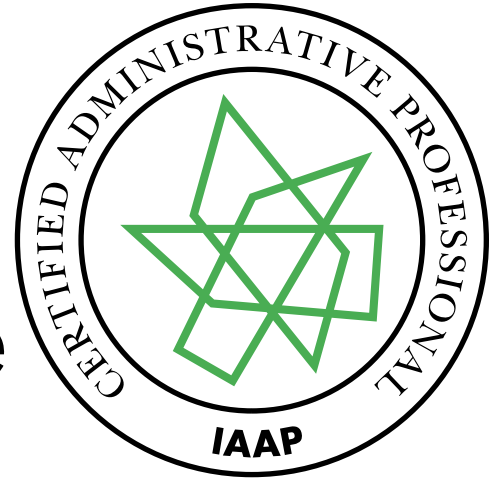


# CAP Exam

## Body of Knowledge



The CAP® (Certified Administrative Professional) is an NCCA-accredited professional certification designed for office and administrative professionals. The tasks and responsibilities of those working in administrative professions are as varied and vast as the number of firms employing them.

The CAP exam is created using the CAP Body of Knowledge, which is developed by practicing professionals and business educators conducting a job analysis study approximately every five years\*. The purpose of the study is to collect qualitative and quantitative data regarding practices conducted by administrative professionals; the resulting data is reflected in the Body of Knowledge to ensure the CAP exam is clear, comprehensive, and reflective of current practices.

Under each of the six functional area domains are Performance Outcomes (POs), which are detailed, measurable competencies based on the most significant knowledge and skills administrative professionals should know to be successful in their positions. Under each PO are bullet points tying the competency to specific business and/or office functions.

*\*A job analysis was conducted in Fall of 2017. This Body of Knowledge is effective beginning Fall 2018 and until the next job analysis is conducted.*

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### CAP Exam Domains

1. **Organizational Communication** 24%
2. **Business Writing and Document Production** 22%
3. **Technology and Information Distribution** 16%
4. **Office and Records Management** 15%
5. **Event and Project Management** 12%
6. **Operational Functions** 11%

Note: The percentages after each domain indicate how much of the exam covers that subject matter. For example, approximately one quarter of the questions on the CAP exam relate to Organizational Communication and its performance outcomes.

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## CAP Core Resources\*

Each domain lists subject-specific recommended readings; however, these four textbooks contain a wide variety of content covered on the CAP examination. These resources serve as good general reference material when studying.

Bovee, C. L., and J. V. Thill. *Business Communication Today*, 13th Edition. Pearson Prentice-Hall, 2015.

Colquitt, J. A., LePine, J. A., and M. Wesson. *Organizational Behavior: Improving Performance and Commitment in the Workplace*, 5th Edition. McGraw-Hill, 2017.

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

Vermaat, M. E., S. L. Sebok, S. M. Freund, J. T. Campbell, and M. Frydenberg. *Discovering Computers 2018 Digital Technology, Data, and Devices*. Cengage Learning, 2018.

\*Questions written for the CAP examination are referenced to one the CAP Core Resources and/or recommended readings or similar texts on the topic from the same date range.

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## DOMAIN ONE: ORGANIZATIONAL COMMUNICATION

### Recommended Readings for Organizational Communication

Bovee, C. L., and J. V. Thill. *Business Communication Today*, 13th Edition. Pearson Prentice-Hall, 2015.

Colquitt, J. A., LePine, J. A., and M. Wesson. *Organizational Behavior: Improving Performance and Commitment in the Workplace*, 5th Edition. McGraw-Hill, 2017.

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

Shockley-Zalabak, Pamela. *Fundamentals of Organizational Communication*, 9th Edition. Pearson, 2014.

### Related College Courses

Business Communication

Introduction to Organizational Leadership

Principles of Business Management

Organizational Communication

### PO 1: Describe the concepts and applications of communication, management, and leadership models/theories within organizations.

- Identify the various types of communication (written, verbal, nonverbal, interpersonal, group, public) and which is the most effective for different business situations
- Describe management/leadership theories and how they relate to effective organizational communication

### PO 2: Describe the process of effective interaction with internal and external stakeholders of an organization.

- Demonstrate a basic knowledge and proficiency in managing and resolving conflict within an organization

### PO 3: Recognize the importance and utilization of professional networking.

- Describe how networking (both in-person and virtual) has changed the way people find jobs and companies recruit new employees

**PO 4: Demonstrate an understanding of team dynamics within organizations.**

- Identify the different types of teams and describe their purpose
- Describe the specific kinds of dynamics within teams and how they can be managed
- Demonstrate knowledge in effective decision making, communication, and team building

**PO 5: Describe the positive and negative types of interpersonal interactions existing within an organization.**

- Explain how human motivation affects organizational dynamics
- Demonstrate basic knowledge of the differences between managing and leading
- Explain the dynamics of mentorship and coaching, including the effect on performance

**PO 6: Demonstrate knowledge in the techniques of creating and giving presentations.**

- Describe how to apply methods of coping with communication anxiety
- Identify the different types of presentations and appropriate usage of each
- Demonstrate knowledge of how to prepare for and deliver a presentation

**PO 7: Demonstrate the ability to conduct business with diverse cultures.**

- Describe international business practices with regard to cultural norms and rituals
- Demonstrate knowledge of the importance of multicultural communication in today's workplace

**PO 8: Demonstrate a basic knowledge in organizational structure, systems, and strategies including their role in productivity and effective management.**

- Describe the parts of a strategic plan and how it affects organization performance
- Define various organization management systems that examine productivity (such as Six Sigma and TQM)

**PO 9: Describe how confidentiality, legality, and ethics are important for the functioning of an organization.**

- Understand basic employer and employees' rights with regard to legality

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## **DOMAIN TWO: BUSINESS WRITING AND DOCUMENT PRODUCTION**

### **Recommended Readings for Business Writing and Document Production**

Covey, Stephen F. *Style Guide for Business and Technical Communication*, 5th Edition. Pearson FT Press PTG, 2012.

Guffey, M. E., and D. Loewy. *Essentials of Business Communication*, 10th Edition. South-Western Publishing Co., 2015.

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

### **Related College Courses**

Business English

Business Communication

Introduction to Word Processing

Desktop Publishing for the Office

**PO 1: Demonstrate knowledge of terminology associated with business writing and document production.**

- Identify the different functions of correspondence, documents, and reports within an organization
- Describe which method is best for creating and distributing reports and documents within an organization
- Identify best practices for developing business communications such as research, audience analysis, and composition

**PO 2: Exhibit proficiency in proofreading and editing documents.**

- Demonstrate knowledge of document readability for business communication
- Identify and describe the most important steps when editing and proofreading
- Apply the basics of copy editing for various types of documents

**PO 3: Demonstrate proficiency in the use of grammar, spelling, and sentence construction.**

- Demonstrate ability to apply basic rules of English grammar, especially spelling, punctuation, capitalization, and sentence construction

**PO 4: Describe the steps required to create and edit different types of business documents.**

- Demonstrate an ability to determine and develop materials for the appropriate audience for different types of business documents
- Exhibit knowledge of which software applications are appropriate to produce common business documents (e.g., MS Word, Google Docs, Adobe Acrobat)
- Demonstrate proficiency in spreadsheet creation, including simple formulas and data manipulation
- Understand the application and use of presentation software (e.g., MS PowerPoint, Prezi, etc.)

**PO 5: Describe the features and tools used in desktop publishing for newsletter, flyers, etc.**

- Exhibit knowledge of desktop design software including features and functions
- Identify important aspects of layout and design
- Demonstrate a familiarity with online tools for web publishing
- Recognize basic graphic design tools for office and web publishing

**PO 6: Identify the necessary elements needed to create and present effective charts and graphs.**

- Demonstrate knowledge of software applications used to create, format, and insert charts, tables, and graphs into business documents and presentations

**PO 7: Identify the important elements necessary for finishing a document (e.g., binding, collation, stapling, coloring, graphics, etc.)**

- Describe the key differences and requirements for electronic versus hard-copy output of documents

**PO 8: Demonstrate proficiency in the creation of minutes for meetings.**

- Identify how to prepare minutes for a meeting, capturing the essence of agenda items and actions taken

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## **DOMAIN THREE: TECHNOLOGY AND INFORMATION DISTRIBUTION**

### **Recommended Readings for Technology and Information Distribution**

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

Vermaat, M. E., S. L. Sebok, S. M. Freund, J. T. Campbell, and M. Frydenberg. *Discovering Computers 2018 Digital Technology, Data, and Devices*. Cengage Learning, 2018.

### **Related College Courses**

Business Computer Applications

Business Office and Administrative Procedures

Introduction to Computing

**PO 1: Describe the process of information distribution within an office environment.**

- Demonstrate knowledge in how to organize distribution lists for various types of communications

**PO 2: Identify the important differences between traditional and electronic distribution of information.**

- Demonstrate knowledge and proficiency of different email interface types
- Know which software and technology is available for distributing information

**PO 3: Identify copyright laws, regulations regarding intellectual property, and ways to maintain confidentiality when distributing information.**

- Identify proper attribution of quotations from published documents

**PO 4: Describe the process and techniques of gathering, compiling, and analyzing data.**

- Exhibit knowledge of which software applications are appropriate for compiling, storing, and analyzing data
- Demonstrate a clear understanding of which data are appropriate to collect and why
- Demonstrate a proficiency in creating a well-organized report with regard to organization and data visualization

**PO 5: Demonstrate knowledge in the use of the Internet, including social media, as a way of distributing information.**

- Identify and describe the important characteristics of sending email (e.g., etiquette, attachments, formatting, etc.)
- Demonstrate knowledge and proficiency in social media usage and etiquette
- Exhibit knowledge of which social media applications are appropriate for a specific task and how to use them

**PO 6: Demonstrate basic knowledge in the installation, maintenance, and troubleshooting of both equipment and software.**

- Identify various computer hardware used in an office
- Demonstrate knowledge of basic office software and functions
- Identify available online resources for equipment and software training and usage

**PO 7: Demonstrate basic knowledge in the use of different types of computer systems.**

- Identify potential issues with compatibility of different operating systems, such as Microsoft and Apple

**PO 8: Describe common ways of storing and transferring data and the types of media appropriate for each.**

- Demonstrate knowledge and proficiency in identifying file types and the appropriate ways of converting documents
- Exhibit knowledge of software programs used for document conversion
- Identify and describe common procedures of backing up electronic information and databases, including cloud storage

**PO 9: Explain appropriate security procedures for maintaining, backing up, and storing information.**

- Demonstrate knowledge of legal issues regarding the storing of electronic information

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## **DOMAIN FOUR: OFFICE AND RECORDS MANAGEMENT**

### **Recommended Readings for Office and Records Management**

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

Read, J. and M. L. Ginn. *Records Management*, 10th Edition. Cengage Learning, 2016.

## Related College Courses

Records Management

Business Office and Administrative Procedures

### **PO 1: Demonstrate knowledge of basic terminology associated with records management using ARMA Guidelines.**

- Prove knowledge of terms such as metadata, records retention, and data archiving
- Demonstrate familiarity with terms used by ARMA and general records management

### **PO 2: Identify the key advantages and disadvantages of electronic and manual (paper) file management based on ARMA Guidelines.**

- Demonstrate usage of both paper and electronic filing systems as appropriate based on access requirements and organizational needs

### **PO 3: Demonstrate knowledge of both electronic and manual (paper) filing rules and standards based on ARMA Guidelines.**

- Describe types of electronic files, naming conventions, options for accessing, and methods of altering information
- Exhibit knowledge of available software, systems, and services for electronic filing
- Describe the different methods for creating, storing, and retaining files

### **PO 4: Identify the appropriate security for both electronic and manual files.**

- Identify the key laws regarding record storage and confidentiality
- Describe both the strengths and weaknesses of types of record and file security

### **PO 5: Demonstrate knowledge of file retrieval, maintenance, and retention.**

- Describe how to develop a record retention schedule for both electronic and paper files

### **PO 6: Identify appropriate ergonomics for a productive personal workspace.**

- Describe the significant elements of workspaces and why they are important to efficient and effective working conditions

### **PO 7: Demonstrate knowledge of resources necessary to efficiently manage an office.**

- Describe the steps in placing and receiving supply orders
- Describe the process of creating and distributing an RFP (Request for Proposal)

### **PO 8: Identify the important methods of checking and maintaining office supplies.**

- Identify the steps involved in creating inventory lists
- Recognize types of software appropriate for maintaining inventory

### **PO 9: Demonstrate knowledge of functioning in a virtual office.**

- Identify both the advantages and disadvantages of virtual offices versus traditional offices

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## **DOMAIN FIVE: EVENT AND PROJECT MANAGEMENT**

### **Recommended Readings for Event and Project Management**

Rankin, D., and K. Shumack. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning, 2017.

Scholar, D., and S. Losurdo. *Meeting and Event Planning Playbook: Meeting Planning Fundamentals*. CreateSpace, 2014.

## Related College Courses

Basics of Project Management

Event Management

### **PO 1: Demonstrate knowledge of basic terminology associated with event management.**

- Identify the necessary elements in planning events ranging from internal meetings to external conferences

### **PO 2: Demonstrate proficiency in travel preparation.**

- Describe the necessary elements for planning and organizing travel, both domestically and internationally

### **PO 3: Describe the key requirements for meetings both in person and virtual.**

- Describe the steps required in the organization and planning of professional meetings
- Exhibit knowledge of which software applications are appropriate for online meetings

### **PO 4: Demonstrate knowledge in prioritizing and delegating elements of a project from planning to implementation.**

- Identify and describe the important techniques of time management from the planning stage to the implementation of a project
- Demonstrate the ability to identify and evaluate the skills and competencies of others for project delegation

### **PO 5: Describe the steps required in organizing, planning, and managing a project.**

- Demonstrate proficiency in prioritizing and organizing work tasks
- Identify which software and technology tools are appropriate for managing a project
- Demonstrate knowledge of negotiating, budget review, and bill explanation when organizing a project

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## DOMAIN SIX: OPERATIONAL FUNCTIONS

### **Recommended Readings for Operational Functions**

Dessler, Gary. *Human Resource Management*, 15th Edition. Pearson Prentice-Hall. 2016.

Siciliano, G. *Finance for Nonfinancial Managers*, Second Edition (Briefcase Books Series). McGraw-Hill Education, 2014.

### **Related college courses:**

Human Relations

Introduction to Business

Introductory Accounting

### **PO 1: Demonstrate knowledge in the duties and processes of human resources.**

- Identify different forms of harassment in the workplace
- Describe the ways to address employee situations professionally and legally
- Identify approaches to and the importance of following organizational policies and procedures
- Demonstrate knowledge of and purpose for performance evaluations

### **PO 2: Describe the various methods of recruitment, staffing, and hiring practices.**

- Define different interview types and processes
- Demonstrate the ability to determine the staffing requirements of an organization

**PO 3: Recognize why cultural and generational diversity is important for organizations.**

- Describe how differing cultural and generational perspectives can benefit an organization
- Identify what should be included in diversity training within an organization

**PO 4: Demonstrate a basic knowledge of the procedures involved in onboarding and offboarding employees within organizations.**

- Describe the process of scheduling orientation and completing required paperwork

**PO 5: Identify basic terminology associated with the financial functions of the organization.**

- Distinguish between terms such as assets, liabilities, overhead, and balance sheet
- Describe the key differences between a budget, a profit and loss statement, and a statement of cash flow

**PO 6: Demonstrate a knowledge of budgets and financial statements.**

- Describe how to track electronic credits and debits on bank statements
- Demonstrate a proficiency in how to read a financial statement
- Describe the process of creating, tracking, and balancing a budget
- Identify the procedures and management of handling petty cash

**PO 7: Identify important elements of the banking process and transactions.**

- Identify the appropriate forms for depositing, withdrawing, and transferring cash
- Describe how to record, report, and document cash and checks
- Describe safe and secure money-handling procedures