



# **VEHICLE BODY REPAIRING AND PAINTING**

**NTQF Level -II**

## **Learning Guide -01**

**Unit of Competence: - Participate in Workplace  
Communication**

**Module Title: - Participating in Workplace  
Communication**

**LG Code: EIS VRP2 M01 LO1-01**

**TTLM Code: EIS VRP2TTLM 0919v1**

**LO 01: Obtain and convey  
workplace information**



<b>Instruction Sheet</b>	<b>Learning Guide #01</b>
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This learning guide is developed to provide you the necessary information regarding the following **content coverage** and topics –

- Accessing information from appropriate sources
- Using Information gathering method
- Using appropriate **medium**
- Using appropriate non- verbal communication
- Following appropriate lines of communication
- Using defined workplace procedures for the **storage** of information
- carrying out personal interaction

This guide will also assist you to attain the learning outcome stated in the cover page.

Specifically, upon completion of this Learning Guide, **you will be able to –**

- Access specific and relevant information from appropriate sources.
- Use effective questioning, active listening and speaking skills to gather and convey information.
- Use appropriate medium to transfer information and ideas.
- Use appropriate non- verbal communication.
- Identify and follow appropriate lines of communication with supervisors and colleagues
- Use defined workplace procedures for the location and storage of information.
- Carry out personal interaction clearly and concisely.

### **Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described in number 3 to 20.
3. Read the information written in the “Information Sheets 1”. Try to understand what are being discussed. Ask you teacher for assistance if you have hard time understanding them.
4. Accomplish the “Self-check 1” **in page -8.**
5. Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-check 1).



6. If you earned a satisfactory evaluation proceed to “Information Sheet 2”. However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity #1.
7. Submit your accomplished Self-check. This will form part of your training portfolio.



## Information Sheet-2

## Accessing information from appropriate sources

### INTRODUCTION

Communication is the process by which we give, receive or exchange information with others. Communication means interacting with others:

- To promote understanding;
- To achieve a result of some kind;
- To pass information to another person so that they can take action.

It can involve speaking, listening or writing. This information does not necessarily need to be hard facts. Sometimes just a shrug of the shoulder can act as our means of communication.

Communicating is a two-way process, as it is also about being understood and belonging to a group

Communication and organisational success are directly related

- Good communication can have a positive and mobilising effect on employees
- Poor communication can lead to strong negative consequences, such as the distortion of goals and objectives, conflict, loss of motivation and poor performance

### PURPOSE OF COMMUNICATION

One might think we would all live quite happily without communicating at all, but no we all need to communicate throughout our life. Communication is a fundamental part of human life. Since we spend a lot of our daily life communicating in one way or another, we should be very good at it, but unfortunately, this is not the case. Life would be a lot easier if we always knew exactly what others were trying to say. Quite often people fail to communicate in a way that you could understand.

Ann Dobson (2000) has said:

*“Nowhere is effective communication more important than at work. Vital information needs to be given, received, exchanged and understood hundreds of times in every working day. Many business transactions go wrong simply because of poor communication between people concerned.”*

Information is a critical resource and powerful competitive tool for any organization. The increasing amount of data available to managers presents a new challenge – isolating the relevant information and turning it into intelligence.

Exploring and identifying sources of information is about finding out what you don't know as well as using and adapting what you do know. Group projects and assignments



frequently require you to carry out research and this will involve identifying specific resources you may need. For example, think about the materials and equipment that might be needed and whether the group needs to get specific expert advice and support and, if so, where you can obtain this.

It is also important to spend some time exploring the skills associated with working in a group and managing the group. There may be discussions and workshops on team working that you hope to make use of, or there may be expertise in the group itself that you can draw on. Group working skills may be new to you, but equally they may be skills you have used many times before in different contexts. Using key skills effectively involves thinking not only about which skills to use, but also about how to adapt them to different situations.

### **Obtaining and interpreting information**

Data and information comes from many sources. This revision note summarizes the main sources of information gathered internally (inside the business) and externally also interpreting them well.

Business data and information comes from multiple sources. The challenge for a business is to capture and use information that is relevant and reliable. The main sources are:

#### **Internal Information**

Accounting records are a prime source of internal information. They detail the transactions of the business in the past - which may be used as the basis for planning for the future (e.g. preparing a financial budget or forecast).

The accounting records are primarily used to record what happens to the financial resources of a business. For example, how cash is obtained and spent; what assets are acquired; what profits or losses are made on the activities of the business.

However, accounting records can provide much more than financial information. For example, details of the products manufactured and delivered from a factory can provide useful information about whether quality standards are being met. Data analyzed from customer sales invoices provides a profile of what and to whom products are being sold.

A lot of internal information is connected to accounting systems - but is not directly part of them. For example:

- Records of the people employed by the business (personal details; what they get paid; skills and experience; training records)
- Data on the costs associated with business processes (e.g. coatings for contracts entered into by the business)
- Data from the production department (e.g. number of machines; capacity; repair record)
- Data from activities in direct contact with the customer (e.g. analysis of calls received and missed in a call center)



A lot of internal information is also provided informally. For example, regular meetings of staff and management will result in the communication of relevant information.

## External Information

As the term implies, this is information that is obtained from outside the business. There are several categories of external information:

- **Information relating to way a business should undertake its activities**

E.g. businesses need to keep records so that they can collect taxes on behalf of the government. So a business needs to obtain regular information about the taxation system (e.g. PAYE, VAT, and Corporation Tax) and what actions it needs to take. Increasingly this kind of information (and the return forms a business needs to send) is provided in digital format.

Similarly, a business needs to be aware of key legal areas (e.g. environmental legislation; health & safety regulation; employment law). There is a whole publishing industry devoted to selling this kind of information to businesses.

- **Information about the markets in which a business operates**

This kind of external information is critically important to a business. It is often referred to as "market" or "competitive intelligence".

Most of the external information that a business needs can be obtained from marketing research.

Marketing research can help a business do one or more of the following:

**1. Gain a more detailed understanding of consumers' needs** – marketing research can help firms to discover consumers' opinions on a huge range of issues, e.g., views on products' prices, packaging, recent advertising campaigns

**2. Reduce the risk of product/business failure** – there is no guarantee that any new idea will be a commercial success, but accurate and up-to-date information on the market can help a business make informed decisions, hopefully leading to products that consumers want in sufficient numbers to achieve commercial success.

**3. Forecast future trends** – marketing research can not only provide information regarding the current state of the market but it can also be used to anticipate customer needs future customer needs. Firms can then make the necessary adjustments to their product portfolios and levels of output in order to remain successful.

The information for marketing research tends to come from three main sources:

**Internal Company Information** – e.g. sales, orders, customer profiles, stocks, and customer service reports

**Marketing intelligence** – this is a catch-all term to include all the everyday information about developments in the market that helps a business prepare and adjust its marketing plans. It can be obtained from many sources, including suppliers, customers and distributors. It is also possible to buy intelligence information from outside suppliers (e.g. Mintel, Dun and



Bradstreet) who will produce commercial intelligence reports that can be sold profitably to any interested organization.

**Market Research** – existing data from internal sources may not provide sufficient detail. Similarly, published reports from market intelligence organizations cannot always be relied upon to provide the up-to-date, relevant information required. In these circumstances, a business may need to commission specific studies in order to acquire the data required to support their marketing strategy.



<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. \_\_\_\_\_ is the process by which we give receive or exchange information with others.(1pts)
2. Communication involve \_\_\_\_\_, \_\_\_\_\_ or \_\_\_\_\_(1pts)
3. Discuss under sets of the main sources of information

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(1pts)

**Note: Satisfactory rating - 3 points                      Unsatisfactory - below 2 points**

You can ask you teacher for the copy of the correct answers.





## Answer Sheet

Score = \_\_\_\_\_

Rating: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Short Answer Questions



## Information Sheet-2

## Using Information gathering method

### Interactive Methods to Elicit Human Information Requirements

#### I. Interviewing

- Interviewing is an important method for collecting data on human and system information requirements
- Interviews reveal information about:
  - Interviewee opinions
  - Interviewee feelings
  - Goals
  - Key HCI concerns
- Interview Preparation
- Reading background material
- Establishing interview objectives
- Deciding whom to interview
- Preparing the interviewee
- Deciding on question types and structure

#### Question Types

##### 1. Open-ended

- Open-ended interview questions allow interviewees to respond how they wish, and to what length they wish
- Open-ended interview questions are appropriate when the analyst is interested in breadth and depth of reply
- Advantages of Open-Ended Questions
  - Puts the interviewee at ease
  - Allows the interviewer to pick up on the interviewee's vocabulary
  - Provides richness of detail
  - Reveals avenues of further questioning that may have gone untapped
  - Provides more interest for the interviewee
  - Allows more spontaneity
  - Makes phrasing easier for the interviewer
  - Useful if the interviewer is unprepared
- Disadvantages of Open-Ended Questions
  - May result in too much irrelevant detail
  - Possibly losing control of the interview
  - May take too much time for the amount of useful information gained
  - Potentially seeming that the interviewer is unprepared
  - Possibly giving the impression that the interviewer is on a "fishing expedition"

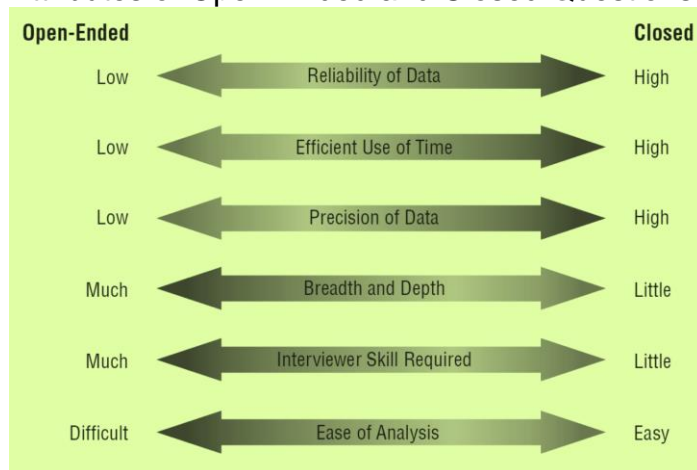
##### 2. Closed

- Closed interview questions limit the number of possible responses



- Closed interview questions are appropriate for generating precise, reliable data that is easy to analyze
- The methodology is efficient, and it requires little skill for interviewers to administer
- Benefits of Closed Interview Questions
- Saving interview time
- Easily comparing interviews
- Getting to the point
- Keeping control of the interview
- Covering a large area quickly
- Getting to relevant data
- Disadvantages of Closed Interview Questions
- Boring for the interviewee
- Failure to obtain rich detailing
- Missing main ideas
- Failing to build rapport between interviewer and interviewee

#### Attributes of Open-Ended and Closed Questions



### 3. Bipolar Questions

- Bipolar questions are those that may be answered with a “yes” or “no” or “agree” or “disagree”
- Bipolar questions should be used sparingly
- A special kind of closed question

### 4. Probes

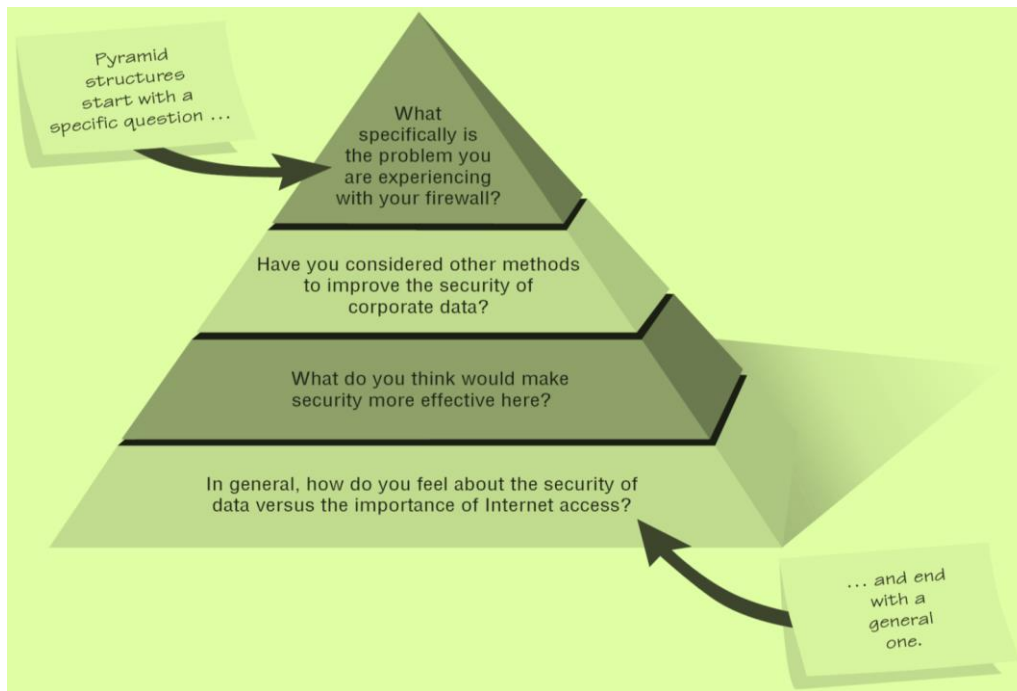
- Probing questions elicit more detail about previous questions
- The purpose of probing questions is:
  - A. To get more meaning
  - B. To clarify
  - C. To draw out and expand on the interviewee’s point
- May be either open-ended or closed

### Arranging Questions

#### 1. Pyramid

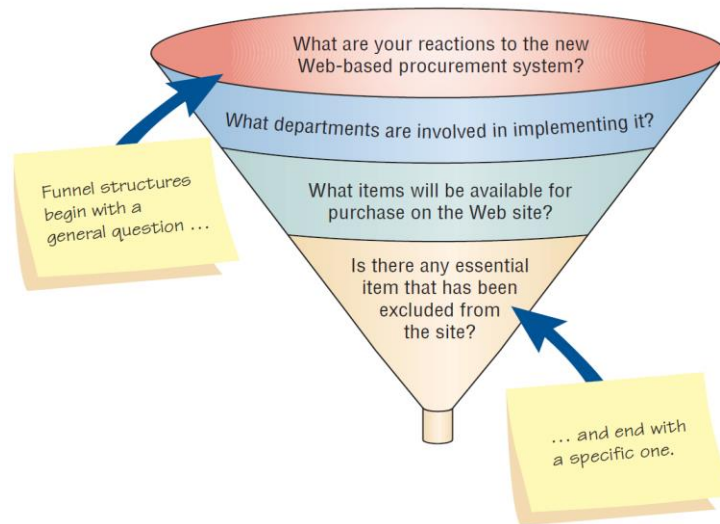


- A. Starting with closed questions and working toward open-ended questions
- B. Begins with very detailed, often closed questions
- C. Expands by allowing open-ended questions and more generalized responses
- D. Is useful if interviewees need to be warmed up to the topic or seem reluctant to address the topic
- E. Pyramid Structure for Interviewing Goes from Specific to General Questions



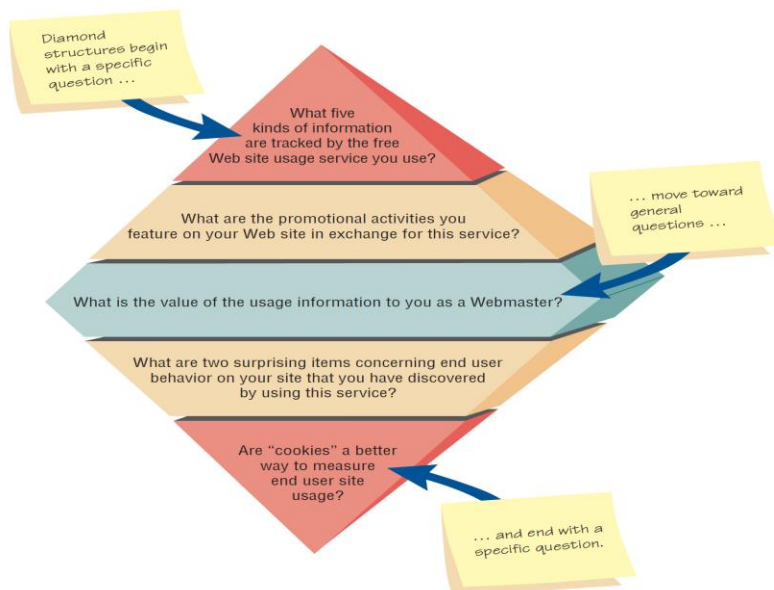
## 2. Funnel

- A. Starting with open-ended questions and working toward closed questions
- B. Begins with generalized, open-ended questions
- C. Concludes by narrowing the possible responses using closed questions
- D. Provides an easy, nonthreatening way to begin an interview
- E. Is useful when the interviewee feels emotionally about the topic
- F. Funnel Structure for Interviewing Begins with Broad Questions then Funnels to Specific Questions



### 3. Diamond

- A. Starting with closed, moving toward open-ended, and ending with closed questions
- B. A diamond-shaped structure begins in a very specific way
- C. Then more general issues are examined
- D. Concludes with specific questions
- E. Combines the strength of both the pyramid and funnel structures
- F. Takes longer than the other structures
- G. Diamond-Shaped Structure for Interviewing Combines the Pyramid and Funnel Structures



### Closing the Interview

- Always ask "Is there anything else that you would like to add?"



- Summarize and provide feedback on your impressions
- Ask whom you should talk with next
- Set up any future appointments
- Thank them for their time and shake hands.

#### Interview Report

- Write as soon as possible after the interview
- Provide an initial summary, then more detail
- Review the report with the respondent

#### Stories

- Stories originate in the workplace
- Organizational stories are used to relay some kind of information
- When a story is told and retold over time it takes on a mythic quality
- Isolated stories are good when you are looking for facts
- Enduring stories capture all aspects of the organization and are the ones a systems analyst should look for

#### Purposes for Telling a Story

- There are four purposes for telling a story:
  - A. Experiential stories describe what the business or industry is like
  - B. Explanatory stories tell why the organization acted a certain way
  - C. Validating stories are used to convince people that the organization made the correct decision
  - D. Prescriptive stories tell the listener how to act
- Systems analysts can use storytelling as a complement to other information gathering methods

## II. Joint Application Design (JAD)

- Joint Application Design (JAD) can replace a series of interviews with the user community
- JAD is a technique that allows the analyst to accomplish requirements analysis and design the user interface with the users in a group setting

#### Conditions That Support the Use of JAD

- Users are restless and want something new
- The organizational culture supports joint problem-solving behaviors
- Analysts forecast an increase in the number of ideas using JAD
- Personnel may be absent from their jobs for the length of time required

#### Who Is Involved

- Executive sponsor
- IS analyst
- Users
- Session leader
- Observers
- Scribe

#### Where to Hold JAD Meetings

- Offsite



- A. Comfortable surroundings
- B. Minimize distractions
- Attendance
  - A. Schedule when participants can attend
  - B. Agenda
  - C. Orientation meeting

#### Benefits of JAD

- Time is saved, compared with traditional interviewing
- Rapid development of systems
- Improved user ownership of the system
- Creative idea production is improved

#### Drawbacks of Using JAD

- JAD requires a large block of time to be available for all session participants
- If preparation or the follow-up report is incomplete, the session may not be successful
- The organizational skills and culture may not be conducive to a JAD session

### III. Questionnaires

Questionnaires are useful in gathering information from key organization members about:

- A. Attitudes
- B. Beliefs
- C. Behaviors
- D. Characteristics

#### Planning for the Use of Questionnaires

- Organization members are widely dispersed
- Many members are involved with the project
- Exploratory work is needed
- Problem solving prior to interviews is necessary

#### Question Types

Questions are designed as either:

- A. Open-ended
  - Try to anticipate the response you will get
  - Well suited for getting opinions
- B. Closed
  - Use when all the options may be listed
  - When the options are mutually exclusive

Trade-offs between the Use of Open-Ended and Closed Questions on Questionnaires



## Open-Ended

## Closed



### Questionnaire Language

- Simple
- Specific
- Short
- Not patronizing
- Free of bias
- Addressed to those who are knowledgeable
- Technically accurate
- Appropriate for the reading level of the respondent

### Measurement Scales

- The two different forms of measurement scales are:
  - A. Nominal
- Nominal scales are used to classify things
- It is the weakest form of measurement
- Data may be totaled

### What type of software do you use the most?

- 1 = Word Processor
- 2 = Spreadsheet
- 3 = Database
- 4 = an Email Program

- A. Interval
- An interval scale is used when the intervals are equal
  - There is no absolute zero
  - Examples of interval scales include the Fahrenheit or Centigrade scale





How useful is the support given by the Technical Support Group?				
NOT USEFUL				EXTREMELY
AT ALL			USEFUL	
1	2	3	4	5

### Validity and Reliability

- Reliability of scales refers to consistency in response—getting the same results if the same questionnaire was administered again under the same conditions
- Validity is the degree to which the question measures what the analyst intends to measure

### Problems with Scales

- Leniency
  - Caused by easy raters
    - Solution is to move the “average” category to the left or right of center
- Central tendency
  - Central tendency occurs when respondents rate everything as average
    - Improve by making the differences smaller at the two ends
    - Adjust the strength of the descriptors
    - Create a scale with more points
- Halo effect
  - When the impression formed in one question carries into the next question
  - Solution is to place one trait and several items on each page

### Designing the Questionnaire

- Allow ample white space
- Allow ample space to write or type in responses
- Make it easy for respondents to clearly mark their answers
- Be consistent in style

### Order of Questions

- Place most important questions first
- Cluster items of similar content together
- Introduce less controversial questions first

### Administering Questionnaires

- Administering questionnaires has two main questions:
  - Who in the organization should receive the questionnaire
  - How should the questionnaire be administered



<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. what are information gathering method

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2. \_\_\_\_\_ questions allow interviewees to respond how they wish, and to what length they wish

3. \_\_\_\_\_ questions are appropriate for generating precise, reliable data that is easy to analyze

4. \_\_\_\_\_ are those that may be answered with a “yes” or “no” or “agree” or “disagree”

5. The purpose of probing questions is:  
 a. \_\_\_\_\_  
 b. \_\_\_\_\_  
 c. \_\_\_\_\_

6. List methods Arranging Questions

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**Note: Satisfactory rating - 6 points                      Unsatisfactory - below 3 points**  
 You can ask you teacher for the copy of the correct answers.



**Answer Sheet**

Score = _____
Rating: _____

Name: \_\_\_\_\_

Date: \_\_\_\_\_

**Short Answer Questions**



Information Sheet-3	Using appropriate <i>medium</i>
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## Communication Means/media

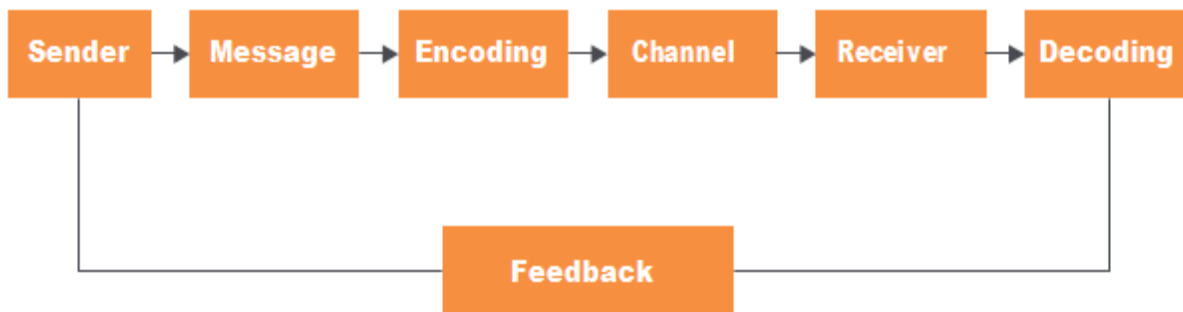
### PROCESS OF COMMUNICATION

The communication process involves the sender who transmits a message through a selected channel to the receiver.

### THE CHANNEL

Information is transmitted over a 'channel' that links the sender with the receiver. The channel may be a computer, a telephone, a television, or face-to-face conversation. At times, two or more channels are used. The proper selection of channel is vital for effective communication.

Not only must information or instructions or ideas be passed from one party to another, but the 'receiving' party must also understand exactly what the 'sending' or 'transmitting' party had in mind. If one party does not clearly understand the meaning of a message or misunderstands or misinterprets its meaning – errors and mistakes, disagreements and disputes, and even accidents, can occur.



Communication process model

**Face-to-Face:** highest information richness.

- Can take advantage of body language and non-verbal cues.
- Provides for instant feedback.
  - Management by wandering around takes advantage of this with informal talks to workers.

**Video Conferences:** provide much of this richness.

- Reduces travel costs and feedback times.

**Verbal Communication electronically transmitted:** has next highest richness.

- No nonverbal cues.
- Phone conversations



- Do have tone of voice, and quick feedback.

**Personally Addressed Written Communication:-** lower richness than the verbal forms, but still is directed at a given person.

- Personal addressing helps ensure receiver reads it.
  - Letters and e-mail are common forms.
- Does not provide immediate feedback to sender but can get feedback later.
  - Excellent for complex messages needing follow-up.

**Written Communication:** - lowest richness.

- Good for messages to multiple receivers. Little feedback is expected.
  - Newsletters, reports are examples.

### Social Networks

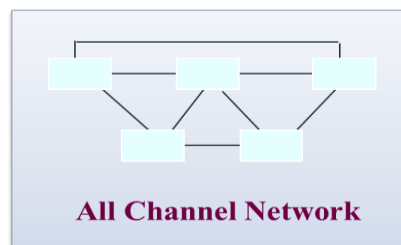
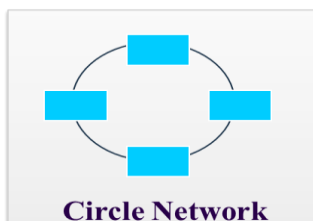
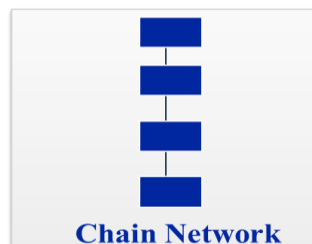
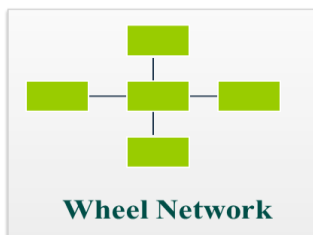
Networks show information flows in an organization.

- **Star Network:** information flow to and from one central member.
- **Circle Network:** members communicate with people next to them in sequence.
  - Wheel and Chain networks provide for little interaction.
- **Chain Network:** members communicate with others close to them in terms of expertise, office layout, etc.
- **Clique Network:** found in teams, with maximal levels of communications between each member and all others.

Importance of Social Networks

- Powerful individuals may limit access to information.
- Simple networks are needed for simple problems or independent tasks.
- Complex networks are needed for complex problems or interdependent tasks.
- No single network is universally effective.
- Adequate sharing of information is crucial.
- Trade-offs or opportunity costs must be considered.
- Informal networks often create barriers.

Communication Networks in Groups & Teams



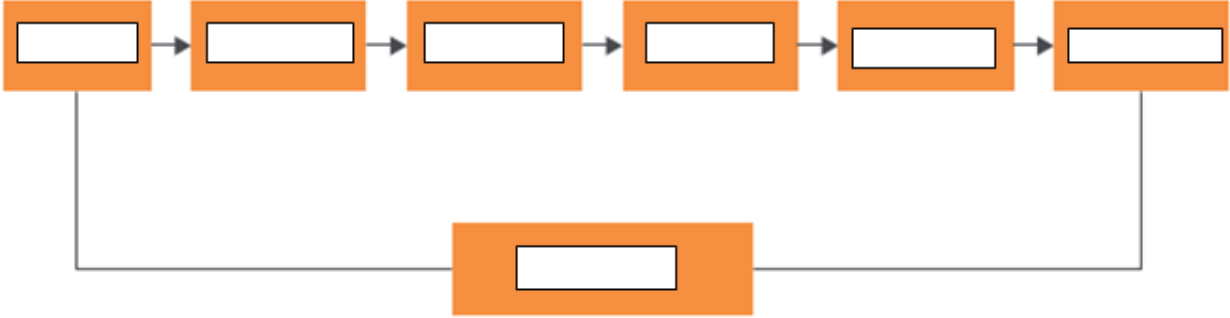


<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

- 1) Describe Communication Media \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Fill on the space given erased element of communication process



Communication process model

**Note: Satisfactory rating - 2 points                      Unsatisfactory - below 1 points**  
You can ask you teacher for the copy of the correct answers.



## Answer Sheet

Score = \_\_\_\_\_

Rating: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

## Short Answer Questions



## Information Sheet-4

## Using appropriate non-verbal communication

### Non-verbal communication

- A. Communication achieved by not just using words
  - B. It is the process of coding or conveying meaning through behaviours such as facial expressions, gestures and body posture
  - C. Following appropriate lines of communication
- The choice of channel to communicate the message is very important in order to achieve understanding
  - Communication can be Formal, Informal or Quasiformal

### **Formal communication channels:**

- A. These channels are officially defined pathways that follow the chain of command or hierarchy in organisations
- B. These channels being official and holding authority are used to send letters, emails, policy statements or announcements

### **Informal communication channels**

- A. Some managers use these informal networks to facilitate formal communication channels or to gather information
- B. Management by Walking Around (MBWA) –
  - Can result in better information and communication exchange
  - Needs to facilitate genuine engagement by senior managers rather than looking like an opportunity to check up on employees' activities
- C. Takes a number of forms, such as unofficial networks that supplement the formal channels and the grapevine and gossip

### **Quasiformal channels**

- A. Quasiformal channels are planned communication connections between holders of various positions within the organisation
- B. They are partly formal, and add additional channels between the formal and informal channels
- C. Project teams or product committees are often used to help encourage innovation
- D. This approach has been extended by the information age, which has provided organisations with new opportunities to link managers effectively through email, intranet and other electronic media tools





<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

**True/ False**

- \_\_\_\_\_ 1. Communication achieved by just using words
- \_\_\_\_\_ 2. Formal communication channels: used to send letters, emails, policy statements or announcements
- \_\_\_\_\_ 3. Quasi-formal channels are planned communication connections between holders of various positions within the organisation

**Note: Satisfactory rating - 3 points                      Unsatisfactory - below 3 points**  
You can ask you teacher for the copy of the correct answers.



## Answer Sheet

Score = \_\_\_\_\_

Rating: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Short Answer Questions



### Communication Direction

One may assume that information is flowing both upwards from the employees, and downwards from management

These flows of communication in an organisation are important, but communication must also be able to move laterally

#### 1. Downward communication

- A. Communication flows from one level of an organisation to a lower level
- B. It is used to implement plans and goals, explain policies and procedures, offer feedback on performance and give directions or instructions regarding job specifications and duties

#### 2. Upward Communication

- A. Communication flows from a lower level of an organisation to a higher level
- B. Provides information to management about what is happening at an operational level
- C. It is important as it facilitates feedback regarding performance and progress of plans and goals; it notifies management of problems or potential problems; and it passes on complaints

#### 3. Lateral communication

- A. Communication flows between members or employees in the same work group or department, or managers at the same level
- B. Serves an important function to facilitate coordination of the work undertaken



<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

**Describe the three communication direction (3pt)**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

**Note: Satisfactory rating - 3 points                      Unsatisfactory - below 2 points**  
You can ask you teacher for the copy of the correct answers.



## Answer Sheet

Score = \_\_\_\_\_

Rating: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Short Answer Questions



Information Sheet-6	Using defined workplace procedures for the <b>storage</b> of information
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## Filing

Filing means storing information in a particular way

Filing can be either:

- **Manual** when paper documents need to be kept in cabinets
- **Electronic** when records are kept in a database on computer

A database is the name of the **software application** which stores records

An example of database software is **Microsoft Access**



Data needs to be kept so that it can be accessed again at any time

### WHAT MAKES A GOOD FILING SYSTEM?

#### The Essential Features

No matter the method of filing, it must be:

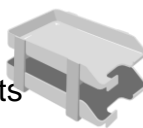
- **simple** and **easy** to use
- capable of **expansion** i.e. **'future-proof'**
- **accessible** by all who need to use it
- **economical** in terms of cost and space
- **secure** from unauthorised access
- capable of keeping files **safe** from damage



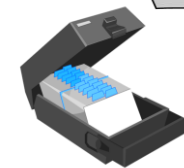
### FILING EQUIPMENT

#### ❖ For Manual Filing

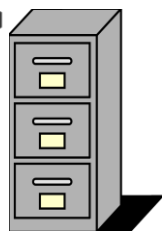
- Lateral filing cabinets
- Horizontal filing cabinets
- Box files



Trays



Card Index



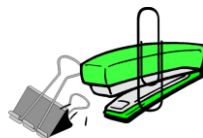
Vertical filing cabinets



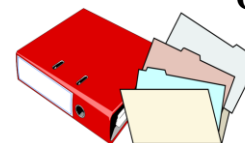
Rotary file



Filofax



Clips and staples



Folders



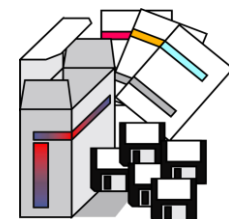
CD-ROM and DVD



Floppy Disc



Hard Disc



Database Software  
Eg. MS Access



## METHODS OF FILING

### For Electronic Filing

#### The order into which records are sorted

#### Alphabetical

- Records sorted alphabetically by surname or firm's name
- The name is the **filing point** simple and easy to use but not easy to expand long term because some letters of the alphabet are more common than others

#### Numerical

- Records sorted by account number or reference number
- The account/reference number is the filing point capable of endless expansion since a new customer is given next number but a manual system needs an alphabetical index to find customer's file

#### Chronological

- Records are organised in date order
- The date is the filing point
- All manual methods use this since the newest documents are placed at the front of the folder

#### Geographical

- Records are sorted according to **place** e.g. the town in the customer's address
- The town or city is the filing point
- The towns are arranged alphabetically could be used by sales representatives who cover different areas

#### Subject

- Records are sorted according to a **category** or **topic** e.g. like
- Books in a library with a crime section, travel section etc.
- The item is the filing point arranged alphabetically by item could be used by department stores or supermarkets where the names of the products stocked is the filing point



## MANUAL FILING PROCEDURE

1. File regularly or it becomes a chore
2. Collect documents from 'out' trays or 'filing' trays
3. Only file documents which have a release mark such as
4. Decide the filing point i.e. the surname if alphabetical account number if numerical date if chronological
5. Pre-sort documents on desk
6. Working in one drawer at a time, remove the first file
7. Place the document at the front of the file
8. Replace file in the proper place in the drawer
9. Repeat the process till all documents are filed



<b>Self-Check -1</b>	<b>Written Test</b>
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**Directions:** Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Why is it necessary to file? \_\_\_\_\_  
\_\_\_\_\_
2. List 3 features of a good filing system, manual or electronic.  
\_\_\_\_\_
3. What do you understand by the term 'filing point'?  
\_\_\_\_\_
4. Which indexing method uses surnames as the filing point  
\_\_\_\_\_  
\_\_\_\_\_
5. Give a major drawback of using this method of indexing?  
\_\_\_\_\_  
\_\_\_\_\_
6. What is the major advantage of using numerical filing?  
\_\_\_\_\_
7. What is meant by chronological order?  
\_\_\_\_\_  
\_\_\_\_\_
8. How do all methods of filing use chronological order?  
\_\_\_\_\_  
\_\_\_\_\_
9. When would geographical filing be appropriate?  
\_\_\_\_\_
10. How would you know a document was ready for filing?  
\_\_\_\_\_

**Note: Satisfactory rating - 10 points                      Unsatisfactory - below 3 points**  
You can ask you teacher for the copy of the correct answers.





## Answer Sheet

Score = \_\_\_\_\_

Rating: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

### Short Answer Questions