

NINTH EDITION

# SECRETARIAL PROCEDURES AND ADMINISTRATION

TILTON  
JACKSON  
POPHAM

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# SECRETARIAL PROCEDURES AND ADMINISTRATION

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# Preface

Whether you are using this book to prepare for a secretarial career, to advance to a management position, as a reference in your present job, or to get ready for the Certified Professional Secretary examination, you will be made aware of the secretarial skills and abilities needed to perform at both the operational and managerial levels required in today's office. You will learn that technical literacy is an important competitive edge for the top-level secretary. Your study of *Secretarial Procedures and Administration*, ninth edition, will help you develop an understanding of computer functions, word processing, telecommunications, electronic mail, and a host of other automated devices that allow management to cope with the avalanche of paperwork.

In your operational role as a secretary, you must demonstrate in-depth knowledge of office and secretarial procedures: making appointments, managing records, processing words, handling travel arrangements, coordinating conferences, and directing the flow of information in the organization that employs you. At the managerial level, you will supervise the work of others, make decisions, and provide feedback to your employer on personnel, law, payroll, insurance, and financial matters.

The ninth edition of *Secretarial Procedures and Administration* is designed for use by both the secretarial student and the working secretary. Basic keyboarding skills are assumed. Other skills are presented as if they were new to you. Emphasis is placed on the development and exercise of decision-making ability and human relations skill. Without a pleasant personality and the ability to work with others, it will be difficult for you, no matter how technically qualified, to be successful in business.

A quick look at the Table of Contents will introduce you to the subjects you will cover. Notice that the text is divided into eight parts and 25 chapters. Part One discusses the secretarial profession in general, secretarial responsibilities, the characteristics of a successful secretary, and office environment. Part Two covers document preparation and mail processing. Technological advancements, including data processing, word processing, reprographics, and telecommunications, are

discussed in Part Three. Travel, meetings, and large-scale conferences and conventions are the subjects of Part Four. In Part Five you will learn how to research business topics and techniques for preparing business reports. A secretary to an executive may be asked to handle financial and legal documents. These topics are covered in Part Six. Part Seven deals with seeking employment and planning your future in business.

Part Eight is a reference and communications guide. It identifies accepted practices for abbreviating and capitalizing words, writing and using numbers, and dealing with plurals, possessives, and other punctuation. Some basic arithmetic is also reviewed. You will use the Reference Guide throughout your study of this book.

At the end of each chapter is a list of carefully selected suggested readings. You will find many uses for these lists. Each chapter also has discussion questions and special problems which will allow you to apply what you read.

Several case problems, close adaptations of actual office situations, are included at the end of each part. These cases bring realism to this course. As you solve these cases, try to develop a set of principles you can use to cope with similar situations you may encounter on the job.

The authors and the publisher wish to thank the educators who reviewed many chapters of the first-draft manuscript and contributed their expertise in the development of this text: Dr. Carol Henson, Clayton Junior College, Morrow, Georgia, and Dr. Patsy Nichols, Murray State University, Murray, Kentucky, in particular. We also want to give special thanks to Dr. Sue Rigby, Northern Michigan University, for writing Chapters 4, 5, 6, and 8 of this text.

The authors hope that this textbook will help you adopt high standards of performance. We hope, too, that you will experience some of the excitement that can be found in the business office by those who are prepared to perform competently and who bring with them a zest for learning new things. We believe, too, that you are entering a field that has great potential for career-minded individuals. We sincerely wish you a happy and prosperous secretarial career.

*Rita Sloan Tilton  
J. Howard Jackson  
Estelle L. Popham*

# Contents

<b>PART ONE</b>	<b>THE SECRETARIAL PROFESSION</b>	<b>1</b>
	Chapter 1 The Role of the Secretary	3
	Chapter 2 The Secretary in the Office Environment	25
	Chapter 3 Office Visitors and Employer's Appointments	57
<b>PART TWO</b>	<b>INFORMATION PROCESSING: BASIC TASKS/ RESPONSIBILITIES</b>	<b>83</b>
	Chapter 4 Preparing Final Documents	85
	Chapter 5 Processing Incoming Communications	112
	Chapter 6 Taking, Giving, and Transcribing Dictation	135
	Chapter 7 Composing Assignments	164
	Chapter 8 Handling Outgoing Communications and Shipments	197
<b>PART THREE</b>	<b>INFORMATION PROCESSING: SERVICES/ EQUIPMENT/SYSTEMS</b>	<b>231</b>
	Chapter 9 Data and Word Processing	233
	Chapter 10 Reprographics	258
	Chapter 11 Basic Telephone and Telegraph Services	284
	Chapter 12 Communication Systems and Services	318
	Chapter 13 Information Resource Management	342

<b>PART FOUR</b>	<b>ADMINISTRATIVE SUPPORT SERVICES: TRAVEL AND CONFERENCES</b>	<b>387</b>
	Chapter 14 Expediting Travel Arrangements	389
	Chapter 15 Planning and Facilitating Meetings	422
<b>PART FIVE</b>	<b>ADMINISTRATIVE SUPPORT SERVICES: RESEARCH AND ORGANIZATION OF BUSINESS DATA</b>	<b>459</b>
	Chapter 16 Collecting Business Information	461
	Chapter 17 Presenting Statistical Information	482
	Chapter 18 Assistance with Writing Reports, Procedures, Speeches, and Publications	507
<b>PART SIX</b>	<b>ADMINISTRATIVE SUPPORT SERVICES: FINANCIAL AND LEGAL PROCEDURES</b>	<b>547</b>
	Chapter 19 Financial Responsibilities	549
	Chapter 20 Investments and Insurance	579
	Chapter 21 Payroll and Tax Records	609
	Chapter 22 Producing and Processing Legal Papers	631
<b>PART SEVEN</b>	<b>YOUR PROFESSION: PLACEMENT AND ADVANCEMENT</b>	<b>661</b>
	Chapter 23 Selecting the Right Position	663
	Chapter 24 Planning for Your Professional Future	706
	Chapter 25 Fulfilling Your Administrative Role	731
<b>PART EIGHT</b>	<b>REFERENCE GUIDE</b>	<b>763</b>
<b>INDEX</b>		<b>864</b>



## **PART ONE**

### **THE SECRETARIAL PROFESSION**

Part One covers the many dimensions of the professional secretary's position. For you, the college-trained secretary, it suggests the basic contributions you can make to the managerial functions of the office.

Chapter 1 defines the emerging secretarial role in an automated office environment. Career paths created with the development of word processing/administrative support centers are also included. The chapter also discusses the employment outlook for secretaries, salaries, job satisfaction, and promotional opportunities. A section is devoted to secretarial work trends and patterns.

Chapter 2 discusses the office environment. It also establishes guidelines for setting priorities, managing time, and maintaining essential secretarial records.

One of the most enjoyable aspects of the secretarial position is receiving office visitors. That responsibility and the records it requires are presented in Chapter 3.



**CHAPTER 1**

**THE ROLE OF THE SECRETARY**

**CHAPTER 2**

**THE SECRETARY IN THE OFFICE  
ENVIRONMENT**

**CHAPTER 3**

**OFFICE VISITORS AND EMPLOYER'S  
APPOINTMENTS**

# The Role of the Secretary

In this age of automation in which office equipment and procedures are changing dramatically, the secretarial position continues to provide employment and promotional opportunities for entry-level and experienced secretaries. In 1982 the Department of Labor estimated a 2.4 million secretarial work force. By 1995 that figure should be 3.1 million, a 29 percent increase.<sup>1</sup> Although secretarial work has no gender, women continue to dominate this area of office employment (still approximately 99 percent female.)<sup>2</sup> While it is believed that automation has the potential for increasing the number of male secretaries, thus far it has had little or no effect on male employment. Women continue to gravitate toward the secretarial profession, and, as in the past, few men choose to do so. The attractiveness of the secretarial position for women is especially noteworthy in view of the increased opportunities for them in other fields once open exclusively to men.

Of general interest is the increasing number of women entering and remaining in the labor market. In 1984 the United States Census Bureau reported that women represented 44 percent of the total labor force or 54 percent of the total female adult population. Projections are that in the 1990s 63 percent of the total female adult population will be on the job.

The demand for secretaries exceeds supply in every geographical area and in every type of business, government, or philanthropic organization. Even in times of economic recession, secretarial positions are available and go begging. In fact, it is currently estimated that approximately 20 percent of all secretarial openings are not filled.<sup>3</sup> It is no surprise, then, that secretarial salaries are on the rise. All these facts

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<sup>1</sup>U.S. Department of Labor, Bureau of Labor Statistics, "The Job Outlook in Brief," *Occupational Outlook Quarterly*, (Washington: U.S. Government Printing Office, Spring, 1984), p. 18.

<sup>2</sup>"Secretary Facts 80s," *The Secretary* (October, 1983), p. 17.

<sup>3</sup>Thomas B. Duff and Patricia A. Merrier, "Secretaries: Caught in the Past?," *Management World* (October, 1984), p. 10.

lead to the conclusion that the secretarial field continues to be a stable and good source of employment.

This chapter presents various definitions of the secretarial position and discusses secretarial responsibilities, job opportunities, salaries, the effect of automation, and the personal characteristics of the successful secretary. It serves as an introduction to the secretarial profession and sets the stage for your study of *the* profession for this decade.

## DEFINITION OF A SECRETARY

In this text, the words *employer*, *principal*, *manager*, and *executive* will be used interchangeably to denote the individual to whom the secretary reports.

The secretarial classification is perhaps one of the least understood in office occupations. Many employers are unclear as to what a professional secretary is expected to do on the job; thus employers tend to use the title *secretary* generally to describe clerical positions. To attract applicants, an employer will advertise for a secretary when a study of the position's requirements indicates that the position is actually of a clerical nature.

The individual performing secretarial responsibilities in today's office may have any of the following titles: secretary, administrative secretary, administrative assistant, executive secretary, or private secretary. The most popular title is *secretary*.

One common definition of *secretary* is that adopted by Professional Secretaries International (PSI), an organization representing more than 42,000 secretaries in the United States and other countries:

*A secretary shall be defined as an executive assistant who possesses a mastery of office skills, demonstrates the ability to assume responsibility without direction or supervision, exercises initiative and judgment, and makes decisions within the scope of assigned authority.*

According to this definition, a secretary is a highly qualified person who has not only mastered office skills but possesses personality requisites of the highest order. A secretary must know the scope of his or her authority and discharge the responsibilities within that sphere. The secretary must judge correctly when to follow through alone and when to consult the employer about how to handle a job. Here is a person capable of making many decisions, of composing routine correspondence independently, and, perhaps, of supervising other office workers and keeping their personnel records.

The person who fits the PSI definition is frequently secretary to a chief executive officer (CEO) or to a managing official in a large organization. This secretary is often referred to as an *executive secretary* or an *administrative assistant* (see Illus. 1-1).

The executive secretary enjoys informal rank within the company according to the formal rank of the executive. The executive secretary has access to privileged information and knowledge of official power in an organization; thus, the executive secretary occupies a unique position of influence and power in the office.



Illus. 1-1  
An executive secretary performs duties of a highly confidential nature requiring initiative, judgment, and knowledge of company practice.

The Administrative Management Society classifies secretaries into three categories (Secretary B, Secretary A, and Executive Secretary/Administrative Assistant). These classifications are defined here.

#### *Secretary—Level B*

Performs a limited range of secretarial duties in a small company or for a supervisor in a larger firm. May take dictation and transcribe from notes or dictating equipment with speed and accuracy. Screens calls, makes appointments, handles travel arrangements, answers routine correspondence, and maintains filing systems.

#### *Secretary—Level A*

Performs an unlimited range of secretarial duties for middle management personnel or more than one individual. Composes and/or

takes and transcribes correspondence of a complex and confidential nature. Position requires a knowledge of company policy, procedure, and above-average secretarial and administrative skills.

*Executive Secretary/Administrative Assistant*

Performs a full range of secretarial and administrative duties for a high-level member of executive staff. Handles project-oriented duties and may be held accountable for the timely completion of these tasks. Relieves executive of routine administrative detail. Position requires an in-depth knowledge of company practice, structure, and a high degree of secretarial/administrative skills.

These groupings are of special interest because they were adopted by people who usually administer salaries and supervise job evaluations. Obviously they are advantageous to secretaries in clarifying job functions.<sup>4</sup>

It is likely that in a first secretarial position an employee will be classified as a Secretary B. With experience and knowledge, the employee should eventually rise to the Secretary A level and ultimately to Executive Secretary/Administrative Assistant. It is also possible that as the secretary gains experience, a shift may be made to a supervisory level.

## THE SCOPE OF SECRETARIAL WORK

The specific responsibilities of the secretary will depend on at least three factors: the experience level of the secretary, the nature of the employer's work, and the electronic equipment available. There are, however, certain basic functions inherent to the secretarial position. They are

- Typing/keyboarding
- Transcribing (from shorthand or machine dictation)
- Processing mail
- Telephoning
- Scheduling appointments
- Greeting visitors
- Composing and editing
- Research and abstracting information

---

<sup>4</sup>1985-86 *Office Salaries Directory* (Willow Grove, PA: Administrative Management Society, 1985).

- Organizing time and work
- Maintaining special records
- Completing various administrative duties
- Coordinating meetings
- Making travel arrangements
- Selecting appropriate copying/duplicating methods
- Exercising effective human relations

The secretary performing all these functions operates in the established or traditional role and will be referred to as a *multifunctional secretary*. The multifunctional secretary may work in any of a number of environments. A physician or owner of a small business may have only one secretary on the staff. The office may be a small one, and the secretary may have access to limited equipment. Or the secretary may hold a position in a large corporation with a variety of electronic equipment and sophisticated organizational patterns. In this situation, the higher the secretarial level, the greater the number of functions to be performed.

## THE EFFECT OF OFFICE AUTOMATION ON THE SECRETARY

The secretary, even in the smallest office, will be increasingly involved with office automation. The automated office environment will broaden the scope of office functions performed by the secretary and provide more options for career opportunities. Every secretary, therefore, needs to be familiar with the concept and the technology of office automation.

In a broad sense, *office automation* is concerned with the accomplishment of office functions through the application of technology to the processing and communicating of information. Today, office automation provides the basis for the *integrated office* (also called the office of the future). In the integrated office, previously separate office functions (dictating, typing or keyboarding, storing and retrieving information, communicating, and distributing information) are interdependent functions. More will be said about the integrated electronic office later in this text.

### Word Processing

Although words have been processed ever since man put chisel to stone, the term *word processing* has been adopted to describe a new

method of improving the efficiency of business communication. With the introduction of IBM's (International Business Machines Corporation) Magnetic Tape Selectric Typewriter (MT/ST), automation entered the secretarial work place. This breakthrough made possible the mechanization of much of the secretary's production of typed material. Since this new equipment was too expensive to place at every secretary's desk, a new organizational pattern was introduced to maximize its use. Secretarial functions were reorganized and were divided into two parts—typing activities and nontyping activities.

One group of employees, identified as *word processing specialists* or *word processing operators*, was trained to operate the expensive equipment. This group was located in a central *word processing center*. The center was responsible for most, if not all, of the typing activities formerly accomplished by individual secretaries. Nontyping secretarial activities were performed by *administrative secretaries*. These secretaries were clustered in a central location and served several employers.

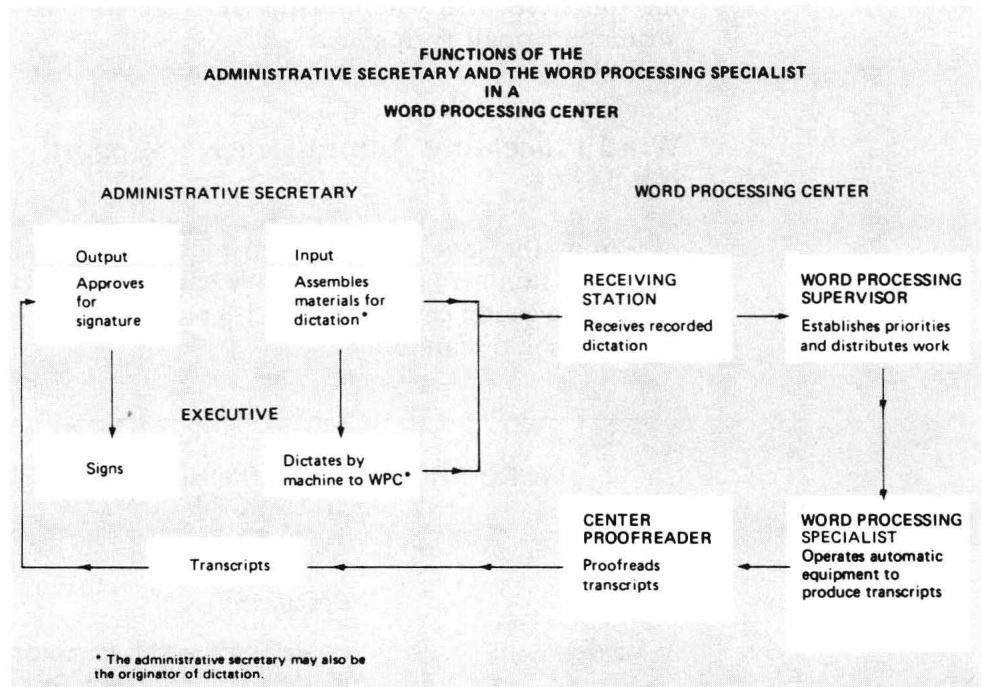
Many large companies found it advantageous to decentralize the word processing function by dispersing the clusters of secretaries and placing them near or in the departments they served. The advantages of departmental centers are that (1) operators can master the specialized vocabularies of the departments involved; (2) there is better communication between the originator of a document and the transcriber; and (3) the operator has a stronger sense of identity with the originator and, as a result, a more personal relationship.

Many large corporations continue to use the word processing center/administrative support organizational pattern. For this reason, this system is described in detail in the next section.

### The Word Processing Center/Administrative Support System

Word processing centers are organized according to a company's needs. One large center may serve all departments, or there may be a center for each heavy volume department or a center for several related departments. The flowchart in Illus. 1-2 shows one possible organizational pattern. It shows the interrelationships of the word processing center and the secretary in an administrative support center. In this plan the administrative secretary gets materials ready for dictation and the principal (originator) dictates. The administrative secretary may





Illus. 1-2  
Interrelation-  
ships of the  
word processing  
center and the  
administrative  
secretary.

dictate the material if it is routine. In this word processing unit there are four components:

1. The receiving station, which logs in the received dictation
2. The word processing supervisor, who decides the order in which work is to be done and assigns the work to individual specialists
3. The word processing specialist, who operates the equipment
4. The center proofreader, who proofreads the transcripts

The approved transcripts are then sent back to the administrative secretary, who attaches the necessary enclosures and approves the document for signing. The principal signs and the administrative secretary distributes the output.

Group needs determine the number of administrative secretaries in a center; for example, six administrative secretaries may serve as many as twenty principals. Administrative secretaries may have general functions for all other-than-typewriting tasks, or they may be assigned special functions in which they excel. For instance, an administrative secretary may handle all records management or travel arrangements or library research for all the principals served by a unit. Although in theory the administrative secretary performs only nontyp-

ing functions, many administrative secretaries have access to typewriters for small typing jobs.

Word Processing/Administrative Support  
Job Titles

From the inception of word processing/administrative support centers, a number of job titles have emerged, particularly in the word processing center category. Illus. 1-3 provides a list of typical job titles and brief job descriptions.

Illus. 1-3  
Typical job titles  
and brief job  
descriptions for  
word processing  
and administrative  
support personnel.

WORD PROCESSING/ADMINISTRATIVE SUPPORT JOB DESCRIPTIONS	
Word Processing	
<i>Title</i>	<i>Description</i>
Manager .....	Overall responsibility for word processing center; budgets, reports, forecasts.
Supervisor .....	Schedules and coordinates work, institutes work measurements, analyzes production.
Proofreader .....	Proofreads all work; may be responsible for training programs.
Senior Specialist .....	Acts as assistant word processing supervisor; knowledgeable in all equipment.
Specialist .....	Experienced operator; capable of revising and formatting complicated documents including lengthy, technical, and statistical work.
Trainee .....	Entry-level position.
Administrative Support	
Manager .....	Responsible for all services in the administrative support area.
Supervisor .....	Schedules and administers work flow; responsible for staffing requirements, budgets, etc.
Senior Adm. Secretary	Acts as assistant to supervisor, composes documents for principals (employers), researches information; other semiprofessional duties vary.
Administrative Secretary .....	Works for a number of principals under the direction of a supervisor; duties vary.

Source: Adapted from "Job Descriptions," *Words* (February-March, 1986), pp. 37-39. Copyright 1986 AISP; reprinted with permission from the Association of Information Systems Professionals, 1015 N. York Road, Willow Grove, PA 19090; (215) 657-6300.