several unsuccessful telephone calls to your mother. She failed to answer your calls. You return home angry about what had happened.
  - While taking a ride in a PMV bus, the off-sider or crew charged you a fare of K2.00. This is K1.00 more than the normal bus fare, and you get angry with the crew.
  - Someone you know is good at name-calling. This time he picked on you and called you a 'primitive from the bush'. You get very annoyed and embarrassed because it was said in From of your mates.

Situation A.	
<i>Behaviour description</i>	<i>When you fail to answer my telephone calls this afternoon</i>
<i>Feelings Disclosure</i>	<i>I became very annoyed</i>
<i>Clarifying effect of other person's behavior on you.</i>	<i>Because I was worried that something may have happened to you.</i>

Situation B.	
<i>Behaviour description</i>	<i>You are charging K2 instead of K1</i>
<i>Feelings Disclosure</i>	<i>It makes me angry</i>
<i>Clarifying effect of other person's behavior on you.</i>	<i>Because it is illegal as the normally approved charge is K1 and you are charging an extra K1</i>

Situation C.	
<i>Behaviour description</i>	<i>When you are calling me a primitive from the bush,</i>
<i>Feelings Disclosure</i>	<i>It makes me annoyed and belittled</i>
<i>Clarifying effect of other person's behavior on you.</i>	<i>Because I am a modernized Papua New Guinean and you are being unfair to me by calling me a negative title.</i>



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**12.1.5****12.1.5.1**

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1. Write down one (1) similarity and one (1) difference between a telephone and a fax?

*Similarity:*

- a. They both are electronic communication tools*
- b. They both send and receive messages*
- c. They both use the telephone line*

*Difference:*

- a. Telephone is only for voice transmission; fax is for written documents.*
- b. Fax machine is not mobile; telephone comes in mobile form as well.*

2. What is the first technology that allowed the transfer of written documents?

*Telegraph technology*

3. Why do you think many people prefer a fax over the telegraph technology?

*Because a fax can transmit photos, diagrams, maps, symbols, etc. apart from written message. A telegraph machine can only transmit written form of communication. Therefore, its service is limited to the typed word.*

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**12.1.5.2**

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1. State one (1) advantage and one (1) disadvantage of a photocopying machine.

*Disadvantage:*

- a. The price of bigger and advanced photocopiers is always higher. Not all photocopiers can produce colour copies of the original.*
- b. Running and maintenance cost can be high.*
- c. Unnecessary photocopying can lead to wastage of paper and toner/ink.*

*Advantage:*

- a. Unlimited copies of the original can be duplicated in exactly the same way without affecting the original at all.*
- b. Latest copiers have additional functions such as scan and fax. There is no need to buy a separate fax machine and scan machine.*

2. Why is the photocopier such an important office machine?

- 1. It saves a firm from writing/typing the same document many times if extra copies are needed.*
- 2. It helps a firm keep extra copies of the original for safe/record purposes.*
- 3. It enables firms to duplicate copies of important documents such as court files, project proposals and contract documents.*

3. Do you think it is good investment for a college to buy a photocopy machine? Explain.

*Yes! It is definitely a good investment because a college handles so much paper on a daily basis. Some of these papers form the basis of filing. There are also correspondences which have to be sent out. In such situations a copy of these documents must always be kept. A photo copier will help the college in filing and in dealing with correspondences. The college*



*will also need to reproduce teaching notes for the students. This can be done using the photocopy machine.*

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**11.1.5.3**

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1. Hard copy is a term used to describe.....

**Select one option from the answers provided.**

(a) writing on a hard board

**(b) printed output**

(c) storing information on the hard disk

2. Another name for output is.....

(a) input

**(b) printout**

3. List one (1) 'advantage' and one (1) 'disadvantage' of scanning.

*Advantage: 1. Can scan an exact copy of an original document in colour.*

*2. Can help an organization or individual to create an electronic file of original documents. Electronic files can be used for Internet or E-mail purposes. It is also a way of having a backup file of a document in electronic form.*

*Disadvantages: 1 A scanner must be configured to a computer That means without a computer a scanner cannot be used.*

*2. The scanning process is long, and can be tiring if you try to scan bulky documents.*

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**12.1.5.4**

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1. Is a binding machine very necessary for every modern office? How?

*Yes, every modern office needs a binding machine, particularly those that deal with a lot of papers and files. The binding machine can create a professionally bound copy of a document containing many pages. Professional reports, for example, can be better presented in a bound form.*

2. Do you think it is a worthwhile investment for a school to buy an electric stapler? Explain.

*Yes! If it is a very big school dealing with so many papers and records. An electronic will serve its purpose well in a very large school.*

*No! if it is a small school like a primary school. There are not that much paperwork involved so a manual stapler can do the job perfectly well.*

3. A law firm is deciding whether or not to invest in an electric stapler. What would be your advice to the law firm, and why is your advice good?

*Looking at the type of work undertaken by a law firm it is clear that a lot of papers and files are handled on a routine basis. Therefore, it is advisable for it to invest in an electronic stapler as it will increase efficiency and effectiveness.*





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**12.1.5.5**

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1. What is the main purpose of a guillotine?

*Its main purpose is to resize papers to sizes smaller than the original. The usual paper size is either A3 or A4. So if a document is to be presented on a paper size smaller than these, a guillotine will help. Also, it is useful when cutting up photographs into passport sizes.*

2. How useful are numerical keyboards?

*Numerical Keyboards are useful because many people use them for number data entry.*

3. Describe a basic calculator.

*A basic calculator is one that does basic calculations like, addition, subtraction, multiplication and division.*

4. The electric shredder is a useful machine, but it produces a lot of paper waste. Suggest one use for the paper waste produced by the shredder.

- 1. Shredded paper can be good compost or fertilizer for gardens and flower beds*
- 2. Shredded paper can be used for pets such as dogs to sleep on. Also, it can be recycled using a paper mill.*

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**12.1.5.6**

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1. Explain in your own words why a dictation recorder is useful to a Journalist.

*A journalist is always under pressure to take note of words and images. Sometimes, things happen so fast that it becomes difficult to capture the events. A dictation recorder enables a journalist to capture the words spoken by someone. This record can be played back several times in order to extract the key message and present it as a news item.*

2. What other professions would require the services of a dictation recorder or transcriber?

- a. Doctors such as surgeons*
- b. Lecturers, teachers*
- c. Musicians*

3. There were many office machines covered in this unit. Should an organization equip its office with all of these machines? Explain your answer.

*The answer to this question depends, but generally speaking, yes! Every office should at least equip itself with most, if not all of the technology covered in this unit. Office functions become very easier and convenient when the necessary office equipment is present. It speeds up work and brings about efficiency. Workers find their job lighter and a lot easier to perform with the help of office technology.*





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**12.1.6**

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**12.1.6.1**

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3. Define the term 'record' and write down at least three (3) different reasons records are important in your opinion.

*A record is evidence of a past transaction or event written down or recorded in some other way and retained so that it can be accessed again.*

4. Name two past business records which are needed in order to calculate profit.

*Receipt*

*Invoice*

*Credit Note*

*Debit Note*

*Bank Statement*

*Stock sheet*

5. What would happen to an organization if there are no records?

*Any of the following can happen:*

- Managers making decisions at will, without proper guidance.*
- Fraud cannot be proven. Also, reporting and auditing becomes impossible.*
- Decision makers cannot be held accountable for their actions.*
- Customers and employees lose their trust on the organisation.*

6. How do records promote accountability in an organisation?

*Accountability is all about being responsible or answerable. Records are proof of events that took place in the past. Events such as decisions, actions, plans, etc. are recorded and kept as records. Those responsible for the actions, decisions or plans know that they will be held responsible through the records. This is what keeps people on track and keeps them doing the right thing for their organisations. Records therefore provide evidence that people knew what they did, at the time it was needed, for the best interest of their organization.*

7. What is records management?

*Records management is a process. It involves planning the creation of records, controlling the records, taking a leadership role in the record creation process, coordinating various record creation and keeping activities and directing of such processes. It is more than just creating and filing a record.*

8. What is the life-cycle concept of records management?

*Records management involves a cycle. It begins with the creation, or receiving of documents. The next stage is organizing and maintaining the records. Once their useful term expires, these records are marked for disposal. After a while such files are either destroyed or transferred to an archive for permanent storage. This cycle continues as new files come in to take the place of expiring records. It is an ongoing process.*



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**12.1.6.2**

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1. Write down some possible consequences or effects of mismanaging records belonging to a business.
  - a. *The manager will have a hard time trying to figure out what happened in the past, especially if it concerns important decisions like calculating profit.*
  - b. *The workers will not have any idea what is happening in the business.*
  - c. *Owners of the business will not know if their business is growing at all.*
  - d. *The government's tax agency (IRC) will find it difficult to determine how much tax the business will pay the state.*
2. What role does the records manager play?

*The records manager's role is to play the key management functions or roles in relation to the process of records management. These roles are: planning, controlling, leading, coordinating, and directing. If these roles are played out properly the records can be managed well.*

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**12.1.6.3**

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1. Explain the difference between a 'centralised' and a 'de-centralised' filing system?

*A centralized system is where all filing for an organisation is done in a central location. Whenever files are created in the organization, they must all be sent to the central filing room for filing. No staff or worker is encouraged or allowed to keep this/her own records relating to their job.*

*A decentralized filing system is where filing is done in various locations within the organization. Usually, staff or workers keep some or all of their files at their work station or location. They can only send in copies to a central filing room for filing. In that way a back-up copy is kept in case something happens to the original.*

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**12.1.6.4**

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1. Use the example of computer filing method above to write the full document file **name for the Preliminary Marketing Research Results completed and entered in 2014**. The document is recorded in the Local Drive (C) of the computer.

*C:/Market Research/Results/2014/Final.doc.*

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**12.1.6.5**

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1. Name the appropriate file classification for the following records:
  - a. *The branch offices of PNG's Internal Revenue Commission (IRC)*  
*Geographical*
  - b. *Class list of FODE students taking Business Studies*  
*Alphabetical*
  - c. *Birth dates of FODE students taking Accounting Studies*  
*Chronological*



- d. *Prisoner Identification Numbers of prisoners held at Baisu Jail, outside Mt. Hagen.*  
*Alpha – numeric or numeric*

2. a. Write a list of all your personal records, for example, Grade 8 and 10 school certificates, birth certificate, baptism certificate, and so on.  
b. develop a simple filing index. Come up with a simple filing key, using any one of the file classification systems covered earlier.

*Example; Subject filing for your school subjects such as English, Math and Science.*  
*Chronological filing for your certificates and other important documents you obtained over the years of schooling.*

3. Differentiate between 'alphabetical' and 'numerical' file classification systems.  
*Alphabetical file classification is normally based on the letters of the alphabet. It is for names of people and places.*  
*Numeric file classification is used for files that have a numbering system such as student File numbers or Air Niugini's passengers seat numbers.*
4. What is 'geographical' file classification system?  
*Geographical file classification is used for filing based on names of places or names of different regions of the country or world. Example; North, South, East and West.*
5. What does 'chronological' filing mean?  
*Chronological filing means filing according to the dates when events took place. Example; birthdates of students in a class can be filled in the chronological order.*

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#### 12.1.6.6

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1. Explain the difference between alphabetic indexing and numeric indexing.  
Alphabetic indexing is used to identify files by a descriptive heading such as;

- *Business names*
- *Names of people*
- *Geographic regions*
- *Subject categories*

Numeric indexing method as an identifier such as;

- *Account numbers*
- *Transaction numbers*
- *Product or part numbers*
- *Case numbers*

2. What is index filing and how does it help an organisation's filing system? *Index filing is a standard system or method for filing to help locate files. It is always a consistent or standard practice in an organization. It starts with the label on the drawer or shelf to easily identify and locate the files. The labels, also called finders, may consist of file headings, names, account numbers, transaction dates, and category names.*



*If done properly index filing will ensure that records are kept in their correctly labeled or marked places. When the records are needed by someone, it is easy to locate and retrieve them. That saves a lot of time and energy and even frustration. The end result is increased productivity and efficiency.*



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**12.1.7**

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**12.1.7.1**

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1. Define the term 'file plan' and write down at least three (3) different reasons for file planning.

- *A file plan is a plan which shows how records are to be organized once they have been created or received. It provides a 'roadmap' to the records created and maintained by an organization, including their disposition schedule.*
- *Reasons for file planning are:*
  - a. *Provide a location for every record for easy finding*
  - b. *Shows how a file can be filed or organized*
  - c. *Provides details of who is responsible for filing*
  - d. *Provides a guide for file labeling*
  - e. *Outlines the types of documents that will be filed*
  - f. *Provides a file disposal schedule.*

2. ABC is an imaginary Business College offering standard business studies courses. Identify its main filing categories and sub categories. Give a numbering system to this file plan. Use the hierarchical structure. Below is a model answer for you to compare.

*10 Economics*

*10.1 Micro-economics*

*10.2 Macro-economics*

*10.3 International economics*

*10.4 Econometrics*

*20 Accounting*

*20.1 Managerial Accounting*

*20.2 Financial Accounting*

*20.3 Auditing*

*30 Business & Management*

*30.1 Human Resource Management*

*30.2 Physical Assets Management*

*30.3 Operations Management*

*30.4 Small Business & Management*

*40 Marketing*

*40.1 Advertising*

*40.2 Pricing*

*40.3 Product Development*

*40.4 Distribution Systems*

*50 Finance*

*50.1 Financial Management*

*50.2 Corporate Finance*

*50.3 Banking & Finance*



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### 60 Information Communication Technology (ICT)

#### 60.1 Business Communication

#### 60.2 Office Information Systems

#### 60.3 Computer Studies

3. You were recently employed as a junior records clerk at a Motor Vehicle Insurance Company.
- What are some regular documents you think you will handle daily?  
*Fresh vehicle insurance applications, Fresh third-party motor vehicle insurance applications, Fresh accident compensation claims, Expired vehicle insurance files and Paid third-party compensation claims.*
  - List and explain the four (4) most important tasks you will undertake each day at work.
    - Receive incoming correspondences from the manager and supervisor*
    - Prepare the correspondences for filing*
    - Filing the correspondences in the correct file folders and cabinets*
    - Retrieving and forwarding files to those who request for it officially*
    - Communicate with the manager or your supervisor each day to get advice and instructions, and also to provide feedback on your performance.*

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#### 12.1.7.2

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1. Moving files to the 'inactive' category is very necessary for every organization. In your opinion:
- How long should a file remain active before it is considered inactive?  
*It depends on the nature of the file and also on the type of organization that keeps the file. There is no set time frame for all types of files.*
  - What should happen if a records clerk mistakenly removes an active file and moves it to the inactive section?  
*That file must be moved back to the 'active' section immediately.*
2. Why do some organisations permanently store their inactive or dead files in archives and other permanent storage facilities rather than destroying them?
- To be used for future research purposes*
  - For historical purposes so future generations can use them*

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#### 12.1.7.3

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1. In a country like PNG where incidence of fire is high, what kind of filing equipment would you recommend for each of the following organisations? Provide an explanation for each one.
- Bank: 'Safe' built from heavy duty steel metal for all files and cash to be stored in. Also, specialized equipment such as safety vaults and fire resistant cabinets,*
  - School: Standard, lateral filing cabinets or even fire resistant cabinets.*
  - Hospital: Standard, lateral filing cabinets and fire resistant cabinets.*



2. Make a list of those important safety tips for a house built to store files.

- *Controlled temperature and humidity*
- *Controlled lighting*
- *Enough space for records shelves*
- *Enough space for records storage containers*
- *Flexible for change*
- *Provides for archives expansion – vertically or horizontally*
- *Guaranteed protection of the archived materials*
- *Fire protection of the stored materials*
- *Safe for staff and visitors occupants*
- *Controlled access to archives storage areas*
- *Secure and safe loading and receiving areas*

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#### 12.1.7.4

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1. Differentiate between ‘micrographics’ and ‘microform’.

**Micrographics** is the process of photographically producing a physically reduced exact-image copy of written or graphic records. Types of micrographics are: Audiovisual Records, Magnetic Computer Tapes, and Direct Access Storage Media.

**Microform** is the generic term for the different formats that microfilm comes in. The general definition for microforms is film that allows the reduction of small-size graphics and text to micro-images many times smaller than the original. Microforms generally fall into one of two broad categories; unitized microfilm and roll microfilm.

2. Which of the three (3) micrographic media outlined above do you think is popularly used by many organisations today? Explain your answer.

*Direct access storage media is the most widely used of the three forms of micrographic media.*

3. List one (1) advantage and one disadvantage (1) of microfilming.

*Advantage:*

- *Bulky, paper-based records can be converted to electronic media, thereby saving a lot of space.*
- *Electronic files can be safe and used repeatedly for a long time after its creation*
- *Good for organisations such as libraries where vast amounts of knowledge are available for safekeeping.*

*Disadvantage:*

- *Time consuming*
- *Delays can happen,*
- *Mechanical breakdown,*
- *Quality control problems,*
- *Sometimes the expectations of microfilm can be unrealistic, and*
- *Time and money can be wasted if records retention period is short.*







4. What is COM (computer output micrographics) and why is it good for organisations?

- *COM machines were used to take print-image output from the computer either online or via tape or disk and create a film image of each page. COM can be produced as microfiche or as 16mm-roll microfilm.*
  - *COM is good because of the following reasons:*
    - *COM provides a safe and reliable way to store and archive historical data.*
    - *COM is not vulnerable to computer viruses, software upgrades or latest media change.*
    - *COM is the ideal method for inexpensively storing large amounts of data in permanent film format.*
    - *Files are directly converted from a computer system to microfiche.*
    - *It is a combination of the computer, microphotography, and electronics.*
    - *This process is faster than printing on paper.*
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#### **12.1.7.5**

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1. For each of the following organisations, recommend the most appropriate file destruction method.
  - a. *Bank: Move them to a different, secured location. Some can be burned if not needed at all.*
  - b. *Hospital: Unnecessary files can be destroyed, but important files can be stored in a separate building that is safe and secure.*
  - c. *School: Unnecessary files can be destroyed, but important files can be stored in a separate building that is safe and secure.*
2. Many people in Papua New Guinea do not know how to properly and effectively do filing. It could be their own documents or documents belonging to organisations they work in. Identify at least two (2) reasons for this situation.
  - *Lack of education or literacy*
  - *Lack of filing awareness*
  - *Lack of knowledge of filing*
  - *Laziness*





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**12.1.8****12.1.8.1**

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1. Have you ever attended a formal or informal meeting?
  - a. *If you answered 'No' to this question, you can proceed to the next question.*
  - b. *If you answered 'Yes' to this question, below are some of the common aspects of meetings which you could have noted down:*
    - Chairperson
    - Minute secretary
    - Members attending the meeting for a specific time period; say 1 hour
    - Members raising their hands up to say something in the meeting
    - Members arguing
    - Chairperson stopping those members arguing
    - Papers distributed to members
2. In your opinion, which two (2) meeting rules do you consider to be the most important rules? Why do you think so?

*When referring to your study guide you find that there are ten (10) meeting rules covering four (4) general areas. You have to pick two of the ten rules and explain as best as you can why you think these rules are very important. Your answer should contain some very important reasons such as organizational success and stability or good management.*
3. List down at least two (2) items or matters which are usually discussed in the following types of meetings:
  - i. *Annual General Meeting (AGM) for a Company*
    - a. *Chairperson's report*
    - b. *Secretary's report*
    - c. *Treasurer's report*
    - d. *Profit/Loss report*
  - ii. *School Board Meeting*
    - a. *Chairperson's report*
    - b. *Secretary's report*
    - c. *Treasurer's report*
    - d. *Principal's report*
4. Why are meetings important for every organization?

A **meeting** is an occasion where two or more people come together to discuss, consult, make decisions and find new direction for future action.
5. Some people think meeting should be held regularly. What is your opinion on this?

*Yes, meetings are important for any organization. But the scheduling of meetings is not the same for all types of organizations. For instance, companies or businesses would not want to spend too much of their productive time meeting unless something urgent needs to be discussed or announced to staff. Non-Government Organisations, on the other hand, meet at regular intervals to discuss issues affecting their operations. Government departments also have scheduled meetings because they are organized and run on the*



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*principles of democracy, particularly for PNG and other democratically run governments. Schools, hospitals, social clubs and sports clubs also hold regular meetings.*

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#### **12.1.8.2**

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1. Why is it important to keep a written record (minute) of every formal meeting?

*In formal meetings a minute must be kept by a permanent secretary or someone appointed at the meeting. It is important because important decisions reached at the meeting need to be recorded and followed upon. Also, actions required are identified and people to take action are also appointed. So, the minute is a means to check out if those decisions and actions are taken or followed as agreed in the meeting. A meeting minute is an official record of the organization. It is needed for other purposes such as in legal cases. So, it is important to keep a formal meeting minute every time a meeting is convened.*

2. Why is listening attentively important for a minute taker or secretary?

*Listening is a very important tool for a minute secretary. The minutes need to be as accurate as possible, capturing all decisions and major discussions of the meeting. In a meeting, it is impossible to replay what was just spoken by someone. In fact it will be ridiculous to ask someone to repeat what was just said unless it is really necessary. So, by listening carefully to every discussion and speaker the proper words, decisions and required actions will be recorded.*

3. How does a 'Memorandum of Association' help a corporation?

*This document spells out the aims and functions of the organization. It also regulates the way the organization deals with outside organisations and people. It spells out the activities it will be engaged in, how, where, with whom and when. If it is a corporation, the document should also clearly state the authorized capital.*

4. List some specific times when a company Constitution is really needed.

- *When there is a lack of an Article of Association*
- *When a dispute arises which cannot hardly be solved using the Articles of Association*
- *When there is no Memorandum of Association*

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#### **12.1.8.3**

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1. What is a 'point of order?'

*This is a direct challenge to the Chair of the meeting. It is usually raised by a member attending the meeting and is done when the Chairperson's conduct in the meeting is improper or if the Chairperson allows someone to drift away from the stated business of the meeting by discussing irrelevant and out of topic matters or issues. Also, if meeting rules are broken, a point of order can be raised.*

2. How can the chairperson avoid a point of order in a meeting?

*Simply by following the meeting rules and exercising fair and proper control of a meeting.*

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3. What can you say about the member who raises a point of order?

*The person who raises a point of order can be considered a very active listener. Also he/she must be someone who is fully aware of the meeting rules. We can even say that such people are bold and are also assertive in nature; they always speak out for something that is right.*

4. How does groupthink negatively affect a meeting?

*Whenever there is a 'groupthink' in action meetings are usually unproductive. Members either become lazy or are not willing to go against the group's way of thinking and the group culture. Usually the group leader and a few cohorts ensure that other members comply with the group's way of doing things or group culture.*

5. When do you think is the right time for the meeting minutes of an AGM to be finalized and set to all members?

*The timing of meetings and distribution of meeting documents such as minutes, agenda list and notice are usually covered in the Articles of Association. So, refer to that document. However, if it is not contained in that document, the Chairperson should decide when the minutes are prepared, finalized and distributed. Usually, it will be a good idea to finalise it within 2-3 months and distributed to all members of the AGM. Some organisations prefer sending out minutes of the last meeting a month before the next AGM. So, it depends on tradition and organizational practices and rules.*

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#### 12.1.8.4

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1. Do you think video teleconferencing is used in Papua New Guinea? If yes, provide an example. If no, why do you think so?

*There are no known cases in PNG. This is a technology that is not so popular in PNG. However, last month (Nov 2014), the Foreign Affairs Minister of PNG, Hon. Ribink Pato hinted at trialing this method of meeting in PNG. Technologically, it is possible in PNG. However, government departments and large corporations need to invest in this technology and trial it out. There are real advantages in this type of technology.*

2. Taking meeting minutes can be a headache for anyone without any solid experience.

*Explain in your own words why it is difficult task, and how this task can be made easier.*

*Minute taking is a skill. Just like any other skill, it can be developed. However, for a starter, it will definitely be a headache. It requires good listening and writing skills. Also, it requires proper preparation before the meeting. So, anyone wanting to be a minute secretary must prepare well. He/she must know the meeting agenda, must read the minute of the past meeting, know the meeting rules and a few other things. He/she must also be an active listener and be good at note taking. That means writing as accurately as possible but at a faster rate than normal.*

3. What is one (1) disadvantage and one (1) advantage of teleconferencing?

*Disadvantage:*

*The use of telephones for teleconferencing has its own disadvantages too. One of that is to do with the lack of physical presence. People only rely on the verbal messages for*



*communication and are not present. Another disadvantage is that it can get rowdy or out of control at times when speakers compete to say their piece. Usually, it is difficult to have two chairpersons operating in two different rooms for the same meeting.*

*Advantage:*

*Teleconferencing is advantageous because it saves cost. People do not have to travel out physically to attend a meeting. The organization can save money and time by conducting its meeting through the telephone or video.*

4. Should large organisations in PNG adopt technology to convene their important meetings?  
*Yes. The answer is definitely yes because of the advantages it offers. Also, PNG is part of the global community so such technology must be adopted and used in the country.*

**GLOSSARY**

<b>Words</b>	<b>Pgs</b>	<b>Definitions</b>
Accountability	94	Framework for justifying managements' organizational actions whether they are financial or employment – related or responsibility for cash or other property held in trust for another person.
Agenda	138	A formal list of things to be done in a specific order, especially a list of things to be discussed at a meeting.
Amendment	146	The process of changing, correcting, and improving something.
Annual General Meeting	132	A yearly gathering of members of an organization, at which officers are elected and the year's activities including financial dealings, new management are discussed.
Appraisal	127	A judgment or opinion of something or somebody, especially one that assesses effectiveness and usefulness.
Audio visual	119	Relating to sound and vision especially when combined in a presentation using both film and sound recordings.
Audio graphics	36	The recording and reproduction of sound and pictures using a computer.
Back up files	127	These are extra files that are made and are kept in another location for safety.
Binder	83	A machine for holding sheets of paper together to for a book or booklet.
Broadband	50	Transferring data fast in large amounts at high speed.
Broadcast	37	To transmit a program or information on television or radio.
By-laws	131	A law or regulation that governs the internal affairs of a company or other organization.
By-pass	13	To ignore or avoid a standard procedure for doing something, or ignore somebody who is usually consulted.
Call center	27	A place that handles high-volume of incoming telephone calls on behalf of a large organization.
Cassette	88	A sealed plastic case containing a length of audiotape or videotape wound around spools ready for use.
Centralized filing	98	To remove administrative power from local or subordinate levels and concentrate filing in a central place.
Chairman	130	The chief officer of a business corporation, elected by its board of directors and responsible for corporate policy and supervision of upper management
Classification	101	Classes or grades by which jobs are evaluated or any method of categorizing business activities and products.
Code	42	A system of letters, numbers, or symbols into which normal language is converted to allow information to be



		communicated secretly, briefly, or electronically.
Coding system	106	A system of letters or numbers that gives information about something such as postal or telephone areas.
Cold site	117	A cold-site is a back-up facility in case the original office is unusable after a disaster.
Committee	132	A group of people appointed or chosen to perform a function on behalf of a larger group.
Communication barriers	14	A blockage which stops communication from getting through.
Communication channel	11	Routes through which communication occurs, for example, team briefings or working committee.
Communication routes	13	Routes through which communication occurs or flows.
Communication styles	59	The different ways of exchangingg of information between people, e.g. by means of speaking, writing, or using a common system of signs or behavior.
Constitution	131	Fundamental Principles of law by which a government or an association is created and administered.
Correspondence	93	Communication by letter, email, telephone or other methods between two or more persons or organisations.
Cross referencing	115	A note, especially one printed in a book, index, or library catalog, that tells a reader to look in another specified place for information.
Cyber crime	52	Cybercrime refers to any illegal activity conducted over the internet.
Data security	127	Regulations which govern how organisations can use information on individuals or businesses which is recorded and processed electronically.
Democratically	130	Something that is governed by the people and for the people.
Digital	46	All information or data is stored as strings of zeros or ones.
Disposal	92	Sale of an asset
Distortion	11	A message can be misinterpreted, altered, lied, falsified and, biased by the subordinate workers at the bottom of the organisation.
Electrostatic	77	Produced by and relating to static electricity.
Email	48	This is a global information super highway network that allows any person to communicate with anyone, anytime and anywhere using a network which is run and guarded by the laws in their country and international laws.
Empathy	65	There is understanding, sympathy, compassion, responsiveness, identification, and fellow feeling
Etiquette	29	Telephone or email etiquettes are standards of manners which stand to guide people when using them.





External communication	10,17	The exchange of information between people by means of speaking, writing, or using a common system of signs or behavior from outside.
Eye contact	22	To see eye to eye.
Fax technology	74	Copy, especially of written business documents or pictures sent by electronic mail.
Feedback	9	Response to a piece of communication. Without it the communicator cannot know whether the communication has been received.
File plan	108	To place material in given order for easy accessibility and retrieval.
Filing clerk	95	A person in-charge of filing business documents.
Gestural	9,14	Body language such as: signal, shrug, nod, wave, motion, indicate, and point used to indicate a response or answer.
Hot site	117	A building or a local area in which wireless Internet users can access a high-speed Internet connection.
Index	104	Statistical compilation that puts in context a current economic or financial condition, especially by relating it to a base year, the previous year, or the previous month.
Industrial signs	42	Industrial signs include safety notices in factories, cargo handling signs, and chemical signs.
Interactivity	36	Allowing or involving the exchange of information or instructions between a person and a machine such as a computer or a television
Internal Communication	10	The exchange of information between people by means of speaking, writing, or using a common system of signs or behavior from within an organisation.
Internet	13,45	Government sponsored mechanism of linking companies and individuals and selected agencies through a computer network. Companies and individuals, who join must pay a fee and participate in various data banks and also use E-mail.
Internet browser	46	To some time to look, surf, cruise, look through, leaf through, glance and navigate on the Internet for information
Internet fax	75	A network that links computer networks all over the world by satellite and telephone, connecting users with service networks such as e-mail, facsimile and the World Wide Web.
Jargon	44	Language that is used by a group, profession, or culture, especially when the words and phrases are not understood or used by other people.
Johari Window	63	A graphical representation of how people give and receive information, used to help people understand interpersonal communication



Laser printer	80	A computer printer using a laser beam that generates an image, then transfers it to paper.
Lateral	12	Businesses combine to carry out the same stage in the production process or produce similar products or services
Magnetic ink	78	A type of ink used on cheques and other documents to enable them to be automatically sorted and the characters to be read and fed into a computer.
Media	17	The various means of mass communication considered as a whole, including television, radio, magazines, and newspapers, together with the people involved in their production.
Medium	17	A means of communicating information.
Meeting	130	An occasion when people gather together to discuss something.
Memorandum	43	An outline of an intended instruction.
Micro form	120	A piece of film or paper such as microfilm or microfiche that contains miniature reproductions.
Minutes	132	Brief summary of proceedings of an assembly or meeting.
Micro film	121	A strip of photographic film on which greatly miniaturized reproductions have been recorded.
Micro processor	45	The central processing unit that performs the basic operations in a microcomputer, consisting of an integrated circuit contained on a single chip.
Motion	140	A proposal put forward for discussion at a meeting
Netiquette	49	A set of empirically derived rules for communication via the Internet
Non-verbal	21	Not using or involving words.
Numeric	108	Using numbers or consisting of numbers.
Oral	9	Expressed in spoken form as distinct from written form
Photocopy	76	A copy of something printed, written, or drawn that is produced almost instantly by a photographic process in a machine designed for this purpose.
Plagiarism	52	A piece of written work or an idea that somebody has copied and claimed as his or her own
Point of order	139	A question raised by one of the participants in a formal debate or meeting that relates to the rules of procedure governing it, in particular as to whether those rules are being breached.
Posture	22	The way in which somebody holds his or her body especially when standing.
Proxemics	20,23	The study of the distance individuals maintain between each other in social interaction and its significance.
Public relations	18	The practice or profession of establishing, maintaining, or improving a favorable relationship between an institution



		or person and the public.
Quorum	138	A fixed minimum percentage or number of members of a legislative assembly, committee, or other organization who must be present before the members can conduct valid business
Records	91	An account of something, preserved in a lasting form, e.g. in writing or on film.
Records manager	96	A person in-charge of records in an organization.
Resolution	140	The process of resolving something such as a problem or dispute
Satellite	27,36	An object put into orbit around Earth or another planet in order to relay communications signals or transmits scientific data.
Scanner	80	An input device used to convert an image or text into digital form for storage or display.
Self-assertion	68	Tending to be aggressively confident in making your views heard and your presence felt.
Self-awareness	31	Having a balanced and honest view of your own personality, and often an ability to interact with others frankly and confidently
Sender	9	somebody or something that sends or transmits something
Silicon chip	45	A small wafer of silicon forming the base on which an integrated circuit is laid out, or such a wafer together with its integrated circuit.
Teleconferencing	36	A system of videoconferencing that uses a restricted band of frequencies and allows participants to be connected by telephone lines.
Telephone	26,73	An electronic apparatus containing a receiver and transmitter that is connected to a telecommunications system, enabling the user to speak to and hear others with similar equipment.
Transcribing machine	87	A machine that can record conversations, lectures, speeches and rallies and replayed later.
Web Camera	37	A video camera recording pictures that are broadcast live on the Internet
Website	47	An address identifying the location of a file on the Internet, consisting of the protocol, the computer on which the file is located, and the file's location on that computer.
Wireless	50	Describes communications systems and devices that make use of cell phone technology.
World Wide Web	46	A system for accessing, manipulating, and downloading a very large set of hypertext-linked documents and other files located on computers connected through the Internet.



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Written communication	9	Printed matter used to convey a message.
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<http://www.sdsc.edu/vrml/>

<http://education-portal.com/academy/lesson/what-is-written-communication.html>

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### STUDENT'S AND MARKER'S COMMENTS

**STUDENT'S COMMENTS:**

[illegible]

Sign: .....

Date: .... /...../.....







FODE PROVINCIAL CENTRES CONTACTS							
PC NO.	FODE PROVINCIAL CENTRE	ADDRESS	PHONE/FAX	CUG PHONES	CONTACT PERSON		CUG PHONE
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2	KEREMA	P. O. Box 86, Kerema	6481303	72228124	The Coordinator	Senior Clerk	72229049
3	CENTRAL	C/- FODE HQ	3419228	72228110	The Coordinator	Senior Clerk	72229050
4	ALOTAU	P. O. Box 822, Alotau	6411343 / 6419195	72228130	The Coordinator	Senior Clerk	72229051
5	POPONDETTA	P. O. Box 71, Popondetta	6297160 / 6297678	72228138	The Coordinator	Senior Clerk	72229052
6	MENDI	P. O. Box 237, Mendi	5491264 / 72895095	72228142	The Coordinator	Senior Clerk	72229053
7	GOROKA	P. O. Box 990, Goroka	5322085 / 5322321	72228116	The Coordinator	Senior Clerk	72229054
8	KUNDIAWA	P. O. Box 95, Kundiawa	5351612	72228144	The Coordinator	Senior Clerk	72229056
9	MT HAGEN	P. O. Box 418, Mt. Hagen	5421194 / 5423332	72228148	The Coordinator	Senior Clerk	72229057
10	VANIMO	P. O. Box 38, Vanimo	4571175 / 4571438	72228140	The Coordinator	Senior Clerk	72229060
11	WEWAK	P. O. Box 583, Wewak	4562231 / 4561114	72228122	The Coordinator	Senior Clerk	72229062
12	MADANG	P. O. Box 2071, Madang	4222418	72228126	The Coordinator	Senior Clerk	72229063
13	LAKE	P. O. Box 4969, Lae	4725508 / 4721162	72228132	The Coordinator	Senior Clerk	72229064
14	KIMBE	P. O. Box 328, Kimbe	9835110	72228150	The Coordinator	Senior Clerk	72229065
15	RABUL	P. O. Box 83, Kokopo	9400314	72228118	The Coordinator	Senior Clerk	72229067
16	KAVIENG	P. O. Box 284, Kavieng	9842183	72228136	The Coordinator	Senior Clerk	72229069
17	BUKA	P. O. Box 154, Buka	9739838	72228108	The Coordinator	Senior Clerk	72229073
18	MANUS	P. O. Box 41, Lorengau	9709251	72228128	The Coordinator	Senior Clerk	72229080
19	NCD	C/- FODE HQ	3230299 Ext 26	72228134	The Coordinator	Senior Clerk	72229081
20	WABAG	P. O. Box 259, Wabag	5471114	72228120	The Coordinator	Senior Clerk	72229082
21	HELA	P. O. Box 63, Tari	73197115	72228141	The Coordinator	Senior Clerk	72229083
22	JIWAKA	c/- FODE Hagen		72228143	The Coordinator	Senior Clerk	72229085

**SUBJECT AND GRADE TO STUDY**

GRADE LEVELS	SUBJECTS/COURSES
Grades 7 and 8	1. English
	2. Mathematics
	3. Personal Development
	4. Social Science
	5. Science
	6. Making a Living
Grades 9 and 10	1. English
	2. Mathematics
	3. Personal Development
	4. Science
	5. Social Science
	6. Business Studies
	7. Design and Technology- Computing
Grades 11 and 12	1. English – Applied English/Language & Literature
	2. Mathematics - Mathematics A / Mathematics B
	3. Science – Biology/Chemistry/Physics
	4. Social Science – History/Geography/Economics
	5. Personal Development
	6. Business Studies
	7. Information & Communication Technology

**REMEMBER:**

- For Grades 7 and 8, you are required to do all six (6) courses.
- For Grades 9 and 10, you must study English, Mathematics, Science, Personal Development, Social Science and Commerce. Design and Technology-Computing is optional.
- For Grades 11 and 12, you are required to complete seven (7) out of thirteen (13) courses to be certified.

Your Provincial Coordinator or Supervisor will give you more information regarding each subject.

**GRADES 11 & 12 COURSE PROGRAMMES**

No	Science	Humanities	Business
1	Applied English	Language & Literature	Language & Literature/Applied English
2	Mathematics A/B	Mathematics A/B	Mathematics A/B
3	Personal Development	Personal Development	Personal Development
4	Biology	Biology/Physics/Chemistry	Biology/Physics/Chemistry
5	Chemistry/ Physics	Geography	Economics/Geography/History
6	Geography/History/Economics	History / Economics	Business Studies
7	ICT	ICT	ICT

**Notes:** You must seek advice from your Provincial Coordinator regarding the recommended courses in each stream. Options should be discussed carefully before choosing the stream when enrolling into Grade 11. FODE will certify for the successful completion of seven subjects in Grade 12.

**CERTIFICATE IN MATRICULATION STUDIES**

No	Compulsory Courses	Optional Courses
1	English 1	<b>Science Stream:</b> Biology, Chemistry, Physics
2	English 2	<b>Social Science Stream:</b> Geography, Intro to Economics and Asia and the Modern World
3	Mathematics 1	
4	Mathematics 2	
5	History of Science & Technology	

**REMEMBER:**

You must successfully complete 8 courses: 5 compulsory and 3 optional.