

A STUDY OF ESSENTIAL PRINCIPLES OF SECRETARIAL TRAINING
WITH PROBLEM MATERIAL ON A COLLEGIATE LEVEL

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APPROVED:

W. A. Larimer
Major Professor

J. B. McBryde
Minor Professor

W. A. Larimer
Director of the Department of
Business Education

L. A. Sharp
Chairman of the Graduate Council

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Catherine Louise McCarty

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CHAPTER I

INTRODUCTION

It is in order that the college student in secretarial training might have some definite idea as to the kinds of on-the-job duties she might be expected to perform and the type of background knowledge she might be expected to know-- or at least to be able to find out quickly when it is needed--that this study has been made.

At the present time it is hardly possible to have the average commercial student's training so closely integrated with business that the student can get on-the-job experience directly connected with his studies. In general, only those who have been fortunate enough to gain business experience through actual part-time employment while attending school, or through summer work between terms, are able to begin full-time work with any appreciable degree of confidence in themselves and in their ability to meet office demands.

The most likely reason for a beginner's lack of success as a secretary is, perhaps, not the fact that she is incapable of doing what is needed, but simply that she has so little knowledge of business in general and so little confidence in her own ability to do the specific duties required of her in office work.

It is with the hope that it will increase her understanding of business and her knowledge of essential information and its available sources, that this is written for the secretarial student. This is by no means an exhaustive study; rather is it a brief summary of selected fundamental material, all the original sources of which could hardly be covered by the individual student within the time available for her college secretarial training, and a source of problem material intended as a help in making the study of this training functional in nature.

Statement of the Problem

The problem encountered was that of presenting concise information regarding the essentials of secretarial practice and of introducing problem material on a collegiate level. Various questions arose for consideration. What should the course in secretarial training include for the student to get the maximum benefit? What fundamental skills and knowledges are essential to the successful performance of secretarial duties? Where does the secretary fit into the business organization? What personality characteristics must the successful secretary develop? Can the secretary measure her own success in terms of the utilization of her qualifications, including personality, skills, and training? These and other questions were considered in the selection of the material to be presented in the study.

The Need for Effective Secretarial Training

The present obvious need for trained office workers makes the teaching of secretarial office practice of great importance. Concerning this need for trained office workers, Herbert A. Tonne writes in the June, 1942, issue of The Journal of Business Education:

Hardly a year ago we were still concerned with the placement of even our adequate commercial graduates. We felt proud when we could place all of our worthy graduates. Now we have the problem of finding people whose training and ability is not too bad.

.
Adjust ourselves to the immediate we must. That is all important. Yet let us not assume that all the world will change. Possibly this is the best time to work out plans for a more adequate education for business. Thousands of the younger workers in business education will not be able to follow through because they are more urgently needed elsewhere. Many thousands more, however, will be of greatest service by staying with their present work. Upon them is placed the obligation of preparing for you a more permanently adequate education for business. Now is the time not only for change and excitement--it is also the time for upgrading and improvement for one's self and one's school. They also serve who carry on the daily routine to which all soon hope to return.¹

Further comment regarding the need for capable office workers is made by Albert W. Hawkes, president of the American Chamber of Commerce, who is quoted in a recent article as saying:

¹Herbert A. Tonne, "Business and Education in 1942-43," Editorial Comment, The Journal of Business Education, XVII (June, 1942), 7.

Programs of vocational training instituted prior to our nation's being plunged into war met the requirements of the national defense period. However, with conversion of entire industries to war production, the need for trained office workers is critical.²

In stressing the importance of the immediate training of girls and women for office and industrial work, Karl Morrison writes, in the April, 1942, issue of The Journal of Business Education:

The Nation is at war now. The fighting forces need adequate arming now. Business, industry and government need capable handling of their correspondence now. Girls and women must heed a command that is urgent, authoritative. When men must war, women must work--with equal skill and determination.³

The national demand then is not that each man and woman complete as many labor-hours as every other. The demand is that each contribute as much productive effort of the highest quality that individual talent and training permit. There is every incentive for great, intelligent, and trained effort.⁴

Research agent Earl P. Strong of the Business Education Service of the United States Office of Education, in the June, 1942, issue of The Business Education World, presents an article, "What Government Stenographers Need," in which he describes the faults observable in those accepting

²Herbert A. Tonne, "Cooperation between Schools and Industry," The Journal of Business Education, XVII (May, 1942), 7.

³Karl Morrison, "Now Is the Time for All Good Women," The Journal of Business Education, XVII (April, 1942), 11.

⁴Ibid., p. 12.

government work. These faults, classified as shorthand, typewriting, transcription, and general, are discussed in detail, and suggestions are given for their correction.⁵

Commercial courses have already been opened for the training of Army men because of the need for government and military office workers. Planned to train the needed secretaries, stenographers, typists, and company clerks, classes have been organized at Fort Totten, Fort Tilden, and two other New York forts.⁶ In these courses instruction is given on the following office machines:

- (1) A. B. Dick Mimeograph (hand and motor operated)
- (2) Niagara Duplicating Machine
- (3) Ditto duplicator
- (4) Mimeoscope
- (5) Dictaphone
- (6) Burroughs and Victor calculating machines.

Because there may soon be similarly organized courses in high schools and colleges throughout the nation, the recommendations made by David J. Kappel for Army courses are quoted:

Two types of courses should be given in Army clerical schools: (1) refresher courses for those who have had some previous training and (2) intensive courses for beginners.

A refresher course should run from two to sixteen weeks, two hours daily, five days a week, the total time being determined by the amount of skill the student retains. At Fort Tilden, the soldiers in the

⁵Earl P. Strong, "What Government Stenographers Need," The Business Education World, XXII (June, 1942), 869.

⁶David J. Kappel, "Commercial Courses in the Army," The Business Education World, XXII (May, 1942), 804.

refresher courses received from 40 to 50 hours of instruction in typewriting and the same in shorthand.

An intensive secretarial course should run for six months on a six-to-eight hour schedule. At Fort Totten, the six hours of daily class attendance were divided into two hours for typewriting, two hours for clerical records, and two hours for shorthand, one hour being spent on instruction and one hour on supervised study.

In my opinion, the shorthand goal at the end of a six-month intensive course should be between 80 and 100 words a minute. Typing speed should be 40 to 50 words a minute, and transcription speed 20 to 25 words a minute.⁷

Not only are these Army men trained in clerical work, but there has recently been launched a voluntary plan for correspondence courses open both to soldiers in training camps and with expeditionary forces overseas. "For their mail-order alma mater, soldiers are given a choice: the brand-new Army Institute at the University of Wisconsin, or the Extension division of any one of 78 colleges and universities."⁸

That special training has been started for civilian employees is evidenced by a report of the training under way at the Philadelphia Signal Depot for "in-service" and "pre-service" training, with the dual purpose of increasing efficiency and increasing production. "Stenographers are

⁷Ibid., p. 805.

⁸"Mail study for Soldiers," from Edpress News Letters, Washington, D. C., The Business Education World, XXII (June, 1942), 913.

trained by specific skills and knowledges dealing with routine, procedures, and vocabulary and phrase-building power in shorthand and are given short-cuts to be used in 'taking' military correspondence."⁹

"A War-Winning Week-End Typing Course," written by Charles E. Zoubek, in collaboration with Philip S. Pepe, appears in the June, 1942, issue of The Business Education World. This is a report concerning a unique and effective intensive typing course conceived and outlined by Philip S. Pepe for the West Side Y.M.C.A. of New York City. The course is called the "Week-End Typing Course." The class meets eight times during the month--on Friday evenings from 6:30 to 9:30, and on Saturday afternoons from 2 to 5. A new group is started each month. In order to give teachers a clear picture of how the class is handled, each session is briefly discussed. In this course, the entire keyboard, with the exception of the numbers and the special characters, is presented in about 45 minutes, during the first evening's class.

The objective of this course of eight sessions is 25 gross words a minute on a 5-minute new-matter take--an aim that was achieved by most and surpassed by many of the students in the first two groups taught under this plan.

In teaching these courses, two points were kept foremost in mind:

⁹George Murraine Cohen, "Training of Civilian Employees," The Business Education World, XXII (June, 1942), 861.

1. The student should be typing as much of the class time as possible.

2. The student should be constantly striving to improve--and a procedure should be set up that will enable him to see his improvement constantly.

There is no time for lengthy, formal introduction of the parts of the machine, for listening to the teacher explain the various typing operations, or for reading about these things from textbooks.

.....
 No attempt is made to develop a high degree of skill in the typing of numbers in this intensive course because, first, there is not time; and, second, the numbers occur with relative infrequency, so that many experienced stenographers look at the keys when they have occasion to type numbers.¹⁰

Concerning the adaption of the commercial courses in the schools, Herbert A. Tonne writes in an editorial:

The government and industry are seeking thousands of trained commercial workers. That the problem is a pressing one, is made evident through the nation-wide appeal for office workers by the United States Civil Service Commission. This need will undoubtedly become further intensified as many clerical workers are inducted into the armed forces. The adequate replacement of these workers by women is quite uncertain because of the increasing use of women workers in industry. Moreover, the distributive services are also beginning to feel the need, for the shortage of competent workers is also becoming evident here.

It is the opinion of leaders in business education that this problem can be met by utilizing more adequately the educational facilities for special emergency training and retraining in business education. To indicate how these programs may be organized the Commercial Education Association of New York City and Vicinity has just issued a bulletin on "Adjusting Commercial Education to War Needs."

¹⁰Charles E. Zoubek, in collaboration with Philip S. Pepe, "A War-Winning Week-End Typing Course," The Business Education World, XXII (June, 1942), 863-68.

The bulletin contains suggestions for concentrations of study and refresher courses in secretarial work, bookkeeping, distributive education and machine practice. There is in addition, a section indicating how business education may be adapted to meet the new problems of consumer education.¹¹

In the abstract of a report by an Eastern Commercial Teachers Association Committee consisting of Peter L. Agnew, Chairman; John G. Kirk; and Joseph Seay, which was published in The Business Education World for June, 1942, the Committee elaborates on some things the school can do to help in meeting the wartime needs for office workers.

1. Do better what we are doing.
2. Step up the pace.
3. Provide short-unit courses.
4. Plan intensive curricula.
5. Induce more people to take commercial work.
6. Federal Government should provide funds.
7. Mobile units for Civil Service Examinations.¹²

These sub-headings of the abstract were considered in the article. In this may be found the keynote of the commercial courses to be presented in high schools and colleges in the immediate future. Already are educators planning to "step up the pace."

¹¹Herbert A. Tonne, "Adjusting Business Education to the War," Editorial Comment, The Journal of Business Education, XVII (June, 1942), 7.

¹²"Wartime Needs for Office Workers," Abstract of a Report by an E.C.T.A. Committee consisting of Peter L. Agnew, Chairman; John G. Kirk; and Joseph Seay, The Business Education World, XXII (June, 1942), 920-21.

Louis Liebling reports that his plans for a Civil Service Club met with enthusiasm. Meeting once a week after school hours for an hour and a half, his students received the type of instruction needed to prepare them to take examinations qualifying them for positions of Junior Stenographer at \$1440 a year and Junior Typist at \$1260 a year. This additional training was given for the purpose of securing stenographers and typists for appointment in Washington, D. C.¹³

From these comments it becomes evident that leaders in business and in the field of business education realize the urgency of the need for brief, practical instruction for office workers. In order to furnish a fairly adequate background, so that the resourceful beginning worker can accept the responsibility productive of maximum results with minimum supervision, this training should be fundamental in nature and practical in its application.

Method of Procedure and Sources of Data

The first step in making the study was the analysis of selected textbooks in secretarial training. Seven books in the field were scanned for content, a copy was made of the

¹³Louis Liebling, "Help Wanted--Civil Service," The Business Education World, XXII (June, 1942), 909-10.

table of contents of each; and, in cases where the chapter or section headings left any uncertainty as to their content, the portions indicated were checked for comparison before classification of the subject-matter was made. The titles, the authors, the publishers, and the dates of publication of the seven books are presented in Table 1.

Analysis of the major topics of these textbooks furnished a tentative list of chapter headings for units of information to be considered in the study. A marked similarity of content was observable in the texts, although the organization and writing styles varied greatly. The text College Secretarial Practice, by Charles G. Reigner, was distinct in its organization in that its subject-matter was divided into five sections, one dealing with testing one's fitness for a secretarial position and another with securing a secretarial position. The remaining three "sections" of the book were concerned with working in a general office, working as secretary to the general manager, and working as a secretary to the president. Seventy-five assignments in the book gave various principles of secretarial procedure and media for their application.

The other textbooks were rather similar in their general organization on a chapter basis. The number of chapters in the texts, in the order of their appearance in Table 1, is: (1) twenty-five chapters; (2) sixteen chapters;

TABLE 1

THE TITLE, THE AUTHOR, THE PUBLISHER, AND THE DATE OF PUBLICATION
OF EACH TEXTBOOK ANALYZED FOR SUBJECT MATTER
FOR SECRETARIAL TRAINING

Book	Author	Publisher	Date of Publication
1. Secretarial Efficiency	Faunce, Frances Avery Nichols, Frederick G.	McGraw-Hill Book Co., Inc. New York, New York	1939
2. Fundamentals of Office Practice	Loso, Foster W. Hamilton, Charles W.	South-Western Pub. Co. Cincinnati, Ohio	1931
3. Secretarial Training	Slade, Madeleine L. Hurley, Mabel Howatt Clippinger, Kathryn L.	Ginn and Company Boston, Massachusetts	1934
4. Office and Secretarial Training	Stickney, Rufus Stickney, Blanche G.	Prentice-Hall, Inc. New York, New York	1931
5. College Secretarial Practice	Reigner, Charles G.	The H. M. Rowe Company Baltimore, Maryland	1940
6. Applied Secretarial Practice	Gregg, John Robert	The Gregg Publishing Company New York, New York	1941
7. Secretarial Office Practice	Loso, Foster W. Hamilton, Charles W. Agnew, Peter L.	South-Western Pub. Co. Cincinnati, Ohio	1937

(3) eleven chapters; (4) ten "units," or chapters; (5) five "sections" (already discussed); (6) twenty chapters; and (7) twenty-two "sections," or chapters. This wide variation in the number of chapters might seem to indicate that some of the tests are more nearly complete in scope than are others. This difference may be partially accounted for, however, by the fact that some authors included in a single chapter the general content that comprised two or more chapters in other books.

The second step in the procedure was the comparison of the subject-matter units selected with the content of standard secretarial handbooks, in order to find out if the basic material were of the same type as that actually used in guidebooks in the realm of business. For this purpose four manuals generally accepted as authorities for office usage were chosen. The names, authors, publishers, and dates of publication are presented in Table 2.

The third step was the comparison of certain phases of the subject-matter selected with the information compiled in a case study of "Recent Observations Relative to Office Practices," by Hilton D. Shepherd of the North Texas State Teachers College, Denton, Texas. This study was based on eighteen responses to questionnaires sent to large business firms in the country.¹⁴ Those sending information were:

¹⁴Hilton D. Shepherd, "Recent Observations Relative to Office Practices," Mimeograph Series, Department of Business Administration, Denton, Texas, North Texas State Teachers College, May, 1933, preface.

TABLE 2

THE TITLE, THE AUTHOR, THE PUBLISHER, AND THE DATE OF PUBLICATION
OF EACH STANDARD HANDBOOK ANALYZED FOR SUBJECT MATTER

FOR SECRETARIAL TRAINING

Handbook	Author	Publisher	Date of Publication
1. Standard Handbook for Secretaries, 3d ed.	Hutchinson, Lois Irene	McGraw-Hill Book Company, Inc. New York	1941
2. Secretary's Handbook; A Manual of Correct Usage, 6th ed.	Taintor, Sarah Augusta Monro, Kate M.	The Macmillan Company New York	1941
3. The Private Secretary's Manual; A Practical Handbook for Secretaries and Executives, Rev. ed.	Turner, Bernice C.	Prentice-Hall, Inc. New York	1940
4. The Secretary's Book; A Complete Reference Manual	Wanous, Samuel J.	The Ronald Press Company New York	1936

American Optical Company	Southbridge, Mass.
American Sales Book Company, Ltd.	Elmira, N. Y.
Amoskeag Manufacturing Company	Manchester, N. H.
Canada Dry Ginger Ale, Inc.	New York, N. Y.
The Carter's Ink Company	Boston, Mass.
Colgate-Palmolive-Peet Company	Chicago, Ill.
Fibreboard Products, Inc.	San Francisco, Calif.
The Firestone Tire & Rubber Co.	Akron, Ohio
The First National Bank of Boston	Boston, Mass.
Geo. E. Keith Company	Campello, Brockton, Mass.
The Hinde & Dauch Paper Company	Sandusky, Ohio
Johnson & Johnson	New Brunswick, N. J.
The Kelly-Springfield Tire Company	New York, N. Y.
The Lowe Brothers Company	Dayton, Ohio
The National Acme Company	Cleveland, Ohio
Ralston Purina Company	St. Louis, Mo.
Scovill Manufacturing Company	Waterbury, Conn.
Westinghouse Electric & Mfg. Co.	East Pittsburgh, Pa.

The questions submitted brought responses concerning the following phases of office practice: (1) the types of office machinery and equipment used; (2) the operation of the filing system; (3) the method of employing and training office employees; (4) secretarial duties and responsibilities; (5) the handling of incoming and outgoing mail; and (6) economies of office arrangement, floor plan, etc. The original letters received were scanned and the summary report was studied for material which might indicate suitable content or problem material for secretarial study.

The fourth step in the procedure was the reading of office manuals compiled by certain business organizations for the use of their employees. For this purpose were selected the Dictator's Manual of the Norton Company, Worcester, Massachusetts; the Office Manual of the Fuller Brush Company, Hartford, Connecticut, by Roy S. Mason, November 15, 1930; the Stenographers' Guide of the Fuller Brush Company,

Hartford, Connecticut, 1931 Edition; and the Mailing Department Manual of the Fuller Brush Company, by H. E. Bartlett, Edition of March, 1933. These manuals contain specific instructions for company employees regarding office standards and regulations, instructions for letter form and content according to company policy, and suggestions for dictators and stenographers.

The fifth step was the reading of periodical material related to secretarial work and office practice. The Readers' Guide to Periodical Literature, July 1939--June 1941 was the source of a list of articles related to secretarial practice. These articles were read for the purpose of obtaining information not included in textbooks and manuals. Because of the present urgency of the need for trained office workers, it was decided also to scan recent issues of business magazines and educational publications for the purpose of ascertaining whether greatly changed methods of teaching secretarial office practice seemed indicated for the immediate future. The chief point of emphasis in this material, as may be observed from the excerpts presented earlier in this chapter, seems to be not on entirely new skills or subject-matter to be learned, but on the urgent need for qualified office workers.

The sixth step in the procedure was the study of Secretarial Studies, Intensive Course, by Rupert P. SoRelle and John Robert Gregg (The Gregg Publishing Company, New York, 1928); Experience Manual with Work Sheets for Secretarial

Efficiency, by Frances Avery Faunce with the collaboration of Frederick G. Nichols, First Edition (McGraw-Hill Book Company, Inc., New York, 1939); the Teacher's Guide to the same manual; and the Instructor's Key for College Secretarial Practice, by Charles G. Reigner (The H. M. Rowe Company, Baltimore, 1940).

"Integration of Commercial Teaching with Business," by Eula B. Reno (unpublished Master of Arts thesis, Austin, The University of Texas, 1938), was consulted, as well as the following Master's theses from the North Texas State Teachers College, Denton, Texas. The short titles are here given.

- (1) LeRoy Marshall Hinton, "Suggested Course in Business Principles and Problems," (M.S., 1941).
- (2) Louise Evans, "Test Material for Secretarial Subjects," (M.S., 1939).
- (3) J. D. Bryant, "Commercial Employees in Glade-water, Texas," (M.S., 1941).
- (4) Mary Lee Sapp, "Value of Business Administration Courses in North Texas State Teachers College," (M.S., 1938).

Although the textbooks Business Organization and Practice, by William B. Cornell and John H. McDonald (American Book Company, New York, 1936), and Office Management and Practices, by John J. W. Neuner and Benjamin R. Haynes (South-Western Publishing Company, Cincinnati, 1941) were used as sources of information, they were not included among the textbooks analyzed because they were not alone concerned with secretarial training, but considered also the organization, management, and control factors of business enterprise.

For the section regarding the personality of the secretary, the sources, in addition to the textbook and periodical readings, were: Webb and Morgan's Strategy in Handling People, Dale Carnegie's How to Win Friends and Influence People, and Vashni Young's Let's Start Over Again.

For the section on indexing and filing of office correspondence, the major source of material was Progressive Indexing and Filing, compiled by D. W. Duffield and published by the Library Bureau Division, Remington Rand Business Service, Inc. (New York, 1928).

Miscellaneous sources were The Business Encyclopedia, edited by Henry Marshall (Doubleday, Doran and Company, Inc., New York, 1940); Principles and Problems of Office Practice, by Peter L. Agnew (a booklet of excerpts reproduced by the Burroughs Adding Machine Company, Detroit, Michigan, 1938); Instruction Projects in Office Machines, A Manual in Curriculum Construction offered by the Burroughs Adding Machine Company; Office Appliance Exercises, by John T. A. Ely and A. C. Beaver (The Gregg Publishing Company, New York, 1935); Ediphone Voice Writing and Integrated Studies (and the manual thereto), by Anna May Allen, Bert Card, and John L. Copeland (South-Western Publishing Company, 1939); the Qualifying Test for Ediphone Voice Writing (published by the Department of Educational Training, The Ediphone, Thomas A. Edison, Inc., West Orange, New Jersey, 1938); the B E C Personality Rating Schedule (The Committee on Publications, Harvard University

Press, Cambridge, Massachusetts, 1936); the General Information Text--Series 1941 and the Machine Calculation Test--Series 1941 of the National Clerical Ability Tests by the Joint Committee on Tests of the National Office Management Association and the National Council for Business Education (distributed by The Joint Committee on Tests, 16 Lawrence Hall, Kirkland Street, Cambridge, Massachusetts); The Commercial Curriculum, by R. G. Walters (Monograph 37, South-Western Publishing Company, Dallas, July, 1937); and a few miscellaneous pamphlets and magazine articles.

For the purpose of this study it was considered inadvisable to attempt a summarization of the content or a statement of all the major principles regarding each subject-matter unit selected for treatment. This would embody a summarization of several thousand pages of the type of material which, to give a fairly comprehensive study of the secretarial field, could not be sufficiently condensed for a study of this nature. Further reason for this decision appears in the fact that elaborations on the theory of these subject-matter units may be found easily available in any one of several textbooks or secretarial handbooks written by recognized authorities in the field of business and in the teaching of business education.

Instead of considering the theory of secretarial training as the point of emphasis for this study, it was decided to use this only as its presentation seemed indicated as a background for the questions and other problem material. After a

study of these references--including textbooks, general office handbooks or usage guides, departmental manuals, workbooks, letters, reports, and periodical literature--was made, the subject-matter headings listed were rechecked, the revised list representing the headings for the materials to be found in the following chapters.

CHAPTER II

THE SECRETARY IN BUSINESS

The term secretary is rather a general one, applied to positions ranging from high governmental and executive positions to those requiring little more than the ability to do stenographic work. By definition, a secretary is a confidential clerk, especially one who attends to correspondence, records, etc., of the organization. Although its derivation from the Latin word secretarius, signifying a confidant or confidential officer, indicates that there has been little change in its general meaning, the word secretary has come to imply a wide range of responsibilities. There is constant change in the duties required of the secretary, as well as a challenging variety in the daily experiences to be found in secretarial work.

Position in the Business Organization

It is important that the beginning secretarial worker understand her position in the organization. Nearly every office of consequence has an organization chart. By looking at it the secretary can quickly learn the organization of the office, how authority flows, and the names of those in charge of the various departments. Another chart, known as the routing chart, shows the flow of work. Statements of

duties, advisory relations, and the relations in direct authority or responsibility supplement these charts. These the secretary may study with profit, since they give her a comprehensive picture of the organization in which she plays a definite part.

If her duties are principally stenographic in nature, she needs the perspective of the entire business in order to understand how best and most effectively she can do her work in order to contribute to the efficiency of the organization and to the smooth and orderly flow of work from other departments through her own. If greater responsibility is hers, she should plan routine duties so that best use will be made of mail collections and other services, and at the same time should keep up with the more urgent matters that come as interruptions. If she is confidential secretary to an executive, she has the added duty of keeping constantly on the alert in anticipating his needs and in relieving him of all matters not requiring his personal attention. In this way his valuable time may be spent in executive capacity rather than in attending to routine details. Whatever the degree of her responsibility, the secretary should know the general organization of the company and the particular place in which she fits into that organization.

General Qualifications and Characteristics

In an article appearing in The Business Education World, E. L. Lelash states that there are three basic requirements

for success in vocational work. These are:

- (1) Good educational background
- (2) Correct personality requisites
- (3) Sufficient marketable skills¹

The article "The White Collar Apprentices," appearing in The School Executive, shows a concurring opinion. In this, F. R. Furlong writes that the student faults that draw criticisms from businessmen are: inaccuracy, inability to take all dictation, and lack of neatness.²

J. P. Alexander's discussion of "What the Business Man Expects of a Secretary" furnishes the wise prospective secretary several hints:

- (1) The average business man seldom analyzes his secretary; all he wants is efficiency.
- (2) In shorthand and typewriting, technical efficiency is an essential.
- (3) The essentials of grammar as incorporated in the business letter must be mastered.
- (4) The secretary must assemble the words into sentences and paragraphs and place the necessary punctuation marks correctly.
- (5) The secretary must be familiar with graphs, curves, etc.
- (6) The successful secretary must be familiar with the principles of plain arithmetic.
- (7) A working knowledge of bookkeeping would be a great aid in helping the secretary to understand checking and savings accounts.
- (8) Another important function is that of filing.
- (9) As the secretary sets the tempo for the rest of the office workers, she must be

¹E. L. Lelash, "Basic Requirements for Vocational Adjustment," The Business Education World, XX (May, 1940), 789-791.

²F. R. Furlong, "The White Collar Apprentices," The School Executive, LX (January, 1941), 32.

near perfect in her actions, being punctual, possessing poise, and displaying dignity and self-control.

- (10) The attributes of responsibility, confidence and reliability lead to one other important quality: loyalty to one's employer and to one's organization.³

In the June, 1939 issue of The Business Education World, Jessie K. Grant tells "How to Work in an Office." Emphasis is placed on the need for neatness, punctuality, accuracy, and orderliness. As skills necessary for office work, there are listed: the use of a typewriter, the use of a telephone, the use of an adding machine, how to send telegrams, how to keep petty cash, how to file, how to write good letters, how to set up tables, how to prepare articles and manuscripts for the printer, how to write invoices, how to use government reports intelligently, how to budget personal income, how to meet people, how to use the Dictaphone, how to behave in the office, how to weigh questions, how to get a social security card, and how to be self-confident.⁴ From this we may assume that the skillful secretary is skillful indeed.

Employable skills are essential to secretarial work, but these do not guarantee success. Fully as important are:

(1) the initiative and the originality that enable a secretary

³J. P. Alexander, "What the Business Man Expects of a Secretary," Eastern Commercial Teachers' Association, 10th Yearbook, 1937, pp. 360-364.

⁴Jessie K. Grant, "How to Work in an Office," The Business Education World, XIX (June, 1939), 851-854.

to "think her way through" duties that require resourcefulness; (2) the patience and the endurance to undertake tedious and wearying duties and to see them through; and (3) the memory and the alertness required to attend to relatively unimportant duties.

Questions and Problem Material

1. Why is it important that an executive have an efficient secretary?
2. Name three basic requirements for vocational success. In your opinion, are there other requirements? Why?
3. Explain the statement that "the secretary sets the tempo for the rest of the office workers."
4. How may a beginning secretary become familiar with the employer's business?
5. How can a study of other people in the business office help the secretary?
6. What can the secretary do to improve the situation when she knows there is some friction among the office workers?
7. In what ways may a secretary show disloyalty to her employer?
8. Do the training, discipline, and habits acquired in the home have any effect on the qualifications for the position as secretary to a businessman?

9. Name some skills and knowledges the secretary should have at her command.
10. Interview two students of your class as applicants for a secretarial position, and make critical comments.

CHAPTER III

THE PERSONALITY OF THE SECRETARY

The Elements of a Pleasing Personality

The sum total of the character and personal traits of a person which makes him different from another is the personality of that individual. The personality is the most important factor for consideration in an applicant for any position, because the personality is the person himself.

Fortunate is the employer having a secretary who tries always to render the best possible type of service to him, who remains cheerful when the work is unexpectedly heavy, who has a pleasing, well-modulated voice, who does not use office time for writing personal letters or for making personal telephone calls, who is well-groomed in appearance, who is neatly and simply dressed, who gets along with the other employees, who is refined enough to keep from gossiping, who can follow directions accurately the first time they are given, who is loyal in keeping confidential business matters confidential, who follows suggestions without criticism or "alibis," who can give instructions to others without being domineering, who can treat the errand boy and the best customer with equal genuine courtesy, and who can anticipate the needs of the employer or of the firm and will attend to those needs without having to be told about them.

Patricia Farren, in an article in The Journal of Business Education, emphasizes the following points:

(1) that the most successful persons in the world of business today are those who realize the value of courtesy; and (2) that courtesy is one of the major requisites considered in an applicant, and one of the qualities either advancing or retarding him after he has secured a position. "Courtesy at all times, to all people, will do more to promote a young man or woman in an office than voluminous knowledge."¹

In considering the ideal secretary, we find that "the courteous, efficient secretary, with her calm presence, tact, poise and understanding, does more than anyone else to keep the office force smooth and unruffled."² And, regarding the secretary's value to the firm, we read the following excerpt:

The secretary also helps to set the tone for the office force in her manner and speech. This is definitely shown when she talks with those who come into the front office to seek a personal interview. She finds out who the visitor is and the importance of his call. If she thinks it is for the best interests of the firm, she will try to make an appointment at a later date (if her employer is busy or absent at that particular time).

A secretary can do much to build up the reputation of her firm. She should keep a concise record of all

¹Patricia Farren, "Office Courtesy," The Journal of Business Education, XIV (January, 1939), 15.

²Ibid.

appointments; then, if possible, see that each caller leaves before the time scheduled for the next visitor. When an out-of-town customer is a guest, she will put through his telephone calls for him and grant him the courtesy of the office. Her manner will not vary with different callers, regardless of their importance or prestige. Above all things, the secretary should always bear in mind that no price can be placed on courtesy; but high is the price paid, in many instances, where it is lacking.³

Stressing the importance of training in personality development and office conduct, Ray Abrams writes in the January, 1941 issue of The Balance Sheet:

Business places value on pleasing appearance and conduct, on courteous reactions and responses, and on attractive grooming and personality. Building agreeable habits intended to function in business situations is the objective of a course in business behavior. At this point, we find one of the strongest arguments in favor of giving the subject a definite place in the curriculum. The formation of a habit requires time for its practice. Unless time is available for the practice and the development of acceptable habits, the school cannot qualify students for employment.

The clinic method can be used with great satisfaction in the building of behavior habits. . . .

Posture offers a field for habit formation through the clinic method. Diction responds to practice. By using the same approach, appearance and grooming can be criticized and improved. . . .⁴

In the Journal of Educational Research, W. H. Lancelot is quoted thus: "From the standpoint of sheer social value, we believe that training in personality is actually worth

³Ibid., pp. 15-16.

⁴Ray Abrams, "Personality Development," The Balance Sheet, XXII (January, 1941), 232.

more to our young people than the study of any social science or combination of social sciences that can be named."⁵

Regarding the element of fair play in office work, Patricia Farren writes:

Time in the office is contracted for and must not be wasted. When a student agrees to work for a stipulated weekly or monthly salary, it is with the understanding that he is to give his best efforts at all times. His verbal agreement is just the same as though he were under contract to act in motion pictures, or to take charge of a large business or social organization.

He should always be on time or a little ahead of starting time. When the moment to begin work arrives, it should be started at once and tasks set about willingly and cheerfully. No one should be afraid to do more than he believes he is paid to do, or sulk and fret if the occasion arises for him to stay later than usual. He should offer assistance to his fellow employee, who may be over-taxed with work, and when a new employee arrives, courteously and quietly show him that his presence is welcome.

In the office personal feelings toward other employees should be relegated to the background, deference and respect shown to supervisors and consideration and patience with co-workers. Employees are working for a common cause, the success of the firm, and should be interested in everything that concerns it. The progress of an employer is essential if a job is to be a permanent one. In most cases it eventually works to an employee's advantage in the form of promotion and increased salary.⁶

On the subject of office conduct, we read the following observation by the same writer:

⁵William F. Bruce, "Personality Development in Student-Teachers," Journal of Educational Research, XXI (April, 1930), quoting W. H. Lancelot, "Developing Student-Teachers in Traits of Personality," Educational Administration and Supervision, XV (May, 1929), 361.

⁶Patricia Farren, op. cit., p. 15.

Manners are not left in the drawing-room, church, or school. It is ill-bred to indulge in idle gossip in the office. Strong language and irrelevant conversation are never tolerated in the well regulated business establishment; such things will not permit others to put forth their best efforts. Every young man and woman must understand that in the business world, as elsewhere: "Courtesy is consideration for the rights of others."⁷

The fact that it is only through the realization of his shortcomings that a person is enabled to advance and to show improvement in personality, is indicated in an excerpt from an article by Beulah H. Burrell, who describes a method of instruction for personality development classes.

We work on the basis of self-criticism. Through assigned readings and class reports, the students study personality. A thorough study is made of traits--introvertive and extravertive--desirable and undesirable. With this study we have a series of tests, which the students take with the knowledge that no one but themselves will ever have access to the results of these tests.

Another study covers grooming. After the study and testing progress on this section, I see some of the notoriously untidy ones coming to school with fresh blouses every day, and shoes brushed, etc., while the bolder ones have toned down their make-up and discarded their loudest garments. Frequently, by this time in the course, I can detect in many of the students a very different attitude toward school and their work.⁸

The course described is organized into four quarters, with material being presented on: (1) "Background Development," for which the basic text is Give Yourself Background, by

⁷Ibid., p. 16.

⁸Beulah H. Burrell, "Our Students Develop Personality through Self-Criticism," The Business Education World, XXII (May, 1942), 823-24.

Bond; (2) "Personality;" (3) "The Job--How to Get It and How to Keep It;" and (4) training for Civil Service tests and work, since the local demand does not take care of the placement of all the graduates.

For the prospective secretary this offers a suggestion. By honest self-criticism and by evaluating her own personality she can be well started toward improvement that will be evident in personal appearance, office conduct, and character traits.

These are some of the desirable personal traits which may be developed in the individual:

Loyalty	Sense of Humor
Dependability	Adaptability
Courage	Co-operativeness
Patience	Poise
Courtesy	Willingness
Promptness	Alertness
Health	Attention
Efficiency	Industry
Dignity	Orderliness
Judgment	Accuracy
Memory	Speed
Initiative	Ambition
Discretion	Perseverance
Honesty	Leadership
Unselfishness	Interest
Ability to Follow Directions	Cheerfulness
Serenity	Tact

The health factor is important to the personality and the efficiency of any individual. The office equipment, the lighting, and other factors contribute directly to the fatigue element. If possible, the secretary should have her own desk placed so that she works in a good light. The height of the chair should permit both feet to rest squarely on the floor and should allow the elbows to be slightly

lower than the typewriter keyboard and on a level with the desk. This prevents the muscular strain and the added force needed for the operation of the machine which is placed too high. Posture at the desk and at all times is important. Heeding the suggestion to "sit tall, stand tall, and walk tall" will add greatly to the feeling of comfort, confidence, and self-assurance, and will at the same time greatly lessen fatigue.

Sensible lunches are important to the vitality the secretary needs during the latter part of the day. The regular and unhurried eating of nourishing, properly cooked food, with plenty of fruit and vegetables, will contribute greatly to her sense of physical well-being. Three other essentials to physical fitness are: (1) a minimum average of eight hours' sleep each night; (2) exercise in the open air for an average of an hour or more a day, in walking or in active sports such as tennis, golf, or swimming; and (3) some recreation daily.

Recreation for an individual depends on the type of duties performed during working hours. A person who does desk work almost entirely may find hard manual labor an actual recreation, while a laborer may find recreation in hard study. Whatever the choice, whether gardening, soap-sculpture, or any one of a hundred other pastimes, recreation should be re-creation for the individual, and should be enjoyable to serve its purpose of relaxation.

Questions and Problem Material

1. What is your definition of personality?
2. In your opinion, what is the real basis of secretarial success? Why?
3. How may a person's clothes, posture, manners, tone of voice, and facial expression add to or detract from the personality of that individual?
4. Read the list of skills needed for the secretary as presented on page 24. What percentage of the skills appears on your list?
5. If the list of skills on page 24 had been presented in different form, would it have been easier for you to fix them in mind? Make suggestions for improvement.
6. Can the memory be trained? Give reasons for your answer, and suggest ways in which training may be effected.
7. From the list of character and personal traits on page 32, select the ten you think most important in secretarial work, and type these in columnar arrangement, double-spaced, on a sheet of paper. To the right of this column, rule three vertical columns for scoring, heading the first column "Low," the second "Average," and the third "High." Opposite each trait place in the appropriate column a check to score yourself. Observe carefully the

results of your scoring, and "file" the paper where you can easily find it for rechecking the same traits three weeks later.

8. Mention some irritating mannerisms you have noticed in others. Would an employer, also, likely be annoyed by them?
9. If you were interviewing a prospective secretary, what character and personality traits would you look for in the applicant?
10. Can personality traits be developed? Name ways in which a prospective office worker can improve himself.
11. A very important business customer rushes into your office, angrily demanding to see your employer immediately. Your employer is in an important conference and has instructed you that he is not to be disturbed for an hour. What would you do under the circumstances? What qualities of the good secretary would you need to bring into use?
12. List the titles of books regarding personality development to be found in your library. Select three of these books and glance through the contents; then read one chapter from each. Which of the three do you like best? Which author seems to reveal the most pleasing personality in his writing?

CHAPTER IV

ROUTINE OFFICE DUTIES

Secretarial efficiency involves completing satisfactorily each of the duties in the shortest possible time. In order to make every minute count, there should be a definite system or schedule for certain routine duties. These duties will depend upon the nature of the office, but in general they are more or less typical. After arriving at the office, the secretary should: (1) consult the desk calendar and follow-up file, and attend to the most important matters immediately; (2) check through any correspondence left over from the day before, and have the letters requiring the employer's attention ready for him to begin the day's work without waiting for the morning mail to be brought in; (3) look up the day's appointments and be ready to call the employer's attention to important items when he arrives; (4) open, read, and sort the mail; and (5) proceed with the new work which includes writing letters, attending to memoranda, and other routine duties.

The secretary's schedule for the day's work will be interrupted many times by telephone calls, dictation, personal callers, and so forth; but it should be followed as closely as possible. The desk equipment, mental and physical,

should be neatly and conveniently arranged for instant use. The precise location of each type of stationery and miscellaneous supplies depends upon the regularity of its use in the special work of the secretary and upon the type of her desk. But a precise location there should be, in order to save time and promote efficiency. A dictionary should be within easy reach always; and other reference books, such as an English handbook or secretarial manual, a classified business directory, a book of synonyms, and trade and professional directories, should be kept where they may easily be referred to when questions arise that cannot well be settled without the use of authoritative reference books.

Dictation and Transcription

When the employer rings for his secretary, her response should be immediate, regardless of the importance of the work she is doing at the time. Instantly she should reach for the upper right-hand drawer of her desk for notebook, pen, and pencils; then, taking with her anything needing the employer's attention, she should signal a substitute to "cover" her telephone, and should answer the summons immediately. Notebook and pen should be open, ready for immediate dictation the moment the secretary enters the room. Regardless of whether she takes this dictation standing, sitting with the notebook on her knee or on the desk, or takes one-handed shorthand at the telephone, her outlines must be clear and legible, and she must take the

dictation word for word. Mumbled syllables should be written as they sound and encircled; and, if the words following do not clarify the meaning or if there is no repetition of such words later in the dictation, the employer may be questioned at the end of the letter. He should not, however, be interrupted during the flow of of thought.

The secretary may take advantage of the call to the employer's office to take up with him anything needing his attention that she may have brought with her, such as: mail that has just come in; letters ready to be signed; memorandums of telephone messages, appointments, or other information; or memorandums of questions or matters that the secretary needs to discuss with him.

If a page in the secretary's notebook is to be designated for quick reference, it can be folded over from the bottom to the right or left so that half an inch of the bottom of the page projects on one side of the notebook, and creased in this position. Telegrams and other urgent dictation may be marked "Rush," or may be marked with a colored pencil. If carbon copies are to be sent to several people, the number of copies needed should be placed at the beginning of the dictation to prevent the necessity for retyping. In leaving the dictator's desk, the secretary should take all materials needed for her transcription, and should never leave any personal belongings on the employer's desk.

In transcribing letters, corrections are made if necessary; but never should the intended meaning be changed. Only of necessity should a dictator be told that he has made an error. In the typing of letters and other materials, the work should be right the first time. Everything the secretary writes she should proofread, with careful attention to figures and dates. If erasures are necessary, they should be made as neatly and as quickly as possible, and the corrections typed in lightly. A good erasure is an art.

A single line drawn through each page of the notebook as it is finished does not lessen its record value when the filled notebook is dated and filed in chronological order with other used pads. The notebook should be ruled with a straight edge at the end of the day for the following day's dictation. A rubber band around the used pages, with the date at the top of the new page, keeps the notebook in readiness for immediate use. Needless to say, the pen should be kept well filled; and the pencils for emergency use or for colored-pencil markings of special items should be kept sharpened.

Meeting Callers

Never should an office caller be ignored when he enters the office; he should immediately be greeted with a smile. Callers may be of four types: (1) those who have regular and legitimate business contacts with the office; (2) those who come occasionally or only once, but who have legitimate

business reasons for calling; (3) those who have legitimate reasons not directly related to the business, as in the case of the employer's family, friends, and associates; and (4) those whose reasons for coming would not be beneficial to the business, as in the case of peddlers and solicitors. The experienced secretary learns to classify callers rather accurately at the first interview, but she must be careful not to make hasty judgments which may irritate a caller who turns out to be one of importance. Courtesy and tact are of inestimable worth, particularly if the caller must be refused admittance or is referred to another person in the organization.

Telephone Technique

Since in a telephone conversation the only means of creating good will for the firm is through the voice, there is an obligation on the part of the secretary to develop a "voice with a smile." A low, well-modulated voice carries much better than one that is pitched high, especially if there are others working in the office. The voice should not be raised above normal; if there is any change, the tone should be lower than that generally used in speaking, and the words should be spoken slowly and deliberately, directly into the telephone, to give clearness and emphasis to the message. It is well to ascertain the name and the number of the person calling, particularly if the message is to be relayed to the employer or to another worker in

the office. Any reminders needed should be made during the conversation or immediately after the call is completed.

The secretary should be familiar with the operation of the office switchboard, in order to be prepared to make any calls that may be necessary after the regular operator has left, or when she is temporarily away from the switchboard.

Appointments and Reminders

A concise record of all appointments should be kept by the secretary. A desk calendar pad is usually kept for this purpose, with a similar one on the employer's desk for notation of his important appointments and for reminder purposes as well.

A card tickler file is generally used for follow-up purposes. This has first a guide for the current month, followed by a set of thirty-one day guides and by guides for the eleven other months. Reminders on 3" x 5" index cards are filed, so that the cards will bring the transactions to the attention of the secretary when, on the date indicated, she looks through the tickler cards for the day. Some offices have, instead, a tickler file of correspondence size, in which are filed substitution cards to be used in place of the correspondence when it is taken out of the active file for consideration. A "pending" folder is frequently used for unfinished material on the secretary's desk until it receives attention. Very few papers should be allowed to accumulate in this folder, however.

Manuscripts, Reports, Charts, and Graphs

In offices throughout the country, thousands of typists copy manuscripts from rough drafts handed to them. These are to be revised by the employer and recopied, until they are in final acceptable form. If material is to be assembled for these manuscripts, the secretary should be sure that what she types makes sense, and that it is in good form as to appearance, correctness of English and spelling, completeness, and accuracy in detail.

Administrative reports are made for the purpose of summarizing past actions on some situation and, usually, of making recommendations for future courses of action. These reports may vary in length from one page to a volume large enough to be bound. In keeping with the factual nature of the report, the language must be clear and direct. The literary style of manuscripts for articles and books, however, will vary with the subject-matter and the author's individuality. Several revisions may be necessary. If there are to be numerous sections transposed in retyping, it may be found much easier to cut the sections apart and pin or paste them in proper order than to try to follow complicated directions for inserts and transpositions. A title page is required for reports, bulletins, or manuscripts. A good handbook will answer a majority of the questions the secretary might have regarding the form and order of material.

The best presentation of statistical matter for reports and manuscripts is in the form of tables. Since graphic charts are frequently used in reports, the secretary will need to be able to construct simple forms of graphs. These are merely pictorial representations of statistics for the purpose of showing contrasts or relationship of the various items. The most commonly used types are: (1) bar, or columnar; (2) linear; and (3) circular. Bar graphs, frequently found in typed material, show contrasts in most cases. Linear graphs show relationships by fluctuating lines, or curves, as they are commonly called. Circular graphs show relative proportions in percentages, and are commonly called pie charts because they resemble a pie divided into sections. A compass and a protractor are needed to construct them accurately. The circle, or 360° , represents the total to be considered. If one element amounts to 25 per cent, then 25 per cent of 360° , or 90° , is measured by means of the graduated scale of degrees on the protractor. The circumference points indicated are then joined to the center of the circle by lines which form the part of the chart representing one particular item of the statistical information.

Examples of these three types of graphs are found in Business Organization and Practice, by William B. Cornell and John H. McDonald, Chapter XXI; Secretarial Training, by Madeline L. Slade, Mabel Howatt Hurley, and Kathryn L.

Clippinger, Chapter VII; Applied Secretarial Practice, second edition, by John Robert Gregg, Chapter XI; and in many other authoritative works on the subject of secretarial training.

Telegrams, Cablegrams, and Other Services

The experienced secretary becomes expert at handling messages needing quick transmission. She knows how to type a telegram on a regular blank, indicating the type of service desired and making two carbon copies, for confirmation for the addressee and for filing. She is familiar with the rates and the methods of writing and sending full-rate telegrams, day letters, night letters, full-rate cables, deferred cables, radiograms, and teletyped messages. Since rates change and methods improve, it is important to have reliable, up-to-date printed information at the desk for reference. As a matter of advertising, the telegraph company is glad to inform business people of its services. If the secretary does not know about some particular service, she should know where to find out about it quickly. If the message is not telephoned to the company in order to speed the process, the messenger boy should be called before the message is typed.

There are several things the secretary should consider when a message is to be sent through the telegraph company:

- (1) The dictation must be taken with the utmost accuracy, and should be read back to the dictator for corroboration.
- (2) Two carbon copies should be made. The original is sent to the telegraph office, unless the message is telephoned; and one carbon (or a confirmation letter) is promptly sent to the addressee, the other copy being filed. The confirmation copy serves also as a check on errors and misunderstandings in the original message.
- (3) The message composed from the data given must be clear and concise, and must be written in words that carry the most meaning.
- (4) Special attention should be given to the checking of figures, of the name and address, and of the exact date.
- (5) The secretary should know the rates and the kinds of services available.
- (6) The message should be dispatched with speed.
- (7) If a reply is expected, notation should be made to remind the secretary to watch for the reply. If the wire is an incoming one, the secretary should watch for the confirmation copy from the telegraph company.
- (8) The two carbons and the copy sheets should be properly arranged with the next blank form, to

permit quick insertion into the machine when the next telegram is to be sent.

Itineraries and Reservations

An itinerary, or outline of a journey, is made in order to spare the employer unnecessary travel. As he usually covers a specified amount of territory in a given time, he needs to know what trains he must take and when each leaves, what calls he has to make, what hotel reservations have been made, and similar details.

In order to plan an itinerary for her employer, the secretary must become familiar with the principal railroads of the country, with steamship lines, with bus and air routes, with desirable hotels, and so forth. Information concerning all these she must know where to find.

Railroad time-tables are published by every railroad to supply information concerning the services the road offers. An index lists alphabetically all the stations on the road and refers to the page or pages of the time-table where the train schedules for these stations are given. A typical time-table has a column which is headed "Read Down;" this is subdivided into several smaller columns, each headed by a number, representing the number of the train making the trip. The figures in the columns below the train numbers indicate the time at which the trains arrive at or leave the station listed. Of these figures, those printed in light type signify forenoon hours

(between twelve midnight and twelve noon), and those in boldface indicate afternoon hours (from twelve noon until twelve midnight). On the opposite side of the time-table is a column headed "Read Up," which is subdivided into time columns for the return trip. The various reference marks commonly appearing on time-tables are explained in the key printed at the bottom of the page. Many railroads provide bus service to stations not on their main lines. Extra-fare trains, for fast service between large cities on trains making only a limited number of stops, may be arranged for by paying an extra charge. The Official Railway Guide, published every month, lists all railroad stations on all railway lines in the United States and contains up-to-date time-tables of these railroads, as well as maps of the railroad systems. A copy of this Guide may be consulted at any railway station.

It would be well for the secretary to find out about the many types of services the railways offer. Reservations for accommodations on Pullman cars should be made in advance at the ticket offices of the railroad company or at the offices of the Pullman Company. Since Pullman cars are rented by the railroad, the regular tickets are presented to the railroad conductor, and the Pullman tickets to the Pullman conductor.

Independent bus lines between most of the cities of the nation have schedules in time-table form, similar to the

tables for railroad and air travel. Baggage limitations may need to be considered in making an itinerary. The amount of baggage that a passenger may carry free of charge is limited to about twenty-five pounds by air, to one hundred fifty pounds by rail, and to one hundred pounds by bus. Within the State of Texas, one hundred fifty pounds are allowed by bus without extra charge.

Steamship schedules can be secured at steamship-company offices or at hotels and travel bureaus. Stateroom reservations must be made if one is to spend the night on the water. Steamship rates are usually lower than railroad rates, while air rates are usually somewhat higher. In planning for ocean travel it is necessary to consult the office of a steamship company, where the clerks will arrange for sailings and will supply necessary information.

If the employer's trip is to be an extended one, the matter of standard time should be considered. Because of the variations in solar time in different parts of the United States, four standard-time belts are observed in traveling. When the sun is directly overhead in New York, it is twelve o'clock noon there; but the sun will not be directly overhead in Chicago until an hour later, in Denver until two hours later, and in Los Angeles until three hours later. When it is 12 noon Pacific time, then, it is 1 p.m. Mountain time, 2 p.m. Central time, and 3 p.m. Eastern time. Watches are set up or back one hour, when a new zone is reached.

All reservations must be made in advance for hotel rooms and for train, bus, or other accommodations. Hotel reservations made several days in advance will be confirmed by letter. Information about hotels in the United States may be found in the Official Hotel Red Book and Directory.

In making an itinerary, a good handbook may be consulted for a conventional style for its construction. A list of the addresses and telephone numbers of the persons to be interviewed will save the employer's time. Business papers to be used on the trip should be placed in envelopes properly labeled, appropriate notation being made in the itinerary. Always, the itinerary should be so constructed as to be easily interpreted. A copy should be kept by the secretary so that she may know where to forward his important mail daily. This mail should be registered, with instructions to hold or to forward it, and memoranda of all mail forwarded should be kept.

Questions and Problem Material

1. Name some of the routine duties of the secretary.
2. With what duties should the secretary usually begin her day?
3. Comment on the following statement: "When the employer signals for his secretary, she should answer the summons just as soon as she finishes the task she is doing."
4. Why should the secretary have someone "cover" her

telephone when she goes into the employer's office for the dictation period?

5. Read in your library the article "Why Use a Pen for Writing Shorthand?" and list two principal reasons presented therein for using a pen in taking dictation. The article appears in the November, 1940 issue of The Journal of Business Education, and is written by E. Clevenger.
6. Why is it a good idea for the secretary to keep her notebook in the front part of the upper right-hand drawer of her desk?
7. What sort of material should the secretary take with her as she starts to the employer's office for a dictation period?
8. If the employer starts giving dictation the moment his secretary enters the room, should she hurry to the desk, or walk composedly but quickly to her chair to begin writing? Give reasons for your answer.
9. How can notebook material be marked for quick reference after the dictation period?
10. What should be done about errors in grammar in the employer's dictation?
11. Comment on the attitude that every caller should be treated as an office guest.

12. Name four types of callers in the business office.
13. Give examples of ways in which the secretary can be of help to her employer in the handling of office callers.
14. Explain the significance of a "tickler."
15. Where is a "pending" folder kept and what is its use?
16. Name some uses in business for manuscripts, reports, charts, and graphs. Give examples of data suitable for each.
17. What is an administrative report? In what literary style should it be written?
18. Name three types of graphs frequently used in business.
19. Make a graph of the annual enrollment of your school for the last ten years. Could a circular graph well be used for this purpose? Explain.
20. Name the types of services available through the telegraph company.
21. Why is the "fast telegram" service more expensive than other telegraphic services?
22. What should the secretary take into consideration in planning to send a telegram?
23. What is an itinerary? List some of the details to be considered in arranging one.
24. Why, in a railroad time-table, are some of the figures printed in light type and some in black type?

25. Construct an itinerary for your employer, Mr. Rudolph Mason, who is general manager in the central office of The Kohlman Company, makers of electrical appliances. He is to interview branch managers in six large cities in various points in the Central, the Mountain, and the Pacific time-belts. He is to be gone six days from his Chicago office, and will make the trip both ways by train.
26. Name a source of information regarding railway schedules.
27. How should the secretary proceed in making hotel reservations for her employer in Seattle, Washington, if she knows nothing of the hotels in that city?
28. What is the Official Hotel Red Book and Directory?
29. Why is a typed copy of the itinerary kept by the secretary?
30. Why should memoranda of all mail forwarded be kept by the secretary?

CHAPTER V

HANDLING OF OFFICE CORRESPONDENCE

The handling of office correspondence, both incoming and outgoing, probably takes more time and intelligent attention than any other task of the secretary. Mechanical skill and a knowledge of what is considered good usage in business writing, as well as some familiarity with postal services and rates and with certain mailing equipment, are essential to the satisfactory handling of correspondence.

In his case study of office practices of representative large business firms, H. D. Shepherd reports:

The subject of incoming and outgoing mail occupied a very important place in the minds of the men reporting for the various companies. Its importance lies in the fact that communication by mail makes up such a vital part of business life; it is the machinery which "makes the wheels go 'round."

Reliable authorities estimate that 16 billion messages in the U. S. are transferred annually by letter.¹

In nearly all large business establishments there is a separate mailing department to which is assigned the responsibility of performing distinct functions in the organization. For this specialization in the handling of mail, these firms have the most modern machinery and equipment, and generally have responsible employees of the department arrive at the office before the regular office hours to open and assort

¹H. D. Shepherd, op. cit., p. 20.

the incoming mail from the last trains. Pre-sorting is done for the purpose of removing the personal mail, which is sent directly to the individual addressees. The other envelopes are sorted according to size and are passed on to the letter opening machine before the final check to determine the departments to which they are to be sent.

Incoming Mail

For incoming mail there is a special system of routing, which depends on its type in connection with the business. In a sales organization, for example, if orders come in for merchandise to be sold on credit, the order would naturally be routed through the credit department before being sent to the sales and shipping departments.

If the secretary has the responsibility for attending to the mail, she should look through the letters to find out if there are any personal letters to the employer or to others in the office. All other letters she opens with a mechanical letter opener which strips off a narrow edge from each envelope as it is fed to the machine, or with an envelope knife which is run under the flap of the letter. A time stamp is often used to indicate the exact time the correspondence is received or opened. The letters are inspected to see that the enclosures mentioned in it are attached to the letter. Remittances are sent to the cashier, and a notation is made on the letter of the amount and the kind of the remittance. If

enclosures mentioned are missing, notation should be made on the letter. A letter having no identifying signature or address should have its envelope attached. If a letter needs the attention of several people in the office, a routing slip bearing the names of persons or departments should be attached, the routing of the letter being indicated by checking the slip.

Correspondence for the employer should be arranged according to its importance, the most urgent matters being placed on the top for first attention. A place should be provided for this, either inside the employer's desk or in a folder where the papers will not be seen by others in the office.

The Business Letter

A business letter properly arranged on an attractive letterhead, with its message written clearly, briefly, and courteously, will speak well for the business it represents. Very important considerations in the writing of a business letter are: (1) its mechanical details, and (2) its personality. In writing letters which have not been dictated, however, the secretary should avoid putting her own personality into routine business correspondence.

The form and content of business correspondence depend on its purpose. A letter may be one of inquiry, of appreciation, of application, of invitation, or of complaint; it may be an order letter, a sales letter, a collection letter,

or a follow-up letter; it may be a letter of condolence or a post card. Letters may be written from dictation verbatim; they may be form letters; they may be a combination of dictation and form paragraphs; or they may be written by the secretary from brief marginal notations of her employer.

Governing the writing of the various types of letters are certain basic principles which may be found in any good secretarial training book or in any standard usage guide. Any prospective secretary who is not familiar with the parts of the business letter, the writing styles for such letters, and the general rules for planning and arrangement should consult a good secretarial book, such as any of those named in Table 2.

In general, the letter should be so placed on the page that it resembles a picture in a frame, its width being approximately three-fifths of its length. In actual secretarial work there is no time to count the number of words and to follow an elaborate letter placement scale. Practice in transcription will enable the secretary to estimate whether or not it is a "short" letter, a "long" one, or one of medium length. When an employer asks that a dictated letter be written directly on the typewriter, he may be asked whether it is to be short or long. Experience in taking his dictation will enable the secretary to judge the meaning of his off-hand response to this question.

Then the margin stops may be quickly set for a four-inch, a five-inch, or a six-inch line, depending on whether the letter is to be short, of medium length, or long. Upper and lower margins may be estimated quickly, and the paper twirled directly to the date-line position.

The real value of a business letter lies in its effect on the reader. This may be anticipated by its mailability. It should be neat in appearance, correct in detail, courteous in tone, and clear and concise in thought expression. The business letter should also be written from the reader's point of view, written around one central idea or corethought, free from trite expressions and weak participial endings, and strong in opening and closing paragraphs.

Outgoing Mail

After business correspondence is properly prepared and proofread, it should be checked to be sure that any enclosures needed are included and that the employer has signed all letters which should have his signature. Business communications may need only to be sent to another department within the organization, or they may need to be sent to individuals or to business firms on the outside.

In preparing correspondence for mailing, each letter is slipped from under the flap of its envelope and, as the folding is started, its inside and outside addresses are checked. The envelope is then turned over and the letter, without

being turned over, is grasped by the upper right corner and slipped into the envelope. Leaving the flaps open each time, with the addressed side down, about ten envelopes are spread on the table so that only the gummed edges of the flaps are exposed. A properly moistened sponge is then run over the flaps. With the right hand, palm facing down, one envelope at a time is picked up and passed on to the left hand, addressed side against the left thumb and flap down a against the palm of the hand; and the flap is sealed simply by closing the left hand. As the process is repeated, the envelopes accumulate in the left hand until the unit is finished.

In affixing the stamps, horizontal strips of stamps are moistened with a single stroke, and each stamp is affixed with the right hand. While the left hand presses it down firmly as the stamp is simultaneously twisted loose from the strip with the right hand, the envelope is moved along with the left hand to expose the next envelope to be stamped.

Any mail of doubtful weight is placed on a "beam" scale, and postage is computed on that over the 1-ounce limit. Stamps may be quickly applied by the use of a hand stamp affixer, which moistens and affixes a 3-cent stamp every time the plunger is depressed. Stamps for odd amounts are affixed by hand. Precancelled stamps may be purchased for parcel post and circular mailing, but not for first-class

mailing. This speeds delivery by eliminating the regular canceling routine at the post office. The use of meter stamps saves a great deal of time in the large business organization, as the automatic mailing machine prints postage on the envelopes and postmarks and seals them, all in one operation. This machine can quickly be adjusted to print gummed tabs for affixing to packages.

The secretary should know something about the four classes of mail and about such additional postal services as: special handling, special delivery, registered mail, air mail, parcel post, and C.O.D. Also, she should know something about the sending of postal money orders and the other methods of sending money, the tracing of mail, the classification of foreign mail, and the keeping and use of up-to-date mailing lists. Of the postal services here mentioned, the fastest and surest is the registered mail with return receipt requested. In order to plan for the most effective use of the many types of postal service, the secretary should be familiar with the daily mail schedule, both for deliveries and for collections, and with the local train and air schedules. Also, she should know the office hours of the local telegraph company.

Questions and Problem Material

1. Why is the efficient handling of office correspondence important to the business organization?

2. Name some advantages of having a separate mailing department.
3. Find out the method of handling incoming and outgoing mail in one of the larger retail stores in your locality.
4. Why is an envelope knife run under the flap of an envelope to open it?
5. What is a time stamp? Why is it used?
6. Explain to the class how you would route an order for merchandise on credit.
7. Describe your procedure for sealing letters. How may stamps be quickly affixed by hand?
8. Find out what should be done in tracing a letter for your employer, and report your findings to the class.
9. Where should the employer's mail be placed when it is taken into his office?
10. How would you arrange the following matter before placing it on your employer's desk?
 - (a) A personal letter from a friend.
 - (b) A memorandum of a telephone call.
 - (c) A registered letter.
 - (d) A memorandum of an appointment.
 - (e) A business letter from a customer.
11. Bring to class three business letters sent through the mail to you, to a friend, or to a local

business establishment. At the top of each letter place your name, and below the letter, near the bottom of the page, write (or type double-spaced) the words "Good," "Fair," and "Poor," arranging these in a vertical column at the left margin. Read the letters carefully and, if there are any errors in spelling or English usage, encircle each error; then evaluate each letter and place a mark to the right of the appropriate descriptive term in your column. Pass the letter on to the other members of the class for their rapid evaluation as to their mailability, based on general appearance and letter placement and, if there are errors indicated, on accuracy. When the letters are returned to you, make calculations to find out the percentage of the class agreeing with you in your evaluation of each letter.

12. What is meant by the "You" attitude in letter writing? To what types of letters is this particularly suited?
13. What is a form letter? Name occasions in business when such letters should be and should not be used.
14. Read from your library the article "How's Your Record?" by William A. Richards, which appears in the June, 1942 issue of The Business Education World. Then read from your text or other source

a section on application letters and personal data sheets. Write a letter applying for a position you would like to have, and fill out a personal data sheet. Using good bond paper, make two more original copies--not carbons--of the personal data sheet, and file these without folding them, for your own use later in making applications. Add to these your later educational training and business experience.

15. From the reading of any good reference material, list several main points to be considered in the mechanical details of letter writing.

CHAPTER VI

ORGANIZING FOR EFFICIENCY

Any business establishment, if it is to be efficient, must be well organized. Any secretary who does efficient work must have her office routine well planned. Not only must the physical and environmental factors--including the arrangement of equipment and proper ventilation and lighting--be conducive to efficiency and to a pleasant working spirit, but the mental attitude and equipment of the secretary must be such as to make possible the achievement of a high standard of excellence in her work.

Of importance to the secretary are: (1) the ability to index and file; (2) a knowledge of duplicating methods and office machines, and the ability to operate efficiently the machines used in her office; (3) the ability to select and use office reference books; and (4) the ability to find readily any other material needed in her work.

Indexing and Filing

The larger the business organization, the more essential to it is the function of correspondence filing. Regardless of the size of the business, however, it is most important that business correspondence and records be systematically

arranged and kept. The method of indexing and filing and the equipment used in any one business establishment depend upon the nature and size of the business, the volume of the correspondence, the character of the transactions and many other factors.

Indexing involves the mental process of determining, once and for all, the caption or heading under which a piece of correspondence is to be filed, and of deciding what shall constitute each unit of the title determined upon. It may or may not include the marking, or "coding," of the correspondence to assure its being replaced always at exactly the same spot in the files.

Filing serves a dual purpose: that of putting matter out of the way when it is not needed, and of making it available for immediate reference when it is needed at some future time. In order to handle with decision and confidence the correspondence passing through her hands, the secretary must be thoroughly familiar with the basic principles of indexing and filing, and must have the ability to apply these principles. A thorough familiarity with the letters of the alphabet in their relative positions is essential in filing, as well as in the speedy use of telephone and other directories, lists, indexes, dictionaries, and other office reference works.

A knowledge of the filing systems and the types of housing equipment in general use is of definite value.

More important, however, is a thorough familiarity with the rules for the indexing and filing of office matter. The general types of filing systems are: (1) alphabetic, (2) geographic, (3) numeric, (4) subject, and (5) the Dewey decimal system. The type of systems and the equipment used vary with the particular needs of the business organization. The rules for filing correspondence and information regarding filing systems and equipment may be found in any standard secretarial textbook or handbook. The most widely used set of rules used in filing is found in D. W. Duffield's Progressive Indexing and Filing, published by the Library Bureau Division of the Remington Rand Business Service, Inc.

Some types of business are better served by a departmental filing system, in which the correspondence and records of each department are kept within the department. There is a tendency, however, toward centralized filing. In this type, the files from all departments are brought together in a separate department under the direction of a file supervisor or a file clerk, who is directly responsible for the material filed. This centralization of records does not mean that, within the filing department, the records of all departments, as the legal, purchases, sales, data, and collection departments, are grouped together in the same file. It does mean, however, that representatives of these departments who are authorized to secure materials from the filing department do so by filling out and submitting requisitions for the needed papers.

Duplicating Methods and Office Machines

The secretary should know something of the various duplicating methods and office machines in general use. These machines include: duplicating machines, such as the typewriter, the Mimeograph, the Mimeoscope, the Multigraph, the Hooven Automatic Typewriter, the hectograph, the Ditto machine, and the Teletypewriter; adding, listing, calculating, and bookkeeping machines; and others such as the Dictaphone and Ediphone, the Stenotype and Dictatype, the automatic mailing machine, the letter opener, the check protector, and the cash register. The capable office worker should have also a degree of skill in operating the machines in use in her office. If she finds in her office machines with which she is not familiar, she should never attempt to use them without first learning how to operate them. Information may be secured from the instruction booklets provided with the machines, or from the local representative company which distributes them. Fundamentals of Office Practice, 1931 edition, by Foster W. Losp and Charles W. Hamilton, is an excellent source of information regarding the operation of various office machines.

Selection and Use of Office Reference Books

The only knowledge that is of value to the secretary is that which she knows and that which she knows where to find. To secure information needed in her work, the secretary should

look for it where it can be found; that is, she should be familiar with the various sources of information available, and should be able to find without delay the material needed.

Reference books include: dictionaries, telephone directories, social directories, city directories, classified business directories, professional and trade directories, the Congressional Directory, encyclopedias, the Readers' Guide to Periodical Literature, atlases, almanacs, gazetteers, credit-rating books, Who's Who in America, Moody's Manual of information concerning industrial corporations, the Directory of Directors, Bullinger's Postal and Shippers Guide, the United States Official Postal Guide, the Commerce Yearbook, the Official Hotel Red Book and Directory, the Social Register and the Blue Book.

The accumulated knowledge of all the ages, however, is of little value to the secretary unless she is able to express the ideas gleaned from it. A thorough knowledge of grammatical construction, as well as of spelling, is essential. The secretary who is not already well versed along this line should keep within easy reach a handbook of English composition and grammar.

Thus we find that the efficient secretary must have: the marketable skills needed in her work; a realization of her particular place in the functioning of the organization; a knowledge of and a skill in handling office duties; the

ability to find what is needed when it is needed; and the character, personality, and adaptability to meet satisfactorily and pleasantly the situations which confront her.

Questions and Problem Material

1. In what ways may the secretary contribute to the efficiency of the business organization?
2. Explain the difference between vertical and flat filing and give the advantages of each.
3. Find out the type of filing system or systems in use in your school, and compare them with those in a local business concern.
4. Why should the secretary be thoroughly familiar with the arrangement of the letters of the alphabet?
5. Should office correspondence be filed in front of or behind the guides?
6. Compare departmentalized and centralized filing.
7. What materials are placed in a file folder?
8. Explain the significance of the tickler date appearing on a requisition slip.
9. Instruct your class on how to make efficient use of a dictionary.
10. Name four commonly used types of duplicating processes and give examples of machines using each.
11. Find out the number of copies which may be satisfactorily reproduced with the various duplicating machines, and comment on the appearance of their work.

12. Type in good form your definition of the following:

Indexing

Correspondence

Filing

Manifolding

Out guides

Alphabetizing

Tab positions

Proofreaders' marks

Requisition slip

Dictograph

Stylus

Postage meter

Photostat

Sulphite bond

Master copy

13. Name five office reference books of importance to the secretary.

14. What are the attributes of the good secretary?

15. Write a paragraph telling why you think you would or would not like to be a secretary.

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