THE DEVELOPMENT OF A WEB-BASED OFFICE SIMULATION

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Dedication

To my mother and father, for always believing in me; and to my husband, John, and my children, Carlee and Rory, for your support and encouragement.

Abstract

Office practice simulations are frequently used in office education in an attempt to assist the student with making connections between theory and practice. This project examines research into the development and design of simulations and, in particular, their use in office education. Furthermore, this project explores current web-design practices and principles and their application to web-based learning environments. Based on this research, a web-based office simulation is developed and presented along with supporting documents and instructor's notes.

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Introduction

To "learn from experience" is to make a backward and forward connection between

what we do to things and what we enjoy or suffer from things in consequence. Under

such conditions, doing becomes a trying; an experiment with the world to find out

what it is like; the undergoing becomes instruction--discovery of the connection of

things. (Dewey, 1918, p. 146)

In office education programs, students often struggle with the connection between

classroom theory and workplace practice. However, the practical nature of this type of

education makes it imperative that students leave educational institutions with some

experiential learning. Providing effective simulative working experiences, however, is

difficult. This project is an attempt to overcome that difficulty and to fill the void between

conjecture and veracity by assisting students with understanding the *connection of things*

between school and work within a supportive, educative environment through the use of a

web-based office simulation.

This project is divided into two parts: the first part is an examination of terms and

research related to simulation, simulation design and web-based instructional design; the

second part is the application of that research to the design and development of a web-based

office simulation.

Background and Rationale

The Office Administration program at Lethbridge Community College offers a first-

year, second-semester course in office procedures. The purpose of this course is to synthesize

and integrate skills developed in other courses and to develop new skills such as resume writing and job preparation, meeting and conference planning, travel planning and ergonomics. The latter part of the course (approximately the last three weeks) has generally been set aside for a short simulation-type of exercise. The purpose of the simulation is to provide students with the opportunity to apply skills, as well as to develop problem-solving and decision-making skills. This simulation has been used with some success during the past two years; however, because of the short time period, it has not provided enough depth and integration with other courses in the curriculum. Moreover, the two co-instructors for this course believe that the placement of the simulation within the semester timeline (at the end of the semester) does not provide students enough time to become familiar with and manage the flow of work. In addition, students' comments on the course evaluations indicate that they have several projects due in other courses during the last three weeks of the term making it difficult to see the usefulness of such an exercise.

Further to these issues encountered with the current use of the office procedures simulation, the instructional staff has been asked to fulfill an aspect the Lethbridge Community College's (LCC) mission; that is, to provide *accessibility* to learner anywhere, anytime. In working towards fulfilling this mission, the Office Administration department is attempting to move away from completely traditional classroom instruction towards a combination of instructional methods that will enhance flexibility for the learner. This is to be completed in conjunction with a new instructional building that is designed around this philosophy. Some of the instructional methods that LCC instructors are being asked to utilize include web-based instruction and a supervised independent learning environment.

Project Design

The purpose of this project is to research and develop an appropriate web-based

simulation for a first-year Office Administration course that would meet LCC's goal to

improve accessibility, Office Administration's goals, the needs of the student and the needs

of business and industry. This will be accomplished in two parts. The first part of this project

will examine the use of simulation, especially in office education as well as a look at current

educational research in the design and implementation of web-based courses. The second

part of this project will apply the theories discussed to an office procedures simulation.

Although there are many simulation publications that can be used in an Office

Administration program, my examination of several published simulations indicate that they

do not cover the required course content, lack the necessary depth, and are too linear in

nature.

Definitions

The following sections define and delineate the terms and topics I will be using in this

project.

Simulation

A simulation is representative of a real system. Greenblat (1988) defines simulation,

in any context, whether technological or social, as "an operating model of central features or

elements of a real or proposed system...", where, "...central features are identified,

represented and constructed into a model that operates in a manner similar to the real-world

system" (p. 14). Roles to play, goals to achieve, activities to perform, constraints to work

around and negative or positive consequences are characteristic of simulations. Furthermore,

in educational settings, simulations meet a number of teaching and learning objectives including enhancing interest and motivation, and developing critical thinking and decision-making skills (p. 16).

In his analysis of simulations, Cunningham (1984), who defines a simulation "as a device for replacing some aspect of reality..."(p. 215), uses taxonomy to describe four types of simulations. The first type, experimental simulations, is used for proving a hypothesis. Performing a lab experiment is an example of an experimental simulation. Predictive simulations, on the other hand, are used to predict or estimate outcomes. Math games and board games come are types of predictive simulations. The third type of simulation, evaluative, is used to assess decision-making capability. Flying simulations or in-basket type simulations are considered evaluative. The fourth type of simulation is educational in nature. Educational simulations are used to transfer knowledge and include the use of role-playing and structured experiences.

It is important to make the distinction between simulation and role-playing; as Greenblat (1980) explains, role-playing is more individualized and concerned with playing a part according to specific rules and outcomes. Simulation, on the other hand, focuses on how the role interacts with other roles and how those interactions affect actions, consequences and responses of other elements within the system.

A computer is an ideal medium in which to create and engage in simulation. Willis, Hovey and Hovey (1987) define computer simulation as an "electronic environment that behaves according to a set of rules" (p. 36). According to Willis, et al, the following are characteristics of a computer simulations: include individual, group or process roles; goals to

accomplish, methods to achieve those goals, missing information that is required to achieve

those goals; a focus on a conceptual rather than a visual environment; a focus on the

cognitive process involved rather than just the psychomotor skills required to use a computer

(ibid, p. 36).

<div align="center">Capstone Course</div>

The course that this simulation is developed for is a first-year capstone course;

capstone courses are also called integrated courses. Capstone courses generally draw from

the student's existing knowledge and skill base; thus the goal of a capstone course is to allow

the student to experience how knowledge and skills from different subjects work together. In

their creation and assessment of an integrated business course, Hartenian, et al (2001) found

that employers are looking for graduates who are familiar with all aspects of an organization;

thus, capstone courses can used to develop this particular trait.

Kerker (2001) describes capstone courses:

Capstones are culminating experiences in which students synthesize subject-matter

knowledge they have acquired, integrate cross-disciplinary knowledge, and connect

theory and application in preparation for entry into a career. Capstone courses should

be both a synthesis and a bridge to students' future after graduation. (p. 3).

Crunkilton, Cepica and Fluker (1997) completed an extensive study of capstone

courses in agribusiness courses—this section draws from their research. Capstone courses are

"planned learning experiences" that allow students to integrate known content to new

information and to "bring meaningful closure to their academic experiences" (p. 3). In order

to be successful in integrating subject matter, however, capstone courses must contain four

key elements. First, a capstone course must define expected educational outcomes and should include problem solving, decision-making, critical thinking and both written and oral communication skills. Required and optional learning activities comprise the second and third key elements. These activities include large projects, small group work, presentations, intensive writing, and discussion between industry representatives and students. The final element of a successful capstone is the use of effective teaching practices.

Capstone courses are beneficial to students and as Fairchild and Taylor (2000) indicate, students in a capstone course are often expected to make the transition from dependent learner to self-directed learner. Furthermore, students who have completed a capstone course may require less on the job training.

Capstone courses often provide an ideal setting for a simulation. According to Hanson & Parker (1982), simulations are often most effective when used as a culminating experience in a capstone course since they provide an opportunity to draw together a multitude of learning experiences.

<u>Web-Based Instruction</u>

Web-based instruction is any instruction that takes place through an online environment and can include any number of electronic tools such as web pages for access to information, resources and evaluation, email and discussion boards. Khan (1997) defines web-based instruction as a "hypermedia-based instructional program that utilizes the attributes and resources of the World Wide Web to create a meaningful learning environment where learning is fostered and supported"(p. 6). Web-based instruction is not necessarily confined to distance education, nor is it considered computer-aided instruction. Rather web-

based instruction can be viewed as a "confluence" (Horton, 2001, p. 2) of distance education, computer aided instruction and Internet technology. Thus, web-based instruction can be used with a variety of teaching and learning methods including enhancing traditional classroom instruction. In fact, some designers break web-based instruction into three forms: a web enhanced course where the web supplements classroom instruction; a web enhanced course where the instructor uses web instruction combined with classroom instruction; and finally, web-based courses where web instruction completely replaces face-to-face instruction (Berge, Collins, & Dougherty, 2000).

<center>Simulations in Office Education</center>

Simulations have a lengthy history in business and office education and are valuable for helping students to develop skills learned in introductory courses (Hanson & Parker, 1972). In many instances, simulations are created and used in business courses as a response to the criticism from business and industry that theory learned in the classroom is often out of touch with the everyday realities of the workforce (Klassen & Drummond, 2000). To assist the reader in understanding how a simulation is useful in administrative/office education, it is helpful to examine some of the curriculum that is generally a part of office education programs. A student in a post-secondary office administration program, for example, might work towards the following outcomes in individual courses:

- Develop keyboarding speed and accuracy (Keyboarding)
- Prepare a document from rough draft copy (Keyboarding)
- Use word processing software effectively (Word Processing)
- Use email to attach and send documents electronically (Computer Skills)

- Compose a business letter using correct grammar, proper usage, and clear, concise language (English/Communications)

The above outcomes are important for developing basic skills; however, a truer test of understanding comes when the student must integrate those skills. Often, the assimilation of skills does not happen until the student is employed in an administrative type of position.

In the past, office simulations were often created around a "real" office where students applied for fictional positions and used typewriters, phones, and other office equipment to accomplish tasks and make decisions; often students moved from one position to another. The time and cost involved in developing these types of simulations have likely led to their demise. However, as Hanson and Parker noted, simulations are useful and can provide the student an opportunity to integrate skills and to get a sense of a real workplace situation within the confines of an educational setting (1972).

Designing Simulations

In her research of simulation design, Greenblat (1988) suggests the designer of a simulation follow five stages of development. The first stage, setting objectives and parameters, involves clear identification of the subject matter, purpose, participants and the context. In the second stage, which involves the development of a conceptual model, the designer, drawing from a good understanding of the referent system, identifies roles, goals, activities, constraints, consequences and external factors. The third stage requires the designer to decide on the style of the game in regards to level of abstraction, time frame, structure of activities and interaction between participants. The designer must also examine the form in which the elements will be represented; that is, will elements be presented

through scenarios, roles, procedures and rules, or visual imagery. The last two stages of simulation design require the designer to construct the simulation, test it, and modify it and then, finally, to prepare the simulation for use by the intended participants.

Cunningham (1984) discusses the importance of "verisimilitude" or the appearance of reality when designing educational simulations. However, Cunningham warns that educational simulations that are too complex or realistic "do so at the cost of the intended educational objective…and as a result, what could be a learning exercise becomes an effort to understand or administer a complex exercise" (p. 225). Thus, it is important to keep the simulation both simple and as true to an actual workplace environment by starting design from the simplest model and adding more complex elements only as they are needed.

Designing an Office Simulation

Hanson and Parker (1972) offer a useful list of suggestions for guiding the development and use of an office simulation. First, it is important to define the limits of the simulation and to be aware of the temptation to include every possible office function or situation; however, the simulation must provide similar experiences to those that the student will find within the local employment community. To manage this issue, the simulation designer must establish clear objectives that are relevant to the current job market. The third suggestion involves the development and use of company manuals and job descriptions. Manuals assist students with understanding expectations, identifying the flow of work, knowledge of standard operating procedures, examples of acceptable document formats, and organizational charts. Students are then encouraged to refer to the manual rather than the instructor when questions arise. Finally, the instructor is encouraged to conduct periodic

debriefings throughout the simulation so that students can provide feedback and discuss concerns and issues.

Office education simulations are often used to develop a student's decision-making, time management, judgment and critical thinking skills, thus making evaluation one of the more difficult aspects of conducting a simulation. Hanson and Parker (1972) stress the importance of establishing clear evaluation procedures rather than merely passing the student based on completion. Some suggestions for assessment and evaluation imitate a "real" office situation where evaluation forms or checklists are filled out by the manager (instructor). The manager then discusses the list with the employee (student) and the employee is given the opportunity to provide feedback (Warner, 1980). To evaluate work produced during a simulation exercise, Warner (1990) suggests that the instructor examine both the quantity and quality of student work in addition to how the work is prioritized.

<div align="center">Designing Web-Based Instruction</div>

As web based instruction in formal education becomes more accepted and therefore utilized, the emergence of a considerable amount of literature on instructional design has appeared. A review of the literature suggests that the following topics are an important part of web development for educational use.

<div align="center">Is Web-Based Instruction Necessary?</div>

The first questions that one should ask when considering web-based instruction is "why"; that is, why use a web-based instructional model (Downs, et. al, 1999). The answer to that question should involve credible answers such as access to potential students or convenience for students; but also must include an examination and commitment of resources

from the institution and faculty. If solid reasons and resources exist, the next step is to ensure

the appropriateness of course content to a web-based instructional medium, as not every topic

is possible to teach over the Internet. For example, it might be difficult to teach soft skills,

such as verbal communication skills, through a web-based environment.

In their discussion of web enhanced courses, Berge, Collins & Dougherty (2000)

emphasize the importance of analyzing current course content to identify what can be best

accomplished in a traditional classroom setting and what can be best offered online.

Furthermore, Berge, et al, (2000) believe it is necessary to create a program of transition

between the two types of media if a course includes both online and classroom instruction.

<u>Preparing the Students to Learn Online</u>

Students tend to equate the classroom with learning. Most students are familiar with a

teacher-centered classroom environment, the use of textbooks, perhaps themselves in a

passive role; using the web for instruction, however, challenges these traditional styles. It is

the responsibility of the instructor to ensure that the student is prepared to learn in a web

environment. The current literature indicates two aspects to preparing students to participate

in web-based instruction: motivation and technical skills.

Web-based instruction tends to place demands on the student and the instructor that

may not occur in a classroom (Downs, et. al., 1999). The instructor, for example, faces an ill-

defined audience. The learner, on the other hand, is generally required to take a more active

and self-directed role and may need to develop a set of organizational skills that previously

did not exist. Thus, the advantage of flexibility may be destructive to some learners who

struggle with self-motivation and require a structured environment. Thus, in terms of

instructional design, Downs et al, suggest that the designer use a combination of learning theories, such as behaviorism and constructivism, in order to provide the student with "structure and sequence as well as a meaningful learning environment" (p. 5).

A more independent learning environment is often a challenge to first year college students. A reaction of students to capstone courses can be mixed because of the intentional ambiguity involved, level of independent decision-making and responsibility (Hartenian, et al, 2001). The negative effects of independent learning environments can be compounded by a more student-centered approach in web-enhanced instruction. To alleviate some student anxiety, Lowny, Thornam and White (2000) suggest the instructor survey students ahead of time to discover a students learning style (preference for verbal vs. written discussion); motivation level (tolerance for ambiguity); time management practices; and, technical factors (experience using computer, email, etc., access to Internet connection outside of class, and type of computer used outside of class).

<u>Navigation in Hypertext Environments</u>

Books are neat little packages; everything is bound together in one location, the information inside a book is generally easy to navigate, and they are transportable. These are only a few advantages of books. Furthermore, students are familiar with how books work; generally, students are familiar with the use of the table of contents, the order of pages, and the inclusion of an index. Hypertext, on the other hand, although useful for providing access to much more information than one book can, has its problems. Navigation in hypertext learning environments, for example, can be much more disorientating for a reader. Often, readers lose their way and may neglect entire sections of important information; or readers

may have difficulty in making connections between nodes of information. Barge, et al (2000) emphasize the need to partition information into "chunks" in order to create a more manageable, inclusive and usable web format. The combination of well-edited text with support from frequent and meaningful headings can also help the reader to keep focus (Berry, 2000). Additionally, use of a consistent and recognizable design throughout the web using the same colour and font scheme for example, can assist the student in maintaining focus.

Another guide tool that can be used with hypertext learning environments is a conceptual or cognitive map. A cognitive map can be used like a table of contents to present the "whole picture" to the student. Thus, the use of a map reduces the amount of time spent navigating through a hypertext document (McDonald & Stevenson, 1999).

Finally, all web pages on a web site should contain a navigation bar or menu; the navigation bar should display and identify—usually through a color-coded system--the current page (also called the active link) as well as any visited and unvisited pages on the web. It should be noted, however, that the overuse of links on a web page could be overwhelming to a student (Downs, et. al., 1999).

<u>Visual Design and Presentation</u>

Berry (2000) notes that web-design factors used for educational web sites often come from computer and information science, graphic design theory and psychology, rather than from educational literature. Of particular interest is the concept of cognitive load, which refers to the "demand placed on the learner's working memory during instruction" (Berry, 2000, p. 50). Web-based instruction appears to add to cognitive load because the learner must not only process content, but also screen elements, objects, navigation tools and layout.

Therefore, the design and layout of a web page becomes an imperative aspect of an educational site, as it is easier to reduce cognitive load through a consistent and simple design rather than attempt to train learners to devote less cognitive effort. A simple design can also help to motivate the student since the student will feel more confident in his or her ability to manage the required learning (Downs, et. al., 1999).

Advantages of a Web-Based Simulation

The World Wide Web (WWW) offers a unique framework in which to offer a simulation. I will use this section to examine some of the traditionally held beliefs about problems with educational simulations and how those problems can be alleviated through use of a web-based environment rather than a traditional classroom setting.

Greenblat (1988) argues that in order for a simulation to be functional it needs to be dynamic. Offering information via the WWW provides that dynamic environment since information on a web page can be updated easily and quickly; students can receive almost immediate feedback, and the WWW is in itself an information resource for the student.

Hovey, et al, (1987) believe that one of the common problems of using a simulation in the classroom is that the inordinate amount of classroom time required for the simulation may not justify the intended learning objectives. Moreover, often the simulation "does not fit into the typical classroom period" (p. 51). Use of a web-based simulation allows students to access the simulation during and outside of classroom time.

Another advantage of a web-based simulation is the use of current technology. Students will have the opportunity to work with technology that they will likely encounter in the work force. Use of email, for example, to send and retrieve information; maintenance of

electronic records; ordering equipment and supplies over the Internet; banking and financial record keeping over the Internet; accessing information through an Intranet and on the Internet, are just a few examples of how technology is used in business.

The linear nature of a paper based published simulation allows students to look ahead to upcoming events and tasks; a web-based simulation, on the other hand, can provide a more realistic environment. Students can have access to current information and can store past information, however future event and task information can be made available as necessary. In addition, links to outdated information and past deadlines can be removed.

Conclusion: The Development of the Simulation

The development of this simulation began with the creation of a fictional business. This fictional business needed to capture all of the skills and proficiencies covered in the prerequisite courses in the first-year program. Moreover, the business had to be local in order to make the simulation a appear both real and relevant to the student. Thus, I decided against having a business that was dedicated to one particular area--such as law, accounting, manufacturing, etc.—but rather, a business that was more prolific.

The result of this forethought is a business called *Office Assist, Inc.* This company provides individuals and businesses with office services such as document processing, temporary office help, telephone answering service, email answering service, ergonomic advice, maintenance and filing of documents, etc. Some individuals and businesses rent office space from the company and use some of the services provided; others use just the services provided. To maintain a more realistic and relevant setting, the company is located in Lethbridge, but serves clients in Lethbridge, the surrounding area, and around the world.

The physical design of the web attempts to employ good design principles as much as possible. Each page displays the company's logo as well as a descriptive title of the project or information presented. All pages use the same background design and font style. Moreover, every attempt is made to "chunk" information by limiting most web pages to one screen; thus there is a minimal amount of horizontal and vertical scrolling and the reader does not feel overwhelmed by too much information.

In regards to the content of the simulation, the simulation includes a combination of Cunningham's decision making model, as students are expected to make some of the day-to-day decisions regarding various issues that arise, and an educational model, as students are expected to apply prior knowledge to new experiences. Furthermore, this simulation combines web-based instruction and regular meetings, (called workshops), during the simulation period. The workshops are designed to present relevant information, obtain feedback from the students, provide a forum for discussion of general issues and problems, and to furnish a continued connection between students and instructors.

This course is offered in the winter semester only, thus students are familiar with the use of the computer as a business tool and the use of *LCC Online*. LCC Online provides access to email and WebCT—both used to provide important information to the student. Email is used to send students notice concerning a new project; WebCT, on the other hand, provides access to the Office Assist web page (see Appendix A), a calendar to record current and upcoming dates and events, and a discussion board which is used for the Coffee Room conversations.

The first week of the simulation is used as an "orientation" period. The purpose of this orientation is to familiarize the student with the Office Assist Inc. web, policies and procedures (see the Employee Manual section of the web simulation), where to find links to projects and information, how to access the discussion board, and to stress the importance of checking email on a regular basis. The orientation period and subsequent workshop meetings are designed to help the student understand the independent nature of the simulation—as, based on past experience, this type of self-directed learning causes anxiety for many first-year college students.

As the simulation progresses, projects become more complex and the student is required to manage several tasks at one time and, in some instances, to work as members of a group. Thus, in addition to practicing and employing technical skills, the student learns to prioritize tasks, manage time, work independently, and practice human relationship skills—all of which are likely used in the *real* workplace.

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Appendix A: Office Assist Inc. Supporting Documents and Instructor's Notes

Office Assist Inc
Helping You Do Business

Instructors Guide
Before You Begin, You Need to Know...

The following assumptions and requirements are applicable to this simulation:

- Students will have access to the Internet and Email on a daily basis.

- Students will have had some training on the use of Microsoft Office as well as the Internet and Email.

- Students will be using Microsoft Office Version 2000 or above to complete the projects and tasks.

- Students will be using Internet Explorer or Netscape to view the web pages. It should be noted that because the simulation was created in Microsoft FrontPage, the web is *best* viewed in Internet Explorer

- The *About Us* link is a link to a PowerPoint presentation. The computer used to view this presentation must have Internet Explorer and PowerPoint.

- The students must have access to an electronic discussion board (such as the one available in WebCT) in order to complete the Coffee Room Conversation section of the simulation.

- The student has a good understanding of APA style and formatting as this is required for the *Foreign Affairs* report.

Week	Items
1	• Getting ready: o Read employee manual o Create letterhead template o Create project planning templates o Create on-line calendar for 8-week period o Hand in check list and associated documents • Coffee Room contribution • Mail Room
2	• Travel Projects—Jayme Petherick's Itinerary o Send initial email from Jayme to start o Students should mark due date in calendar • Email from Lethbridge Small Business Assoc (LSBA) o All emails re: LSBA are printed o Students start a meeting folder to hold all emails and information regarding meetings; maintained in chronological order o Students should mark dates in calendar (all meeting dates, etc. should be provided in the initial email) • Coffee Room contribution • Mail Room
3	• Jayme's itinerary **due** • LSBA Meeting Notice **due** • Ergonomics—PowerPoint Presentation o Send initial email from Jayme to start research • Cooperative Education One-Day Workshop Planning o Initial email from Jayme includes database attachment o Create budget in Excel o Students should mark in calendar due dates for database and budget • Coffee Room contribution • Mail Room

4	- Invoice Office Assist clients for office rental & services **due** - Agenda & Minutes for LSBA meetings **due** - Cooperative Education One-Day workshop planning - Database and budget **due** - Create invitation form letter - Create one-page "advertising" flyer - Coffee Room contribution - Mail Room - Calendar **due**

5	- Travel—Information for Donna McAdams - Send email from Jayme to begin research - Students should mark due date in calendar - Cooperative Education Workshop - Form letter **due** - Flyer **due** - Coffee Room contribution - Mail Room
6	- Foreign Affairs Report for Angelo - Send initial email from Jayme - Letter to Donna McAdams regarding travel info **due** - Email from Jayme regarding travel expenses - Expense claim form **due** - Coffee Room contribution - Mail Room
7	- Ergonomics Power Point presentation **due** - Meeting notice out for LSBA - Coffee Room contribution - Mail Room
8	- Invoice Clients for Office Rental & Services - Agenda & Minutes for LSBA - Foreign Affairs report **due** - Mail Room - Coffee Room contribution - Calendar **due**

Office Assist Inc
Helping You Do Business

First Week Employee Orientation Checklist

Please complete the following. Check each item as you complete it. All items are due, including this checklist, at the end of your first week.

Task	Completed
Read and explore the five links on the Employee References page	
Create a Project Planning template form (use the example in the Employee Manual) ❑ print a copy to hand in ❑ save the file for future use	
Create an official letterhead using the Office Assist logo (obtain a copy from the Employee Manual) ❑ print a copy to hand in ❑ save the file for future use	
Create a 2-month calendar to records important dates (use the dates that you will be working for Office Assist Inc. as assigned by your instructor)	
Review and familiarize yourself with the website	
Use the Coffee Room discussion board to answer your first situational question--see the Coffee Room link on the Course Map page for more information	
Use the Mail Room link on the Course Map page to complete your first job in the mail room.	

Office Assist Inc
Helping You Do Business

Meeting Notes for the Lethbridge Small Business Association:

- Students will have completed a "practice" month with the Association and therefore, they should be familiar with names of the Association members and the format of the documents
- Meeting dates, time, place and Association members are listed on the web page
- All meetings are held on the last Wednesday of each month.
- The notice must go out two weeks before the meeting date
- The agenda is always due at the Friday before the meeting
- The minutes are made available in the first week of the next month

Here is a list of emails and the corresponding minutes in rough draft. These emails should be sent at various times during the month sometime before the last week.

Month One:

Email from Louise Drake, Chairperson
Please send out the Notice for the March meeting to be held at the Ramada Inn at 7 p.m. in Room 101. Also, add the following to the meeting agenda:

Guest speakers, President of the Alberta Small Business Association, would like to discuss the benefits of attending the annual conference and provide information on the number of people attending previous conferences

Email from Bill James, Treasurer
Under the Treasurer's Report, I would like to give an update on our investment.

Email from Sheila Watson
I have a report regarding the Membership Drive. I have a list of names and a rough draft letter for promotional purposes for the committee to approve.

Month Two:

Email from Bill James, Treasurer
I have a Treasurer's Report for the March meeting. Thanks, Bill

Email from Louise Drake
I have received a phone message from Sheila Watson. Sheila wants to be put on the March agenda as she has an update on the membership drive pamphlet and, she also wants to talk about creating a membership database.

Email from Louise Drake
In regards to the Small Business Conference, I would like to talk about forming an ad hoc conference planning committee.

Also, Jill Bradley left a voice message and asked that she be added to the agenda. She has a travel-funding request.

The meeting is coming up, please get the agenda read as soon as possible. Thanks, Louise.

Month One

LSBA

- All member were present
- Louise called the meeting to order
- Minutes were approved as circulated

Typist: use previous month's minutes as a guide for formatting. . .thanks, Louise

Bill James

- Money is currently held in a business account, no interest is accruing
- Discussed the following option with the account mgr. At the Royal Bank
  - Business Account—no interest
  - GIC (90 day)—2.5%
  - GIC (90 day locked in)—3.5%
  - Treasury Bill—2%
  - Money Market—varies
- Need to consider the following: do we want to lock funds in for a certain term; how liquid to we want the investment, that is, do we need to be able to access the cash quickly?
- Pat Phillips asked if it was possible to invest the funds in the stock market
- Bill replied that since the funds are of a public nature, that this option is too risky
- Ted moved that the funds be placed in the 90 day locked in GIC. Seconded by Jill Bradley. CARRIED

(Reports)

Membership Drive

- Sheila Watson asked the members for their opinions of the letter she drafted for promotion of the LSBA
- After discussion, decided that Sheila will put together a promotion pamphlet. This would include a registration form that can be returned to the association. The pamphlet needs to be ready for the end of next month

New Bus—none

Small Bus Conference

Old Business

- Louise introduced president of the Alberta small business association, Susan Reynolds.
- Susan offered info regarding the small bus conference
  - Start planning now
  - Set up a committee to discuss guest speakers, start to evaluate accommodations
  - Last year in Edmonton, the annual conference had approx 400 attendees
- Louise will call a meeting of the Lethbridge Small Bus members to get volunteers to help organize the conference

Other bus: no other bus was reported

Note: remember to include next meeting date and place (Ramada) in typed minutes

Month two

All members in attendance
Louise called mtg. to order
Minutes approved

Treasurer's Report
Bill James reported that $8000 placed in 90 day GIC at Royal Bank

Membership Report

Reports
- The first draft of the pamphlet is completed; but deadline for end of this month will not be met as she has been away due to a death in immediate family
- Committee reviewed pamphlet and suggested a few minor changes—overall thought it was satisfactory. Sheila will have it ready for next meeting

Travel Funding—Jill has been invited to April meeting of the Edmonton Small Bus. Association.

New Bus:
- She plans to promote the Alberta small bus conference hosted by LSBA
- Jill asked for travel and accommodation expenses to be paid
- Ted moved tat Association cover Jill's mileage and 2 nites accommodation in order to attend the Edmonton Small Business Association meeting next month. Sandra K seconded. CARRIED

Old bus: Small Bus Conference
Louise reported
- contacted majority of members asking for volunteer for Alberta conference
- meeting of volunteers to be set up for early next month; goal is to set up ad hoc planning committee

no other business to report

(include next meeting date and place: Ramanda, Room 210

Office Assist Inc
Helping You Do Business

LASTNAME	FIRSTNAME	SCHOOL
Aab	Wilbur	Vulcan Outreach
Anderson	Kristen	Coalhurst High
Ball	Robin	Picture Butte High
Bordeau	Katherine	Champion School
Bressette	Cheryl	County Central High
Bullshields	Frances	Coalhurst High
Castillo	Robin	County Central High
Chervinski	John	County Central High
Chin	Roger	Sunnyside
Coats	Bill	Shaughnessy
deGroote	Pearle	Kate Andrews High
Doepke	Cheryl	Shaughnessy
Ezaki	Duane	Coalhurst High
Fitzgerald	Edmond	Milo School
Gao	Xiaoming	Coalhurst High
Ikebuchi	Luigi	Coalhurst High
Jacobson	Andrew	Noble Central
Kaluza	Laurie	Coalhurst High
Lee	Kell	St. Catherines
Lu	Jim	Coalhurst High
McConnaghy	Germain	Kate Andrews High
Mikkola	Claudia	Noble Central
Nelsen	Beth	County Central High
Neumann	Kenneth	Pass Plus
Palermo	Sheryl	Kate Andrews High
Pereschitz	Loland	County Central High
Ranson	Ray Lynne	Vulcan Outreach
Scheib	Earl	Sunnyside
Schmale	Carolyn	Picture Butte High
Slingerland	Vohn	Kate Andrews High
Smith	Tom	Pass Plus
Smythe	Janice	Noble Central
Stewart	Mark	Champion School
Van Maanen	Donna	Kate Andrews High
Vander Heyden	Merle	Kate Andrews High
Yamashita	June	County Central High
Young	Jeff	Picture Butte High

Office Assist Inc
Helping You Do Business

Each "situation" is posted at the beginning of the week. These topics are designed to encourage students to think about how they would handle a particular situation. Each topic will be posted on a threaded discussion board so that all students can observe each other's comments and respond. The instructor posts the introductory thread.

Here is a list of *possible* discussion topics:

1. Your boss is ill today and he has asked you to take care of some work that he has stored on his office computer. While searching for the files, you accidentally come across some pornography that was obviously downloaded from the Internet. Company policy states that there is severe penalties for office equipment for personal use; especially this type of use. What do you do in this situation?

2. Jane works in a small office as an administrative assistant to two busy executives. One manager frequently asks her to take care of some her personal items. For example, a couple of times she asked Jane to wash her car; pick up her dry cleaning; send flowers to a friend and make personal dinner arrangements. To top it off, she asked Jane to take her son to his dentist appointment. Jane has feels used and frustrated; this is not what she was hired to do. What kind of advice can you offer Jane?

3. While meeting with your manager to discuss some work that needs to be done with your co-worker you accidentally let some extremely confidential information about the coworker slip. Your manager is upset about your behavior; what do you do?

4. You answer the phone for the office on a regular basis. One of the people you answer the phone for has asked you to screen his calls. You are supposed to ask the person calling, "May I tell him who is calling", and "What is your call concerning". Although this makes you uncomfortable, you continue to do as asked. Today when you asked a caller the required questions, he yelled at you and told you it is none of your business and "just let me talk to him"...what do you do?

5. You happen to be friends with someone who works at the competition. Lately, your boss has been questioning you about the competition and asking you to get certain information for her. How do handle this *and* keep your job?

6. It is Friday and you have worked hard all day to get month end work completed. You are not quite completed, but your friends will be picking you up in 10 minutes to go to Calgary for a concert that you have already purchased tickets for. What do you do and or say to your supervisor?

7. While attending a party on the weekend, you hear that, Mark Trembly, one of the clients at Office Assist, runs an escort service on the side. What do you do with this information?

8. One of your coworkers spends an inappropriate amount of time on personal email and phone conversations. The company has explicit rules concerning use of company time and equipment for personal use. You don't want to be a tattletale, but you end up having to "help" with unfinished work because your coworker falls behind. What can you do to solve the problem without causing hard feelings?

Office Assist Inc

Helping You Do Business

Sample Project Planning Form

Employee Name _____

Client Name _____

Project _____

Date Started: _____ Date Completed: _____

List the documents/tasks that the client expects:

List the resources that you require to complete this project (software required; online and/or paper resources)

Appendix B: Office Assist: The Simulation
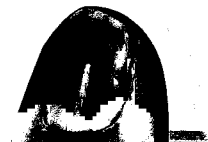
Office Assist Inc
Helping You Do Business

About Us and Our Services

Important References

Projects & Evaluation

An Administrative Procedures Web Simulation; ©Nancy F. Russell, 2002

Employee References

This page provides links to important information that you will need to complete many of the projects and tasks assigned to you.

Employee Organizational Chart	Use this link to see a list of the names and positions of the people that you work with.
Employee Manual	Use this link to refer to your position description and associated standard operating procedures required by your position.
Database of Office Temps	Use this link to obtain a list of names and employment descriptions for the temps that work for Office Assist.
Current Office Space Rentals	Use this link to find out names of people and or businesses who currently rent office space and use Office Assist services.
Price List	Use this link to look up standard charges for the services that Office Assist provides.

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References

Organizational Chart

This chart displays the names and position of the people who currently work for Office Assist (note: there is a separate list of temp positions)

Jayme Petherick (owner)
Office Manager and Bookkeeper

| Mary Anne
Administrative Assistant | Jared
Operator /Administrative
Assistant | Shavonne
Office Assistant | You
Office Assistant |

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References
Your Employee Manual

These pages will provide information that you need to do your job. Please read this manual before beginning the simulation; refer to it as often as you need to.

General Duties

You are an office assistant with **Office Assist.** Your duties include but are not limited to:

*Note: it is important to check your email everyday for tasks, projects and important information!

- compose or prepare from rough draft copy correspondence and reports for Office Assist and Office Assist clientele
- answer telephone and email inquiries
- schedule appointments and maintain a calendar
- process incoming and outgoing mail
- maintain a records management system
- organize time and tasks
- exercise effective decision making skills
- coordinate meetings for Office Assist clientele
- coordinate travel for Office Assist clientele
- act as a public relations person for the company
- other administrative duties as assigned

You report to Jayme Petherick, the office manager. Check the organizational chart to see the names and positions of other employees at Office Assist Inc.

References
Your Employee Manual

Page 2

Forms

Logo	The Office Assist Inc. logo must be used on all paper correspondence. This is a graphic file that you can insert into a Word or Excel document. See a sample <u>logo and instructions</u> for copying the logo to your disk for use.
Letter Format	All letters are keyed in full block format with open punctuation and must be printed on company letterhead with the official logo. Unless otherwise indicated, all correspondence must be signed by Jayme Petherick.
Monthly Client Billing	All clients, including those working in the Office Assist Inc. offices, are billed on a monthly basis. <u>See a sample Invoice</u>.
Project Planning Form	Some project require the use of a project planning form--use this form when required. It is suggested that you create a template of this document in Word. <u>See a sample project planning form</u>.

<u>Page 3...</u>

References
Your Employee Manual

Page 3

Telephone

Office Protocol

When you answer the telephone at Office Assist, you are representing our company. Answer the telephone as promptly as possible with the following: "Good Morning/Good Afternoon, Office Assist, your first name speaking". Do not provide personal information about Office Assist employees or clients to any caller without their prior permission.

Email

You are responsible for handling email enquires from current and prospective clients. All email must be handled in a professional manner. It is expected that Office Assist employees will not use email or the Internet for personal use.

Mail Handling

Note: Please check the Mail Room everyday for possible tasks.

You are responsible for the majority of the mail handling in the office. These responsibilities include:
- Sorting incoming mail upon arrival.
- Collecting outgoing mail by 2:30 p.m. everyday.
- Gathering information from Canada Post as required by your supervisor.

Back to page 1...

References

Temp Database

Temps are people that work for local businesses that require temporary staff for a variety of reasons. This page provides information on current temps that work on a contract basis with Office Assist.

Name	Education	Specialties	Availability
Clarke, Minja	Administrative Assistant Diploma	Microsoft Word, Excel, Access, PowerPoint	Monday to Friday
Henderson, Chelsie	Administrative Assistant Diploma	Microsoft Office Suite; Desktop Publishing	Monday to Friday
Ichikawa, Junko	Administrative Assistant Diploma	Microsoft Office Suite; Corel Suite; bookkeeping	Monday to Friday
Malkewsky, Martin	Administrative Assistant Diploma	Microsoft Office Suite; Corel Suite; web page design	Monday to Friday; prefers mornings
Matksky, Ian	Business Administration Certificate	Bookkeeping; Excel	Wednesday to Friday
Vanderheide, Kelli	Office Assistant Certificate	Word Processing; reception	Monday to Friday
Walking Stone, Adele	Multimedia Diploma	Web page design and development; Dreamweaver; Flash; Adobe Photoshop	Monday to Friday
Zimmer, Paula	12-week training program	reception only	Thursday, Friday

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References

Database of Rented Office Space

Office Assist maintains and rents ten office spaces. Businesses that choose to rent office space have the option of purchasing additional services provided by Office Assist. The following is a list of current office space and occupants.

Office #	Name	Business	Services Used
100	Donna McAdams	Psychologist	Office Space/Answering Service
101	Anna Ranhadsingh	Psychologist	Office Space/Answering Service
102	Del Morris	Web Designer	Office Space
103	Ryan Chong	Insurance Appraiser	Office Space/Answering Service
104	vacant		
105	Delores Hopcheck	Industrial Cleaning Supplies & Service	Office Space/Answering Service
106	Angelo Stambeni	Import/Export	Office Space/Answering Service
107	vacant		
108	vacant		

| 109 | Mark Trembly | Independent Sales Consultant | Answering Service |
| 110 | Sandy Schille | Entertainment Bookings and DJ Service | Answering Service |

References

Price List

This page will provide information that you need to do determine pricing for clients and potential clients and to do monthly invoicing.

Task	Charge per Unit
Work performed at Office Assist	$12.50 per hour
Work performed for clients renting office space at Office Assist	$7.50 per hour
Document Processing	$3.50 per page
Telephone / E-mail Answering Service	$300.00 per month
Office Space Rental	$600.00 per month
Temporary Help	$28.00 per hour

*Important Notes:

- If a client requests document processing (letters, reports, manuscripts, memos) you charge the cost per hour **plus** the cost per page of the document
- Special rates can be negotiated for long-term contracts; only Jayme is authorized to do this
- Clients using temporary help are billed on a monthly basis; Office Assist takes care of paying the temps wages.

Projects

First Week of Work!

Monthly
Bookkeeping for
Office Assist Inc.

Lethbridge Small Business
Association Meetings
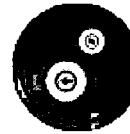
Cooperative Education Workshop

Itinerary for
Jayme

Travel Information for
Ms. Donna McAdams

Mail Room

Office Assist Gets
A Face Lift

Foreign Affairs for
Mr. Stambene

Coffee Room

◆ Home ◆ References ◆ Projects ◆ About Us ◆

Introduction to Office Assist Inc
Your First Week
Employee Orientation

Info... Welcome to Office Assist Inc.! In order to help you, we have set aside this first week as an orientation period. During this week, you will be familiarizing yourself with the Office Assist employee manual, important references and our website.

To do... Please use the Employee Orientation worksheet provided to you on your first day to complete each item below:

☑	Read and explore the five links on the Employee References page
☑	Create a Project Planning template form (use the example in the Employee Manual)
☑	Create an official letterhead using the Office Assist logo (obtain a copy from the Employee Manual)
☑	Create a 2-month calendar to record important dates (use the months that you will be working for Office Assist as assigned by your instructor). You can use an electronic calendar or create one in a software program.
☑	Review and familiarize yourself with the website
☑	Use the Coffee Room discussion board to answer your first situational question--see the Coffee Room link on the Projects page for more information
☑	Use the Mail Room link on the Projects page to complete your first job in the mail room.

Note: Project page links are active when the project is assigned and deactivated when the project is due. All assignments (excluding the Coffee Room and Mail Room) begin with an email message from your supervisor, Jayme. Some projects require the use of the Project Planning form.

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Meetings

Keeping track of and maintaining meeting documents.

Info...

As a member of the Office Assist team, you have been asked to compile and maintain documents for the **monthly** meetings held by the *Lethbridge Small Business Association* for the next two months.

Each month you will receive emails from members of the association who want to add items to that month's agenda. It is expected that you will keep a current meeting file to store all pertinent information for those meetings as well as to calendar when all documentation is due. In addition, you are in contact with the chairperson of the association, Louise Drake. Louise will send you information regarding these meetings on a regular basis through email.

- The executive members of the association include: Louise Drake (chairperson); Bill James (treasurer); Sheila Watson (membership committee); Sandra Kryzowski; Pat Phillips; Jill Bradley; Ted McGill.

- All meetings are held on the last Wednesday of each month in Room 101 of the Ramada Inn at 7 p.m.

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Meetings

Keeping track of and maintaining meeting documents--Page 2

To do...   Each month you are required to:

- Send out a notice to all members at the beginning of each month. Louise Drake, meeting chairperson, will provide you with any additional information, changes, as well as any special arrangements required. Make sure that the notice goes out on the right date.
- Compile the agenda using information you receive from members of the association over the month. This means that you should be checking your email on a regular basis and keeping track of information that comes in to you using a current meeting file folder. Make sure the agenda is ready before the meeting day.
- Compile the minutes of the meeting that are sent to you in rough draft form. These minutes are to be distributed to the committee members by the first week in the following month.

Note: Click on this <u>sample documents</u> link to see a sample of each document from a previous meeting.

<u>Back to page 1...</u>

<u>How will I be evaluated on the meeting notice?</u>

<u>How will I be evaluated on the agenda and minutes?</u>

◆ <u>Home</u> ◆ <u>References</u> ◆ <u>Projects</u> ◆ <u>About Us</u> ◆

Rubrics

Meeting Documents--Meeting Notice

Marks:	3	2	0
Content	no spelling errors or grammar errors; all information is correct including date, time, place and proper names	all information is correct; no spelling errors; minor grammar errors such as punctuation or capitalization; information copied from email; inclusion of unnecessary information	inaccurate information; spelling and major grammar errors; including proper names); headings and guide words missing
Formatting	formatting used follows specified conventions for memos; appropriate use of font attributes (bold, underline, italics, etc.) that enhance the readability of the document	minor formatting errors such as inconsistency in fonts used; minor alignment errors.	poor design; overuse of font attributes which detracts from the logical flow and readability of the document

◀ Back to project instructions...

Rubrics

Meeting Documents--Meeting Agenda and Minutes

Mark:	5 (each)	3 (each)	2 (each)	0 (each)
Content	free of spelling and grammar errors; all information is accurate including dates, times, proper names, etc.; inclusion of signature lines in minutes; use of appropriate titles and side headings; page numbers included; excellent business language	free of spelling and grammar errors; information is accurate; appropriate use of titles and headings; signature lines included appropriate business language	free of spelling errors; minor grammar errors such as capitalization or punctuation; wordy or extra headings; headings missing; wordy text; minor information missing; signature lines missing; adding extra items or inferring information	spelling and major grammar errors; important or blocks of information missing; information repeated; inappropriate language for a business document
Formatting	formatting is correct and consistent throughout **all** related documents including pagination, consistency; use of tables or columns to align information;	includes page number notation; minor formatting errors such as inconsistency in fonts and alignments and other text attributes;	page numbers missing; tables or columns not used to align information; inconsistency such as use of multiple fonts between the documents	major formatting errors, such as incorrect alignment between headings and text, that make it difficult to logically follow the information and detract from readability

◀ Back to project instructions...

Bookkeeping

Assisting with the monthly bookkeeping for Office Assist.

Info...

Each month, **Office Assist** sends out invoices to our regular customers for services conducted. These include invoices to both customers that use office space at Office Assist and customers that use our Temp service. Clients that use our services on a one-time basis are billed when the work is completed.

To do...

Using the format for invoicing shown in the Employee Manual and the pricing list shown on the References page, complete the monthly billing. Jayme will be sending you additional information for invoicing customers using the Temp service. In addition, please create a spreadsheet that shows the complete details of the months billing. Divide the spreadsheet into two sections: one for office renters and one for temp users. Have a subtotal for each and a grand total.

How will I be evaluated?

Rubrics

Bookkeeping Tasks

| Mark Assigned:	2	1	0
Content	Information (name, date, numbers and totals) are completely accurate.	Minor errors in content that do not affect the accuracy of the information	Major errors including errors in numbers or totals; recipient's name; date
Formatting	Invoice is well-designed; readable; follows the guidelines given in the employee manual; consistent use of fonts and alignment	Minor formatting errors that do not affect the readability of the information	Form is poorly designed making it difficult to follow and detracts from readability

Back to project instructions...

Cooperative Education Workshop

Project
Planning
Sheet
Required

Office Assist has obtained a contract to assist with the planning of a **Cooperative Education Workshop** to take place in late spring. Your assistance is required with various tasks. The workshop is hosted by the Palliser School Division and the person in charge of conference is Candice Herman. Her office is located at 1345 15 Street South, Lethbridge, AB, T1K 1L6. Candice is also your contact person.

| Download Database | Prepare Budget | Compose One-Page Announcement | Compose Form Letter |
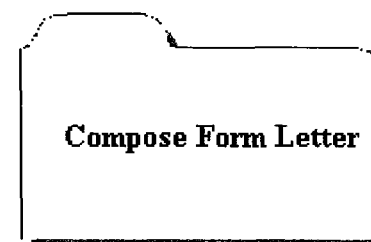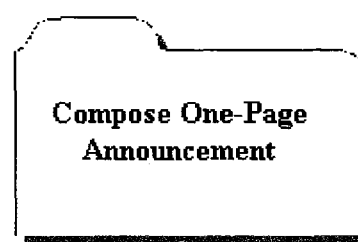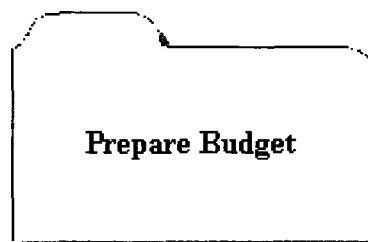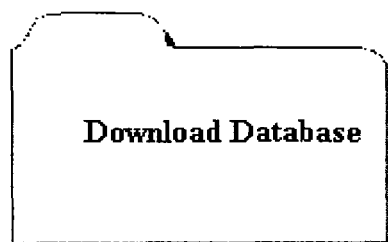
➔ <u>Home</u> ➔ <u>References</u> ➔ <u>Projects</u> ➔ <u>About Us</u> ➔

Cooperative Education Workshop

Mailing list

Info...   The list of possible workshop attendees has been sent to you via email.

To do...   Download the file workshop_list.doc from the your email account.

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Cooperative Education Workshop

Preparing a Budget

Info...

The workshop planning committee has estimated that approximately 150 people will be attending the workshops. Each person pays a $75 fee. The expenses will include a $40 per person charge for lunch and coffee; there will be a $100 per room rental for six rooms. Each speaker will receive a $50 honorarium and the keynote honorarium and the keynote speaker will receive $300. Office Assist is charging a contract fee of $2000 to Palliser School Division. Approximate paper supplies will amount to $150. Printing costs will be estimated at $200. Media release will cost $500.

To do...

Reading the information carefully from above, prepare a budget using Excel showing each revenue and expense item in detail. Calculate the net revenue for the workshops. Your spreadsheet should be properly formatted with correct formulas in place.

Print the worksheet as is and showing cell formulas--therefore, you should have 2 printouts. Due March 21, 2003 by noon.

How will I be evaluated?

Back to Workshop instructions...

Rubrics

Preparing a Budget

Mark Assigned:	5	4	3
Content	Numbers and formulas are correct; revenue and expenses are clearly defined; calculations are accurate and match the information provided; data is logical and easy to follow	Numbers are correct; minor inaccuracies in development of formulas used in calculations (for example, using a SUM function inappropriately); clear division between revenue and expenses; data flows logically	Numerous errors in data; unclear division between revenue and expenses; data does not flow
Mechanics	Presentation contains absolutely no errors in spelling, grammar and usage, punctuation, capitalization	No spelling errors; minor errors in grammar, punctuation and capitalization	Numerous errors that completely distract from the presentation of the data
Visual Elements: (Text/ Graphics/ Animation)	Font is easy to read; visual enhancement with use of text attributes (bold, italics, use of color, lines, etc.)	Generally, the font style and text attributes are used appropriately	No attempt to make the data visually enhancing; poor design

◄ Back to Workshop instructions...

Cooperative Education Workshop

Compose a one-page announcement.

Info...

The workshop takes place at the Ramanda Inn at Mayor Magrath Drive and Scenic drive in Lethbridge. Included during the day is:

- plenary (whole group) session from 8:30 to 9:30 that includes coffee and juice
- Concurrent sessions from 9:45 to 11
- coffee break from 11 to 11:15
- Concurrent sessions from 11:15 to 12:30
- Lunch from 12:30 to 1:30
- Concurrent sessions from 1:30 to 2:45

The keynote speaker at the plenary session is Lorie Lemmer; her topic is *Coop Education is for Everyone.*

Back to Workshop instructions...

Cooperative Education Workshop

Compose a one-page announcement Page 2

The concurrent sessions are as follows:

Session	Speaker	Topic
1	Franco Santini	Employer Expectations for Co-op Students
	Jan Hortenz	On-the-Job Monitoring
2	Chris Hoorst	Fitting Student Schedules and Training Schedules
	Lisa Klien	Evaluating Co-op Students
3	Mackenzie Iwassa	Relevance of Co-op in Today's Job Market
	John Nicole	Promotion of Your Co-op Program

To do... Create a one-page announcement that displays the above information in an attractive manner. This announcement is enclosed with the invitation letter.

How will I be evaluated...

Rubrics

Create a one-page announcement

Mark Assigned:	5	3	1
Content	All required information is accurate; professional and inviting to read; excellent use of business language	Required information requested is present; minor errors in accuracy; use of appropriate business language	Information is missing, inaccurate and unclear; language is inappropriate for a business document
Organization	Information is organized in a clear, concise, easy to follow and readable manner	Information is organized but lacks some clarity; inclusion of unnecessary information	Little or no evidence of organization; information lacks cohesion and appears scattered and disconnected
Mechanics	Free of spelling, grammar and usage errors; correct using of punctuation and capitalization	Minor grammar or punctuation errors that do not detract from the readability	Spelling or major grammar and usage errors that completely detract from the readability of the form
Format	Consistent use of alignment and font (no more than 2 font styles; use of a graphic theme; use of graphic lines, check boxes etc. for the tear-off registration form	Minor spacing or alignment errors; consistent use of font and font	No concept of business letter form

Back to instructions...

Itinerary for Jayme Petherick
Assisting with a travel plan.

Info...

Jayme, your boss, is taking a business trip to Medicine Hat, Red Deer, Prince George, and Kelowna. The purpose of the trip is to meet with owners of businesses similar to Office Assist to discuss the creation an information network. Jayme makes frequent trips to Medicine Hat, rarely goes to Red Deer and has never visited Prince George or Kelowna. She will be traveling by car and has asked you to assist with her creating her itinerary.

Here is the information she has given you:

- leaving Lethbridge on March 24 for Medicine Hat
- staying in Medicine Hat until March 26
- meeting with Jo Biloxi owner of *AssistU* at 1:00 at her office located at 1302 Bomford Crescent SW; phone is 502-8765
- dinner reservation with Jo on March 25 at Mario's Ristorante, 439 5 Ave SE
- arrive in Red Deer on March 26
- meeting with Sharon Auel of *A to Z* Office Services at 1:00 at her office located at 34-4917 48 Street; phone is 342-8231
- leave for Prince George on March 27
- meeting with Ranj Phansing of **Northwest Office Specialists** at his office located at 1198 Victoria Street, phone is 250-562-9090
- leave for Kelowna on March 29
- lunch meeting with June Itto of **Okanogan Valley Business Services** at Earl's Restaurant (you will need to find the address for this restaurant)
- leave for Lethbridge on March 30; spending one night in Calgary at a friend's house; arrive in Lethbridge April 1

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Itinerary for Jayme Petherick

Assisting with a travel plan--Page 2

To do...   Create an itinerary for Jayme with the necessary information.

Find the approximate traveling time and distance between each city. Check any time differences between Alberta and British Columbia. If possible, find a hotel chain that is available for all cities traveled to (for example, the Travel Lodge).

Back to page 1...

How will I be evaluated?

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Rubrics

Itinerary for Jayme

Mark Assigned:	5	3	1
Content	All requested information is relevant and accurate; time zone differences included; inclusion of web sources used; excellent and professional business language used	Necessary information requested is presented; some information is not relevant; inclusion of web sources used; use of appropriate business language	Information is inaccurate and unclear; no evidence of sources used; language is inappropriate for a business document
Organization	Information is organized in a clear, concise, easy to follow and readable manner	Information is organized but lacks some clarity; inclusion of unnecessary information	Little or no evidence of organization; information lacks cohesion and appears scattered and disconnected
Mechanics	Free of spelling, grammar and usage errors; correct using of punctuation and capitalization	Minor grammar or punctuation errors that do not detract from the readability	Spelling or major grammar and usage errors that completely detract from readability of information presented
Format	Correct itinerary style; use of columns or tables to display information; visual elements are used in a pleasing and easy to read; pagination used if necessary	Minor spacing or alignment errors; some visual elements are used; no page numbering	No concept of correct format

◀ Back to project instructions...

Travel Projects and Tasks

Information for Ms. McAdams

Info... Donna McAdams, a psychologist renting office space from Office Assist, has asked Office Assist to do some preliminary planning for a trip she is taking to Vancouver this spring.

She would like you to:

- Check morning flight times from Calgary to Vancouver leaving April 5 and returning April 8. Check both WestJet and Air Canada
- Check car rental prices for at least two car rental companies.
- Check the price of a room with a double bed at the Pan Pacific hotel in downtown Vancouver.
- Meetings are planned for April 6 in downtown Vancouver.
- A trip to Nanimo on April 7 requires you to check the BC ferries schedule for crossing times and cost (she will be taking the rental car).

To do... Compose a letter to Ms. McAdams outlining the above information. Use the official letterhead for Office Assist.

Include phone numbers for the car rental agencies and the hotel.

How will I be evaluated?

Rubrics

Travel Information for Donna McAdams

Mark Assigned:	5	3	1
Content	All requested information is relevant and accurate; inclusion of web sources used; use excellent and professional business language	Necessary information requested is presented; some information is not relevant; inclusion of web sources used; use of appropriate business language	Information is inaccurate and unclear; no evidence of sources used; language is inappropriate for a business letter
Organization	Information is organized in a clear, concise, easy to follow and readable manner	Information is organized but lacks some clarity; inclusion of unnecessary information	Little or no evidence of organization; information lacks cohesion and appears scattered and disconnected
Mechanics	Free of spelling, grammar and usage errors; correct using of punctuation and capitalization	Minor grammar or punctuation errors that do not detract from the readability	Spelling or major grammar and usage errors that completely detract from the readability of the letter
Format	Correct business letter format on page 1 and subsequent pages	Minor spacing or alignment errors	No concept of business letter form

Back to project instructions...

An Ergonomic Presentation
Researching and Compiling a Presentation--
A Group Activity

Project
Planning
Sheet
Required

Info...

Office Assist is planning to do some renovations of its offices. The owners of the building are planning to purchase new workstations and chairs as well as change carpets, paint colour and lighting. The owners have asked for Jayme's input regarding the renovations.

To do...

Jayme would like you to research office ergonomics with a focus on the health aspects of the subject. Prepare a PowerPoint presentation of at least 12 slides (with one extra to quote sources used) and a maximum of 16 slides (with one extra for sources used) that focus on workstation set-up and design, chair design, colour, lighting and noise with an emphasis on how these elements can affect worker health and stress levels. The last slide must contain all sources referenced in your research in APA format; the sources that you reference must be non-commercial (that is, avoid sources that are selling something); obtain your sources from a variety of places such as books, journals, Internet, etc.

How will I be evaluated?

Rubrics

Preparing a Presentation

Mark Assigned:	5	4	3	1
Content	The content is written clearly and concisely with a logical progression of ideas and supporting information	The content is written with a logical progression of ideas and supporting information.	The content is vague in conveying a point of view and does not create a strong sense of purpose; some of the information may not seem to fit	The content lacks a clear point of view and logical sequence of information; information is incomplete
Mechanics	Presentation contains absolutely no errors in spelling, grammar and usage, punctuation, capitalization; correct number of required slides	No spelling errors; minor errors in grammar, punctuation and capitalization; correct number of required slides	Spelling and grammar errors affect the presentations readability (2 or more errors); number of slides is two above or below min and max required	Numerous errors that completely distract from the presentation (4 or more errors); number of slides is more than 2 above or below min and max required
Visual Elements: (Text/ Graphics/ Animation)	Font is easy to read; enhanced by text attributes (bold, italics); text is appropriate length; graphics make visual connections with the content; a graphic theme is used throughout	Generally, the font style and graphics are used appropriately; in most cases the use of colour, pictures, background, etc. do enhance the connection between content and visual elements	Readability is difficult with too much text; too much variety in the use of fonts and graphics; visual elements do not appear to relate to the topic	Long blocks of text; use of a small font size, poor use of visual elements (overuse or none used)
References	Sources are correctly and accurately cited using APA style;	Most sources are correctly and accurately cited using APA style	Sources are not correctly cited using APA style; some information does not appear have a source	Difficult to check validity of information; total disregard for use of correct APA style

◀ Back to project instructions

Foreign Affairs

Researching and Writing a Report--
A Group Activity

Project
Planning
Sheet
Required

Info...

Angelo Stambene, a client at Office Assist, is an importer/exporter; he plans to take a business trip to Europe and Asia. However, before he leaves, Angelo requires some knowledge of business etiquette and protocol in order to conduct business effectively in the countries in which he plans to travel. For example, he needs to know if shaking hands when meeting someone is proper or offensive.

To do...

Prepare a report for Angelo that includes headings for Greeting, Gestures, Business, and Gift Giving for each of the following countries:

- Sweden
- Germany
- Japan

The report needs to be written in APA style and must include a title page and a reference page. A minimum of 4 pages in length (content only) is required. Make sure **all** sources accessed are valid and referenced.

Hint: If you are searching the internet for information, try using the key words "business etiquette". Also, an excellent source of information is *Do's and Taboos Around the World* (3rd edition) edited by Roger E. Axtell.

How will I be evaluated?

Rubrics

Preparing a report for Angelo; using APA style

Mark Assigned:	6	4	2	0
Content	The content is interesting and written clearly and concisely with a logical progression of information	The content is clear and is written with a logical progression of information.	The content is vague and somewhat incomplete and does not create a strong sense of purpose; some of the information may not seem to fit	The content lacks a logical sequence of information; information is incomplete
Mechanics	Text contains absolutely no errors in spelling, grammar and usage, punctuation, capitalization	No spelling or usage errors; minor errors in grammar, punctuation and capitalization	Spelling and grammar errors affect the paper's readability (2 or more errors)	Numerous errors that completely distract from the presentation (4 or more errors)
Layout/Style	Correct use of APA style guidelines from title page to references; appropriate headings and subheadings	Minor style errors that do not influence the overall look of the document	Major style errors such as missing or incorrect page numbers; poor use of headings and subheadings	Total disregard for correct APA style; lack of headings and subheadings
References	Sources are correctly and accurately cited using APA style;	Most sources are correctly and accurately cited using APA style	Sources are not correctly cited using APA style; some information does not appear have a source	Difficult to check validity of information; total disregard for use of correct APA style

◄ Back to project instructions...

Mail Room

Finding Information

Info...   You need to check this page every week for mail room tasks and requests. Each l is available only in the week it is due .

To do...   Access the following links; type your findings in memo form to Jayme; attach a print out of the web page information if necessary.

Week 1	Checking it Out		Week 5	International Mail
Week 2	Postal Code Look-up		Week 6	How Long Does it Take?
Week 3	Canada Post Addressing Guidelines		Week 7	Ad Mail
Week 4	Purchasing a Postage Meter		Week 8	Rate Comparison

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Mail Room

Week 1--Check it Out

To do...

Jayme, the Office Manager, has placed you in charge of mailing and shipping information for Office Assist and its clients. One of your first tasks is to find out if postal and shipping information is available on the Internet. Find and explore the sites for the following companies for future information. Provide the email address and a short description to your supervisor.

- Canada Post
- Federal Express
- UPS
- Any others?

Back to project instructions...

Mail Room

Week 2--Postal Code Look-up

To do... I have some letter mail to send out, but I am missing some information. Please find the postal codes for the following addresses:

2427 Duthie Avenue, Burnaby, BC

808 72 Avenue NW, Calgary, AB

General Delivery, Boyle, AB

PO Box 1724, Raymond, AB

◀ Back to project instructions...

Mail Room

Week 3--Addressing Guidelines

To do... There has been some discrepancy in the office concerning the proper addressing of letter mail. Would you please lookup the information on the Canada Post web site and let me know what you find.

Back to project instructions...

Mail Room

Week 4--Postage Meter

To do...   We are considering acting as a central mail station for all of our clients. Someone suggested we purchase a postage meter. Please check with Canada Post and find out what we need to do in order to use a postage meter and the cost associated with it.

◀ Back to project instructions...

Mail Room

Week 5--International Mail

To do... Angelo would like to mail a letter to Europe and Asia. What is the cost of postage?

◀ Back to project instructions...

Mail Room

Week 6--How Long?

To do...   I need to send a parcel to Toronto to the postal code M5W 1E5. If I send it through regular mail, how long will it take to get there?

Back to project instructions...

Mail Room

Week 7--Ad Mail

To do... One of clients in the office would like to do some advertising through the mail. Please find out the cost of sending **unaddressed admail** through Canada Post. The item is a small pamphlet and she plans to send it to approximately 1500 households in the Lethbridge area.

Back to project instructions...

Mail Room

Week 8--Price Comparison

To do... Please check the cost of sending a package through the mail (business rate). I would like a rate comparison of all of the services that Canada Post offers.

Back to project instructions...

The Coffee Room

Discussion of everyday issues concerning ethics and organizational behaviour

Info...

At the beginning of each week, an office situation will be posted on the Webct bulletin board. These situations are designed to encourage you to think about how you would handle a particular situation. Each topic will be posted on a threaded discussion board so that you can see how other people are responding to each situation.

To do...

A situation will be posted on Monday; your contribution are due by the end of Friday of the same week.

How will I be evaluated?

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Rubrics

Coffee Room Conversations

Mark Assigned:	2	1	0
Content	Contribution illustrates individual thought and reflection about the issue	Simple agreement with another persons views	No Contribution

Back to project instructions...