Office Systems Management

Ninth Edition

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NINTH EDITI

OFFICE SYSTEMS MANAGEMENT

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PREFACE

The modern office of today continues to be impacted by an abundance of automated *technologies* designed to enhance office productivity. The implementation of such new technologies within business greatly affects the *tasks* that are performed, the *organizational structure* that is employed, and most of all, the *people* that are involved. A compatible synergism of these four concepts should be a major goal of those who serve in any management capacity.

Office Systems Management, 9th edition, reflects tremendous changes that are taking place in the world of technological development. This revision is designed to assist the reader with strategies for making a smooth and gradual transition from the traditional to the automated office. Throughout the book theoretical concepts, models, and practical suggestions are included to aid in the achievement of these strategies. The integration of the components of technology, task, structure, and people receives wide coverage.

The fundamental makeup of office systems management is still the creating, processing, retaining, and distributing of information. The basic challenge to the office systems manager remains the same. Stated simply, it is to get the necessary office work done in the most effective way. The challenge includes two basic needs: (1) to manage effectively the efforts expended in performing the essential office services for the total organization, and (2) to help all management members perform their work effectively by supplying them the right information at the right time and the right place. These needs are integrated throughout the writing and constitute the main thrust of this book.

In this edition the management functions of planning, organizing, actuating, and controlling are included with their respective relationship to office systems management. New concepts in office systems management have been added; but those office management practices proven effective in the past have been retained. Suggestions and experiences from academicians, researchers, and practitioners were used in many instances in this revision. The intent, as in the past, was to offer any person interested in knowing more about office systems management a comprehensive, meaningful, and modern book which could be used as a tool in office systems management.

This is the second time in which the emphasis has been given to having the reader develop competencies in office systems management. The writing is attuned to this view, and activities are included to enhance such competency development. Several changes have been made in this edition. The development of managerial thought to provide a conceptual framework for office systems management is presented. The behavioral aspects of management receive wider attention. The importance of the human element in business on the part of both manager and nonmanager pervades the writing throughout the book. The concepts of word/information processing has been expanded to two chapters. Computer technology and managerial considerations now comprise three chapters. Electronic mail receives adequate attention, and the areas of reprographic and micrographic services have been revised to reflect new developments in those fields. Some attempt has been made to show the integration of these technologies through networking as a means of accomplishing office work. Some real examples of the use of certain technologies are included; and a real example of an administrative services office manual is included as a model of possible content to emulate. A positive contribution to this edition is the inclusion of a seven-part case. The case material appears at the end of Chapters 1, 2, 8, 9, 17, 18, and 21. The cases were designed so that students could be subjected to material that provided some continuity and the opportunity to work with material that had a previous base. These cases will permit students to solve problems as they relate to one company's operations and as they affect personnel, technology, structure, and so on. One role-playing activity on differentiation and integration is contained in the seven-part material.

The content of the book is presented in seven parts. Management considerations and practices are emphasized throughout. To begin, Part One, Introduction, includes the office in perspective with a development of managerial thought and the various characteristics of information and their relevance to office systems management. Competencies needed by the contemporary office systems manager and career opportunities for office systems management follow. Part Two, Information Processing, covers office systems analysis, the various computer technologies, and word/information processing. Equipment, procedures, structural requirements, and people factors necessary to successful office systems management are described in this section.

Part Three, Administrative Services, contains chapters dealing with information communication media, such as electronic mail, and the highly important and essential area of records management. Part Four, Planning and Office Systems Management, covers such topics as office work simplification, forms design and improvement, office space planning, and office standards and furniture considerations. Part Five, Organizing and Office Systems Management, includes basic guidelines to follow, the formal and informal organization types, the organization's influence upon employee behavior, and organization dynamics.

Part Six, Actuating and Office Systems Management, includes the popular areas of people in office systems management, interpersonal relations, group behavior, supervision, motivation, salary administration, employee development, office safety, and office unions. Part Seven, Controlling and Office Systems Management, is a prominent area in management. Making

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the office controls motivational, the use of standards, the need for office work measurement, controlling office security and supplies, time use, cost control, and quantity and quality control are discussed in this section.

You will see semblances of some futuristic trends that will eventually become commonplace in the office. Even though most of us are amenable to such futuristic concepts once they are proven effective, we must not forget realism. Numerous manual or traditional means and quasi-automated systems for performing office work are still functional today. Let us dream and be idealists; but at the same time, let us not declare some current systems obsolete before it is time to do so.

The 9th edition features appropriate and ample materials for the testing and reviewing of office systems management concepts plus selected behavioral activities to develop attitudes, skills, and knowledge. A total of 250 review questions, 58 competency development activities, and 26 situational activities are included. The activities are diverse and include cases, in-baskets, roleplaying, and perceptual experiences. Many new questions have been added, some situational activities from the 8th edition were revised to become competency development activities, several cases were revised, and eight cases are in print for the first time. Competency development and situational activities not used for end-of-chapter material are included in the Appendix. These may be used as supplementary resources in the teaching of office systems management. For the first time ever, transparency materials have been developed to accompany each chapter.

When attempting to say thank you to the many people who have contributed to this edition, I am reminded of one of my favorite quotations. Homer wrote the following words: "When many are got together, you can be guided by him whose counsel is wisest. If a man is alone, he is less full of resource and his wit is weaker." A great reliance on resources from many people, companies, and agencies was necessary in order that a work of this magnitude could be realized. Those individuals who reviewed the 8th edition provided some excellent suggestions, many of which have been integrated in this edition. The reviewers were Helen W. Brown, Auburn University, Auburn; Warren Perry, Illinois State University, Normal; and John Martin, Mt. San Antonia College, Walnut, California. Students in my Cases in Office Systems Management classes at The University of Tennessee have provided invaluable assistance with the tryout and critique of new case material for this edition. Numerous individuals who represent a variety of companies have been so cooperative in supplying reference material and illustrations for this edition.

Several practicing office systems managers and nonmanagers have provided insights that were helpful in the writing. Adopters of previous editions have also offered excellent advice. A special thank you is extended to Drs. Ray Smith and Don Reese, colleagues at The University of Tennessee, for their support and encouragement and for their input to the manuscript.

Their close personal and professional relationships are highly valued. Sincere appreciation is also expressed to Debbie Crowder, office supervisor in our department of Office Systems Management at The University of Tennessee, who has provided a great deal of secretarial support for this edition, and to my family and friends who continue to be so supportive of my efforts in such projects as this. The memory of the late George R. Terry and his influence on me and so many others is deserving of special tribute. His contributions to management, and especially office management, were remarkable; his encouragement and support were truly positive motivators. To me, he was a master teacher from whom I learned much and am deeply indebted.

JOHN J. STALLARD

Contents

Part One

Introduction 1

1. **The Office in Perspective 2**
Office management defined. Development of managerial thought: *Scientific management. Bureaucratic theory. Administrative theory. Human relations theory. Behavioral science research. Operations research.* The office and information: *The challenge of managing information. The need for information. Information growth. The dynamics of office systems management. The management of information. Information management activities.* Current vital considerations of office systems management.

2. **The Contemporary Office Systems Manager 22**
Traditional office setting. Automated office setting. Office management competencies: *Summary of competency catagories.* Profile of the office systems manager: *Professionalism in office systems management.* Choosing a career in office systems management.

Part Two

Information Processing 41

3. ***Office Systems Analysis* 42**
System identified: *Illustration of a system. System design. The essential makeup of a new system design.* Administrative tasks: *The bases of a system. Organize and evaluate the facts. Establish the system premises. Design the system.* Decisions on the extent of

mechanization: *Evaluate the system. Implement the system. System personnel. Systems improvement. Systems simulation. The total systems concept.*

4. Computer Technology Perspective (Part I) 64
Perspectives of computer technology: *Rationale. Hardware. Data processing cycle.* Computer software: *Converting the system into a computer program. Stored programs.*

5. Computer Technology Perspective (Part II) 84
Languages. Vocabulary. Classifications: *The mainframe computer. The minicomputer. The microprocessor. Putting data into the computer medium.*

6. Management Considerations of Computer Technology 102
Applications of computer systems: *The cashless-checkless society. Energy expenditure management systems. Point of sale (POS). Information utilities.* The computer and management: *The computer and the functions of management. The computer feasibility study. Acquisition of a minicomputer.* Organization: *Executive workstations. Desirable manager practices. The human element.*

7. Word/Information Processing (Part I) 124
Word processing defined. Historical perspective of word processing hardware: *Word processing systems design. Decentralized. Centralized. Combination of decentralized and centralized patterns.* Hardware: *Hardware configuration. Hardware selection.*

8. Word/Information Processing (Part II) 150
Dictation: *Dictating machines. Guidelines for dictation.* Establishing productivity standards: *Basic elements. Data collection for productivity standards. Cost of document production.* People and the automated office: *Word/Information processing positions. The human element and word processing.*

Part Three

Administrative Services 171

9. Information Communication Media 172
Distribution of information: *Selecting the means of distribution. Mail. Messenger service—personal means. Messenger service—mechanical means.* Electronic mail: *Telex and TWX. Facsimile systems.*

Communicating word processor. Computer-based message systems. Electronic mail transmission media: *Telephone lines. Satellites.* Applications of electronic mail systems: *Advantages of electronic mail. Forms of electronic mail. Problems with electronic mail systems. Planning and implementation of electronic mail.*

10. Office Reprographic and Micrographic Services 200
Reprographics: *Management role in reprographics.* Micrographics: *Computer output microfilm (COM). Techniques of indexing microimages. Studies on micrographics. Actual use of CAR system. Microfiche. Ultrafiche. Optical disk. Managerial considerations in evaluating COM.*

11. Records Management—Fundamentals and Facilities 226
Records management systems: *The processes of a records management system. What should the records management system include?* Manual operation of the records management system: *Motorized files. Nonmotorized files. Arrangements for storing material. The use of color in filing. Indexing.*

12. The Management of Records 248
The management of mechanized means. The management of manual means: *Records centers.* Quantitative measurements—manual means. Procedure for manual storing and retrieving. Records retention: *Advantages of records retention. Recommended program for records retention.*

Part Four

Planning and Office Systems Management 273

13. Office Work Simplification 274
Applications of office work simplification: *Guides to office work simplification.* Steps of office work simplification: *Select the work to be simplified. Obtain all the facts about this work. Devise improvement. Apply the derived improved means.* Common charts of office work simplification: *The process chart. The procedure flowchart. The movement diagram. The left- and right-hand chart. The production study chart.*

14. Office Form Design and Improvement 296
The office form defined: *Who designs office forms? Cardinal factors in the design of office forms. Functional considerations in the design*

of office forms. Physical considerations in the design of office forms. Special office forms for machine processing. Additional thoughts on the design of office forms: *The proper utilization of office forms. The administrative program for office forms.*

15. **Office Space Planning 318**
Selecting an office: *Office location factors. Own or lease?* Design of the contemporary automated office: *Areas of planning. Office physical environment.* Office space utilization: *The AMCO–PACT approach. PACT. Fundamental layout issues.* Preparing an office layout: *Basic layout guides.*

16. **Office Standards and Furniture Considerations 342**
Office space standards: *Desks, aisles, and filing cabinets. The private office. The reception room. The conference room. Wardrobe facilities.* Moving the office. Office furniture: *Office chairs. Office desks. Modular office furniture.*

Part Five

Organizing and Office Systems Management 361

17. **Office Organization Basics 362**
The benefits of formal organizing. "The office"—what and where? Office organization arrangements: *The office services arrangement. The systems and procedures arrangement. The modified systems and procedures arrangement. The administrative services arrangement. The top staff administrative services arrangement.* The makeup of organizing: *Work and its division. Work division at the lower office level. Differentiation and integration. Job analysis and job description. Employees and organization. Recruiting. Tools of personnel selection. Relationships of organization. The environment of the organization.*

18. **Office Organization Dynamics and Improvement 390**
Organizational change: *Office organization dynamics. The organization structure and organization dynamics. Formal and informal organization. Interpersonal relations and organization dynamics.* Organizational development: *The benefits and prerequisites of OD. Coping with organization change. Organizational balance. Implementing organization change. Change models.*

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Part Six

Actuating and Office Systems Management 411

19. Office Employee Behavioral Fundamentals 412
Background basics: *Current illustrations. Theory X and Theory Y. Theory Z.* A human behavior model: *The work environment. Defense mechanisms.* Performance appraisal: *The appraisal interview. The administration of performance appraisal. Guidelines to follow in managing human resources.*

20. Supervising Office Systems Employees 430
Supervising and communicating: *The skills of the supervisor. The work of the supervisor. The selection of the office supervisor. Relationships of the supervisor with superiors and with peers. Counseling and the supervisor. Absenteeism and tardiness. Flexitime for office employees. Checklist for the office supervisor. Securing effective supervision. Quality circles. Transactional analysis.*

21. Motivation and Salary Administration 452
Introduction to motivation: *Need as a motivator. The hierarchy of needs. Basic considerations of motivation. Approaches to motivational achievement.* Participative management: *Management by objectives. Office job enrichment. Suggestion systems: Office salary administration—importance and purposes. The guideline method of office salary administration. Job evaluation. Fringe benefits. Scanlon plan.*

22. Developing Office Employees, Office Safety, and Unions 474
Objectives of employee training: *Development and learning. Basic learning principles. Advantages and types of training.* Employee training: *Developing a training program. Available training means. The cost of training. The effectiveness of training. How to implement a program of automation.* Safety in the office: *Office safety personnel. OSHAct. Office safety records.* Office trade unions: *Collective bargaining. Important legal provisions.*

Part Seven

Controlling and Office Systems Management 501

23. Controlling: Fundamentals, Costs, Budgets 502
Motivational controlling: *Controlling and information. Office work*

measurement. Controlling and standards. Media for standards. Change and standards. Advantages of standards. Office standardization. The spectrum of office controls: *Overall controls. Controls over office supplies. Office security controls.* Cost controlling: *Approaches to office cost reduction. The effective cost control program. Evaluating costs. Applying corrective measures. The controlling of reports.* Office budgeting: *Budgets and the office systems manager. The preparation of the budget plan. Zero-base budgeting. The period and budget revision.*

24. Time-Use Controlling 526
The importance of time-use controlling: *The effective use of time.* Office time standards: *The determination of office time standards. Subjective judgment. Past performance records. Work sampling. Standard time data. Stopwatch study. Standard data from stopwatch study. The reporting activity system. Examples of office time standards. PERT.*

25. Controlling: Quantity, Quality, and Office Manuals 548
Quantity control: *Quantity controlling efforts. Means of controlling office work fluctuations. Routing. Scheduling. Dispatching.* Quality control: *Basic considerations of office quality. Approaches to office quality controlling. Control charts.* Office manuals: *The manual of policies. The manual of operations. The manual of office rules and regulations. The historical manual. The multiple-purpose manual. Sources for manual material. Manual preparation.* Content of manuals—a real example. The distribution of manuals: *Manual maintenance.*

Appendix Supplementary situational and competency development activities for selected chapters 571

Case Index 579

Index 581

Part One

Introduction

The study of office systems management begins with a discussion of the following: definitions of the office, the schools of managerial thought and their relationship to office systems management, the importance of information and its processing, and the role of office systems management today. Our study continues with competencies needed by office systems managers and positions available in today's workplace.

Part One contains two chapters: The Office in Perspective and The Contemporary Office Systems Manager.

1

The Office in Perspective

After studying this chapter, you will enhance your competence in the following areas:

1. **Differentiating the schools of management thought and showing their application to office systems management.**
2. **Explaining the concept of the office and its relationship to information.**
3. **Recognizing the various classifications and characteristics of information.**
4. **Relating information management concepts to the basic functions of management.**
5. **Analyzing the components of information management.**
6. **Developing an appreciation for the role of office systems management in our contemporary society.**

All things must change
To something new, to something strange.
Longfellow

The *office* is a term that has many connotations. Among the definitions of *office* as stated by Webster are the following: " a special duty, charge, or position conferred by an exercise of governmental authority and for a public purpose; *(b)* a place in which the functions (as consulting, record keeping, clerical work) of a public officer are performed; *(c)* the directing headquarters of an enterprise or organization; and *(d)* the place in which a professional person (as a physician or lawyer) conducts professional business."[1]

Within the context of this book, *b* and *c* seem to be most closely allied in a generic way with the role of the office systems manager in today's business environment. The office plays an important role in any business—whether it is a small family-owned business, a medium-sized firm, or the offices of a multinational corporation.

Whatever the purpose, the first contact with practically any type of business is the office. Usually a receptionist refers the visitor to the office that deals with whatever type of business needs to be transacted. Likewise, a telephone caller is directed to the appropriate office to deal with the problem at hand. Activities performed within an office are familiar to all of us—for example, invoicing for an order placed with a firm such as Sears. The office is the hub of all the organization's activities. Depending on a number of variables, it may run the gamut from a very simple to a very complex operation. A major goal of any business should be to manage its office operations in the most efficient and effective way possible. The purpose of this book is to provide a tool for managing the office systems domain.

OFFICE MANAGEMENT DEFINED

Traditionally, office management has been defined as the *unseen force which plans, organizes, and coordinates personnel, materials, money, methods, and markets in office work and which directs and controls so as to achieve the objectives of the enterprise.* For many years, the office manager was characterized in the following manner:

Male.
Nontechnician.
Used a manual filing system.

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[1] *Webster's New Collegiate Dictionary,* 7th ed., S.V. "office."

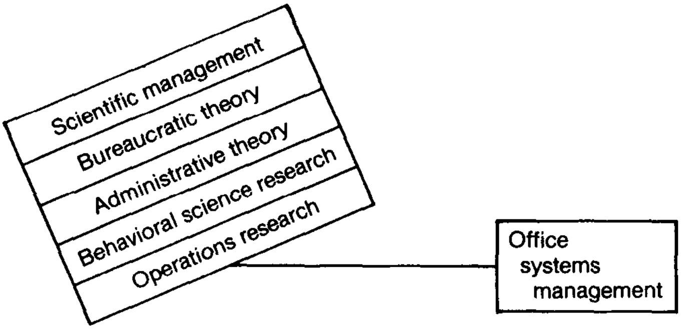
Wore spectacles.
Sat at his desk.
Limited visibility in organization.
Involved with planning, organizing, staffing, and controlling office functions.
Role not equivalent to sales managers or other management positions.
Title "office manager" not used frequently.

Even though this presents a stereotype, some parts of this definition of office management and the traditional characteristics of the office manager are still applicable today. However, due to the impact of technology in the marketplace, the role and scope have changed dramatically. Technology has aided in the development of a new role and title—office systems manager. Information manager is somewhat synonymous with office systems management. The contemporary role and scope of the office systems manager will be addressed later in this chapter and in subsequent chapters.

DEVELOPMENT OF MANAGERIAL THOUGHT

As in any discipline, a historical foundation must be built and nurtured to give the discipline credibility. The area of office systems management is no exception. Three schools of thought have provided the impetus for contemporary management thought. These are (1) scientific management, which began about 1910, (2) bureaucratic theory, which began at approximately the same time, and (3) administrative theory, which began around 1930. In addition, an overview of human relations theory, behavioral science research, and operations research are included to provide a conceptual framework of management (Figure 1–1) for the student of office systems management.

FIGURE 1–1
Conceptual framework for managerial thought and the relationship to office systems management



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