

# The Office

5e

PROCEDURES AND TECHNOLOGY



MARY ELLEN OLIVERIO

*Lubin School of Business  
Pace University  
New York, New York*



WILLIAM R. PASEWARK

*Professor Emeritus  
Texas Tech University  
Office Management Consultant  
Lubbock, Texas*



BONNIE R. WHITE

*Distinguished Professor  
College of Education  
Auburn University  
Auburn, Alabama*



Dianne Rankin, *Contributing Author*

**THOMSON**  
—★—  
**SOUTH-WESTERN**

Australia • Brazil • Canada • Mexico • Singapore • Spain • United Kingdom • United States

**The Office, Procedures and Technology, 5th Edition**  
Mary Ellen Oliverio, William R. Pasewark, Bonnie R. White

**VP/Editorial Development:**

Jack W. Calhoun

**VP/Editor-in-Chief:**

Karen Schmohe

**Contributing Author:**

Dianne Rankin

**Acquisitions Editor:**

Jane Congdon

**Project Manager:**

Dr. Inell Bolls

**Marketing Manager:**

Michael Cloran

**Marketing Coordinator:**

Kelley Gilreath

**Marketing Communication**

**Manager:**

Elizabeth Shipp

**Production Manager:**

Patricia Matthews Boies

**Senior Production Manager:**

Kim Kusnerak

**Senior Technology Project**

**Manager:**

Mike Jackson

**Web Coordinator:**

Ed Stubenrauch

**Manufacturing Coordinator:**

Charlene Taylor

**Production House:**

Lachina Publishing Services

**Printer:**

Quebecor World  
Dubuque, IA

**Art Director:**

Stacy Jenkins Shirley

**Cover/Internal Design:**

Grannan Graphic Design, Ltd.

**Cover Images:**

© Getty Images

**Photo and Permissions Editor:**

Darren Wright

COPYRIGHT © 2007

Thomson South-Western, a part of  
The Thomson Corporation. Thomson,  
the Star logo, and South-Western are  
trademarks used herein under license.

Printed in the United States of  
America

1 2 3 4 6 10 09 08 07 06

ISBN 0-538-44354-5

ALL RIGHTS RESERVED.

No part of this work covered by the  
copyright hereon may be reproduced  
or used in any form or by any means—  
graphic, electronic, or mechanical,  
including photocopying, recording,  
taping, Web distribution or informa-  
tion storage and retrieval systems, or in  
any other manner—without the written  
permission of the publisher.

For permission to use material from  
this text or product, submit a request  
online at  
<http://www.thomsonrights.com>.

For more information about our prod-  
ucts, contact us at:

Thomson Higher Education  
5191 Natorp Boulevard  
Mason, OH 45040  
USA

Microsoft product screen shot(s) reprinted with permission from Microsoft Corporation.

The names of all products mentioned herein are used for identification purposes only and may be trademarks or registered trademarks of their respective owners. Thomson South-Western disclaims any affiliation, association, connection with, sponsorship, or endorsement by such owners.

# TABLE OF CONTENTS

## PART 1 The Office in the Business World 1

### CHAPTER 1 | The Office in a Changing Business World 2

<b>Topic 1-1</b>	<b>The Office Today</b> . . . . .	<b>3</b>
	Offices Are Information Driven	
	Office Functions Are Varied	
	Technology in Modern Offices	
	Virtual Office	
	Home Office	
	Mobile Office	
	<b>Exercises:</b>	
	Reviewing the Topic . . . . .	11
	Making Decisions . . . . .	11
	Reinforcing English Skills . . . . .	12
<b>Topic 1-1</b>	<b>Activity 1 Getting Acquainted with Local Offices</b> . . . . .	<b>12</b>
<b>Topic 1-1</b>	<b>Activity 2 Accessing the Web Site for This Textbook</b> . . . . .	<b>13</b>
<b>Topic 1-1</b>	<b>Activity 3 Qualifying as a Home Office</b> . . . . .	<b>14</b>
<b>Topic 1-2</b>	<b>The Office in Relation to the Total Organization</b> . . . . .	<b>15</b>
	Understanding Organizations	
	Types of Organizations	
	Businesses, Not-for-Profit Entities, and Governmental Units	
	Goals of Organizations	
	Make Profits or Provide Services	
	Structure of Organizations	
	Board of Directors	
	Management	
	Department Employees	
<b>FOCUS ON</b>	<b>Employee Empowerment</b> . . . . .	<b>26</b>
	<b>Exercises:</b>	
	Reviewing the Topic . . . . .	27
	Interacting with Others . . . . .	27
	Reinforcing Math Skills . . . . .	28
<b>Topic 1-2</b>	<b>Activity 1 Organization Chart</b> . . . . .	<b>29</b>
<b>Topic 1-2</b>	<b>Activity 2 Income Statement</b> . . . . .	<b>29</b>

<b>Chapter Review</b> . . . . .	<b>31</b>
<b>Chapter 1 Activity 1 Organizations in Your Community</b> . . . . .	<b>32</b>
<b>Chapter 1 Activity 2 Balance Sheet</b> . . . . .	<b>32</b>

### CHAPTER 2 | Office Competencies 34

<b>Topic 2-1</b>	<b>Office Competencies Needed for Employment</b> . . . . .	<b>35</b>
	National Overview of Employment	
	Employment Outlook for Office Workers	
	Overview of Office Competencies	
	Word Processing	
	Data Processing	
	Information Management and Transmission	
	General Managing and Communicating	
	<b>Exercises:</b>	
	Reviewing the Topic . . . . .	46
	Making Decisions . . . . .	46
	Reinforcing English Skills . . . . .	47
<b>Topic 2-1</b>	<b>Activity 1 Jobs in Your Community</b> . . . . .	<b>47</b>
<b>Topic 2-1</b>	<b>Activity 2 Study an Occupational Field</b> . . . . .	<b>48</b>
<b>Topic 2-2</b>	<b>Developing Office Competencies</b> . . . . .	<b>49</b>
	Company Goals and Expectations for Employees	
	Total Quality Management	
	Continuous Management	
	Customer Satisfaction	
	Ethical Standards	
	Teamwork and Diversity	
	Global Marketplace	
	Productivity and Cooperativeness	
	Independence in Learning	
<b>FOCUS ON</b>	<b>Teamwork</b> . . . . .	<b>54</b>
	<b>Exercises:</b>	
	Reviewing the Topic . . . . .	60
	Interacting with Others . . . . .	60
	Reinforcing Math Skills . . . . .	61
<b>Topic 2-2</b>	<b>Activity 1 Checklist for Evaluating Team Projects</b> . . . . .	<b>62</b>

Topic 2-2 Activity 2 Professional Reading File . . . .	62
Chapter Review . . . . .	64
Chapter 2 Activity 1 Expectations of Employers . . .	65
Chapter 2 Activity 2 Employment Projections . . . .	65

**CHAPTER 4** Communicating in Written Form 111

**PART 2**  
Managing Information to Enhance Productivity 66

**CHAPTER 3** Information: A Vital Business Resource 67

<b>Topic 3-1</b> Information Processing. . . . .	68
Using and Managing Information	
Obstacles to Managing Information	
Information Processing Activities	
Information Technologies	
Hardware and Software	
Networks	
Maintenance and Security Measures	
<b>Exercises:</b>	
Reviewing the Topic . . . . .	88
Interacting with Others. . . . .	88
Reinforcing English Skills . . . . .	89
<b>Topic 3-1 Activity 1 Equipment Inventory. . . . .</b>	<b>89</b>
<b>Topic 3-1 Activity 2 Local Area Networks . . . . .</b>	<b>90</b>
<b>Topic 3-2</b> Information Systems and Resources . . . . .	<b>91</b>
Typical Information Systems	
Traditional Information Resources	
Electronic Resources	
Intranets	
The Internet	
Finding and Sharing Information	
E-Commerce	
<b>FOCUS ON . . . Intranets to Extranets . . . . .</b>	<b>98</b>
<b>Exercises:</b>	
Reviewing the Topic . . . . .	105
Interacting with Others. . . . .	105
Reinforcing Math Skills . . . . .	106
<b>Topic 3-2 Activity 1 Internet Use Report. . . . .</b>	<b>107</b>
<b>Topic 3-2 Activity 2 Update Equipment Inventory . . . . .</b>	<b>107</b>
<b>Chapter Review . . . . .</b>	<b>108</b>
<b>Chapter 3 Activity 1 Privacy Policies . . . . .</b>	<b>109</b>
<b>Chapter 3 Activity 2 Computer Security Tips . . . . .</b>	<b>110</b>

<b>Topic 4-1</b> Reading and Writing at Work. . . . .	<b>112</b>
Reading at Work	
Understanding and Following Instructions	
Responding to Inquiries	
Using References and Databases	
Improving Reading Skills	
Writing at Work	
Characteristics of Effective Messages	
Management of Writing Tasks	
<b>Exercises:</b>	
Reviewing the Topic . . . . .	125
Interacting with Others. . . . .	125
Reinforcing English Skills . . . . .	126
<b>Topic 4-1 Activity 1 Reading to Answer Inquiries . . . . .</b>	<b>126</b>
<b>Topic 4-1 Activity 2 Writing Procedures for a Task . . . . .</b>	<b>127</b>
<b>Topic 4-2</b> Business Correspondence. . . . .	<b>128</b>
Preparing Effective Documents	
Drafting and Revising	
Editing and Proofreading	
Positive, Negative, and Persuasive Messages	
Business Letters	
Repetitive Letters	
Envelopes	
Memos and E-Mail	
Improving Communications in Organizations	
Desktop Publishing	
<b>Exercises:</b>	
Reviewing the Topic . . . . .	147
Interacting with Others. . . . .	147
Reinforcing English Skills . . . . .	148
<b>Topic 4-2 Activity 1 Form Letters . . . . .</b>	<b>148</b>
<b>Topic 4-2 Activity 2 Standard Letter Format . . . . .</b>	<b>149</b>
<b>Topic 4-3</b> Business Reports and Related Documents . . . . .	<b>150</b>
Informational Reports	
Analytical Reports	
Gathering Data	
Researching Information Online	
Writing the Report	
Report Parts and Formats	
Documentation	
Tables, Graphs, and Charts	

FOCUS ON . . . Voice Recognition Systems . . . . .	154
<b>Exercises:</b>	
Reviewing the Topic . . . . .	167
Interacting with Others. . . . .	167
Reinforcing Math Skills . . . . .	168
<b>Topic 4-3 Activity 1 Memo Report with Table . . . . .</b>	<b>168</b>
<b>Topic 4-3 Activity 2 Memo Report with Graph . . . . .</b>	<b>169</b>
<b>Chapter Review . . . . .</b>	<b>170</b>
<b>Chapter 4 Activity 1 Press Release . . . . .</b>	<b>171</b>
<b>Chapter 4 Activity 2 Leftbound Report. . . . .</b>	<b>172</b>

## CHAPTER 5 | Communicating Orally 173

<b>Topic 5-1 Listening and Speaking. . . . .</b>	<b>174</b>
Importance of Listening	
Effective Listening Strategies	
Speaking Effectively	
Proper Language and Tone	
Considering the Audience	
Nonverbal Communication	
FOCUS ON . . . Body Language . . . . .	183
<b>Exercises:</b>	
Reviewing the Topic . . . . .	184
Interacting with Others. . . . .	184
Reinforcing English Skills . . . . .	185
<b>Topic 5-1 Activity 1 Speaking and Listening in a Meeting. . . . .</b>	<b>185</b>
<b>Topic 5-1 Activity 2 Summarize Meeting Proceedings. . . . .</b>	<b>186</b>
<b>Topic 5-2 Planning and Preparing a Presentation . . . . .</b>	<b>187</b>
Identify the Purpose	
Profile Listeners	
Develop the Message	
Visuals and Handouts	
Design Strategies	
Team Presentations	
<b>Exercises:</b>	
Reviewing the Topic . . . . .	200
Thinking Critically . . . . .	200
Reinforcing English Skills . . . . .	201
<b>Topic 5-2 Activity 1 Plan and Organize a Presentation . . . . .</b>	<b>201</b>
<b>Topic 5-2 Activity 2 Prepare Visuals and Practice a Presentation. . . . .</b>	<b>202</b>
<b>Topic 5-3 Delivering a Presentation . . . . .</b>	<b>203</b>
Practice and Prepare Notes	
Communicate with the Audience	
Use Visuals Effectively	
Answer Questions	
Present Closing Remarks	

<b>Exercises:</b>	
Reviewing the Topic . . . . .	215
Interacting with Others. . . . .	215
Reinforcing Math Skills . . . . .	216
<b>Topic 5-3 Activity 1 Create Presentation Evaluation Form . . . . .</b>	<b>216</b>
<b>Topic 5-3 Activity 2 Deliver a Presentation and Evaluate Performance . . . . .</b>	<b>217</b>
<b>Chapter Review . . . . .</b>	<b>218</b>
<b>Chapter 5 Activity 1 Research for a Presentation. . . . .</b>	<b>219</b>
<b>Chapter 5 Activity 2 Team Presentation . . . . .</b>	<b>220</b>

## CHAPTER 6 | Processing and Understanding Financial Information 221

<b>Topic 6-1 Cash and Banking Procedures. . . . .</b>	<b>222</b>
Safeguarding Cash	
Billing Customers	
Receiving and Making Payments	
Preparing Deposits	
Preparing Checks	
Reconciling a Bank Account	
Maintaining a Petty Cash Fund	
<b>Exercises:</b>	
Reviewing the Topic . . . . .	241
Making Decisions . . . . .	241
Reinforcing Math Skills . . . . .	241
<b>Topic 6-1 Activity 1 Reconcile Bank Statement . . . . .</b>	<b>242</b>
<b>Topic 6-1 Activity 2 Manage Petty Cash Fund . . . . .</b>	<b>243</b>
<b>Topic 6-2 Financial Reports and Payroll. . . . .</b>	<b>245</b>
Budgets	
Income Statements	
Balance Sheets	
Compensation Plans	
Deductions from Earnings	
Records for Payroll	
FOCUS ON . . . E-Commerce and Planning Strategies . . . . .	252
<b>Exercises:</b>	
Reviewing the Topic . . . . .	258
Making Decisions . . . . .	258
Reinforcing English Skills . . . . .	259
<b>Topic 6-2 Activity 1 Payroll Register. . . . .</b>	<b>260</b>
<b>Topic 6-2 Activity 2 Supplies Budget . . . . .</b>	<b>260</b>
<b>Chapter Review . . . . .</b>	<b>262</b>
<b>Chapter 6 Activity 1 Purchasing Schedule . . . . .</b>	<b>263</b>
<b>Chapter 6 Activity 2 Monitoring a Budget. . . . .</b>	<b>264</b>
<b>Chapter 6 Activity 3 Projected Income Statement. . . . .</b>	<b>264</b>





















