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Procedures & Theory

for Administrative Professionals



Fulton-Calkins
Stulz

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Procedures *&* Theory

for Administrative Professionals



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P r e f a c e

Message to Student

Procedures & Theory for Administrative Professionals is more than a textbook; it is a complete learning package designed to add to your administrative professional skills. You, no doubt, have taken a number of courses in preparation for your career as an administrative professional, including keyboarding, word processing, computer technology, information management, communication, and English among others. This course is a capstone course—one that pulls together the skills you learned previously and adds to your knowledge and understanding of the technical and human relations skills necessary to succeed in your chosen profession.

Your role as an administrative professional in the workplace of today is a challenging one where constant changes in the world frequently impact your job. Some of the major changes include:

- Constant advances in technology
- An increasingly diverse workforce
- A global economy

These changes demand that you learn continually—not necessarily through formal education (although you may seek this venue), but by daily learning on the job, continual reading/research in your field, and taking advantage of opportunities offered through professional organizations. Since your ongoing success demands that you commit to continual learning, this course stresses the importance of that learning and that you adopt the philosophy of learning as a lifelong goal.

Text Organization

Procedures & Theory for Administrative Professionals is comprised of six parts, with a total of twenty chapters.

PART I TODAY AND TOMORROW'S WORKPLACE

- 1 The Workplace—Constantly Changing
- 2 Anger, Stress, and Time Management
- 3 Ethical Theories and Behaviors
- 4 Workplace Team and Environment

PART II EFFECTIVE COMMUNICATION

- 5 Effective Verbal and Nonverbal Communication
- 6 Written Communications
- 7 Presentation Skills
- 8 Telecommunications—Technology and Etiquette
- 9 Workplace Mail

PART III TECHNOLOGY

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- 11 Computer Software
- 12 Reprographics
- 13 Telework

PART IV RECORDS AND FINANCIAL MANAGEMENT

- 14 Filing Rules and Procedures
- 15 Records Technology
- 16 Financial Analyses—Organizational and Personal



Procedures & Theory for Administrative Professionals

By Dr. Patsy Fulton-Calkins and Karin M. Stulz

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PART V MEETINGS AND TRAVEL

- 17 Effective Meetings and Conferences
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- 20 Leadership Theories and Behaviors

Key Features

- **Learning Goals**
Reveals expected outcomes from studying each chapter
- **Summary**
Provides a quick review of major points in each chapter
- **Find the Problem**
Provides a short real-life case situation
- **Professional Pointers**
Gives several professional growth pointers
- **Reinforcement Items**
Provides review questions
- **Critical-Thinking Activity**
Provides a case (based on a real-life situation) that demands the use of critical-thinking skills
- **Vocabulary Review**
Offers a review of the technological and vocabulary-building terms for each chapter
- **English and Word Usage Drill**
Provides a review of the rules given in the Reference Guide of the textbook
- **Workplace Applications**
Provides applications tied to the learning goals of the chapter, with the goal(s) identified for each Workplace Application
- **Assessment of Chapter Goals**
Provides an opportunity to evaluate completion of the chapter goals
- **Team-Building Icon on Workplace Applications**
Indicates a collaborative activity involving a group of class members

- **Online Icon on Workplace Applications**
Indicates use of the Web in conducting research

Learning Styles— Recognizing Differences

Individuals learn in a variety of ways. These learning differences are addressed throughout the textbook by recognizing the tenets of learning theory and utilizing a variety of techniques to address these tenets, including the following:

- Providing *Learning Goals* at the beginning of each chapter
- Coordinating end-of-chapter *Workplace Applications* with the *Learning Goals*
- Utilizing a writing style that reinforces concepts presented with current real-life cases and illustrations
- Presenting case studies based on real-life situations in *Find the Problem* and *Critical-Thinking Activities*
- Providing *Workplace Applications* involving teamwork, individual work, written presentations, and oral presentations
- Utilizing the Web to enhance research skills
- Providing a summary in each chapter to reinforce the important points
- Providing an *Applications Workbook* with activities that support the concepts presented in the textbook
- Providing self-assessment of goal achievement through completion of *Assessment of Chapter Goals*
- Providing PowerPoint slides as an overview of each chapter

New in this Edition

- **Chapter 16, Financial Analyses—Organizational and Personal**
As educated wage earners and contributing members of society, students must acquire an understanding of the financial picture of

organizations, as well as an understanding of how individuals prepare themselves to achieve their financial goals. This chapter helps to satisfy these needs.

- Find the Problem

Real-life case situations are presented at the end of each chapter.

- Two additional cases per chapter focus on developing critical thinking.
- A *Vocabulary Review* appears at the end of each chapter.
- An *English and Word Usage Drill* appears at the end of each chapter.
- An *Assessment of Chapter Goals* is included at the end of each chapter.
- New *Workplace Applications*, with at least 50 percent of the applications in each chapter new.
- PowerPoint slides are expanded to include an outline of the major points of each chapter and selected concepts.

Learning Aids

- Key technology and vocabulary-building terms highlighted in each chapter, with definitions for terms given in the chapters and in a glossary
- Numerous illustrations and figures
- Professional pointers at the end of each chapter
- Critical thinking addressed through real-life case situations
- Online research applications designed to reinforce use of the Web
- Chapter summary
- Student CD that contains additional activities and forms for use in *Workplace Applications*
- *Reference Guide* that serves as a review of grammar and punctuation rules, basic formats for letters, and guidelines for business introductions
- Six part tests, with one for each part of the textbook
- Final exam

Instructor Resources

- Comprehensive Instructor's CD that includes learning theory principles, the Learning Goals for each chapter, chapter outlines, teaching suggestions, additional resource suggestions, *Find the Problem*, *Critical-Thinking Activity*, and *Workplace Applications*
- Testing software that offers the instructor the opportunity to create printed tests and choose questions in rank order
- PowerPoint slides for each chapter, including an outline for each chapter and selected concepts within chapters

WebTutor on WebCT and **WebTutor on Blackboard** are also available for use as an online course for distance learning.

The Authors

Dr. Patsy J. Fulton-Calkins' experience in the field is extensive. Her experience in the workplace includes working as an administrative professional for large corporations for six years. Early in her career she completed the CPS certification. Her teaching experience includes more than 17 years at the university, community college, and high school levels.

Courses taught at the community college and high school level include office procedures, keyboarding, business communication, bookkeeping, business law, general business, and vocational office education. At the university level, she taught courses in business and society, senior level management capstone courses, and a general education course covering diversity in the United States. Short courses taught for business and industry include CPS review and communication courses.

In addition to her teaching experience, she has extensive management experience in the following positions:

- Chancellor of Oakland Community College (the CEO), Oakland County, Michigan
- President of Brookhaven College, Dallas, Texas

- Vice President of Instruction, El Centro College, Dallas, Texas
- Vice President of Instruction, Cedar Valley College, Dallas, Texas
- Division Chairperson of Business and Social Science, Cedar Valley College, Dallas, Texas

She also engages in consulting work with community colleges across the nation.

She has traveled extensively within the United States and abroad. Her international travels include China on a Fulbright program for community college presidents, Korea (where she established a sister college with JuSeong College), Hong Kong, England, France, Italy, Germany, Belgium, Switzerland, the Netherlands, Mexico (where she helped establish a language program for community college students), and Canada.

Her educational credentials include a B.B.A., an M.B.Ed., and a Ph.D. Honors include Outstanding Alumnus, University of North Texas; Transformational Leader in Community Colleges; Who's Who in America; Outstanding Woman in Management; listee in *Michigan Women: Firsts and Founders*; Paul Harris Fellow of Rotary International; Beta Gamma Sigma, National Honorary Business Fraternity; and Piper Professor.

Karin Stulz has held a faculty position in the Walker L. Cisler College of Business at Northern Michigan University for the past 14 years. She has extensive experience in the administrative professional field. Her career at Northern Michigan University began with a variety of full-time administrative professional positions. While teaching primarily community college courses, her teaching responsibilities have included courses in office procedures, keyboarding, formatting, machine transcription, and business math, as well as a capstone evaluation course and internship program. In addition, she had taught a wide

variety of software application courses, including beginning, intermediate, and advanced word processing, spreadsheets, database, presentation software, and software integration. Karin is active in the College, the University, and the local community. She serves on a wide variety of academic and community committees.

Her educational credentials include a B.S., secondary teaching certification, and an M.A.E. degree. She has also earned specialized certifications through the Microsoft Office Specialist Certification program. Specialized certifications include core certification in Access, Excel, PowerPoint, Word, and expert certification in Microsoft Word 2000. Honors include the *Outstanding Teaching Award* in the Walker L. Cisler College of Business as well as the *Postsecondary Business Teacher of the Year Award* from the Michigan Business Education Association.

Reviewers for This Edition

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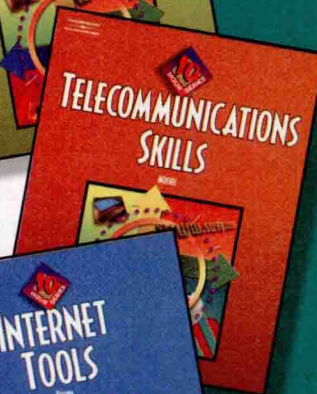
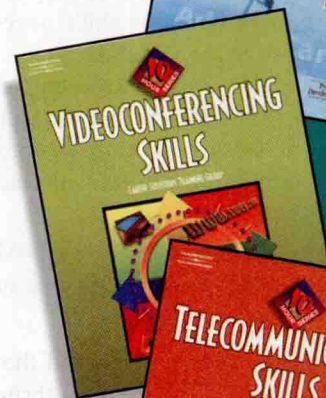
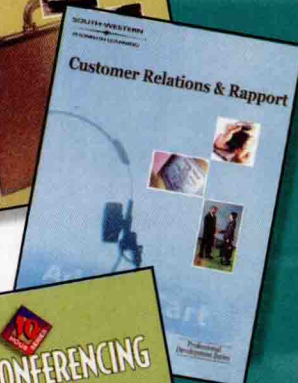
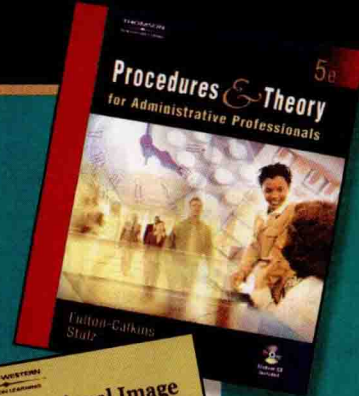
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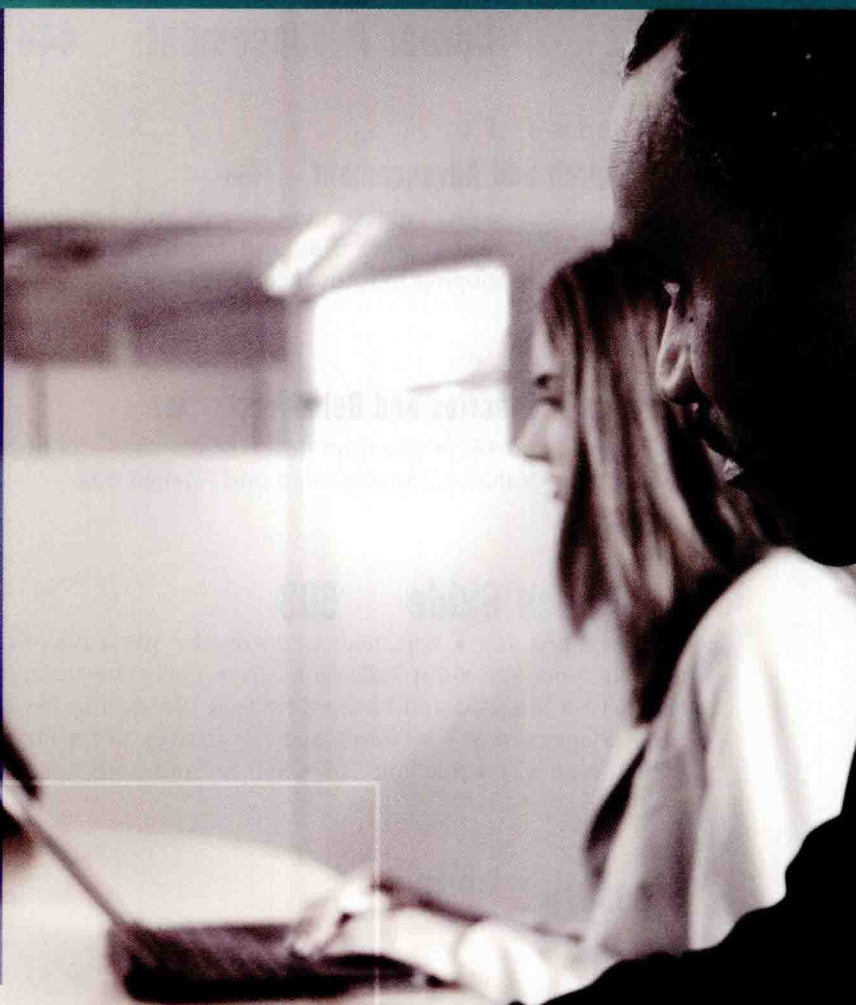
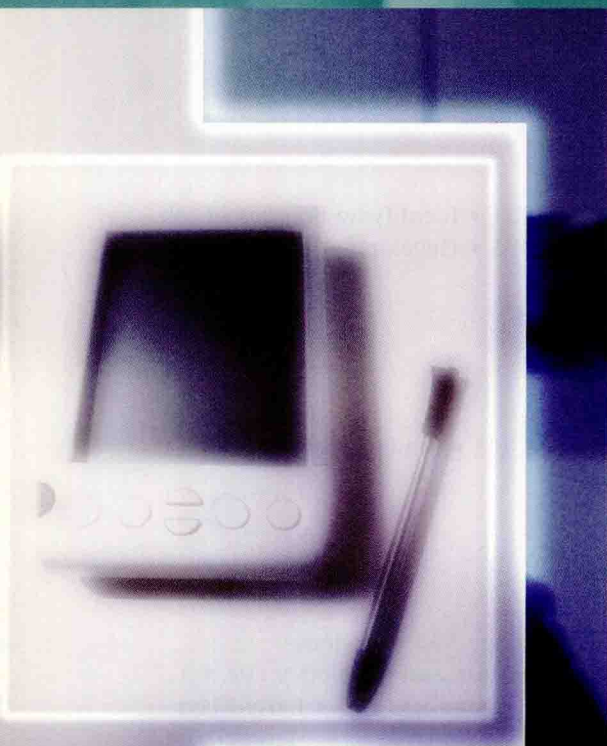
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1

Today and Tomorrow's Workplace

Chapter 1

The Workplace—Constantly Changing

Chapter 2

Anger, Stress, and Time Management

Chapter 3

Ethical Theories and Behaviors

Chapter 4

Workplace Team and Environment

The Workplace— Constantly Changing

LEARNING GOALS

1. Identify forces that are changing the workplace environment.
2. Identify workplace strategies for coping with change.
3. Describe career opportunities available for the administrative professional.
4. Define twenty-first-century workplace requirements.
5. Develop a career plan utilizing effective decision making.

The constantly changing workplace is a reality today. The consistency of the change is evident by the technological innovations that confront you as you work and go about your daily life. Consider the following four examples:

- Today cars have navigation systems that provide graphic directions of how to get from one point to another and a human voice to give verbal directions.
- The workplace is no longer confined to the traditional office; you are able to operate via technology from home offices, from cars, from international cities, or from tropical beaches. JetBlue AirwaysSM, an airline based at New York's John F. Kennedy International Airport, has its entire force of reservation agents working from their homes.
- In the world after 9/11, technology allows individuals to be scanned using patterns of the iris or fingertip or the shape of the hand or face. Thousands of such systems are being tested or are already up and running. At a handful of airports, face scanners scrutinize passengers. The systems can then compare passing faces against a database of images from FBI lists of suspected terrorists and wanted felons.
- According to some projections, people may be living on Mars by 2017.

In addition to technology, the composition of the workforce is changing constantly. Whether you are preparing to enter the workplace after finishing your studies or you are presently employed either full- or part-time, the increased cultural diversity of the environment is most likely apparent to you. The population of the United States is more diverse today than it has ever been. According to projections, this diversity will continue to increase due to the following:

- Increases in the Asian and Hispanic populations as a percent of the total population of the United States
- Continued immigration to the United States from other countries



We live in a world of constant technological innovation.

- Increased longevity of the population

As an administrative professional employed in the technological and diverse workplace, your goals must be as follows:

- Proficiency in the field
- Commitment to lifelong learning
- Development of strong human relations, critical-thinking, and decision-making skills

This chapter will help you understand more about the direction of the workplace and the skills you must acquire to be successful as an administrative professional.

Forces of Change in the Workplace

You live in a time when knowledge is exploding dramatically. Terms such as **Information Age** and **Knowledge Age** describe the age in which you live and work. Continual advances

in technology drive the changes that occur constantly.

Technological Changes

Technology has spawned the **digital era**—a world fueled by numbers. In this world, everyone wallows in numbers—credit card numbers, **PINs** (personal identification numbers), Social Security numbers, checking account numbers, account numbers for utilities, telephone numbers (with many people using cell phones in addition to regular home and workplace phones), fax numbers, and email addresses (which may include numbers).

If you are employed presently or will begin working soon, you will learn about other technological innovations that have changed the way the administrative professional works. You will discover that computer technology influences the following:

- Procedures used to produce work

- Techniques used to communicate from within and outside the office
- Information available (both amount and type) for making decisions

A Diverse Environment

You will also discover dramatic changes in the work environment, including the ones listed here.

- Greater ethnic diversity
- Increased number of immigrants
- Growth in the number of older workers
- Larger numbers of women in the workforce

Greater Ethnic Diversity

The United States is becoming more ethnically diverse; and based on the statistics of the country's young people, ethnic diversity will continue to increase in the future. For example, demographers identify the group of young people born between 1977 and 1995 as **Generation Y**. Projections are that this population will increase at twice the rate of the total population until 2010. By 2020, this percentage is projected to reach 32 percent. Generation Y is the most ethnically diverse generation to date. While minorities make up 24 percent of **baby boomers** (individuals born between 1946 and 1964), minorities make up 34 percent of Generation Y.¹

Another comparison that helps to explain how ethnic diversity is increasing is the ethnic diversity of children in 1980 compared to the projected diversity in 2020. In 1980, nearly three-quarters (74 percent) of all children in this country were non-Hispanic whites. Projections are that by 2020, non-Hispanic whites will constitute just over one-half (55 percent) of all U.S. children. By the year 2010, Hispanics are projected to be 19 percent of the child population, replacing blacks as the largest minority group in the child population. The Asian American population is also ex-



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Projections are that by 2020, non-Hispanic whites will constitute just over one-half (55 percent) of all U.S. children.

pected to continue to grow—increasing to 6 percent by the year 2020.²

According to the 2002–2003 *Occupational Outlook Handbook*, the ethnic origin of the U.S. workforce by 2010 will grow as follows:

- The white workforce population will grow by 0.9 percent.
- The black workforce population will grow by 1.9 percent.
- The population of Asian and other Pacific Islanders will grow by 3.7 percent.
- The Hispanic population will grow by 3.1 percent.³

Increased Number of Immigrants

According to projections, the United States will continue to become home to an increasing number of immigrants. The 2000 census, the latest census (census figures are gathered every 10 years), shows that the percentage of

¹"Faces of the New Millennium," accessed May 5, 2001; available from www.pubweb.acns.nwu.edu.

²"Racial and Ethnic Composition of U.S. Children," accessed May 5, 2002; available from www.aspe.hhs.gov/hsp.

³"2002–03 Editions of The Occupational Outlook Handbook and The Career Guide to Industries Available on the Internet," accessed May 5, 2002; available from www.fhp://146.142.4.23/pub/news.release/ooh.txt.