

## **Unit 224 (B&A 36): Principles of providing administrative services**

### **Diary systems**



# Introduction

- Consider organising your work around the following without a diary:
  - deadlines for completion of tasks
  - routine and regularly occurring tasks
  - promises and commitments
  - regular meetings
  - one-off meetings
  - appointments – personal or work
  - training courses to be attended
  - special events in the office
  - appraisal interview
  - days off/leave.



# Use of a diary

- Enables you to plan your work in order to complete it to deadline.
- Recording reminders and follow-up tasks that have to be completed.
- Tick off tasks that have been done and carry forward any that remain.
- Check the diary as the first job of the day to see the tasks and events scheduled and plan your day.

# Maintaining others' diaries

- An office diary records
  - staff availability
  - appointments
  - office events and meetings.
- Easy to see when staff are meant to be in the office in order to arrange meetings and appointments.
- Avoids wasting time looking for a colleague when they are scheduled to be out of the office.

# Types of manual diary system

- desk diary
- appointments book
- wallchart/planner/calendar.



# Desk diary

- easy to use for all staff
- contains useful information – bank holidays
- portable, but often bulky
- not easy to edit
- updates or changes made by the manager out of the office will not be known
- entries need to be neat in order to be understood by all the users.

# Appointments book

- preprinted time slots against each day
- used on reception to record customer appointments
- needs to be completed neatly
- can easily be removed or borrowed, leaving others with no information at all.



# Wallchart/planner/calendar

- Usually wall-mounted and therefore visible to all.
- Good for planning staff absences and long projects.
- Usually cover a whole year at a view.
- Different colours (stickers or pens) to denote different staff or project tasks.
- One person has responsibility for updating the chart and this can be time-consuming.
- Too many entries can also result in a colourful and confusing chart.



# Electronic systems

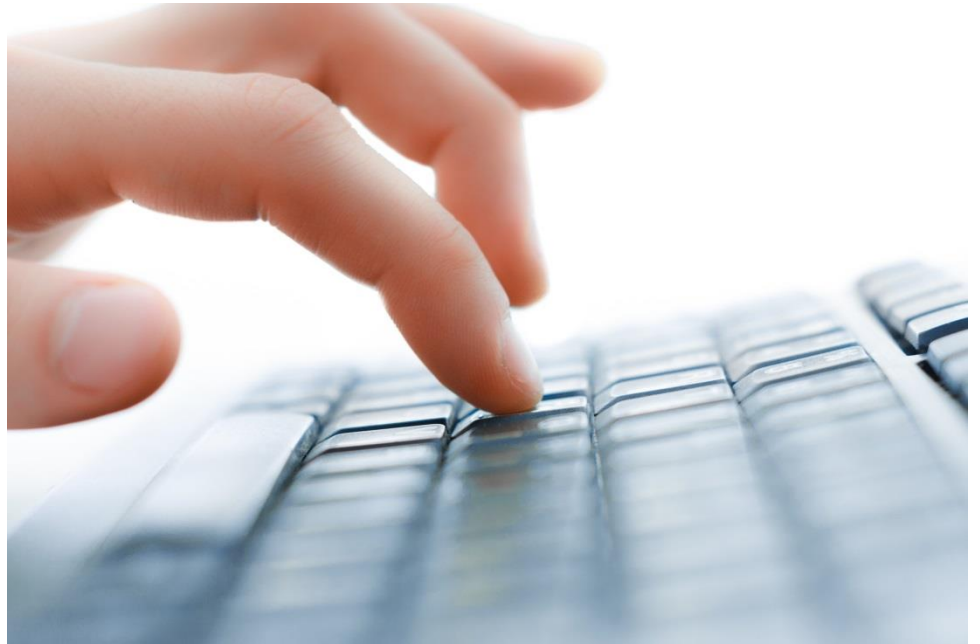
- diary programs, eg Outlook
- electronic appointments systems
- PDAs – Personal Digital Assistants.

# Electronic diary programs – advantages

- Entries can be searched, edited, deleted and updated easily.
- Reminder alarms can be set.
- Regular occurrences can be made for the whole year with one entry.
- Rights of access so that others can view the diary and therefore book appointments or meetings.
- Usually has a feature that prevents double-booking.
- Can often be accessed out of the office via the Internet, or uploaded onto a PDA.

# Electronic diary programs – disadvantages

- Needs computer access.
- In order to be effective, all staff need to use the system, and this means access to a computer.



# Electronic appointments systems

- Electronic version of the appointments book.
- Easy for searching, editing, deleting bookings.
- Shared system allows you to view appointments without moving from your desk.
- Usually has the facility to send an automatic reminder about the appointment to both customer and staff involved.

# PDA's – Personal Digital Assistants

- Portable device suitable for people who are regularly out of the office.
- Combines scheduling with telephone, address book, memo facilities.
- Diary entries can be up/downloaded from/to the main office computer diary system.
- Changes and updates can be made immediately by the user, but will not be known to the rest of the staff until the systems are synchronised.