

Shri Ram College, Muzaffarnagar

Date: 26.09.2015

Notice

We are organizing Training on "file maintenance and office management" for the office staff as per the following schedule:

Date: 29-09-2015 to 30-09-2015

Session Delivery by: CA Dr. Saurabh Mittal

The office staff is required to attend the training session which will of 2 Hours daily. The attendance of the office staff is compulsory.



Director,

Shri Ram College, Muzaffarnagar



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IOAC, Shri Ram College,
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Session 1

FILE MANAGEMENT (STUDY MATERIAL)

The purpose of good file management is to keep the paper flowing to its final destination. Piles of paper, are lost papers looking for a home! Creating a filing system is like finding the pot of gold at the end of a rainbow. A good filing system will organize your operations, enhance your professional image and increase productivity. When it comes to files and piles, people have three fears. Do any of these haunt you?

Afraid to make a decision - If you don't know what to call a piece of paper, you'll end up calling it nothing. If it doesn't have a name, it doesn't get a home. Such orphans collect in unnamed stacks, piles, drawers and in boxes.


Afraid to discard anything - You might need it someday. Better to keep it, even if you can't lay your hands on it when you need it.


Afraid you'll never see it again - Filing an item in some systems is like flinging it into a black hole. If that describes your system, stacks and piles are indeed a lot safer. The point of filing is, easy placement and access to information.

Four Easy Steps to Improve File Management

Step 1: Separate Working from Archival Material - There are two basic types of files, temporary (working) and permanent (archival). Determining when and how often a file will be used should tell you which type it is. Temporary files include the following:

1. Action items - frequently used items requiring regular decisions and action.
2. Project items - plans, notes and documents related to current projects.


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3. Reading items - must-read materials from any source.

4. Tickler files - organizing material for future use on a specific day.

5. Chronological file - tracking correspondence sequentially.

Step 2: Label Working Files – Label action, project and reading files by purpose or function. Use broad, generic headings that are meaningful to you. If the files are shared, the categories and headings must make sense to everyone involved.

Tips 1.

Don't create thin file headings that are hard to keep track of. Use headings that cover a substantial amount of material (up to 2 inches of paper. Box containers are great for thicker files.).


2. Design your system, complete with headings and sub-headings, before actually creating the files.


3. Use nouns for headings. Adjectives tend to get lost in memory.

4. Create a master index by primary headings so that anyone can locate a file.

5. Make it as easy as possible to add new files to your system. Keep a stock of labels, folders (manila and hanging), tabs and other filing materials close at hand. Be ready to quickly create a home for any lost piece of paper.

Step 3: Choose Locations and Fixtures - Decide who will be using the files, when they will be used and how much room is available for storage. Should the files be in, or close to your desk for frequent retrieval? Should they be centrally located, accessible to several people? Is security a factor? Are some files confidential, such as personnel files that should have limited accessibility? Choose appropriate fixtures for holding files. 'Hot Files' are receptacles that attach to the wall next to you and hold about


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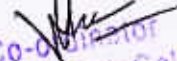
100 sheets of paper. File cabinets can be vertical, lateral or open shelf. Choose wall storage units or rolling file racks. The type of fixture depends on your space and needs. Don't forget that binders work well for storing articles, newspaper clippings, reports, job descriptions, policies and procedures and other reference materials.

Step 4: Arrange the Files - Once you have appropriate fixtures in place, decide how you want to arrange your files. Choices include:

1. Alphabetically - great for client or customer name files.
2. Subject - a good choice if you're using subfolders.
3. Numerically - excellent for dated material, such as purchase orders and bills.
4. Geographical - appropriate if you have satellite operations.
5. Chronological - a good solution for back-up files that need to be set up by month.
6. Tickler files - great for very detailed tasks, such as tracking bills, correspondence and reading material. Set up tickler files by the day, month, and/or year.

Special Filing Categories - Product samples, photos and catalogues are examples of items that don't readily fit into file folders. Organizing fixtures for filing or storing such items include:

1. Boxes that hold both samples and hanging file folders.
2. Cardboard, metal or plastic holders (great for magazines and catalogues) that sit nicely on your bookshelf.
3. Tubes that accommodate large, rolled-up prints or maps.
4. Large envelopes that hold oversized papers in the bottom of a file drawer.


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Permanent Files –

After the project is finished or the action complete, temporary files move into the permanent file category. Moving a file from temporary to permanent status requires analysis and purging. Decide if items contain quality information worth keeping and storing. Are they timely? Can they be obtained elsewhere? Are they accurate and reliable and will they continue to be so? How will you use them in the future? Must you keep them by law?

Once you decide to store a file, it is absolutely necessary to set up a retention schedule specifying how long the material will be kept before purging. Without a retention schedule, your office files will eventually flow into any space available, including public storage units. Maintain the retention schedule separately from the files themselves. The dates for consideration/purging should show up on your calendar (or a shared calendar) and should be the same every year so that consideration/purging become a habit for those involved.


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Session-II

Office Management

1. Proper work Distribution
2. Proper filing of files
3. Accountability
4. Cash management
5. Documents safety and security
6. Accounting of relevant records
7. Keeping of records
8. Efficient and responsive work system
9. Managing stationery and equipments
10. Coordinating the activities
11. Working environment
12. Layout of office
13. Correspondence


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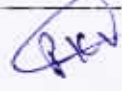







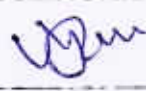

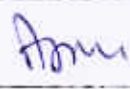

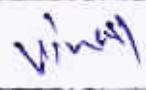
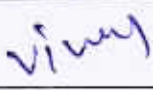


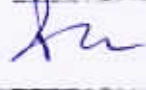


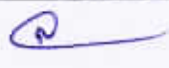


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Tally and Accounting Training

Date 29.09.2015 to 30.09.2015

S.No	Name	29/9/2015	30/9/2015
1	Mr. Paritaj Kumar		
2	Mr. Parvesh Kumar		
3	Mr. Rajendra Tyagi		
4	Mr. Sachin Kumar		
5	Mr. Nand Kishor		
6	Mr. Nitin Sangal		
7	Mr. Vinay Jain		
8	Mr. Ajay Kumar		
9	Mr. Vinay Tiwari		
10	Mr. Bala Kumar		
11	Mr. Parveen Gautam		
12	Mr. Neeraj Gupta		


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John

N.G.