



# General Office Procedures

Carol A. Silvis

# *General*

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# *Office*

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# *Procedures*

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*New Kensington Commercial School*



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# Preface

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*General Office Procedures* was developed for use as an instructional tool in the classroom and as a reference manual in the office. This text/workbook provides a practical, on-the-job perspective of the modern office. Additionally, it presents an overview of the skills necessary for success in an office position.

*General Office Procedures* consists of 21 chapters and four mini simulations divided into five parts. The information it contains is timely and covers a variety of topics in an easy-to-read and easy-to-locate format. All chapters may be completed or only those chapters of particular interest to the reader. Special features of this text include the following:

- *Each chapter begins with a pretest.* These can be used to determine what the reader knows about the information to be presented in the chapter and to identify where special attention is needed.
- *Each chapter discussion unfolds with a situation.* These are intended to stimulate thinking about what may occur during a typical office day.
- *Each chapter is followed by a series of decision-making and thought-provoking questions.* The first set of questions asks how the reader would handle a given situation. A second set of questions asks whether the reader considered certain principles and variables in arriving at answers.
- *Various assignments and self-evaluations are given throughout the chapters.* These provide an opportunity to apply what has been presented. They also provide immediate reinforcement and feedback.
- *End-of-chapter work is given.* This work is in the form of discussion questions, exercises, and self-evaluations.
- *Four mini simulations are provided.* These require independent thinking and the application of skills. The simulations consist of several hours of application problems and the directions and forms necessary for completing those problems. The simulations appear at various intervals throughout the text and include exercises that pertain to the chapters preceding the simulation.

- *Photographs, illustrations, and examples are provided.* These elements help clarify the information presented in the text discussions.

An *Instructor's Manual* accompanies the textbook. It includes chapter outlines, learning objectives, teaching suggestions, answers to pretests and questions for discussion, answers to end-of-chapter exercises, answers to mini simulation problems, chapter tests with answer keys; and 16 transparency masters. An accompanying diskette contains the chapter tests and answer keys.

I would like to thank my family, colleagues, and friends who offered encouragement and support. I also am grateful to those individuals who reviewed the manuscript for the text: Debbie Bailey, Texas State Technical Institute; Anne Barnes, Indiana Vocational Technical College; Yolanda Foley, American Business Institute; Dorothy Jackson, Okaloosa Walton Community College; Donna Matherly, Tallahasee Community College; Pat Miller, Greenville Technical College; and Barbara Wells, Trident Technical College. I especially want to thank Susan Mease, my acquisitions editor, for providing me with the opportunity to publish this text and the staff members at Harcourt Brace Jovanovich and Bookmark, who contributed their expertise and assistance to this project.

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## *Improving Yourself and Working with Others*

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*Today's business personnel must be prepared to meet the needs of the offices in the Information Age. First, there are technological needs—a move from the traditional office to the electronic workstation is well under way. Although businesses may use some traditional equipment, the rapid change is toward the increasing use of electronic equipment. The office worker will face more challenges and responsibilities in the workplace than ever before.*

*Second, there are positive personal characteristic needs—vocabulary, human relations, professionalism, and time management. The office worker must be knowledgeable in these basic areas, which have been the cornerstone of the office.*

*Chapters 1-6 will give you practical information and principles for self-improvement and self-enrichment.*

# PRETEST

## FOR CHAPTER 1

### Do you Know the Following Terms?

	YES	NO
1. Traditional office	_____	_____
2. Electronic office	_____	_____
3. Information processing	_____	_____
4. Automation	_____	_____
5. Input	_____	_____
6. Output	_____	_____
7. Administrative assistant	_____	_____
8. Correspondence specialist	_____	_____
9. Workstation	_____	_____
10. Information-processing system	_____	_____
11. Hard copy	_____	_____
12. Soft copy	_____	_____
13. Magnetic media	_____	_____
14. Electronic mail	_____	_____

### Complete the Following

1. What is the difference between an information-processing cycle

and an information-processing system? \_\_\_\_\_

2. How does a traditional office differ from an electronic office?

\_\_\_\_\_  
\_\_\_\_\_

3. What is the difference between a correspondence specialist and an

administrative assistant? \_\_\_\_\_

\_\_\_\_\_

# CHAPTER 1



## A Career in the Business Office

### A LOOK AT THE PAST

Centuries ago office workers performed routine tasks and duties without benefit of the inventions and technologies that modern-day office workers take for granted. Think about office life without electricity and telephones, let alone without typewriters, word processors, and computers. Many tasks would become repetitive, boring, and mundane; and the quality and quantity of work produced would be greatly reduced without technology as we know it.

### **Here Is the Situation**

Jeremy is an office worker for a large retail clothing business. His duties on a particular day included the following: copying two letters to be mailed, billing two customers, and processing the payroll for the company's eleven employees. To accomplish this, Jeremy lit the oil lamp on his wooden desk and began the day's work. He dipped his quill pen into the inkwell and began to copy meticulously one of the letters.

### **How Would You Handle It?**

How would you copy a document if there were no carbon paper, duplicators, or copiers?

How would you produce a finished document without the use of a typewriter, word processor, or computer?

### **Did You Consider**

How painstakingly slow the performance of routine office tasks was in the past?

How technology has eliminated many dull, tedious tasks by creating better ways of performing these tasks?

How technology helps the office worker efficiently produce a quality final copy?

## **THE CHANGING OFFICE**

The office of today has come a long way since the days when Jeremy hand copied documents. The introduction of office equipment like the typewriter has improved the speed and ease with which documents are produced. The typewriter also has improved the quality of documents.

Office workers should not be intimidated by changing technology that they do not understand and equipment that they do not know how to operate. Instead, workers should consider how beneficial new equipment and procedures are toward the performance of their jobs. Today's office personnel can expect changes to occur in the workplace, and they must be prepared to update their skills willingly.

### **Here Is Another Situation**

Warren worked as an office clerk in a large mining company. He was the oldest of seven office workers. While he prepared a letter for the morning mail, Warren thought about the new typewriters his supervisor recently had ordered for each of the workers.

"I don't know what all the fuss is concerning that noisy machine," Warren grumbled to himself. "Letters have been written by hand for decades," he continued. "We've done just fine up to this point without machines that type!"

The two youngest clerks, however, eagerly awaited the arrival of new typewriters, because they had witnessed a demonstration and had seen a copy of the kind of document the machines were capable of producing. The other workers in Warren's office were unsure of such a machine.

Warren thought about his years of service with the company and the quality of work he had produced. He said to himself, "Well, I am not using any typewriter. That is all there is to it!"

### **How Would You Handle It?**

Why do you feel Warren had such negative feelings about using a typewriter?

Do you think Warren's feelings are natural?

How would you feel if suddenly the way you were doing your tasks changed?

Does confronting change bother you?



## Did You Consider

The office worker is confronted constantly with changes in the office?

New technology has increased production and the quality of office work?

---

## Take Changes in Stride

### TAKE CHANGES IN STRIDE

Over the years, numerous office workers have resisted the changes brought about by technological advances in equipment and procedures. In the past, some typists had questioned the introduction of the Selectric typewriter with a stationary carriage. Later, typists questioned the introduction of the electronic typewriter and the text editor. Typists asked why they needed a machine with additional function keys when a standard keyboard seemed to be adequate. To those doubtful typists, modern machines did not necessarily mean a better way of doing things. The introduction of electronic equipment often represented a different, unknown way of doing things. The uncertainty of change has caused a great number of office workers to oppose the application of modern technology in the office.

A resistance to technological advancement will decrease an office worker's value to his or her company. Therefore, the office worker should become familiar with current features and options available for equipment. Becoming proficient at using special features and options ultimately will increase productivity and improve task performance. Office workers must be open minded with regard to new ideas and the operation of modern equipment.

Office workers are needed to deal with the changes that advanced technology has brought to the office.



## Here Is the Situation

Collette is an office assistant for a large legal firm. One morning she sorted the items in her in-basket and found the following: a dictation tape containing two wills and a sales agreement, a rough draft of a letter, a report with several pages of revisions, and three handwritten memos.

Collette paused for a moment and thought of her reaction last year when the law firm had acquired a microcomputer for her office. At the time Collette complained that her electronic typewriter and Dictaphone were efficient enough to perform any task. She did not want a computer, and she did not want to take a night class in computer operations. She argued that the old ways were fine. "Why do manufacturers keep changing equipment and creating new machines?" she had asked a year ago at a planning meeting.

Today as Collette turned on her microcomputer, she smiled. Her microcomputer made it easy to keyboard, change, store, and delete documents. She could produce quality documents in greater quantity and in less time with the microcomputer than with the typewriter. Collette had learned quickly the answer to the question she had asked at the planning meeting a year ago.

## How Would You Handle It?

How would you make revisions on several rough draft pages without the use of a computer or word processor?

Are you willing to learn a new skill requiring hours of training?

## Did You Consider

Technological advances in equipment have taken the repetitiveness out of office jobs and have created more opportunities?

New training comes with change, and today's office workers must be willing to become proficient at operating modern equipment?

## TRADITIONAL VERSUS ELECTRONIC OFFICE

Electronic technology leaves little doubt that the business office has changed and the change will continue. Technology is here to stay with advances taking place rapidly. Electronic machines continue to be improved and new ones created. Electronic equipment has enabled office workers to perform their duties faster, easier, and more efficiently.

We are in what is being called the **Information Age**. The word *information* refers to the orderly arrangement of facts. Today's office workers spend many hours handling information. If the information is to have a purpose within the office and the company, it must be accurate, current, and accessible to persons who need it. The amount of information generated by business offices has increased enormously, and this increase has prompted companies to seek more efficient processing methods.

The combining of people, equipment, and methods to process information has been referred to as an *information-processing (or word-processing) system*. The series of steps performed by the office worker who arranges information is called an *information-processing (or*