# 120376 Formative Assessments

**Formative Assessment filing**

**Individual activity**

How would you file the following?

Manual Filing

|  |  |
| --- | --- |
| **Subject** | **Save as…** |
| SA Equipment |  |
| Mr John Bennett |  |
| United Sports |  |
| James R Brown |  |
| St Albans School |  |
| Sue McDonald |  |
| Smith’s Bakery |  |
| Rees Jones Transport |  |
| E Thornton-Smith |  |
| Dr Paul Byron |  |
| SABC |  |
| 20th Century Group |  |
| The Valley Hotel |  |
| City of Cape Town |  |
| V Jones, Pretoria, South Africa |  |
| A Candy Shop |  |

Computer Filing

|  |  |
| --- | --- |
| **Subject** | **Save as…** |
| Marketing report for April 2001 | c:\ |
| Letter to Mr S Brown from Eskom dated 17 April 2001 | c:\ |
| List of staff contact numbers | c:\ |
| Memo to all staff from Financial Director, Lawrence Smith | c:\ |
| Invoice No 1034 fro Sasol | c:\ |
| Article for Finance Weekly magazine for April 2001 issue | c:\ |
| Fax form | c:\ |
| Company logo | c:\ |
| Memo form | c:\ |

**Formative Assessment SO1 AC1**

**Individual activity**

You are tasked with designing a filing system for project admin. How will you organise the following:

Monthly progress reports

General correspondence

Budgets

Purchases

Invoices

Minutes of meetings

Manpower

Salaries

Contractors

**Formative assessment SO1 AC1-5; SO5, AC1-5**

**Document control system**

1. In a group, develop a document control system for the HIV/AIDS Information project.
2. Make a list of all the documents that will be needed for the project
3. Develop templates for the documents
4. Discuss and explain how the documents will be filed and what the procedures will be to withdraw documents from files
5. Discuss and explain why it is important to have a document control system
6. Discuss and explain the benefits of your document control system
7. Discuss your document control system with the rest of the group

**Formative assessment All outcomes and criteria**

**Project documents**

1. In a group, develop a document control system for the HIV/AIDS Information project.
2. Make a list of all the documents that will be needed for the project
3. Develop templates for all the documents
4. Decide whether it will be a manual or computer-based system
5. Develop a filing system for the project. Explain what the filing procedures will be and how documents will be filed.
6. Make sure that the filing system is structured and indexed reflecting project, sub-project, phase and stage levels, management, quality and specialist (technical) products.
7. Obtain files and name them according to the system you developed
8. Name and file the documents
9. Prepare an inventory for all the project documentation
10. Describe the audit trail for the documents and prepare a master document
11. Discuss and explain how the documents will be filed and what the procedures will be to withdraw documents from files
12. You have to file reports in more than one location. Describe how this will be done.
13. File reports that you have developed as a group
14. Describe the back-up and archive processes
15. Archive the first report
16. Withdraw a file for the demonstration to the class and update the audit trail
17. Prepare project handover documents
18. Complete the handover documents and distribute them to all the stakeholders
19. Discuss your document control system with the rest of the class
20. Explain how templates should be used
21. Discuss and explain why it is important to have a document control system
22. Discuss and explain the benefits of your document control system