Essential Skills Study Guide

Office Skills

NATIONAL BUSINESS SERVICES ALLIANCE

The National Business Services Alliance collaborates with universities and commercial organizations to create workforce solutions that fundamentally improve U.S. economic development across diverse populations by developing and certifying skills that are key to the workplace.

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Module 1: Basic Office Competencies

Overview

Office competencies such as filing, word processing, and managing business correspondence are essential to running an office efficiently.

Other characteristics and skills that are often demonstrated by successful office workers are:

Strong Written and Verbal Communication Skills
Presenting accurate and comprehendible information, either verbally or in writing, that is appropriate to the intended audience.

Interpersonal and Relationship Skills
Establishing positive relationships with co-workers, clients, suppliers, etc., by being tactful, courteous, and cooperative.

Self-directed
Working without direct guidance, and being self-directing in assuming the duties of the job.

Detail-oriented
Being aware of, and taking care of, the small details of any task. This might include actions such as performing a final proofread of emails and documents, or confirming a conference room reservation the day before you have it booked to use.

Accurate Work
Taking the time and care necessary to reduce errors in any task performed.

Well-groomed
Ensuring personal cleanliness, neatness, and an appropriateness of dress for the job.

Dependable and Punctual
Adhering to work schedules and fulfilling job commitments. Being reliable and arriving to work on time.

Efficient Use of Time
Effectively and efficiently accomplishing job tasks, and successfully meeting deadlines. Only tending to personal matters outside of work hours.

Adaptable or Flexible

Adapting easily to organizational and procedural changes. Being willing to try new processes or tools.

Willingness to Learn

Being open to learning new job skills or new approaches to current tasks.

Positive Attitude

Displaying interest and enthusiasm, and taking pride in a job well done. Being willing to help where needed.

Workplace Safety

Taking care to follow established safety practices, and correct or report unsafe working conditions on the job.

Job Knowledge

Knowing and using the guidelines, regulations, and procedures applicable to the job. This may also require some knowledge of the products or services offered by your organization.

Technological Skills

Having the technological skills needed to perform tasks such as photocopying, word processing, electronic file management, data entry, email communication, and scheduling.

Summary

After reading this module, you should be able to:

- Describe the office competencies essential to running an office efficiently.
- Give examples of characteristics and skills efficient office workers have.

Module 2: File Management

Overview

Filing is the processing, arranging, sorting, and storing of records so that they can be found quickly and easily.

An effective office filing system should be:

- Economical to install and maintain.
- Simple to learn and use.
- Easy to access.
- Secure from damage or unauthorized use.
- Expandable and adaptable to meet future needs.

Creating an Effective Filing System

Creating an effective office filing system involves analyzing the type of documents or records that will be stored, designing the filing index system to match this information, selecting appropriate physical storage, determining a retention schedule, and finally, filing any records that already exist. The following are steps you can use to work through this process:

Step 1: Analyze the Information
Make a list of the types of information or documents you expect will be stored in the filing system. At this stage it is best not to be too specific. For example, if you were setting up a filing system for a business that does building inspections on contract, the types of documents you would expect to store might include:

- Client contact information.
- Inspection reports.
- Invoices paid to suppliers, etc. (accounts payable).
- Invoices billed to clients (accounts receivable).
- Inspection appointment schedules, etc.
- Employee timesheets and payroll information.
- Employee contact information.

Step 2: Choose Your Filing and Indexing System
You will need to choose an appropriate filing and indexing system to suit your particular needs. For example, you might want to take all the account receivable invoices and organize them in chronological order so that you can quickly reference the amount your company has been billed in any given month. Refer to the "Indexing and Filing Options" section below to help you determine what system will best suit your needs.

Make sure to label your file categories and indexing system, and document the filing guidelines you decide upon. This will help to ensure that everyone is using the system in the same way, and provides a training resource when new staff are hired.

Step 3: Office Storage and Filing Tools
The physical storage system you use will depend on the size and quantity of files you will be storing, the level of security needed, and the space available in the office. One storage system might be sufficient to store all your files, or you may find that you need to mix and match storage options.

You can browse any office supply catalogue to see the many options available for filing. However, here are some examples of file cabinets and other filing supplies you might typically find in an office:

Hanging-folder file cabinets
These cabinets come in sizes designed to hold either legal and/or letter-sized files. The files are generally suspended in the drawer using hanging file folders that have hooks which sit on two bars in the file drawer.

- Vertical file cabinet: Files are hung parallel to the orientation of the drawer opening, so tabs face you when you open the file cabinet drawer.
- Lateral/horizontal file cabinet: Files are hung perpendicular or sideways to the orientation of the drawer opening. These cabinets tend to be wider than vertical file cabinets.

End tab/side tab file cabinets and folders
Often used in medical offices, these cabinets are designed horizontally, and the drawers lift up and slide out of the way.

Flat file cabinets
These cabinets have large, shallow drawers designed to store large documents, such as maps or blueprints, without having to fold or roll them.

Cardboard or plastic file storage boxes
Often used for long-term storage of files that are being removed from the active filing system, but must still be retained. This is common for files that must be kept for legal or taxation purposes. Storage boxes are also often used when a large number of files must be transported.

Filing shelves
Designed to hold file storage boxes, or files of unusual sizes and shapes (e.g., rolled maps stored in cardboard tubes).

Cardboard tubes
Tubes can be used to store large documents that should not be folded, such as prints or maps, especially when a flat file cabinet is not available.

Expanding files
These are transportable or compact in nature, and expand or accordion out as needed to hold folders.

File sorters
Used to temporarily hold and help sort files or records that are to be re-filed in the file cabinet at a later time.

File guides
Cardboard or plastic inserts used to identify a group of file folders within a file drawer.

File registers
Used to record files taken out, and files returned. This helps to prevent files from going missing. The important information that should be tracked is the name of the file, when it was borrowed, who borrowed it, and when it was returned.

Rubber stamps
Used for stamping documents with common phrases such as “Paid”, or to stamp a record with the date it was received. Stamps can also be custom made to suit your business’ needs.

Step 4: Determine the File Retention Schedule
A file retention schedule determines each of the following:

- How long a record will be kept in the active files.
- When, where, and how files will be put away for long-term storage or archiving.
- If files will be converted into an electronic format.
- How long files must be stored before they can be disposed of or destroyed.

This schedule will vary from office to office, and will be determined by such factors as fiscal year-end, storage space available for active files, archiving methods and ease of access to archived files, and legal and taxation considerations. For some types of files, such as medical records, retention schedules are influenced by government regulations.

Step 5: File Existing Documents
If a new filing system has just been created, then appropriate file hangers, file guides, and file folders will have to be put in place. Loose documents, such as invoices or reports, are put into folders before going into a file cabinet.

If it is a new file folder you are creating, you must first index the file by giving it an appropriate file name or code. You may also want to add a cross-reference to another file if they are related or connected in some way.

When re-filing an existing file, the first step should be to inspect it to ensure it is indexed properly, that all documents have been returned to it, that the folder does not need to be replaced, that all documents needing signatures are signed, etc. You should also tape or glue any small documents or notes to a sheet of standard size paper so they don't become lost in the file cabinet.

Indexing and Filing Options

Indexing is the process of assigning a name to a file that clearly identifies its contents or purpose. The name is then used to determine where the file will be stored in the filing system. When sorting and storing files, it is important to use an organized system so that files can be easily put away and retrieved. Four popular ways of filing and indexing files include:

Alphabetical

This filing system is based on the letters of the alphabet. Files are stored in order of the alphabet, with files starting with "A" being first, and files starting with "Z" being last as shown in Figure 1.

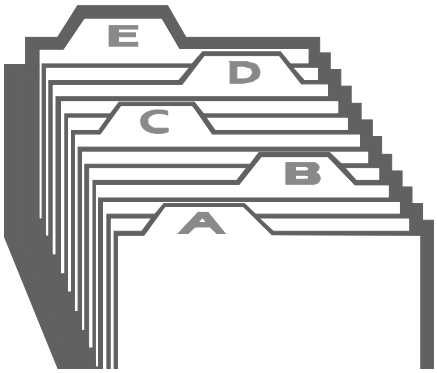

Figure 1: Folders Sorted Alphabetically, with Labeled File Guides

Generally, files are indexed and stored by last name (surname) first, followed by the first name (given name) and/or initials. If two clients have the same last name, then refer to their first name or initial to order them. For example, if your office keeps a file for every client that has requested a building inspection, the file folder tabs will likely be labeled with the clients' names. You would then sort and store the files based on the alphabetical order of these names. The following list of names is in alphabetical order:

- Bickers, Sam W.
- Peterson, Jeff
- Smith, Barry
- Smith, E.
- Smithe, Williams

Company names are filed alphabetically based on the full business name. For example, the following list of suppliers is in alphabetical order:

- Blue Diamond Forms, Inc.
- Bluepoint Drafting Equipment, Ltd.
- Caliber Precision Tools, Inc.
- Downtown Design
- OfficePro Supplies, Ltd.
- Quail Equipment Repair

Numerical

This filing system is based on numbers. Numerical filing is sometimes used to ensure the privacy of people or data. For example, a medical office may file patient records by number, rather than name, and use a separate file to cross-reference the name to the number.

Files may be sorted in ascending order (counting up), or descending order (counting down). A numerical system may also be used to sort files by case number (e.g., in legal office), or by identification number (e.g., student numbers at a university, or social security number at the IRS). In the example of the building inspection company, inspection reports may be filed based on the report number assigned to them.

Chronological

This filing system is based on dates. It may be organized by year, month, or day only, or it may take into account all three. Generally, when using a system based on year/month/day, the biggest unit (year) would be the first criterion looked at when sorting the file, then month, and then day. For example, if the building inspection company were to file their inspection reports by the date the inspection was completed, rather than by the report number, then a set of reports may be sorted as follows:

- March 23, 2004
- March 30, 2004
- August 12, 2004
- April 9, 2005
- October 25, 2005
- January 11, 2006

Alphanumeric

This filing system is based on both letters and numbers. In some cases, it may also include dates. For example, a doctor's office might file appointments by day and by the order the appointments are taken that day: Monday 1, Monday 2, Monday 3, Tuesday 1, Tuesday 2, etc.

In the case of the building inspection office, inspection reports could be filed by street name, then by address and unit number. For example:

- Adams Drive, 347
- Adams Drive, 439
- Boxwood Avenue, 9811 Unit 12
- Boxwood Avenue, 9811 Unit 23
- Mayfair Street, 1245
- Sandbury Road, 87 Unit 67

Subject

Another option is to file by subject. Within each subject category, further sorting may be done based on one of the four systems mentioned above. For example, in the building inspection office, files may be sorted within groups such as:

1) Inspection reports

- Adams Drive, 439
- Boxwood Avenue, 9811 Unit 12
- Mayfair Street, 1245
- Sandbury Road, 87 Unit 67

2) Invoices paid to suppliers, etc. (accounts payable)

- Blue Diamond Forms, Inc.
- Caliber Precision Tools, Inc.
- Downtown Design
- OfficePro Supplies, Ltd.
- Quail Equipment Repair

3) Invoices billed to clients (accounts receivable)

- Bickers, Sam W.
- Peterson, Jeff
- Smith, Barry
- Smith, E.

The system a business uses to organize and store files is formally known as *records management*. On occasion, it may be necessary to evaluate your office's filing system to ensure that the most effective and efficient system is being used to meet the current needs.

Summary

After reading this module, you should be able to:

- Create an effective filing system.
- Give examples of indexing and filing options.

Module 3: Typing or Keyboarding Skills

Overview

Typing or keyboarding basics can be taught quite easily, but to really become an efficient typist it takes practice, practice, practice! When learning, don't let your mistakes bother you, just keep practicing.

Hand Placement and Technique

An important factor in achieving fast and accurate typing skills is to first learn and practice correct hand/finger placement and movement. The following are some recommended practices and proper typing techniques:

- Place your hands over the keyboard with your fingers in a relaxed, somewhat curled position.
- Keep your wrists low and relaxed, without bending them up or down, or to the left or right.
- Use a keyboard rest for the base of your palms as needed for comfort.
- Place the tips of your fingers on the *home keys*, (**ASDF** and **JKL;**), starting with the little finger of your left hand on "A", and ending with the little finger of your right hand on "**;**".
- Place your thumb lightly on the spacebar. Position the tip of the right thumb so it points to the N key, and the left thumb so it points to the B key. Conventional teaching says that the right thumb should be used to press the spacebar, but your preference may depend on which hand is dominant.
- Use a quick, rhythmic stroke, pressing each key with equal pressure.

Figure 2 below shows which fingers should be used to press each key on a typical keyboard. (See *Appendix A* for a description of each key's purpose).

Figure 2: Hand Placement on a Typical Keyboard

Keyboarding Posture

Posture is very important to keyboarding effectively, and reducing the risk of injury while at work. The following are guidelines to help you maintain an ergonomically correct posture:

- Sit at least one hand span from the keyboard.
- Place the computer's screen at least an arm's length away from you.
- Screens should be at eye level and tilted backward slightly.
- Reduce as many sources of glare as possible.
- Center your body with the "N" key.
- Place feet flat on the floor with one foot slightly ahead of the other.
- Keep your shoulders square to the keyboard, but relaxed and low.
- Sit up straight, with your lower back against the chair.
- Keep your upper arms relaxed, with elbows hanging loosely near your sides.
- Your forearms should be slightly above the keyboard and parallel with the floor, or sloped slightly down and away from your body.
- If you are typing from a printed document, keep your eyes on the printed document, not the keyboard or computer screen. However, if you are typing original content, then you can watch the computer screen.
- If you are typing from a printed document, place it near the computer screen so you are not over-stressing your neck to turn and see it.

Summary

After reading this module, you should be able to:

- Use proper hand placement and technique when typing.
- Maintain an ergonomically correct keyboarding posture.

Module 4: Incoming and Outgoing Mail

Overview

Despite the rise in the use of email for communications, traditional post remains important to the office communication process. Efficiently handing incoming mail and preparing outgoing mail is essential to a well-functioning office.

Often traditional post is the best method for sending written communications, especially if an electronic version of a document is not available, or if an original signature is needed, such as in the case of many legal papers.

Here is a list of some other documents that typically move in and out of the office environment:

- Invoices.
- Price quotes and estimates.
- Marketing material.
- Reports.
- Business contracts.

Handling Incoming Mail

Office clerks, receptionists, and administrative assistants will often be assigned the task of processing incoming mail. Typically, for a fairly large volume of mail, this first involves sorting the mail into appropriate groups. Here is an example of how this initial grouping of mail could be done:

- General mail not addressed to a specific employee or department.
- Mail from suppliers that is addressed to the company in general.
- Mail addressed to the financial department.
- Mail addressed to Ms. Kim MacLeod, CEO.
- Mail addressed to Mr. Sam James, etc.

Mail can then be delivered to the appropriate person or department, or placed in mail slots designated to individuals. As an office employee, you may be asked to open some mail even if it has not been sent to you personally. For example, you might be responsible for opening general mail that is not addressed to specific individuals or departments, or you may be asked to read and reply to general inquiries for product or service information.

The following are a few guidelines to be aware of when dealing with incoming office mail:

- Do not open mail marked “personal” or “confidential”, unless it is addressed specifically to you.
- Staple enclosures, such as catalogues, price lists, leaflets, or postal orders, to the main letter or document.
- Ensure all content, such as enclosures, are emptied from an envelope before discarding it.

Preparing Outgoing Mail

When sending documents, letters, or packages, it is important to consider cost, delivery time, and the safety of the items being mailed. For example, if you are sending documents that must not be damaged in the mail, it would be best to use a padded envelope that will help prevent the material from being folded or crushed.

However, for most correspondence, a standard, size 10 business envelope is used, with the letter folded into thirds as shown in Figure 3. These envelopes may even be pre-printed with the company’s return address. Size 10 envelopes are also available with an optional transparent window in them. These are commonly used to mail out invoices or statements where the recipient’s address is printed on the document and will line up with the window. Window envelopes can come in other sizes as well, and the size a business uses may depend on what paper size the invoices and statements are printed on.

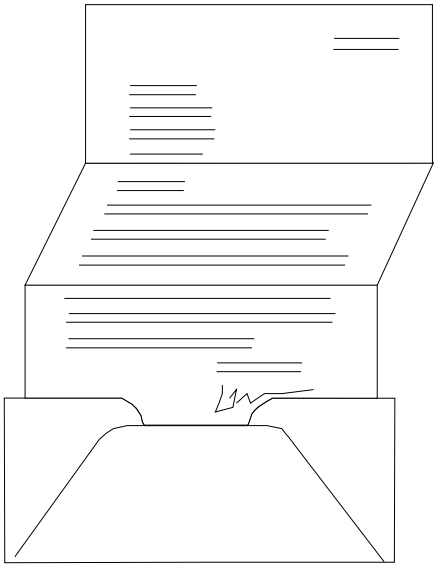

Figure 3: Letter Folded into Thirds

If you are sending an item by mail, and it is important that you have proof that the item was received, then certified mail is a good choice for delivery. This delivery service requires the postal carrier to obtain a signature from the recipient when the item is delivered.

If you have an item to send across town, rather than out of city or state, it is very common to use a local messenger. This is especially true if the document you are sending needs to arrive at its destination the same day.

Faxing is a quick and convenient way to send copies of documents, but you should be very aware of confidentiality concerns when using this method of correspondence delivery. When preparing a document for faxing, be sure to include a cover sheet stating the name of the sender, the receiver's name and fax number, and the number of pages being faxed. (See *Appendix B* for an example of a fax cover sheet).

When sending items other than paper documents, it is important not to overfill the envelope because it may burst during delivery, be refused by the postal service, or have the contents damaged in transit. Padded envelopes can be used for items that are an unusual shape or have hard corners that may break through a regular envelope (e.g., 3-ring binders or product samples).

The following are a few tips for packaging unusual items:

Tips

- Large maps, plans, and unframed pictures or prints can be rolled and packed in a cardboard tube, securely sealed at both ends.
- Photographs can be placed between sheets of cardboard in an envelope marked DO NOT BEND.
- Cassettes, videotapes, and CDs or DVDs can be mailed in cardboard envelopes specifically designed for each item, in padded envelopes, or in appropriately sized boxes.
- Other unusually shaped items, large items, or very fragile items can be placed in a box surrounded by polystyrene chips or packing paper.

Summary

After reading this module, you should be able to:

- Process incoming mail.
- Prepare outgoing mail.

Module 5: Communicating by Email

Overview

Electronic mail, or email, has become a popular method of communication. Email is often the preferred method to use for such purposes as internal correspondence between employees in an office, communicating with clients, sending out special promotion notifications or electronic newsletters to customers, or sending documents such as proposals or reports.

Email Advantages and Disadvantages

Although email lacks some of the advantages of personal contact, it is often an effective method for transferring information inexpensively and quickly. Other benefits of email include:

- Emailing is almost instantaneous. There is generally not the delay of traditional post.
- Messages can be sent almost anywhere in the world, easily and inexpensively.
- An email can be sent at any time, and the recipient can read and respond to it at their convenience.
- The same email can be sent to several people at the same time.
- Emails can be forwarded without having to re-type them.
- Electronic documents can be included in an email, and the recipients can edit and return revised versions.

Some disadvantages of email are:

- Unlike faxed or hard copy documents, emails can be edited. This means that unauthorized changes could be made.
- If a signature is required on a document, it must generally be printed, and mailed or faxed back, rather than emailed.
- The recipient of an email may not be able to open an attachment if they do not have the appropriate software to read the file format.
- Emails, or their attachments, can contain viruses.
- Emails can easily be forwarded to inappropriate recipients of the information contained within them.
- Emails can be accidentally misaddressed and sent to the wrong recipient.

Writing an Email Message

Like in any form of written business communication, it is important to present a professional image when sending an email. Just as you would in a business letter, an email should address the recipient in a formal and professional way, using titles and full names. Only adopt a casual, first name basis style if this is specified or initiated by the person you are dealing with.

Consider the goal or intention of your message when writing an email, and focus the main statements on making this message clear. Organize the content of your email so that it gets to the most important point quickly. If applicable, try to predict what questions might arise from your message, and include whatever information is necessary to answer these questions—either in the body of the email or as an attachment. Business emails should be free of jargon, slang, or terms that are not commonly used or understood by the average person. An exception may be made to this guideline if you are aware of the background or expertise of the person you are corresponding with, and using industry specific terms will help make your message clear and concise.

Before sending your email, always carefully re-read, review, and make any necessary edits. Use full sentences, proper grammar, and double-check that you have used the correct spelling for proper names and industry specific terms. It is a good practice to use the email program's built-in spell checker, but don't rely on it alone to catch errors.

Emails are commonly sent either in a text format or in an HTML format. HTML allows for more formatting options than does text, but text-only can be read by any email application. A carefully formatted HTML email can end up looking very garbled if it is received and read in text format.

Sending an Email Message

To send an email, you must enter information similar to the heading of a typical inter-office memo. The minimal requirements necessary for you to send an email are a recipient's email address (the person you are sending the email to), and your email address (the sender). The following are standard elements of an email, and their purpose in most email applications:

To: Contains the email address of the person the message is being sent to (recipient) as shown in Figure 4. An email can be sent to more than one recipient at a time using the To, Cc, or Bcc fields.

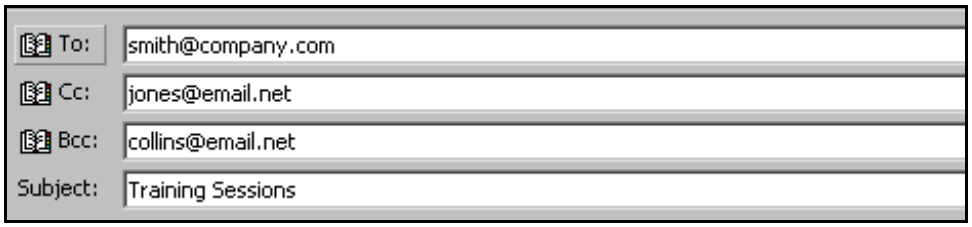

Figure 4: Email Fields

Cc: This is an abbreviation for carbon copy. When sending an email to more than one person, other addresses can be listed in the Cc field. The concern with this practice is that everyone who receives the email also receives all the addresses of the other people who were copied. Some people would prefer that their email address remains private, much like an unlisted telephone number.

Bcc: This is an abbreviation for blind carbon copy. This works like the carbon copy (Cc) field except that the email addresses are hidden from the other recipients.

Subject: This should contain the main topic of the message. It is written by the sender, and should be a brief but descriptive summary of what the email is about. For example, "Inspection report for 3009 Colquitz Ave." Recipients see this in their list of incoming emails.

Body: This area contains the message itself, which can be of any length. (See *Appendix C* for an example of an email communication).

Sender's Email Address (From): This is the email address of the person who is sending the email. Your email program automatically adds this when you create and send a message.

Attachments: Most email programs allow you to attach word processing documents, spreadsheets, graphics, audio, video, and other electronic files to a message. The recipient of the email is then able to open, download, or save the attached file to their computer. To attach a file to an email you must click on the Attachment icon, which is often represented by a paper clip. This feature is often located on the email program's toolbar. Before sending a message with an attachment, you should first consider the following questions:

Will the recipient be able to open this attachment?
This is determined by the file format of the attached file, and whether the recipient has the specific software required to view it.

Is the attachment too large?
Some email services will refuse to send large attachments, and will "bounce back" or return emails to the sender when the recipient's Inbox becomes over full. Large attachments may also take a long time to send and receive if the computer is older, or if the Internet connection is slow. Avoid sending large files, but if you must, then consider compressing or "zipping" them before attaching and sending.

Is the attachment free of viruses?
This can be checked by first scanning the attachment using the virus software on your computer. Keep your own computer's virus protection software up-to-date to help ensure viruses don't infect your computer via email. It is a good practice to set your virus protection software to update daily, and to perform a full virus scan on you computer weekly.

Responding to an Email Message

After receiving and reading an email, you may choose to respond to the sender, or pass the information on to someone else. The following are common options for this:

Forward: Use the Forward option when you want to pass an email you have received on to someone else. Forwarding is also the best option to use if you want to send on an email that has an attachment. When you open an email you have received, you will typically see a Forward button. When you click this button, a new window will open that has the subject, message, and any attachments of the original email. The email address of the person the email is being forwarded to will have to be entered in the "To" field.

Reply: Use the Reply option when you want to respond to the sender of an email that you have received. The window that contains the opened email will typically have a Reply button. When you click this button, a new window will open that has the "To" and "Subject" lines already filled with the email address of the sender and the subject of the original message. The original message also appears in the body of the email, with space above where you can type a reply message.

Reply To All: Use the Reply To All option when you want to respond to the sender of the email, and everyone who was copied (Cc'd) in the original email. Similar to the Reply option, the Reply To All button also opens a new window. In this case, all the addresses in the "To" and "Cc" fields of the original message are included in the "To" and "Cc" fields of the new email. When replying to a message sent to several people, be aware of who needs to see your response so that you are not sending unnecessary email. You can remove addresses as needed when you Reply To All.

Email Addresses and Signatures

Email Addresses: An *email address* is a string of characters used to uniquely identify an email user. Senders use this address to identify the person they want an email sent to, and recipients use it to retrieve email from their email service.

Email addresses always have an "at" symbol (@) in them. This separates the user name from the web server or domain name. For example, jackhill@fetchwater.com. The email address must be exact in order for the email to be delivered to the correct email recipient.

Email Signatures: Many email programs allow you to configure a signature that can be automatically inserted into the body of an email. An email signature normally includes whatever contact information you wish to send—much like a business card. This saves you the time of retyping this information for every email you send.

An email signature often includes:

- Sender's name.
- Sender's title.
- Company name.
- Telephone number(s).
- Fax number.
- Company address.
- Email address.

For example:

Jack Hill
Marketing Director
Fetch Water, Ltd.

Tel: 250-555-2235
Fax: 250-555-6789
Wellington, CA
jackhill@fetchwater.com

Managing Emails

In most email programs, messages are organized into the following standard folders or boxes as shown in Figure 5.

Figure 5: Common Email Folders

Inbox: When you launch your email program, it will likely open showing you the Inbox, and the old and new messages you have received that are stored there. From your Inbox, email can be read, replied to, and managed. To review mail in other folders or boxes, click on the folder you are interested in, and then select the message that you would like to read.

Outbox: Outgoing mail (mail that is in the process of being sent or waiting to be sent) is stored in the Outbox.

Sent Folder: Mail you have sent is stored in the Sent folder.

Deleted Items: Discarded email may be kept in the Deleted Items, or Trash folder. The messages are still available there until you discard them permanently.

Drafts: Composed emails that are not ready to be sent can be saved in the Drafts folder.

Contacts: Another folder commonly used for storing email related information is the Contacts folder. This is a list which you create, containing business or individuals' names, their email addresses, and other contact information such as telephone numbers. It is also referred to as an Address Book.

Most email programs will also let you create your own custom folders to sort your messages into. This allows you to arrange received email in categories, such as by sender's name or project name.

Some email programs can be configured to automatically file a message in a folder, or discard it when it is received. These programs then look for criteria that you specified, such as the name of the sender, a word in the subject line, or the name of an email server, and move the email to the appropriate folder. These criteria are often called email rules or filters. Filters are a common way to have spam email (unwanted bulk email) discarded.

In many email applications, you can also manually drag a message from one folder to another. And within any folder, you usually have the option to sort your emails by various categories, such as date received, sender's email address, or subject.

Avoid opening any email you suspect may contain a virus, such as emails from senders you do not recognize, or that have an odd subject line. A virus could infect both your computer, and all your office's other computers if you are on an internal network.

Email Etiquette

Email etiquette is also known as "Netiquette", which stands for Network Etiquette, and refers to communicating with others in a courteous and professional manner when using technology such as email. The following are some of the common guidelines that should be observed when sending email in a business or office setting:

- Clearly summarize your message in the subject line. This can help the recipient prioritize, store, and sort their emails.
- Be careful about using slang or overusing emoticons. These can make a business email appear too informal or unprofessional.
- Use proper spelling, grammar, and punctuation.

- Avoid using all capital letters in a business or formal email. It is considered to be the equivalent of shouting.
- Keep your message concise and focused. Wordy messages are often ignored, and including unnecessary information can result in wasted use of the recipient's time.
- When replying to a message sent to several people, reply only to those who need to see your response.
- When forwarding an email, add a comment in the body of the email indicating to the recipient why you are forwarding the email to them.
- Do not forward emails unless you are confident that the original sender would approve of you passing it on.
- Do not forward virus hoaxes, jokes, or chain letters. These are generally inappropriate to send in a business setting, and they may contain a virus.
- Do not use email to discuss confidential information. Emails can be too easily forwarded to anyone in or outside of your organization.
- Do not "flame" email recipients. *Flaming* is an informal term used to describe emails that are written using an angry tone and language.
- Do not write or forward letters containing offensive, discriminatory, or obscene remarks.

Summary

After reading this module, you should be able to:

- Give examples of email advantages and disadvantages.
- Write, send, and respond to emails.
- Describe email addresses and signatures.
- Organize emails into folders or boxes.
- Use email etiquette when communicating with others in the workplace.

Module 6: Business Writing Basics

Overview

Depending on the office where you work, or the type of business you conduct, you may find yourself writing everything from informal telephone messages to formal business letters and reports. No matter what the purpose of your written communication, the most important consideration is to make your writing as clear and concise as possible so that the meaning of your message is accurately conveyed to the reader.

Writing Tips and Techniques

Use the following tips and techniques to help make your written communications more effective:

Have Your Goal Clearly in Mind

Before you start to write, have a clear understanding of what your purpose is for the communication. What is the main point you are trying to communicate? Is the message intended to be informative only? Do you expect the reader to take some sort of action? Are you trying to convince the reader of your views?

Choose Your Mode of Written Communication

Keep in mind that written communication may not reach the recipient instantly. Consider how this possible delay, and lack of person-to-person contact, could affect the interpretation of your message. Select the most appropriate written mode to use (email, business letter, memo, etc.), depending on the urgency and level of formality of the message.

Use a Formal Business Writing Style

When communicating with clients, business partners, managers, or anyone you have a formal business relationship with, it is important to use the right tone in your writing. For example, it is not necessary, and often inappropriate, to use humor in your business writing. However, you can adjust the tone and feel of your message to match your working relationship with that person. A letter to your manager will likely have a more formal and business-like tone than an email to a co-worker.

Target Your Audience

Be sure to use a style of writing appropriate to your intended audience. Keep in mind the knowledge the reader has regarding the subject you are writing about. For example, a letter to a potential customer would not likely include jargon, slang, or terms that are commonly used and understood only by experts within your profession or business.

State Your Message Clearly

Organize your message so that it gets to the most important point as soon as possible. Keep in mind the goal of your communication so that you can keep statements focused. Include any necessary details, or expected actions, after your main point is made. Try to provide answers to any questions that you can anticipate the reader might have.

Proofread

Before sending or circulating your written communications, carefully re-read and review one last time. The most useful technique for proofreading your own writing is to allow some time to lapse between writing and proofreading, so you can approach it with a fresher perspective.

Check your spelling and grammar—ensure that the content and layout are appropriate for clearly getting your message across, and make any necessary final revisions. Even less formal written communications, such as internal emails and memos, should still include complete sentences, proper grammar, and correct spelling and capitalization.

Because spell checking tools will not normally catch errors in proper names, be especially careful to confirm that all organizations' and individuals' names are spelled correctly. Spell checkers will not catch errors in incorrect word choice either. For example, in the sentence, "I am going to there house for dinner" the spell checker will not realize that "there" should be "their."

Writing a Business Memo

Memo is short for memorandum. In a business setting, a memo is usually considered to be an official document used to exchange information. Memos are also used to persuade the reader to take a specific action, provide feedback on an issue or idea, or remind the reader of an upcoming event.

Memos are often issued from the top down, from management to their employees, and are frequently sent to a group of employees, such as a team or department. They may even be distributed across a whole organization. For example, a memo could be used to explain a procedural change in the organization's safety regulations, or to remind all employees of the upcoming office picnic.

In whatever capacity they are used, memos tend to be short documents. They are not generally used to share the complete, detailed information about such items as research findings, financial reports, or marketing initiatives, but they may be used to provide a brief summary or overview of these items.

If you are required to write a memo, you should keep the style formal, and address people by their full names and job titles.

A common memo format is as follows:

Header: The header, or heading section, generally includes the following:

To: (The recipient's names and job title)

From: (The sender's name and job title)

Date: (Complete and current date)

Subject: (What the memo is about, highlighted in some way)

Statement of Purpose: Start the memo by clearly and concisely stating the purpose of the memo. The first line of the business memo should make a strong link to the subject line.

Summary of Your Message: This is a brief but informative statement of the key points laid out in the rest of the memo.

Discussion Section: Use this section to expand upon your idea or suggestion, offer supporting details, provide examples, etc. This section should try to answer in advance any question the reader may have regarding the purpose of your memo.

Closing: Use this section to clearly state what actions you would like to see taken by the readers. Be sure to state this courteously, and try to outline how the reader will benefit from taking this action, or how you might assist. For example, you might state, "A training session has been arranged to provide information regarding the new safety procedures, and I would be happy to discuss any questions or concerns you may have in person."

(See *Appendix D* for a sample memo communication).

Writing a Business Letter

As part of your office duties, you may be required to write formal business letters. In most cases, the layout and content will follow a customary business letter style and format, such as block, modified block, or semi-block. Typically, business letters are created on letterhead. *Letterhead* is formal stationary that may have an organization's name, logo, and address printed at the top.

Keep in mind the writing tips and techniques discussed previously in this guide, and be sure to use an appropriate tone for the letter's purpose. For example, if you are trying to have the reader take some sort of action (e.g., purchase your company's inspection services), then the letter should have a compelling or convincing tone.

The following are the most common sections or elements you will find in a formal business letter. (See *Appendix E* for an example of a letter written in block style).

Date: You should always date a letter. Place the date at the top of the page, just below the letterhead or the address of the sender. This is normally written in the form of month, day, and year. For example,
August 16, 2007.

Recipient's Address: The recipient's full name, title, and address are usually placed below the date. If the recipient's full name is used here, it is not necessary to also include an Attention line.

Attention Line (optional): An attention line can be added below the recipient's address. This helps ensure that the letter reaches the correct person, especially if it is being sent to a business with many departments or employees.

Subject Line (optional): The subject should be a brief statement summarizing the main topic or purpose of the letter, thus bringing it to the attention of the reader. This is often also stated as Re: for "regarding." For example, "Re: Storm Drain Issue at 473 Stubbs Ave."

Salutation: Type "Dear", then the recipient's courtesy title or formal title, and name if you know it (e.g., Dear Ms. Jane Hill, or Dear Dr. Edwards). If unknown, you can use a generic salutation such as, "To Whom it May Concern" or "Dear Sir/Madam."

Body: The body of a letter is where the actual message of the correspondence is written out. It generally begins below the salutation line. If you wish to include a list of items in the body of a letter, it is a good practice to leave extra space between each item and add bullets or numbering.

Complimentary Closing: This is generally placed two spaces below the last line of the body of a letter. If there are two words in the complimentary closing, the second should not be capitalized. There are several standard closings that are used for business letters with "Sincerely" or "Yours truly" being two of the most common.

Signature Block: The signature block is where the sender's name, and possibly title, is placed. Allow at least four blank lines or spaces between the complimentary closing and the signature block for the sender to insert their personal signature.

Identification Line (optional): This line indicates the sender's initials followed by a colon or slash, and then the typist's initials.

Enclosures (optional): This line tells the recipient that other items or documents are included in the envelope. For example, you might add this if you are including photographs of a building you are discussing in the letter.

Writing a Business Report

Business reports can be written for many different reasons and may target many different types of audiences, but generally, they are formal documents intended to inform and/or persuade the readers to take a suggested action.

Following these steps will help to ensure any reports you create are well thought out and written:

1) Define the purpose of the report. This will help your writing stay focused, and clarify what information you need to gather.

2) Perform any research, or gather any information you will need to write the report and support its purpose.

3) Determine the report's audience to ensure you write from the appropriate perspective.

4) Prepare an outline that touches on the main points you want to make.

5) Write a first draft.

   - Use simple, clear language.
   - Be concise and factual, removing any irrelevant points.
   - Include any background information necessary to understand your main points.
   - Create visual aids such as diagrams, graphs, or tables as necessary.

6) Check grammar, spelling, and punctuation.

7) Have a second person proofread the report if possible. If not, carefully proofread yourself.

8) Make revisions as necessary, and complete the final copy.

A report is often made up of several sections or groupings of information. The sections will vary somewhat, depending on the focus or purpose of the report. The following provides examples of the types of sections you might use in a report to help organize the content in a logical manner:

Introduction or Purpose Statement: This provides background information, or the reason for the report.

Executive Summary: This summarizes all the sections of the report. This is commonly found in research reports.

Procedure or Methodology: This outlines the steps taken or methods used to produce the report outcomes or the data presented. This is commonly found in research reports.

Findings: These are discoveries made, or information uncovered during the research or investigation done for the report.

Discussion: This may provide a thorough analysis of the topic and related findings.

Conclusion: A conclusion is generally based on the findings and "wraps up" what has been discovered or discussed.

Action Steps or Recommendations: This outlines the actions the writer of the report feels should be taken, based on the findings and conclusion.

Appendices: This is where secondary documents or data are included that may be used to support the conclusion, or clarify any points made in the report.

Summary

After reading this module, you should be able to:

- Use effective methods and techniques to communicate in writing.
- Create professional business memos, letters, and reports.

Module 7: Meetings

Overview

As part of your office duties, you may be expected to help organize business meetings. This may include booking the required room and equipment, creating an agenda, or taking minutes.

Organizing a Meeting

The following are typical arrangements that are required to hold an effective and efficient meeting:

- A meeting room must be booked or reserved for the length of time required. If remote attendees will be joining in, a conference line, or Web conference session should also be arranged.
- Any presentation equipment or visual aids (e.g., projector, flip charts, television) should be ordered or reserved.
- A meeting agenda should be created.
- A notice of the meeting and the agenda should be circulated to all those invited to attend in advance of the meeting.
- Refreshments (e.g., drinking water, coffee, tea, snacks) are not essential, but can be provided if appropriate to the length and purpose of the meeting.
- Supplies of paper and pens should be available for attendees to take notes.
- A notice can be put on the door if appropriate (e.g., “Meeting in Progress – Please Do Not Disturb”).
- A person should be assigned to take minutes regarding such items as:
  - The date and location of the meeting.
  - The purpose of the meeting.
  - A list of attendees and those absent.
  - Who spoke, and a summary of what they said.
  - Decisions reached and the names of the people involved in them.
  - Action items and those responsible for acting on them.
- Copies of the meeting’s minutes should be typed up immediately after the meeting, and circulated to all relevant parties as soon as possible.

If you are invited as an attendee to a meeting, it is important to arrive on time, or even a few minutes early, in order to get settled before the meeting begins. This ensures you do not keep other people waiting, and that you do not disturb someone who may be making a presentation. If you cannot avoid arriving late, enter as quietly and unobtrusively as possible.

Creating a Meeting Agenda

An *agenda* includes the topics to be covered at the meeting, and the order they are to be covered in. Most importantly, it states the scheduled time and place of the meeting.

When you are organizing a meeting, it is important to have an agenda prepared. By following an agenda, the meeting chairperson can ensure all items that were planned for discussion are covered, and that the meeting does not stray too far off track. Also, if the agenda is sent out in advance, attendees can be better prepared to discuss the topics listed.

A typical format for an agenda is as follows:

Title: The purpose of the meeting, or the main subject to be addressed. For example, "Status Update of NeWell Project."

Date and Time: The month, day, year, and time of day that the meeting will take place.

Location: The physical location of the meeting. This usually includes the name of the building and room number, and sometimes the street address. In some cases, the meeting may be a virtual meeting held over conference telephones or the Internet. In that case, you would supply dial-in or login information instead.

Topics for Discussion: The body of the agenda should include a list, and possibly a brief description of the primary topics to be covered at the meeting. (See *Appendix F* for an example of an agenda).

Summary

After reading this module, you should be able to:

- Organize a business meeting.
- Create an agenda for a business meeting.

Appendix A: Keyboard Key Definitions

The following is an outline of a keyboard's keys and their functions. The key descriptions begin at the top upper most key and work left to right, and top to bottom, based on the standard US English QWERTY keyboard shown in Figure A.1:

Figure A.1: US English QWERTY Keyboard

Escape (Esc): Used to cancel actions in progress before they finish. It is also used to close certain dialog boxes.

Function Keys (F keys): Numbered F1 through to F12. These keys can have different assigned actions, depending on the program you are using at the time. For example, F6 will often open the Help menu for whichever application you are using.

Print Screen: Sends a copy of the screen to the Clipboard (the computer's temporary storage area) as a graphic. You must paste the screen capture to an appropriate program (such as a word processing program) to view or edit it.

Scroll Lock: The function of this key depends on the particular software in use. In the original design, Scroll Lock was intended to modify the behavior of the arrow keys. When the Scroll Lock mode was on, the arrow keys would scroll the contents of a text window. The Scroll Lock key is rarely used in modern programs.

Pause: This key is rarely used in a Windows environment, but can be used to halt processes in DOS.

Number/Symbol Keys: Each key has two characters, one at the top of the key and one at the bottom. Holding down the Shift key while pressing a number/symbol key accesses the upper character.

Backspace: Erases or removes the character to the left of the cursor each time it is pressed. It can also be used in a web browser to go back to the previous web page you were on.

Tab: In word processing, it is used to indent text within a document. It moves the cursor to the right to a pre-set point. As well, it can often be used to move from one element on a web page to another, especially in online forms you are completing.

Letters and Other Punctuation Keys: The key layout shown is known as the US English QWERTY keyboard because of the order of the first letter keys on the top row. Most keys on a keyboard are used to enter characters for writing purposes, filling in forms, etc.

Enter: In word processing, it acts like the Return key on a typewriter by moving the cursor to the next line so that you can start a new row of text or add blank spaces. It can also be used in place of a mouse click with some buttons and drop-down menus, especially on web pages.

Caps Lock: This name stands for "capitals locked." When pressed once, any letter key pressed after that will be in its upper case or capital form. It must be pressed again to switch back to lower case. This does not affect the punctuation keys.

Shift Keys: This key "shifts" the numeric/symbol keys and letter keys. When pressed in unison with a punctuation key, the top symbol illustrated on the key will be entered. When pressed in unison with a letter key, the upper case version of the letter will be entered. It must be held down if more than one uppercase letter is desired.

Control (Ctrl): This key does nothing on its own. It must be pressed in combination with other keys to perform any action. When used in combination, the Control key changes the normal function of another key. Exactly what will happen depends on the software in use, but some common examples are Ctrl + C to copy text, and Ctrl + Z to undo the last action performed.

Alt: This key does nothing on its own. It must be pressed in combination with other keys to perform any action. When used in combination, the Alt key changes the normal function of another key. Exactly what will happen depends on the software in use, but a common use is to combine it with a number (entered on the numeric keypad) in order to insert special characters or symbols into text. For example, Alt + 0162 will insert the cent sign (¢), which is not otherwise available on the keyboard.

Spacebar: Used to enter blank spaces in text.

Insert: When word processing, pressing this key will alternate between typing new characters over characters that are already there (overtype), and typing new characters between the characters that are already there (insert). Insert mode is the most commonly used option.

Home: When word processing, pressing this key will move the cursor to the beginning of the current line.

Page Up: This is a navigation key that will move the view up the page relative to what is already displayed on the screen. It is used as a means to scroll in word processing or web pages.

Delete: This key erases or removes the character to the right of the cursor each time it is pressed. Large sections of text that have been selected can also be removed with the Delete key.

End: When word processing, pressing this key will move the cursor to the end of the current line.

Page Down: This is a navigation key that will move the view down the page relative to what is already displayed on the screen. It is used as a means to scroll in word processing or web pages.

Arrow Keys: These four keys are used to move the cursor on the screen. The up and down arrows move the cursor up or down one line. The left and right arrows move the cursor one character either way.

Numeric Keypad: When the Num Lock key is on, the keys on the numeric keypad are used to enter numbers, much like an adding machine. When the Num Lock key is off, the numeric keypad responds as navigation keys, using the alternate markings on the keys, or simply types the symbols that are on some of the keys as characters.

Num Lock (number lock): Used to switch the numeric keypad keys back and forth between "number" mode and "navigation" mode.

Note

The numeric keypad can only perform functions such as division, multiplication, subtraction, and addition when used in appropriate software such as spreadsheet programs (e.g., MS Excel) or in the Windows Calculator. It cannot perform these functions in a word processing program such as MS Word.

Forward Slash (division): When Num Lock is on, the Forward Slash key performs division on the numbers entered. When Num Lock is off, this key types the **/** character.

Asterisk (multiplication): When Num Lock is on, the Asterisk key performs multiplication on the numbers entered. When Num Lock is off, this key types the ***** character.

Hyphen (subtraction): When Num Lock is on, the Hyphen key performs subtraction on the numbers entered. When Num Lock is off, this key types the **-** character.

Plus (addition): When Num Lock is on, the Plus key performs addition on the numbers entered. When Num Lock is off, this key types the **+** character.

Appendix B: Sample Fax Cover Sheet

VBS Systems, Inc.
2255 Robust Road
Smithville, CA 96000
(250) 555-1234

FAX COVER SHEET

Company: Doing Business Office Supplies, Inc.

Attention: Frank Stone, Sales Rep

Fax #: 250-555-4792

Re: Invoice #057840

From: Lucy Harris, Office Manager

Date: November 29, 2007

No. of Pages: 2 (Including cover page)

Comments:

Please find enclosed a copy of invoice #057840, which has the incorrect product pricing. Please correct this as soon as possible.

Thank you,

Lucy Harris

Appendix C: Sample Email Communication

To: slee@vbs.org;bjones@vbs.org;nrogers@vbs.org;treeves@vbs.org;fsanchez@vbs.org

Cc: pdaniels@vbs.org

Bcc: dadams@vbs.org

Subject: Team Meeting

Arial 10

Team:

Please be advised that there will be a team meeting tomorrow at 2:00 p.m. in the boardroom.

As you know, there are several projects due at the same time, and we will be discussing how we can meet all our deadlines. I will be sending an agenda for the meeting shortly.

Regards,

Maria Smith
Administrative Assistant
VBS Systems, Inc.

Tel: 250-555-1234
Fax: 250-555-0898
Smithville, CA
msmith@vbs.org

Appendix D: Sample Business Memo

VBS Systems, Inc.
2255 Robust Road
Smithville, CA 96000
(250) 555-1234

Memo

To: Sandra Rosen, Sales Representative, Frank Reece, Sales Representative, Marvin Catana, Project Coordinator, Peter Richards, Marketing Coordinator

From: Maria Smith, Administrative Assistant

Cc: Patricia Daniels, General Manager

Date: September 19, 2007

Subject: New Office Desks

The new office desks will be arriving on Wednesday, September 26th. The new desks are corner desks and each will have a new chair as well. Please prepare your work area for the new desks by the end of the day on Tuesday, September 25th.

Please do not hesitate to contact me if you have any questions.

Thank you,

Maria Smith

Appendix E: Sample Business Letter – Block Style

VBS Systems, Inc.
2255 Robust Road
Smithville, CA 96000
(250) 555-1234

August 21, 2007

Doing Business Office Supplies, Inc.
1234 Middleton Avenue
Graphite, CA 96111

Attention: Frank Stone, Sales Representative

Subject: Paper for Color Copiers

Dear Mr. Stone:

We are currently looking for a supplier of color copier paper that is made from a minimum of 20% recycled, post-consumer material. Our current supplier is no longer available.

I have included a sample of the paper we have been using as a reference for the quality we will expect. As well as using recycled material, we require that the paper be:

- Extra heavy, 28 lb stock.
- Premium 115 brightness.
- Acid-free.
- Size 8 ½" x 11".

We are a high volume facility and would need to be assured that you can consistently supply 10 cases of color copier paper per week (8 reams per case).

If you can meet these criteria, please forward details of costs and a sample of your product.

Sincerely,

Lucy Harris

Lucy Harris
Office Manager, VBS Systems, Inc.

LH:bd

Enc.

Appendix F: Sample Meeting Agenda

VBS Systems, Inc.
2255 Robust Road
Smithville, CA 96000
(250) 555-1234

Meeting Agenda

Meeting Purpose:	Update on the NeWell Project
Date and Time:	August 23, 2007 at 2:30 p.m. ET
Location:	Conference Room 112, Gardner Street Office, Smithville. Remote employees please dial-in using the conference number and password that will be emailed to you.
Chairperson:	Patricia Daniels, General Manager
Attendees:	Frank Reece, Peter Richards, Marvin Catana, Sandra Rosen, Bonita Jones, Susan Lee, Natisha Rogers, Maria Smith, Fred Sanchez

Topics for Discussion

Topic	Presenter	Time Allotted
1. Attendance roll call.	Patricia Daniels	2 min.
2. Review of minutes from the last NeWell project meeting, and discussion of any matters arising from the last meeting.	Patricia Daniels	15 min.
3. Status reports.	Susan Lee, Project Manager	20 min.
4. Presentation of new application functionality.	Bonita Jones, Computer Programmer	20 min.
5. Discussion regarding using a direct marketing campaign.	Peter Richards, Marketing Coordinator	15 min.
6. Decision as to when to launch the product.	Patricia Daniels	10 min.
7. Date of next meeting and meeting close.	Patricia Daniels	5 min.

Glossary

Accounts Payable: The amount owed by businesses to suppliers and other creditors for goods and services they have provided.

Accounts Receivable: Amounts owed to a business for goods or services the business has provided.

Active File: In the context of manual filing systems, an active file is any file that is still expected to be referred to on occasion, or has not been put away for long-term storage (archived).

Adjournment: The ending of a meeting, or postponing it to another place or time.

Agenda: A list of topics to be discussed or presented at a meeting, in the order of presentation.

AGM: See *Annual General Meeting*.

Alphanumeric: Coding that includes both numbers (digits) and letters. It may also contain other keyboard characters such as dashes or periods.

Amendment: In the context of meeting minutes or other official records, the act of formally correcting, altering, or adding to the content of the document or record.

Annual General Meeting (AGM): A mandatory annual meeting open to all shareholders and/or members of an organization. Agenda items such as electing directors, the Board of Directors' report, and the annual financial report are covered.

Archived File: Documents or other information that have been put away for long-term storage, and which have often been converted to electronic media, or other optical media such as microfiche.

Ascending Order: A sequence that increases in value or moves towards a higher level or degree. For example, the following numbers are sorted in ascending order: 1, 2, 3, 4, 5.

Attachment: A document or file attached to an email message.

Block Style: A business letter format where all text, in all sections of the letter, are left justified.

Board of Directors: The group of people chosen to manage the affairs of a corporation or other organizations such as a non-profit society.

By-laws: Rules governing an organization's activities.

Chairperson or Chair: In the context of a meeting, the person given the authority to conduct the meeting.

Committee: A group of people delegated to officially investigate, report on, or act on, some specified matter.

Compress or Zip: In the context of information technology, the process of reducing the file size of an electronic or digital file.

Consensus: When a group of people comes to a general agreement on an issue.

Convene: To formally assemble or call to order a meeting.

Descending Order: A sequence that decreases in value or moves towards a lower level or degree. For example, the following numbers are sorted in descending order: 5, 4, 3, 2, 1.

Email Address: A string of characters used to uniquely identify an email user.

Email Etiquette: Communicating with others in a courteous and professional manner when using technology such as email. Also known as “Netiquette.”

Emoticons: These are also known as "smilies" and are the little symbols often used in emails and other online messages that help to indicate the mood or emotion associated with a statement.

Ergonomics: The design and placement of equipment (e.g., computer monitors and keyboards), with the intention of reducing physical strain, discomfort, or fatigue for the operator, while still maximizing productivity.

File Guides: Cardboard or plastic inserts used to identify a group of file folders in a file drawer.

File Retention Schedule: See *Retention Schedule*.

File Sorters: Used to temporarily hold files or records that are to be re-filed in the file cabinet at a later time.

Filing: The processing, arranging, sorting, and storing of records so that they can be found quickly and easily.

Flaming: Emails that are written using an angry tone and language.

Folder Tab: The rectangular or rounded extension at the top of a folder where the folder’s name or index is normally added.

Given Name: Generally, a person’s first name.

HTML Email: Email that is formatted using HTML, rather than just plain text. Therefore, it can include elements such as graphics, font formatting, tables, animations, etc.

Indexing: The process of giving a file a name that clearly identifies its contents or purpose.

Itinerary: A detailed travel plan, listing dates and times of flights and events, locations, and phone numbers.

Keyboarding: To type, or enter data or text into a computer using the keyboard.

Left Justified: In word processing, text that is lined up with the left margin of the document.

Letterhead: Stationary with the organization’s identification, such as name, address, contact information and logo, pre-printed at the top of the paper. Some of these elements are also commonly found at the bottom of the paper.

Memo: *S*hort for memorandum. In a business setting, a memo is usually considered to be an official document used to exchange information. They are also used to persuade the reader to take a specific action, provide feedback on an issue or idea, or remind the reader of an upcoming event.

Minutes: The written record of a meeting.

Modified Block Style: A business letter format where some sections are left justified (e.g., the body of the letter), and other sections are aligned with the center of the page (e.g., date and closing).

Motion: In the context of a meeting, a proposal or suggestion that is put forward.

Proper Name: A noun that is used to specifically identify a person, place or thing, and is usually capitalized. For example, Robert, Europe, Wednesday, etc.

Proposal: An idea or plan that is suggested or put forward. In business, this is often a formal, written document.

Records Management: Managing the lifecycle of records or files. This is the systematic control of the creation, distribution, maintenance, use, reproduction, retention, and disposition of records in order to meet operational needs, regulations, and community expectations.

Resolution: In the context of a meeting, a motion that has been discussed, voted on, and accepted.

Retention Schedule: A set of guidelines or regulations that are followed by an organization when determining the length of time its records should be retained, how they should be stored or archived, and how they should be disposed of when no longer needed.

Right Justified: In word processing, text that is lined up with the right margin of the document.

Robert's Rules of Order: Rules and procedures commonly used during meetings, especially during discussion or debate, to help ensure the meeting is run democratically and effectively.

Semi-block Style: A business letter format that is similar to the modified block business letter style except that each paragraph is indented instead of left justified.

Smilies: See *Emoticons*.

Supplemental Files: Used to keep some information separate from the primary files.

Surname: A person's last name or family name.

Virtual Meeting: A meeting that is not held in person, but is conducted using technology such as teleconferencing or web conferencing.

Web Conference: A meeting or conference that is held using Internet or World Wide Web technologies. This allows attendees to join the meeting from remote locations without having to physically be in the same room.

Words Per Minute (WPM): A common way to measure a person's typing or keyboarding speed. A "word" is generally considered to be 5 characters in length.

Zip: See *Compress*.

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