Clerical and Administration Guide

Version Control:

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1. Introduction

Welcome to the Governance & Scrutiny Clerical and Administration Guide. Here you will find all the necessary duties which a Clerical/Admin Assistant undertakes on a day-to-day basis.

2. Post

Clerical/Admin Assistants are responsible for any outgoing post and collect post from the mailroom every morning. Any post will need to be sent down to the Mailroom, which is located in the basement of the Town Hall.

Before going down you must complete the **postage form** for any external post. This is shown below:

Filling in the form

CEX (Chief Executives)

Today's Date

CENTRAL MAIL ROOM

DEPARTMENT.. DATE...

SECTION ....

Governance & Scrutiny Support Unit

OR

Governance & Scrutiny (School Appeals)

No. OF ITEMS

...ASS MAIL WITHIN ALL M CODED AREAS   ....

...ASS MAIL   ....

...ASS MAIL OUTSIDE THE ABOVE AREAS   ....

...DED MAIL   ....

...ENT EXCHANGE   ....

...L DELIVERY   ....

OVERSEAS MAIL   ....

M/c 8563

Put the number of items here, according to how they are going to be delivered

3. Labels

Clerical/Admin Assistant in the unit maintain the labels for the different committees within the council. There is a requirement of creating, amending and printing a set of labels for each committee.

Creating Data Source

MS Excel

1. Open up a new MS Excel spreadsheet by clicking the button

2. The following information should be recorded:

	A	B	C	D	E	F
1	Title	Name	Address 1	Address 2	Address 3	Postcode

3. The spreadsheet will include the name and address of all the recipients of the papers for each individual committee. This will include such people as:
- Committee Members (Post & Pigeon Hole)
- Leader of the Council & Executive Members (Rooms 206 & 203)
- Scrutiny Chairs
- Internal Directors, Heads of Dept and Officers
- Appropriate GSSU Team members (who need a copy)
- Councillors Pigeon Hole (majority & minority)
- Access to Information
- Press Office
- 5 Copies for Public Domain (St. Peter's Square Entrance)
- 5 Spare Copies

Click the save button and save the file in the appropriate committee folder:

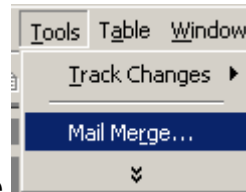(NB. Each Committee folder has its own set of labels for members/officers appropriate to that Committee)

If you want to check that the information in the spreadsheet is accurate then please check with the lead officer for that committee
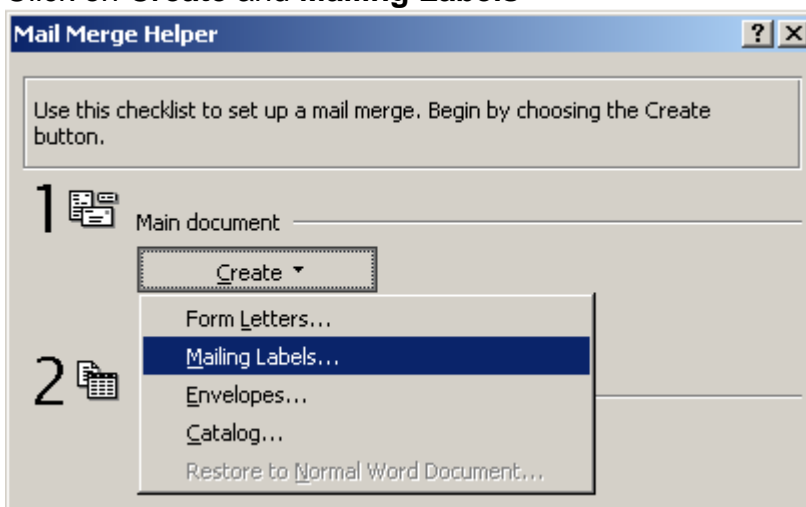
Merging Labels

To merge labels follow these steps:

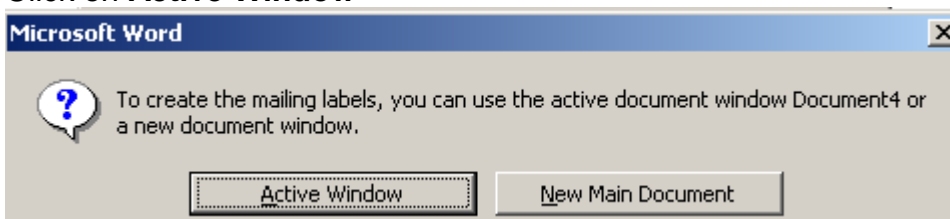1. Open up a new MS Word document ⟶   MS Word
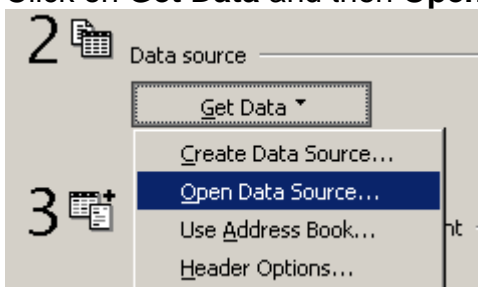

2. Click on **Tools** and the **Mail Merge**

3. Click on **Create** and **Mailing Labels**

4. Click on **Active Window**

5. Click on **Get Data** and then **Open Data Source**

6. From there locate the excel spreadsheet you wish to mail merge (note that you must change the file type to **MS Excel Worksheets**)
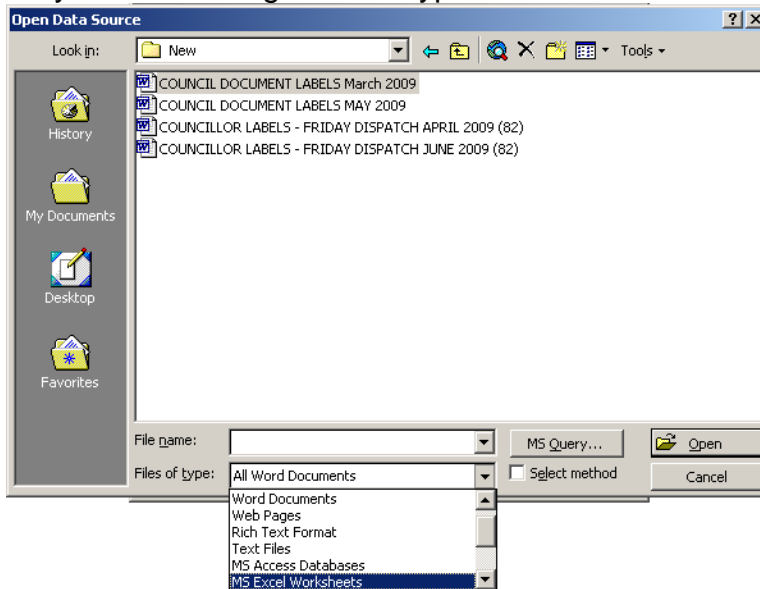
7. Select OK for **Entire Spreadsheet** (Unless you've assigned a print area on the spreadsheet)
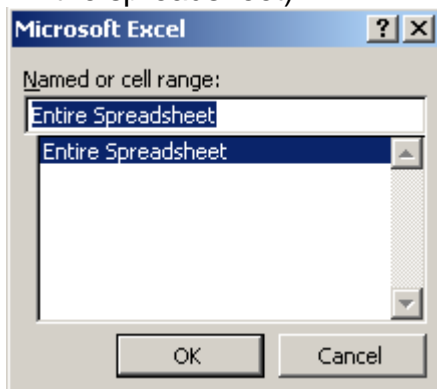
8. Select **Set Up Main Document**
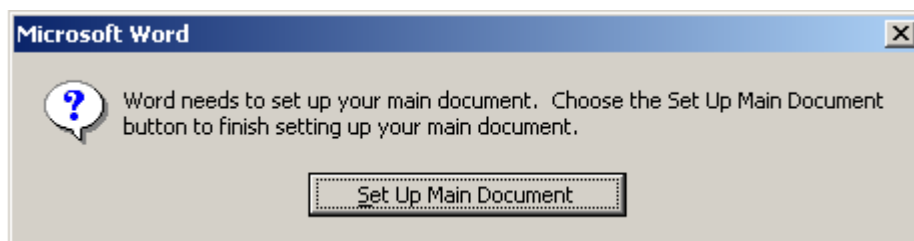
9. Select the **Avery A4 and A5 sizes** within the **Label products** tab. Refer to the product number of the labels for committees which is usually **L7161-Address**
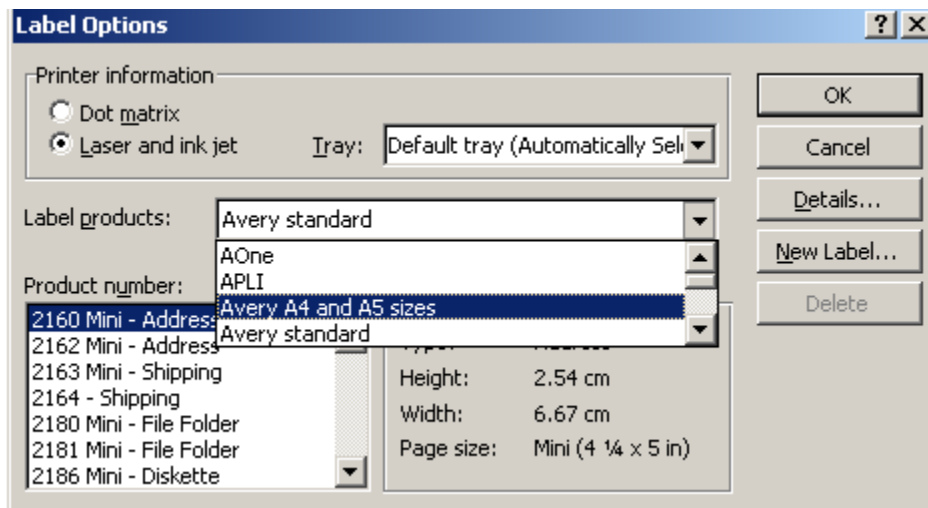
10. By inserting the column headers from the spreadsheet you can create how you want an individual label to be listed.
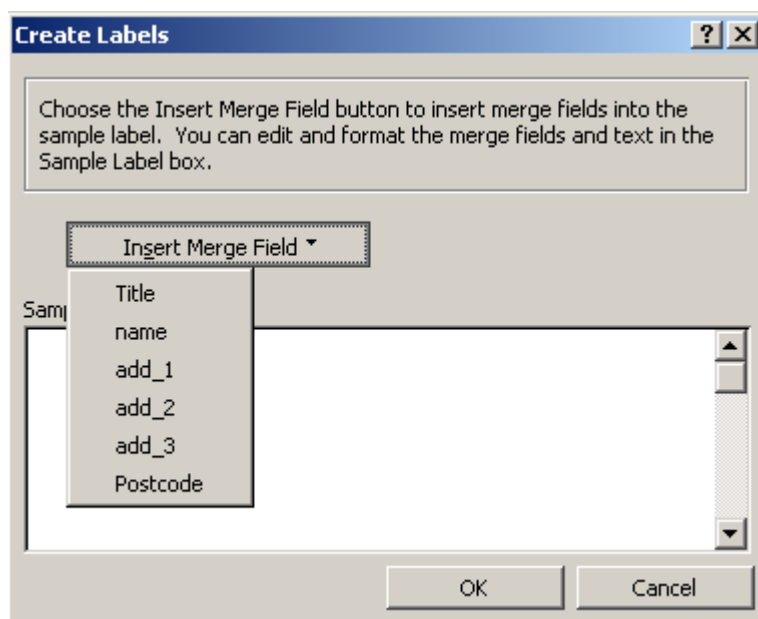
11. Click on **Merge** and then again to merge the labels into a **New Document**
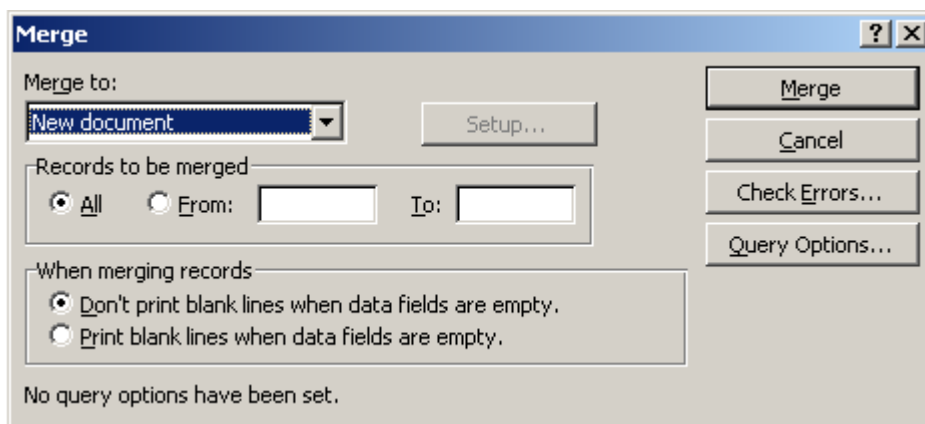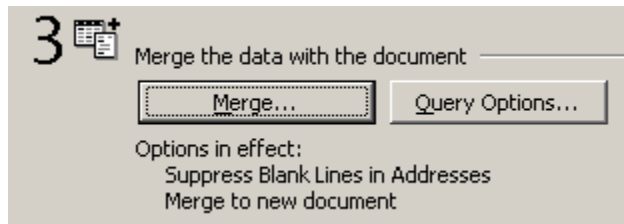
Amending Labels

When making amendments to labels you just change the details within the fields of the Excel spreadsheet and go through steps 1-11 to create another set of labels. **Always remember to save the file name with the month/year and the quantity of the agenda order. (Example – EXECUTIVE PART A & B LABELS JULY 2009 (72)**

When committee membership changes (following Constitutional and Nomination Committee) the Clerical/Admin Assistant will be requested to update the labels according to the Con & Nom minutes.

4. Agenda Dispatch

The Committee Support officer will circulate electronic copies of papers to members but the Clerical/Admin Assistant is responsible for the delivery of any physical papers to the members of each committee. Papers must be published **five working days** prior to the meeting so the Committee Support Officer must plan when papers must be dispatched by looking at the meeting dates (NB. there is also a lotus notes file that you can use to import all the dispatch dates to your lotus notes diary).

Confidentiality
All Part B papers must be stored away from the public eye. No papers with confidential items should be in the public domain or displayed on office desks. The confidential items on an agenda can be noticed by the salmon coloured paper they are printed on.

Printing
All papers are printed in black and white unless the Committee Support Officer advises you that some of the pages should be in colour and they will advise you which ones. Where colour pages are required they will only need to be printed in colour for the members, Executive members and Strategic Directors. Everyone else will receive black and white copies.

To create multiple copies of the agenda you must fill in an M-four print requisition form as shown below:

Take the master copy of the papers along with this form to the M-Four Print Copy Centre located in the basement of the town hall. If the document is particularly large or has a lot of colour consider asking the Committee Support Officer for a pdf to email to the copy centre manager instead.

NB: Always do a visual check of the printed papers and ask the Committee Support Officer or a manager to check before distributing them.

Dispatch

All Councillor papers are put into their designated pigeon hole. All internal officers will receive their papers through the internal post. Senior officers, executive members and heads of majority & minority members services will also receive a copy of the papers hand delivered to the office rooms. These offices are located in the following areas:

Carol Culley	Room 122
Sharon Kemp	Room 122
Richard Paver	Room 103
Executive Members Office	Room 203
Leader's Office	Room 206
Howard Bernstein	Room 212
Liz Treacy	Room 212
Geoff Little	Room 218
Sara Todd	Room 218
Mike Houghton Evans	Room 219b
Vicky Rosin	Room 219b
Mike Livingstone	Room 219b
Sean McGonigle	Room 319
Angela Harrington	Room 316
Legal	Room 607

The 5 public domain copies will need to be placed on the shelves at the St Peters Square entrance. One copy should have a green compliment slip attached notifying the public it is for reference only.

For anyone that requires papers to be posted A4 sized envelopes are located within the stationery cupboard and room 402. Papers can occasionally be sent 1st class if requested by the Committee Support Officer. Some people request no paper copies. This is clearly marked on the excel spreadsheet so discard any labels which state this.

There is also a weekly dispatch **every Friday,** which provides a courier service for the contents of councillor pigeon holes to their home addresses. A Clerical/Admin Assistant should stick the labels on to the A3 sized envelopes and leave the envelopes on the table adjacent to the Councillors pigeon holes prior to 4pm each Friday. These labels can be found in the Council & Committee Meetings full Council labels folder: ..\Council and Committee Meetings\Full Council\Labels\New

5. Access to Information

By law we have to keep a copy of the papers for six years after a meeting for office or public reference.

Filing

A filing system has been implemented so that officers or members of the public can request a copy of the papers which the Clerical/Admin Assistant can find. From the set of papers printed, a copy (referred to as the access copy) is filed and kept in the bottom draw in a cabinet located in room 403. When the cabinet draw is full it must be emptied to make room for future papers. Papers are then put into archive boxes which are then stored in room 402. Any papers older than 6 months must be taken down to the book room for further storage. The location of the keys to access this rooms is explained within section 11. The filing system is located in room 405

All Part B papers must be stored away from the public eye. No papers with confidential items should be in the public domain or displayed on office desks. The confidential items on an agenda can be noticed by the salmon coloured paper they are printed on.

6. SAP Information

Cost Centre Codes

These are the codes used to reference the different budgets the unit uses for any expenses or claims made. The Clerical/Admin Assistant is required to input these codes as required on SAP or on a requisition form. The codes are as follows:

Governance & Scrutiny Support Unit – 103068
School Appeals – 102569
Member Training - 109074
Scrutiny – 107252

The GSSU manager is the Cost Centre Manager for the first three cost centres and the Team Leader (Scrutiny) is the Cost Centre Manager for the Scrutiny cost centre. The GSSU manager and Team Leaders can all approve SAP orders. Most orders will be raised under the general cost centre (103068) for example stationary and refreshments but you will be requested to use the other cost centres also.

GL Codes

These are designed to categorise the payment, expense or claim being made by the requistioner. The GL code automatically changes on SAP to correspond with the appropriate cost centre code

Vendor List (Contact Details)

The Vendor List is used by Clerical/Admin Assistants to see whether a vendor has been assigned to the SAP Application or to find out the relevant details of a vendor. This information can be found on the navigation bar of the SAP Application.

Vendor Create/Amend

When a vendor is not listed on SAP the Clerical/Admin Assistant is able to create a new one by filling in their details on a Vendor Create Form. This can be found on the intranet or in the Administration folder on the shared drive

7. SAP Requisitioning

As a Clerical/Admin Assistant you if you haven't already done so, you will be required to attend a SAP Requisitioning internal training course. Once you have completed the training course and have the SAP application up and running you will be able use SAP. You will place orders for goods and services either via creating a shopping cart or raising an invoice both of which will then need to be approved by the Cost Centre Manager. You will also 'goods receipt' to confirm when orders have been received.

Banner (Stationery)
The office's stationery is ordered through Banner Business Supplies Ltd. Each week the Clerical/Admin Assistant needs to check if there is a need for any stationery to establish how much stock should be bought in a certain period of time. The Clerical/Admin Assistant should meet the requirements of the Stock Inventory Levels**.**

Catering/Refreshments
When ordering catering through SAP ensure that you are using the MCC Catalogue option as it is easier for requisitioners to allocate the catering items. Refreshments are normally ordered at the beginning of the month for meetings/events held in that month. Water is free of charge and should be requested via the notes box.

Invoices (training, conferences etc.)
There are many invoices coming through to pay for difference expenses made by the unit. To raise an invoice you must select the Describe Requirement option on SAP and fill in the necessary details. Always remember to put as much information as you can in the Vendor Text so that the vendor can understand why the invoice has been raised. All Invoices must be sent to the Finance Shared Service Centre in which they can be processed by a purchase ledger officer. You can email them a copy to purchaseledger@manchester.gov.uk and await the 30 days for the invoice to be paid.

Transport (Taxis, Coaches, Trains)
To order any form of transport you must use a contracted supplier, and it must be whichever is most cost effective for the journey you are making. Please see guidance on the intranet:
http://intranet.mcc.local/corpserv/procurement/Pages/Taxicontract2013.aspx:

- Manchester Cars (0161 228 3355)
- Street Cars Manchester Ltd (0161 228 7878)
- Radio Cars (Manchester) (0161 236 8033)
- Mantax Radio Taxis Ltd (0161 230 3333)

For mini bus/coach hire
- Orion Travel (0161 273 3895)
- Belle Vue Manchester (0161 947 9477)

For hotel reservations
Cresta World Travel t/a UniGlobe Diamond Travel (01925 234524)

Taxi bookings

The Clerical/Admin Assistant may be asked to order taxis for staff, in this instance the following process applies.

- The Officer completes the taxi hire service journey authorisation forms which are found in the room 405.
- Once the chitty is completed, it is then signed off by the team leader or manager
- The chitty form is handed to the Clerical/Admin Assistant who should have details from the form as to where the journey is
- The Clerical/Admin Assistant with the aid of the taxi fare calculation sheet can then workout from the mileage which is the most economical taxi hire service to use for the journey.

The template for the standard taxi rates sheet can be found in the link below:-
\\mcc001c27fdfs\dfs-all$\CEX\CommitteeServices\Administration\Taxi hire

MANCHESTER CITY COUNCIL

Standard Taxi Rates

Rate Type	Mantax		Radio Cars		Street Cars		Mcr Cars	
	First Mile	Next Mile	First Mile	Next Mile	First Mile	Next Mile	First Mile	Next Mile
Day Fare Rate	£4.62	£2.15	£3.30	£1.90	£3.00	£1.80	£2.00	£2.00
Night Fare Rate	£5.27	£2.80	£3.30	£1.90	£3.00	£1.80	£2.00	£2.00
Bank Holidays Fare Rate (inc Good Friday)	£5.27	£2.80	£3.30	£1.90	£3.00	£1.80	£2.00	£2.00
Christmas and New Year Fare Rate	£6.66	£4.19	£4.95	£2.85	£4.50	£2.70	£2.00	£2.00

Please note that **Mantax** include an administration / booking fee of 7.5% on all fares, and a £2.30 flagfall charge as standard on all journeys, this has been included in the milage rates. Mantax have a minimum day fare £5.00 night fare £6.50. For the corr

Taxi Fare Calculator

| **No. of Miles** | 3 | **Fare Type** | Normal Day Travel |

Company		**Price**
Manchester Cars	0161 228 3355	£6.00
Street Cars	0161 228 7878	£6.60
Radio Cars	0161 236 8033	£7.10
Mantax	0161 230 3333	£8.92

- All chitty receipts are filed in the purple wallet and inputted into a taxi hire excel sheet for quick electronic reference.

The template for the taxi hire sheet can be found in the link below:-
\\mcc001c27fdfs\dfs-all$\CEX\CommitteeServices\Administration\Taxi hire

Taxi Hire Service 2013						
SLIP No	DATE	PERSON TRAVELLING	PRICE	REASON FOR JOURNEY	Cost Centre	Account Number
322509	24.01.13	Chris Shepherd	£23.50	Wythenshawe meeting	103068	M01
322510	24.01.13	Chris Shepherd	£21.70	Wythenshawe meeting return	103068	M01
322511	30.01.13	Brian Crook	No price	School Appeals return	105421	M01
322512	30.01.13	Brian Crook	No price	School Appeals	105421	M01
322513	31.01.13	Chris Shepherd	£20.70	Wythenshawe meeting	103068	M01
322514	31.01.13	Chris Shepherd	£24.70	Wythenshawe meeting return	103068	M01
322515	06.02.13	Brian Crook	No price	School Appeals return	105421	M01
322516	06.02.13	Brian Crook	No price	School Appeals	105421	M01
322517	18.02.13	Debbie H	No price	School Appeals	105421	M01
322518	28.02.13	Chris Shepherd	£13.50	Wythenshawe meeting	103068	M01
322519	28.02.13	Chris Shepherd	£24.50	Wythenshawe meeting return	103068	M01

8. Xerox

There are two Xerox machines within the office and they are:

WorkCentre 7345 Series

Phaser 8560

Ordering Consumables & Technical Support

If you having any problems with the printers, and to order consumables please ring Xerox on:- **0800 835 6100.** You can also do this online but you will need to register and create an account (see: https://eppns3.eur.xerox.com/irj/portal/ordcons?ut=c)

Printer 7345 – serial number:- 3526472895
Black toner   – 06R01175
Magenta toner – 06R01177
Cyan toner -   06R01176
Yellow toner -   06R01178
Drum cartridge - 013R00624
Waste Bottle -   08R12903
Staples -   08R12925

Phaser 8560 – serial number:- FBT 137693
Black toner   – 108R00709
Magenta toner – 108R00670
Cyan toner -   108R00706
Yellow toner -   108R00708
Maintenance kit - 108R00676
Waste Container – 109R00754

9. Filing/Storage

Folders

As a Clerical/Admin Assistant you are required to maintain the filing systems within the office. There are different folders kept in the office for various types of documentation, these include:

- **Invoices –** Any invoices sent through to the department should be attached to the shopping cart raised on SAP and stored within the **Miscellaneous Invoice Folder**

- **MFour Printing Slips –** All printing requisition slips should be kept in the monthly plastic wallet in the **Print Requisitions Folder**

- **Catering –** All shopping carts raised for catering should be listed in chronological order and stored in **Refreshments SAP Order Folder**

- **Banner** – All banner stationery orders are kept in **Stationery Folder**

- **Taxi –** Chit forms should be kept in the **Purple Wallet**

- **Outstanding SAP Orders –** Any payments pending or outstanding orders should be kept in the **BLUE ID WALLET**

Stationery Cupboard

Any stationery received should be stored within the Stationery Cupboard located in Room 403 and stock should be replaced accordingly. Spare stationary should be kept in room 402.

Filing System

The wall shelf located in room 405 is used as the communal filing system for the unit. This should be maintained and if there are any additions to the system then a Clerical/Admin Assistant should make the necessary arrangements for a new folder or file to be added.

Library

The Clerical/Admin Assistant also maintains the Scrutiny Library kept in room 405 and may be requested from time to time to provide copies of materials and to update the excel spreadsheet with any new additions: ..\Library

10. Website (JADU)

JADU CMS (Content Management System) is designed to manage and publish content on the web. The application is connected to the Manchester City Council website, therefore any content published will automatically upload on the website itself once approved. We use it to publish committee papers on to the web and create/amend councillor or committee details as and when required. You will be required to attend a training session on using JADU.

Councillors
Councillors are listed on the website for the public to obtain relevant information such as the ward they belong to and their contact details. Member's services manage this element of the job but if any changes are made to councillor details the unit is informed.

Register of Interests
The Clerical/Admin Assistant may sometimes be requested to update these pages on JADU.

Committees
When committee membership changes (following Constitutional and Nomination Committee) the Clerical/Admin Assistant should updated the website through the JADU Application

Agendas, Reports & Minutes
Committee Support Officers are required to update the website and publish papers. Clerical/Admin Assistants are sometimes requested to upload documents on to the website.

FOR MORE INFORMATION ON JADU PLEASE REFER TO THE JADU USER GUIDE

11. Office Environment/ General

Emails
The Clerical/Admin Assistant should check the Scrutiny Support inbox on a daily basis and forward any emails on to the relevant team members. They may also be requested to check the School Appeals inbox.

Unit/Team Meeting Minutes
The Unit holds a regular Unit Meeting and the Scrutiny and Governance Teams hold regular Team Meetings. The meetings are chaired by the GSSU Manager and/or the Team Leaders. The Clerical/Admin Assistant will be expected to minute the unit and scrutiny meetings and must write up the minutes, get them checked by the Chair, and distribute them before the next meeting.

Recycling Bins, Cardboard, Xerox Consumables etc
A weekly rubbish collection is usually made for any Xerox recycling products, confidential bin, cardboard and/or wastepaper bins. This request process is completed online via the Concerto system.

Concerto
This is an online FM Helpdesk self-serve form for all Town Hall building requests, which include bin collections, general report maintenance issues and request services. Once the form has form has been completed you will immediately receive a reference number. Click on the links below, save it as a favourite and it will be easy to find in future: http://cpad.manchester.gov.uk/content/helpdesk_external_abc2.aspx

Keys
There are different sets of keys located in the safe of the stationery cupboard. Please ask a member of the unit for the code to the safe. These keys are for different doors, lockable pigeon holes, drawers and cupboards.

12. Committee Set-Up/ Support

The Clerical/Admin Assistant may be required to assist with setting up committees or attending to any difficulties a committee might have.

Room setup
You may be required to set up the room prior to Committee. See separate guide on this.

Presentations
Sometimes committees require presentations. Any presentations must be burned to disc prior to the Committee and printouts of the content made. The Committee Support Officer will advise you if they require assistance with this and/or setting up of the equipment.

Catering issues
If catering for a committee meeting hasn't arrived or hasn't been ordered then please ring Catering Services (**3052 or 3050**) and ask them to deliver it immediately. Make sure that the room number and the order are confirmed with the customer service officer.

Name Cards
In the committee meetings all members must have a name card. Clerical/Admin Assistants are sometimes required to print out name cards and slot them into the name card holders. Name card sheets are kept in each Committee folder. A quality standard has been set by the unit so that all name cards are equally sized in font and visible to the other members in the committee.

13. Member Support

Members Expenses
This includes travelling costs for members who attend meetings, training courses and conferences. It is paid to cover the time and expense attending these events creates. The Councillor will need to provide receipts in order to claim the money back. The form which they complete is called a "Claim form for out of pocket expenses". These completed forms usually come from members services office, and once it's signed off by the GSSU manager, a copy is taken along with any receipts and the Clerical/Admin Assistant is responsible to file them away in the blue Members Allowance folder in alphabetical order and the originals are posted internally to the following address:-

Expense Claims
Purchase Ledger
11th Floor
Wenlock Way Offices

Gorton
M12 5DH

The Register of Members' Interests
The Governance and Scrutiny Support Unit maintain a Register of Members' Disclosable Pecuniary and Members' Personal Interests. Each individual member's entry in the register can be viewed online. Paper copies are also kept by the Clerical/Admin Assistant, who's responsible for filing them.

Members Activity Returns Cycle
The Clerical Admin Assistant files them alphabetically within the appropriate returns folder which are called Councillors Activity Returns Cycle 1 – 5. These completed public service contract reports of activities usually come from the members services office. Additionally, the Clerical/Admin Assistant updates an excel spreadsheet for easy reference.
\\mcc001c27fdfs\dfs-all$\CEX\CommitteeServices\Administration\Councillors

GL Codes

REVENUE EXPENDITURE	GL CODE
Employees – Basic Pay	411000
Employees - Training	418030
Equipment, Furniture and Materials	441000 - 441999
Catering	442050
Photocopying	443000
Printing	443010
Stationery	443040
Legal Fees	444000
Courier Costs	445010
Computer Purchases	445060
Other IT Charges	445090
Members Allowances	448010
Bookbinding	448390
Storage Fees	532210

Listed above are some of the most common GL Codes used within the unit.

Stock Levels

Stock	Minimum Required	Max Required
Banner Paper (White – 80gsm)	2 boxes	6 boxes
Pens (Black & Blue)	2 boxes	3 boxes
Staples	2 boxes	4 boxes
Paperclips (Large, Medium & Small)	2 boxes	3 boxes
A4 & A3 Manilla Envelopes	2 boxes	3 boxes
Window Envelopes	2 boxes	3 boxes
A4 Paper Pads	2 Pads	4 Pads
Post-it Notes	1 x Pack of 10	2 x Pack of 10
Rubber bands	1 box	2 boxes
Xerox Toner	2 boxes	3 boxes
Plastic Wallets	1 x Pack of 50	2 x Packs of 50
Avery Labels	1 x Box of 5	2 x Boxes of 5
Name Card Plates	2 boxes	3 boxes
A4 Folders	1 Folder	3 Folders
Lever Arch Files	1 Folder	3 Folders
Suspension Files	1 x Box of 50	2 x Boxes of 50
Xerox Toner (Room 403 & 405)	2 Boxes	3 Boxes
Other Xerox Consumables	1 Box	2 Boxes

Committees List

The unit is at the centre of the Council's decision-making process and is a first point of contact for advice and information on procedures.

The governance team consists of a team leader and a group of governance clerks, which cover the following committees:
- Audit Committee
- Constitutional and Nomination
- Council
- Local Access Forum
- School Admission Appeals
- Standards
- Personnel Committee
- Planning and Highways
- Wythenshawe Area Committee
- Executive
- Employee Appeals
- Licensing Hearing Committee
- Licensing and Appeals

The scrutiny team also consists of a team leader with a group of support officers, which cover the following committees & any sub-groups:

1. Young People & Children Scrutiny Committee
2. Neighbourhoods Scrutiny Committee
3. Economy Scrutiny Committee
4. Health Scrutiny Committee
5. Finance Scrutiny Committee
6. Economy Scrutiny Committee