Online Instructor's Manual
to accompany

Office Procedures in the 21st Century

Eighth Edition

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Table of Contents

PART III: INDIVIDUAL CHAPTERS

CHAPTER 1
UNDERSTANDING THE CHANGING AND CHALLENGING OFFICE

CHAPTER OUTLINE

Your Company
        Know Your Company
        Mission Statement
        Ethics in Business
        Current Office Trends
        Organizational Structure
                Classification of Authority
                Line Organization
                Line-and-Staff Organization
                Participatory Management
                Organization Chart
You and Your Manager
Your Role
        Job Titles
        Office Support Functions
        Telecommuting
                Virtual Office
        Job Prospects for the Future
Your Workspace
        Ergonomics and the Environmental Office
                Computer Workstation
                Desktop Supplies and Equipment
                Décor
                Furniture
                The Environmental Office

International Employment

PURPOSES OF THE CHAPTER

1. To strive to know all about your company.

2. To be aware of the company's mission statement and how the office professional's role contributes to the mission statement.

3. To realize the importance of maintaining a high standard of ethical behavior in the office.

4. To understand the company's organizational structure.

5. To help the students become aware the office worker is an important communication link in the office—to the company, to the office, and to his or her manager.

6. To be familiar with the various job titles used in today's offices.

7. To focus on the office functions which have been automated.

8. To identify today's office as one that has broadened to include new options such as telecommuting.

9. To be aware of the importance of understanding how to make your office space ergonomically correct.

10. To introduce the student to international employment opportunities.

LEARNING OUTCOMES

1. Describe the purpose of a company mission statement.

2. Explain the purpose of a company code of ethics.

3. Define and explain the classifications of authority.

4. Explain the importance of developing a good working relationship with your

   manager.

5. Explain the role of the office professional.

6. Identify common office support functions.

7. Define the elements of appropriate ergonomic design in the workplace.

TEACHING SUGGESTIONS

1. Give the students some eye-openers on the variety of duties performed by office professionals, how communication flow has increased, and the responsibilities that they must accept. Do this by asking a former student or advisory board member to talk to your class about the changes taking place in his or her office.

2. Call attention to where the increase in jobs is in your area. Invite someone from the employment field to discuss the availability of jobs, emerging job titles, entry-level requirements, and salary information.

3. Assign articles to be read to broaden the students' concepts of the automated office. Suggest the articles come from the list given in the Quick Tip at the end of the

chapter. Spend some class time discussing what the students learned from reading the articles.

4. Invite an administrative assistant who reports to more than one manager to speak to the class to discuss the dos and don'ts for success in that type of job.

5. Assign a major company located in your area for students to research. Include who the CEO is, what products are manufactured, is the company privately owned or traded on one of the stock exchanges, what is the price of their stock, where is their service area, do they have plants outside the U.S, if so, where.

6. Stress the importance of recognizing lines of authority. Students have difficulty understanding the role of staff. Explain that a staff manager has line authority over his/her own department or unit, but the staff manager and his or her department serve as specialists to assist and advise line managers throughout the organization.

7. Have students practice MS Word's Organization Chart by creating an organization chart of the college, campus, or school. If a full install was not made, MS Organization Chart may need to be installed from the setup disk.

POINTS TO EMPHASIZE

1. Companies want their employees to know the company mission statement and code of ethics and where to find it.

2. Following the chain of command is required. The office professional can get into real trouble by not doing so.

3. Understand the classifications of authority and the difference of each. Locate the company organization chart and memorize the names and titles of those people who are listed on the chart.

4. The office worker is an essential human link in the rapid flow of business information.

5. Many office professionals today work for more than one manager or executive.

6. Professional organizations in the office technology field continue to work toward raising the professional status of office workers. Mention IAAP (International Association of Administrative Professionals) and NALS (National Association of Legal Secretaries) chapters located in your area.

7. Formal structure is established within organizations to designate authority and responsibility.

8. Lines of authority are not always easy to recognize, and problems arise when lines of authority are not always clearly defined.

9. An employee should always direct a problem or situation needing attention to an immediate supervisor.

10. The title secretary has changed; the role, responsibilities, and equipment used to perform office jobs has changed or is in a constant state of change; but, even with all the change, the basic business functions still exist.

11. The five office support functions are routine, technical, analytical, interpersonal, and managerial. You should understand each function and what skills each function requires.

12. More and more companies are offering office personnel the opportunity to work from home or other remote locations. From telecommuting to and from your home and the office to independent virtual assistants who work strictly from home, all are growing as more and more employer's take advantage of the economic benefits. The office of the future suggests an increase in the mobile office.

13. More and more emphasis is being placed on creating an ergonomic office to keep each employee healthy. Each employee should make sure his or her work station is ergonomically correct for his or her size to avoid future health problems.

14. With more and more companies moving their operations outside the U.S., opportunities for international employment is increasing. If students consider working abroad, they will find many similarities to employment in the U.S.

RELATED ACTIVITIES

1. Have students research how many levels of management exist at your school. Groups or teams work well for this assignment. If your school has an organizational chart, have the students study it and prepare a description of the lines of authority and the relationship of the work areas to one another.

2. If your school does not have an organization chart, have students draw one, using the titles listed in the school catalog. If they encounter difficulty deciding who reports to whom, provide that information for them.

3. The United States Department of Labor is an agency of the federal government, and the Secretary of Labor is a member of the President's cabinet. The Department has a tremendous array of responsibilities and programs. One important division is its Bureau of Labor Statistics, which has principal responsibility for gathering facts about the American economy. For instance, this is the agency that does continual research on employment and unemployment levels in the United States. The Bureau of Labor Statistics has numerous publications, including the **Occupational Outlook**

Handbook (OOH), a major source of information about occupational and job market trends. Here you will find some of the best and most current information available on the nature of various occupations, the levels and types of education required, whether growth is projected to be slower, about average, or faster than for all occupations, and so on. The printed version of the OOH has been a standard reference for career counselors and continues to be available in nearly all major libraries and career centers. Connect to the Internet, then follow these steps:

1. Type in this url: http://stats.bls.gov/
2. Click on "Occupations."
3. Click on (Latest Version) Occupational Outlook Handbook.

SOLUTIONS TO "FOR YOUR DISCUSSION"

1. Discuss how the role of the office professional relates to the company's mission statement.

   By affirming the company's primary goals, this statement assures the company the office professional is working toward the same objectives.

2. Describe how the office professional applies ethics on the job.

   The code of ethics is a set of rules governing the behavior of the office professional that calls for high standards of honesty, objectivity, diligence, and loyalty. This code gives the employee direction concerning expectations of the company regarding his or her behavior on the job.

3. Explain the difference between line authority and staff authority and compare the advantages and disadvantages of each.

   Line managers have direct responsibility; staff managers work in an advisory, functional, or service capacity. Staff managers usually advise line managers and make recommendations. Line managers have the final say in accepting or rejecting the recommendations of staff managers.

   Advantages of Line Organization:
   *   Ease of understanding*
   *   Employees have direct accountability to their superiors*
   *   Clear-cut place for each worker*

   Disadvantages of Line Organization:
   *   Each supervisor has large areas of responsibility*
   *   Is more structured, thus, less flexible*
   *   Flow of communication and information often restricted*

Limited use of employees where needed

Advantages of Line-and-Staff Organization
  Line personnel has freedom from performing specialized tasks
  Has flexibility within staff to pursue unique projects
  Availability of expertise to line personnel

Disadvantages of Line-and-Staff Organization
  Line employees do not have a clear understanding of the staff member's duties
  Problems arise if staff members with line duties contradict line manager

4. What is meant by *participatory management* and how does it affect the organizational structure?

   In isolated situations, project teams are formed; bringing together employees with the talents needed to work on a specific project. The team members are encouraged to communicate with different levels of management and give input about their own areas of responsibility and solutions.

   They affect the organizational structure when they work in the teams, and there is no line of authority. Each member is equal, even though there might be a manager, office professional, accountant, or custodial employee on the team.

5. What is the purpose of an organization chart?

   An organization chart is a graphic illustration of the formal structure of an organization. It shows lines of authority, existing divisions of work, and the relationship of the work groups to each other.

6. What is meant by *chain of command* in relation to classification of authority?

   The line of authority that has been established in an organization is called its chain of command. Each employee must follow this chain of command; in other words, no one in the chain can be bypassed.

7. List five ways you can build a good relationship with your manager.

   1. Each time you are assigned to a new manager, learn his or her priorities, preferences, and work habits.
   2. Adjust your schedule to that of your manager.
   3. Admire and respect your manager, and do what you can to build his or her morale.
   4. Refrain from expressing your manager's opinions.
   5. Refrain from giving your personal interpretation of a company policy. That is your manager's job.

6. *Be careful not to give away secrets inadvertently to your friends and coworkers, your manager's counterparts, or competitors.*
7. *Be loyal.*

8. Describe the five basic office support functions. Include in your discussion examples of each function.

Routine functions: require minimal original thinking; include essential skills, such as filing, photocopying, coordinating direct mailings, and keeping logs.

Technical functions: require judgment and advanced office skills, such as a high level of keyboarding and demonstrating proficiency with various software applications.

Analytical functions: require critical and creative thinking and decision-making skills, creating and analyzing reports, planning meetings and special events, working closely with vendors and suppliers, and making decisions regarding equipment purchases.

Interpersonal functions: require judgment, analytical (decision-making), and people skills, such as coordinating a team project, or quickly establishing rapport with team members and identifying and responding to preferred work styles and personality traits.

Managerial functions: require planning (analytical), organizing (analytical), measuring (analytical), using Internet/intranet and communications for research, interviewing, orienting supervising and motivating other staff (interpersonal communications); examples include budgeting, staffing, personnel evaluations, and taking action to solve problems.

9. Discuss the advantages and disadvantages of telecommuting and having a virtual office.

Advantages:
   Entrepreneur avoids paying insurance for the employee.
   Entrepreneur avoids paying payroll tax on the employee each payroll period.
   Entrepreneur avoids having to meet OSHA safety and health rules.
   Employee is available beyond the nine-to-five schedule.
   Employee is hired only when needed.
   Employer does not have to provide workspace for employee.

Disadvantages:
   Contact is limited by equipment.
   Employee may not be available when needed.
   Employee may be able to work only when needed.
   Employee may have to pay money to get office set up.

Employee must pay self-employment tax on him-self or herself.

10. Describe the ideal ergonomically correct office. Include office layout, décor, furniture, and computer equipment.

   a. *Computer chair back support and height should be adjustable with a five-pedestal stand.*
   b. *Computer should have a screen glare guard to avoid screen glare.*
   c. *A wrist pad should be attached to the mouse pad to rest hands when not keyboarding.*
   d. *A wrist pad should be placed in front of the keyboard to rest hands when not keyboarding.*
   e. *Wall colors should be cool tones to aid concentration.*
   f. *Office furniture should be modular so it is easy to move and change.*
   g. *The computer screen should be placed so the worker is looking slightly down.*
   h. *The computer table height should be adjustable.*
   i. *A foot rest should be provided.*
   j. *The keyboard should slope from 5° to 25°.*

SOLUTIONS TO "DEVELOPING CRITICAL THINKING SKILLS: PROBLEM SOLVING ON THE JOB"

1. **Mission statement.** The company's mission statement presents the goals, strategic intent, and business direction for the company. It is important that Cindi knows the mission statement to help her evaluate whether or not she is working toward the same objectives.

    As she works during the next review period, she should keep a record or list of those activities she performed that provided quality goods and services at competitively low prices and generated earnings to supported or influenced military morale, welfare, and recreation programs. In her next performance review session, she can bring to her supervisor's attention how she specifically improved her performance, by referring to the list, describing the activities, and explaining how each activity directly contributed to the mission.

2. **Company's structure.** By posting the company mission statement, code of ethics, organizational structure, classification of authority, and organization chart on bulletin boards, in newsletters, on the company Web site, and in meetings, the company is showing its concern for each employee and the consumer. The company should constantly stress that all employees should work toward the same company goals.

3. **Telecommuting.** Jana was not correct in reporting David. She is David's coworker and does not have all the information. She assumed if David did not answer the phone, he should be working. Since David worked at home, he may have preferred to work in the evenings. Jana may not have approved of employees working at home and felt more supervision was necessary. David's manager probably told her he was pleased with David's work and perhaps she should concern herself only with her work. He might have suggested she talk to David about a convenient time she should call in order to reach him. David's manager probably told David nothing about Jana's complaint.

4. **Chain of command.** You should suggest to Milan that she talk to Chikondi before she talks to Chikondi's supervisor. Chikondi might lower her conversations and laughing if she knew it was disturbing Milan's work. You should not support Milan going to someone's supervisor without talking to them first. Chikondi's supervisor might mention to her that she might want to tone down her conversations since it was disturbing other workers. Chikodi's supervisor would not like Milan going over her head to another level of supervision to complain.

SOLUTIONS TO "IMPROVING YOUR WRITING SKILLS: PUNCTUATION WORKSHOP"

The rules in all workshops are based on *The Gregg Reference Manual,* 11th ed. If you choose to follow another reference, an adjustment may be needed to students' responses.

Rule 1: Commas Used with Conjunctions

1. We carefully entered the data in the computers, but the accounting clerk decided to double-check our work.

2. C

3. New application software usually comes stored on a CD-ROM disk, but you can also request it on floppy disks as well.

4. Absenteeism is a problem in many offices, and management constantly strives to reduce it.

5. "Just Say No" to drugs is a worthwhile program against drug abuse, yet each year drug use continues to devastate our youth.

6. C

7. Digital cameras are becoming more popular, and photo printers especially designed to print photos are now available on the market.

8. Printing envelopes is the last item on our list to do, and we will be finished.

9. C

10. Output devices are used to get information from a computer, and two of the most common output devices are a monitor and a printer.

Rule 2: Commas Used with Nonrestrictive Words, Phrases, and Clauses

1. C (Restrictive)

2. C (Restrictive)

3. The president is the one responsible, of course, for the final decision. (Nonrestrictive)

4. A delay in the morning mail, whatever the reason, may cause a delay at the bid-opening meeting. (Nonrestrictive)

5. John Curtis, our production manager, has been in that position for five years. (Nonrestrictive)

6. C (Restrictive)

7. Your role as an office assistant when proofreading is to find errors and, of course, correct them. (Nonrestrictive)

8. Computer crime is becoming more and more a security issue and, therefore, cannot be ignored. (Nonrestrictive)

9. C (Restrictive)

10. Unscheduled absenteeism is at an all time high because, for example, many employees feel that it is wasteful to not use all their sick leave. (Nonrestrictive)

SOLUTIONS TO APPLICATION PROBLEM

If any of the following applications are completed by students in teams, you may use the team work rubric located under IM-Part II Evaluation.

Application 1-A   Organization Chart

First copy C1-AP-A1

```
                        VP – Marketing
                          Division

        Advertising Manager        Marketing Research
                                       Manager

Assistant VP –    Assistant VP –     Assistant VP –      Assistant VP –
Eastern Region    Southwestern       Northwestern        Western Region
                  Region             Region

Regional Sales    Regional Sales     Regional Sales      Regional Sales
Manager           Manager            Manager             Manager
```
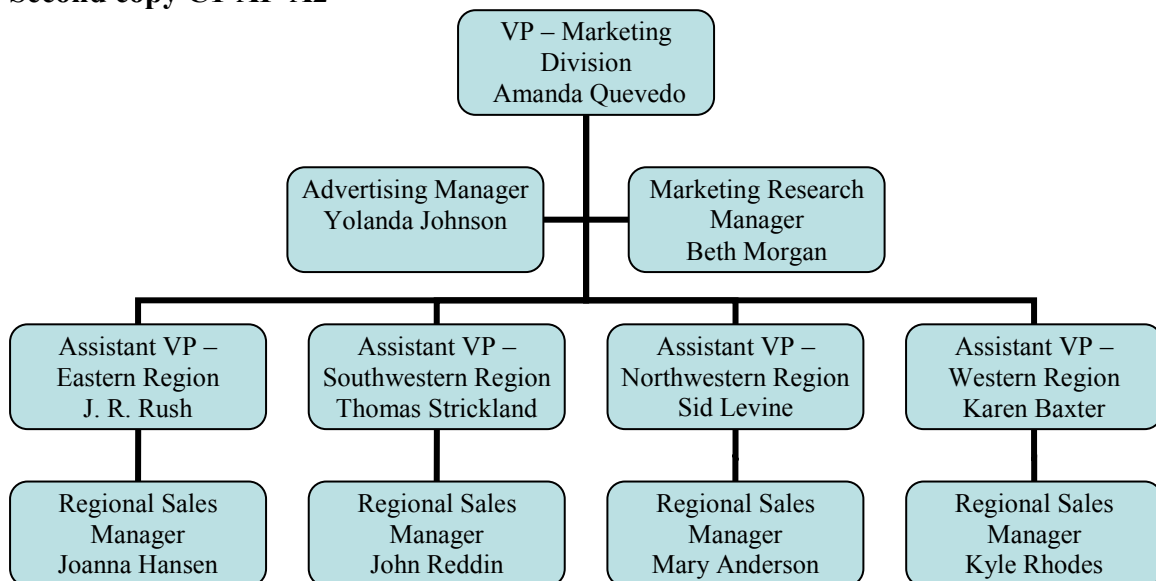
Second copy C1-AP-A2

```
                        VP – Marketing
                          Division
                        Amanda Quevedo

        Advertising Manager        Marketing Research
        Yolanda Johnson                Manager
                                    Beth Morgan

Assistant VP –    Assistant VP –     Assistant VP –      Assistant VP –
Eastern Region    Southwestern       Northwestern        Western Region
J. R. Rush        Region             Region              Karen Baxter
                  Thomas Strickland  Sid Levine

Regional Sales    Regional Sales     Regional Sales      Regional Sales
Manager           Manager            Manager             Manager
Joanna Hansen     John Reddin        Mary Anderson       Kyle Rhodes
```

Application 1-B   Locating Resource Material
Formats may vary slightly, but should look something like the following.

Resource Material for Workstations
Office Procedures for the 21ˢᵗ Century

No.	Topic	Page No.(s)
1	Dealing with visitors with special needs	414-415
2	Working as an office team	483-485
3	Receiving telephone calls	188-189
4	Placing international telephone calls	196-197
5	Keeping confidential information confidential	65-66
6	Working with complaining customers	415
7	Coping with stress	67-68
8	Acting ethically in the office	6-7, 70
9	Dealing with office politics	65-66
10	Reading an organizational chart	12
11	Filing business correspondence	311-341
12	Arranging flight tickets through the Internet	432-433, 437-438, 440-441
13	Choosing the most efficient mail services	276-277, 279-280
14	Working with multiple managers	12-13
15	Organizing your workstation	18-21
16	Overcoming communication barriers	222-225
17	Writing effective business messages	228-232
18	Handling a petty cash fund	336-339
19	Understanding electronic file organization	336
20	Receiving visitors	405-413
21	Scheduling and organizing a meeting	462-468
22	Preparing minutes of a meeting	479-482
23	Delivering a presentation	510-514, 511-512
24	Reviewing time management tools and strategies	139-154
25	Respecting diversity	65

Application 1-C   Self-Assessment: Office Support Functions; C1-AP-C.
- This document has been set up as a Word form.
- Results will vary.
- Student may be asked to set a goal(s) based on one or more of his or her weaknesses indicated on this form and commit to improvement during this semester. At the end of the semester ask student to respond to whether or not they accomplished this goal(s).

Building Your Portfolio

As students complete the assignments in each chapter, keep in mind the document(s) they will want to showcase. There is a Portfolio Rubric in the Teachers' Edition in the Part II Rubric folder for the student and the teacher to use to evaluate the Portfolio.

Portfolio Rubric

As described in Chapter 1, students will create a portfolio comprised of a selection of their own work. Students will select items and include a paragraph of why the item was selected and what content mastery that particular item demonstrates. Students will be graded on the following rubric that measures responsibility, content skills, and completeness.

Category	Needs Improvement 1	Satisfactory 2	Excellent 3	Student	Instructor
Responsibility	*Assignments not completed *Assignments not submitted on time *Assignments required extensive assistance from instructor *Instructor not notified of reason of delay	*All assignments completed *Assignments submitted on time *Assignments needed some assistance from instructor. *Instructor notified prior to deadline of reason of delay. Plan of action was agreed upon and fulfilled	*All assignments completed and submitted on time		
Content	*Limited student generated work included (from 1 content area of study) *Includes items of work other than student's own creation and design *Little thought and effort was given to prepare and include each item	*Includes some variety of student generated work (from 2 content areas of study) *Items included are almost entirely student created and designed *Some thought and effort was given to prepare and include each item	*Includes a variety of student generated work (from 3 or more content areas of study) *All items included are of student's own creation and design *Much thought and effort was given to prepare and include each item		
Completeness	*Incomplete - missing information from three or more components in portfolio *Portfolio is unorganized and/or not neatly presented *Users find it difficult to navigate and can easily get lost *Organization and planning of portfolio is not apparent	*Incomplete - missing information for one or two components in portfolio *Portfolio is organized and neatly presented *Users able to navigate without much difficulty *Portfolio reflects some planning in organization and design; however, not immediately apparent	*All components for each item included in portfolio is complete, organized, and neatly presented. *Users able to navigate easily *Entire portfolio reflects much planning in its organization, design and creation		

Portfolio Rubric Total Points:
Comments: