

Secretarial Administration



AND Management

Daniel R. Boyd / Stephen D. Lewis

DANIEL R. BOYD

Middle Tennessee State University

STEPHEN D. LEWIS

Middle Tennessee State University



SECRETARIAL ADMINISTRATION AND MANAGEMENT

PRENTICE-HALL, INC., ENGLEWOOD CLIFFS, NEW JERSEY 07632

Library of Congress Cataloging in Publication Data

BOYD, DANIEL R.

Secretarial administration and management.

Includes index.

1. Secretaries. 2. Office practice. I. Lewis,
Stephen D. II. Title.

HF5547.5.B65 1985 651.3'741 84-16537

ISBN 0-13-798265-8

Editorial/production supervision and
interior design: Sonia Meyer

Cover design: Photo Plus Art; photo courtesy of Honeywell Corporation

Manufacturing buyer: Ed O'Dougherty

**To
Nancy and Gayle
Linda, Stephen, and Erin**

© 1985 by Prentice-Hall, Inc.
Englewood Cliffs, New Jersey 07632

All rights reserved. No part of this book may be
reproduced, in any form or by any means,
without permission in writing from the publisher.

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

ISBN 0-13-798265-8 01

Prentice-Hall International, Inc., *London*
Prentice-Hall of Australia Pty. Limited, *Sydney*
Editora Prentice-Hall do Brasil, Ltda., *Rio de Janeiro*
Prentice-Hall Canada Inc., *Toronto*
Prentice-Hall Hispanoamericana, S.A., *Mexico*
Prentice-Hall of India Private Limited, *New Delhi*
Prentice-Hall of Japan, Inc., *Tokyo*
Prentice-Hall of Southeast Asia Pte. Ltd., *Singapore*
Whitehall Books Limited, *Wellington, New Zealand*

PREFACE

Secretarial Administration and Management is a modern, up-to-date information source emphasizing the administrative and secretarial skills necessary for success in today's highly technological offices. It includes the major skills, attitudes, and knowledge needed by administrative assistants/secretaries. Students, teachers, and practicing office professionals alike will benefit from its comprehensive yet succinct coverage.

Key terms are listed at the beginning of each chapter to help in studying and reviewing the material. A glossary provides quick reference to definitions of technical terms used throughout the book. The student workbook complements the text in providing assignments, activities, and chapter summaries which reinforce concepts presented in the text.

The accompanying teacher's manual provides helpful materials and suggestions for making classroom activities useful for students and easier for the teacher. Chapter summary outlines serve as model lecture notes. Short-answer test questions for each chapter are included in a test bank with answer keys. Answers to end-of-chapter questions and exercises also are provided.

Secretarial Administration and Management is adaptable to both community college and university-level students and may be used for a one- or two-semester course. The 23 chapters, although arranged in eight parts by job and task relationships, may be presented in various sequences at the individual teacher's discretion.

For practicing office professionals, *Secretarial Administration and Management* is a valuable resource in several ways. Its comprehensive coverage makes it an excellent desk reference. Within it are answers to many content and application questions regularly confronting administrative assistants, such as style, format, and content of various business documents. Also, persons studying for the Certified Professional Secretary Examination or similar examinations will find it an excellent review source.

Our wish is that you will enjoy your use of this book and that you will gain invaluable knowledge from reading it.

DANIEL R. BOYD STEPHEN D. LEWIS

CONTENTS

PREFACE

viii

PART I

THE SECRETARIAL ENVIRONMENT

1 FOUNDATIONS OF SECRETARIAL WORK 1

- The Role of Today's Secretary* / 3
- Secretarial Definition and Job Description* / 5
- Secretarial Compensation* / 10
- Employment Outlook* / 14
- Additional Study of the Secretarial Profession* / 15

2 ORGANIZATION STRUCTURE AND OFFICE ENVIRONMENT 18

- Organization Importance and Design* / 20
- Levels of Management* / 21
- Functions of Management* / 23
- Organization Structure* / 26
- Informal Organization* / 32
- Office Environment* / 33

3 WORK ORGANIZATION AND TIME MANAGEMENT 42

- Work Organization and Time Management—*
 - Its Importance* / 44
- Identifying Specific Job Tasks and Responsibilities* / 47
- Prioritizing Job Tasks* / 52
- Analyzing and Planning Each Job Task* / 55
- The Need for Adaptability and Flexibility* / 61
- Developing a Listening Profile* / 62
- Concentrating on Completing One Job Task at a Time* / 62
- Creating and Maintaining a Spirit of Teamwork* / 63
- Part I / Case Studies* 67

PART II

HUMAN RELATIONS AND PROFESSION- ALISM

4 HUMAN AND PUBLIC RELATIONS FUNCTIONS 69

- Human and Public Relations—*
 - Components of Organizational Success* / 71
- The Human Relations Function* / 72
- The Public Relations Function* / 82

5 PROFESSIONALISM AND ETHICS 96

- Professionalism and Ethics—*
 - Essential Ingredients for Career Success* / 98

iii

<i>Sources of Professional Growth</i>	/ 99
<i>Ethics—A Brief Discussion</i>	/ 104
<i>The Ethical Responsibility of Administrative Assistants</i>	/ 106
<i>A Code of Ethics for Administrative Assistants</i>	/ 108
Part II / Case Studies	110

PART III
COMMUNI-
CATION
SERVICES

6	TYPEWRITING—A BRIEF REVIEW OF SUPPLIES AND TECHNIQUES	112
	<i>The Typewriting Function</i>	/ 114
	<i>Typewriting Supplies</i>	/ 115
	<i>Preparing Carbon Packs</i>	/ 119
	<i>Correcting Typographical Errors</i>	/ 121
	<i>Business Letter Typewriting</i>	/ 123
	<i>Business Forms</i>	/ 129
	<i>Typewriting Memoranda</i>	/ 131
	<i>Statistical Typewriting</i>	/ 131
	<i>Business Reports</i>	/ 137
7	DICTATION AND TRANSCRIPTION	143
	<i>The Dictation/Transcription Process</i>	/ 145
	<i>Dictation</i>	/ 146
	<i>Transcription</i>	/ 155
8	COMPOSITION AND THE ADMINISTRATIVE ASSISTANT	170
	<i>Importance of Composition Skills</i>	/ 172
	<i>Organizing Your Thoughts</i>	/ 173
	<i>Purposes of Communication</i>	/ 173
	<i>Basic Composition Qualities</i>	/ 175
	<i>Improving Composition Skills</i>	/ 179
	<i>Responsibilities for Composition</i>	/ 182
	<i>Reducing Correspondence Costs</i>	/ 190
9	MAIL MANAGEMENT AND SHIPPING SERVICES	193
	<i>Mail Management and Shipping Services— Important Office Functions</i>	/ 195
	<i>Incoming Mail</i>	/ 196
	<i>Mail Management While Executive Is Absent</i>	/ 198
	<i>Outgoing Mail</i>	/ 198
	<i>Electronic Mail Service</i>	/ 202
	<i>Mail Handling</i>	/ 203
	<i>Improving Mail Service</i>	/ 208
	<i>Shipping Services</i>	/ 208
	Part III / Case Studies	211

PART IV
INFORMATION
PROCESSING

10 WORD-PROCESSING ORGANIZATION, EQUIPMENT,
AND CONCEPTS 213

Word Processing—A Brief History / 215
Word-Processing Organization / 217
Word-Processing Applications / 224
Word-Processing Trends / 227

11 REPROGRAPHICS 231

*Reprographics as an Administrative
Support Function* / 233
Copying Processes / 234
Duplicating Processes / 241

12 DATA-PROCESSING CONCEPTS 244

Impact of EDP on Businesses / 246
Basic Data-Processing Functions / 247
Data-Entry Machines and Media / 248
Components of EDP Systems / 252
Minicomputers and Microcomputers / 257
Business Systems / 258
EDP and the Modern Office / 261

13 TELECOMMUNICATIONS 265

Telecommunications Defined / 267
Telephones—Equipment, Systems, and Services / 267
Telegrams / 271
Electronic Mail / 271
*Emerging and Expanding Telecommunications
Concepts* / 276
Message Transmission by Telecommunications / 279
Changes in Telecommunications Services / 280
Part IV / Case Studies 282

PART V
INFORMATION
AND RECORDS
MANAGEMENT

14 RECORDS ORGANIZATION 284

*Importance of Efficient Records Management
Programs* / 286
The "Life Cycle" of Records / 288
Secretarial Role in Records Management / 290
Basic Filing Methods / 290
Filing Equipment / 298
Basic Filing Aids / 305

15	ALPHABETIC INDEXING	312
	<i>Importance of Alphabetic Filing</i>	/ 314
	<i>The Filing Process</i>	/ 315
	<i>Sequence of Filing Units</i>	/ 319
	<i>Alphabetic Indexing Rules</i>	/ 320
16	EFFECTIVE RECORDS MANAGEMENT	349
	<i>Basic Components of Records Management Programs</i>	/ 351
	<i>Records Retention</i>	/ 352
	<i>Records Transfer</i>	/ 355
	<i>Protection of Vital Records</i>	/ 358
	<i>Records Disposition</i>	/ 360
	<i>Centralized and Decentralized Files</i>	/ 360
	<i>On-Site and Off-Site Records Centers</i>	/ 361
	<i>Micrographics</i>	/ 362
	<i>Changing Records Management Concepts</i>	/ 366
	Part V / Case Studies	370

PART VI

TRAVEL, MEETINGS, AND CONVENTIONS

17	BUSINESS TRAVEL	371
	<i>Travel—A Common Requirement of Business</i>	/ 373
	<i>Making Preliminary Travel Plans</i>	/ 374
	<i>Making Reservations</i>	/ 376
	<i>Preparing a Final Itinerary</i>	/ 386
	<i>Preparing Support Materials</i>	/ 388
	<i>Arranging Travel Funds</i>	/ 389
	<i>International Travel Considerations</i>	/ 390
	<i>Conducting Business During Executive's Absence</i>	/ 393
	<i>Performing Follow-Up Activities</i>	/ 394
18	MEETINGS, CONFERENCES, AND CONVENTIONS	398
	<i>Meetings, Conferences, and Conventions—</i>	
	<i>An Important Phase of Business</i>	/ 400
	<i>Informal Meetings</i>	/ 401
	<i>Formal Meetings</i>	/ 407
	<i>Conferences and Conventions</i>	/ 421
	Part VI / Case Studies	427

PART VII

ACCOUNTING AND FINANCIAL MANAGEMENT

19	BASIC ACCOUNTING PRINCIPLES AND PROCEDURES	429
	<i>The Accounting System—An Important Component of Business Success</i>	/ 431
	<i>Theory and Classification of Accounts</i>	/ 432
	<i>The Accounting Cycle</i>	/ 436
	<i>Bank Statement Reconciliation</i>	/ 444
	<i>Petty Cash</i>	/ 448
	<i>Payroll Accounting</i>	/ 450

20 FINANCIAL MANAGEMENT 458

Financial Management—An Important Aspect of Organizational Success / 460

The Budgetary Process / 461

Financing Business Operations / 463

21 INSURANCE AND REAL ESTATE 476

Major Classifications of Insurance / 478

Property and Casualty Insurance / 479

Life and Health Insurance / 483

Additional Insurance for the Multinational Business / 485

Real Estate / 487

Part VII / Case Studies 491

PART VIII

22 SEEKING EMPLOYMENT 493

CAREER
PLANNING AND
ADVANCEMENT

Competing for the Job You Want / 495

Researching Job Sources / 496

Evaluating Your Potential and Expectations / 498

The Data Sheet / 500

The Application Letter / 507

Application for Employment / 509

The Interview / 512

Follow-Up Letters / 514

23 THE ADMINISTRATIVE ASSISTANT AS SUPERVISOR 517

Supervision—An Administrative Assistant's Role / 519

Responsibilities of a Supervisor / 520

Characteristics of an Effective Supervisor / 522

Recruiting, Orienting, and Training Employees / 523

The Supervisor as a Team Member / 525

Motivating Employees / 527

Delegation / 530

Improving Your Supervisory Skills and Knowledges / 531

Part VIII / Case Studies 534

APPENDIX 536

References Sources / 536

Samples of Business Letter Styles / 540

GLOSSARY 544

INDEX 551

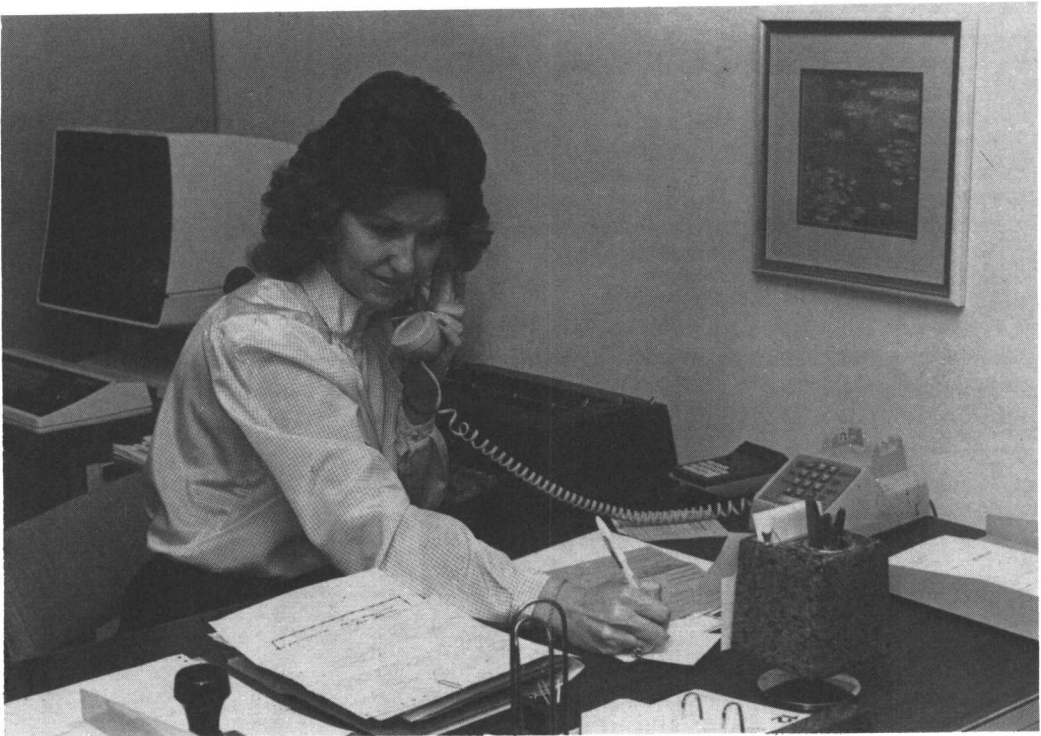


Photo by Jack Ross

1

FOUNDATIONS OF SECRETARIAL WORK

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO:

- EXPLAIN THE ROLE OF TODAY'S SECRETARY AND IDENTIFY THE VARYING SECRETARIAL JOB TITLES AND JOB DESCRIPTIONS.
- IDENTIFY THE LEVELS OF SECRETARYSHIP AS DETERMINED BY THE LEVEL OF SECRETARIAL SUPERVISION.
- BETTER UNDERSTAND SECRETARIAL COMPENSATION.
- DESCRIBE THE SECRETARIAL EMPLOYMENT POTENTIAL IN THE 1980s.

KEY TERMS TO BE STUDIED:

ADMINISTRATIVE SECRETARY
ADMINISTRATIVE ASSISTANT
CORRESPONDENCE SECRETARY
DATA PROCESSING
WORD PROCESSING
SOCIAL SECRETARY
LEGAL SECRETARY
MEDICAL SECRETARY
SCHOOL SECRETARY
CONSUMER PRICE INDEX (CPI)
COMPENSATION LEGISLATION
FAIR LABOR STANDARDS ACT
EQUAL PAY ACT
AFFIRMATIVE ACTION
COLLECTIVE BARGAINING
PROGRESSION SECRETARIES

Today's professional secretaries must possess a basic knowledge of business organization, psychology and accounting, as well as fundamental skills and abilities, combined with a personal knowledge of the structure and goals of their organizations. Assistants who are thoroughly familiar with modern developments in office management and technology, and who can make decisions and exercise initiative are invaluable as the position of secretary becomes more closely aligned with management. Tomorrow's top-level secretaries, as members of the management team, will be rewarded on their exercise of mental rather than manual skills.

JERRY HEITMAN
Executive Director
Professional Secretaries International

THE ROLE OF TODAY'S SECRETARY

Various factors, including technological, economic, and social changes, have made the role of today's secretary a rapidly changing and expanding one. Skills and competencies that helped secretaries reach the top of their profession ten years ago may be inadequate for today's dynamic offices. Because changes have been so dramatic, secretaries should remain "students" of their occupation, continually striving to improve their skills, to learn more about their business in particular, and to learn more about business in general.

Equipment developed in recent years has revolutionized office work for many secretaries. Data-processing and word-processing equipment has had a particular impact. In many businesses automated typewriters have replaced the traditional electric and manual typewriters. Work flow within the office has been reorganized. Where there was once a one-secretary/one-executive relationship, an *administrative secretary* or *administrative assistant* may now serve more than one executive, performing such duties as answering the telephone, greet-

ing visitors, and dictating correspondence as well as taking part in the decision-making processes of the company. *Correspondence secretaries* working in a word-processing center may perform typewriting functions for several or all of the executives within a business. Their work is simplified through the use of typewriters that allow rapid typewriting, quick correction of mistakes, and, on some of the more sophisticated equipment, rearrangement of entire paragraphs.

Despite the introduction of sophisticated equipment, office administration students should continue to develop useful manual skills such as typewriting and shorthand. Typewriting skills may be applied to a variety of office tasks such as correspondence, reports, and business forms not readily adaptable to automated systems. Occasionally, a task may need to be performed in a nonautomated manner to insure confidentiality, to meet time restrictions, or to satisfy other priorities. Additionally, shorthand remains an important secretarial skill, and employers sometimes use it as a criterion for the selection and promotion of office personnel. A glance at the daily employment ads and job announcements will confirm these observations (see Figure 1.1).

Economic changes in society and business also have altered the role of today's secretaries. Inflationary trends have led employers to look for more cost-efficient ways to operate their offices—particularly by using automated office equipment and improved workflow procedures. These innovations, however, have not decreased the total number of secretarial personnel needed; rather, they have enabled secretaries to devote more time to other tasks. Secretaries are increasingly being called upon for their knowledge and expertise for a wide variety of administrative functions. In many instances they serve as assistants to their employers, often being asked to manage selected business matters in the absence of the executive.

Social changes, likewise, have greatly affected the secretary's role. Only a few years ago secretaries were "second-class citizens" in the business world. The majority of them, primarily women, were in the labor force on a temporary basis until they married or decided to have a family. Consequently, few worked for a specific organization long enough to become eligible for promotion into higher functions. Those who were qualified for promotion often were held back unjustly because they were "just a secretary."

FIGURE 1.1

SECRETARIES/ADMINISTRATIVE ASSISTANTS
min 60 wpm Typing, 80 wpm Steno

**IF YOU DO EXACTLY
WHAT YOU'RE TOLD
TO DO,
NO MORE,
AND NO LESS,
WE WOULDN'T CHANGE
YOU FOR THE WORLD.**

**We wouldn't hire
you either.**

At Revlon you have to make a commitment: creative thinking, time and effort. It's a high pressure, fast-paced environment; there's lots of legwork and you'll be assuming all sorts of responsibilities. You'll be juggling time, people and priorities constantly (with tact and discretion, please), managing details, taking it all in stride without getting ruffled. To put it simply, your judgement is critical. Can you cope with frustration? Can you fill in for "the boss": smiling and projecting calm assurance all the way through? Will you be available for frequent paid overtime?

If you hesitated once, please don't respond. But if you're challenged by the prospect of working in this results-oriented atmosphere, by all means please send resume establishing qualifications and earnings history in confidence to:

Corporate Personnel AA6 Area
REVLON
767 Fifth Avenue.
New York, New York 10022
(General Motors Building)

An Equal Opportunity Employer M/F

REVLON, New York, NY

Employers seek an assistant who will help them to be more effective in their jobs.

More recently the secretarial field has become more promising and rewarding. Secretaries see it as a profession whereby they may continue to improve themselves economically, socially, and professionally or advance themselves into other challenging areas of business. Employers are recognizing the importance of competent office administration personnel, are giving them the opportunity to participate in decision-



Varityper Division, East Hanover, NJ

Word processing is a system of processing office communications which enables the executive assistant to expand administrative support capabilities.

making, and are making promotion opportunities more attainable. Because of the education and experience now required of secretaries, salaries offered are becoming more competitive with other business areas.

Secretaries themselves are recognizing the need for more "professionalism" within their ranks and are doing something about it through active involvement in such organizations as Professional Secretaries International, The National Association of Legal Secretaries, and The National Association of Educational Secretaries. The secretary's role today and tomorrow offers change and challenge for those who are genuinely interested in the profession.

SECRETARIAL DEFINITION AND JOB DESCRIPTION

Defining the term "secretary" is difficult, partly because there are so many different types and levels of secretaries. Many people classify any person who performs any of several clerical

functions as a secretary. For example, typists, file clerks, receptionists, stenographers, and other similar workers may be referred to as "secretaries," when they perform only one or two of the multiple and sometimes complex duties of a true secretary.

Professional Secretaries International (PSI) defines a secretary as:

An executive assistant who possesses a mastery of office skills, demonstrates the ability to assume responsibility without direct supervision, exercises initiative and judgment, and makes decisions within the scope of assigned authority.

Because of the great diversity of work they perform, the U.S. Department of Labor has classified secretaries according to the level of their supervisor and the level of their responsibility.¹ Listed below are four of the Department's classifications of secretaries determined by the level of the secretary's supervisor.

Level of Secretary's Supervisor (LS)

- LS-1**
 - a. Secretary to the supervisor or head of a small organizational unit (e.g., fewer than about 25 or 30 persons);
 - b. Secretary to a nonsupervisory staff specialist, professional employee, administrative officer or assistant, skilled technician, or expert. (*Note:* Many companies assign stenographers, rather than secretaries as described above, to this level of supervisory or non-supervisory worker.)
- LS-2**
 - a. Secretary to an executive or managerial person whose responsibility is not equivalent to one of the specific level situations in the definition for LS-3, but whose organizational unit normally numbers at least several dozen employees and is usually divided into organizational segments which are often, in turn, further subdivided. In some companies, this level includes a wide range of organizational echelons; in others, only one or two; or
 - b. Secretary to the head of an individual plant, factory, etc. (or other equivalent level of official) that employs, in all, fewer than 5,000 persons.
- LS-3**
 - a. Secretary to a corporate officer (other than chairman of the board or president) of a company that employs, in all, over 100 but fewer than 5,000 persons; or
 - b. Secretary to the head (immediately below the officer level) of either a major corporate-wide functional activity (e.g., marketing, research, operations, industrial relations, etc.) or a major geographic or organizational segment (e.g., a regional headquarters;

¹*National Survey of Professional, Administrative, Technical, and Clerical Pay*, March 1980, U.S. Department of Labor, Bureau of Labor Statistics, Bulletin 2081, pp. 66-67.

- a major division) of a company that employs, in all, over 5,000 but fewer than 25,000 persons; or
 - c. Secretary to the head of an individual plant, factory, etc., (or other equivalent level of official) that employs, in all, over 5,000 persons; or
 - d. Secretary to the head of a large and important organizational segment (e.g., a middle management supervisor or an organizational segment often involving as many as several hundred persons) of a company that employs, in all, over 25,000 persons.
- LS-4**
- a. Secretary to the chairman of the board or president of a company that employs, in all, over 100 but fewer than 5,000 persons; or
 - b. Secretary to a corporate officer (other than the chairman of the board or president) of a company that employs, in all, over 5,000 but fewer than 25,000 persons; or
 - c. Secretary to the head, immediately below the corporate officer level, of a major segment or subsidiary or a company that employs, in all, over 25,000 persons.

The Department of Labor's classification by level of a secretary's responsibilities clearly shows the expectations of secretaries at particular levels:

Level of Secretary's Responsibility (LR)

- LR-1** Works under general instructions and guidance as needed; carries out recurring work of the office independently; selects appropriate guidelines, references, and procedures for application to specific cases. Performs a full range of procedural office duties that involve various related steps, processes, or methods.
- Performs varied secretarial duties including or comparable to most of the following:
- a. Maintains supervisor's calendar and makes appointments as instructed.
 - b. Reviews correspondence, memoranda, and reports prepared by others for the supervisor's signature to assure procedural and typographic accuracy.
 - c. Makes travel arrangements for supervisor and staff.
 - d. Notifies staff of meetings or conferences.
 - e. Requisitions supplies, printing, or other services.
 - f. Prepares scheduled reports from readily available information in the files.
 - g. Reviews publications for articles of special interest to the supervisor or staff.
 - h. Answers telephone, greets personal callers, and opens incoming mail.
 - i. Answers telephone requests which have standard answers. May reply to requests by sending a form letter.
 - j. Types, takes and transcribes dictation, and files.
- LR-2** Works independently to achieve defined objectives; handles problems and deviations in accordance with established instructions, priorities and program goals. Guidelines include a large number of unwritten policies, precedents, and practices.