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THE PRACTICAL MANUAL FOR OFFICE WORKERS

*The quality of the materials used in
the manufacture of this book is gov-
erned by continued postwar shortages.*

THE PRACTICAL MANUAL FOR OFFICE WORKERS

BY

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First Edition

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THE PRACTICAL MANUAL FOR OFFICE WORKERS

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Preface

This manual was written to meet the urgent need for clear, brief information about the details of the everyday work that goes on in every office.

It is adaptable both to the organization with many employees and to the office where the work rests on a single assistant.

It does not deal with accounting, although there are sections which may be profitably studied in the accounting department.

Employers and office workers are carrying a heavier burden than ever before. As far as this book helps to ease that burden, its purpose will have been accomplished.

THE AUTHOR AND THE EDITOR.

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Part I. Making This Manual Count for Everybody in the Office

TO THE READER OF THIS PRACTICAL MANUAL

In this manual the **employer** stands for any superior officer who plans and directs office work.

The **office assistant** is the one who carries out any of these directions under such titles as

SECRETARY
RECEPTIONIST
STENOGRAPHER
TYPIST
MAIL CLERK
FILING CLERK
BOOKKEEPER
MESSENGER
MACHINE OPERATOR
SWITCHBOARD OPERATOR

Together, employers and office assistants make up the vast office army. Its work is vital in government departments, in production plants, and in every business that must be successfully maintained. Each office assistant has an honorable share—whether clicking typewriter keys, adding columns, handling telephone calls, indexing cards, filing correspondence, taking dictation, managing accounts, sorting mail, keeping records, or standing responsible for other affairs of the office.

POINTERS FOR THE USE OF THIS MANUAL

Adapting the Ideas. This manual is meant to be elastic for your practical needs. Use the margin of any page to write in or paste in additional or different procedures in effect in your office. Keep a folder of special forms, directions, and lists with this full-sized manual, to meet your routine requirements. For the forms, models, and other typed work, the ordinary 8½-inch by 11-inch sheet is advised because of uniform ease in filing and finding. When another size is needed, such as the 8½-inch by 13-inch sheet commonly used in lawyers' offices, the ideas in the manual will be found to apply.

Making the Manual Convenient. Make your copy a complete guide to your work so that it will provide full directions for the person who may succeed you, when you are promoted or transferred to another department. Let it show exactly how the officers you assist wish to have things done, to save you now, and your possible successor later, from asking needless questions or making needless oversights.

Enjoying the Index. To find a subject quickly, use the alphabetic index at the back of the book.

NOTE. The names and addresses given by way of illustration are wholly fictitious. Any similarity to actual names or addresses is purely a coincidence.

CHAPTER 1

Memorandum to the Employer

To: The Employer
From: The Author and the Editor
Subject: "Just How" for Your Office Assistants

This is the little book we should like to see in the hands of every office assistant in every office everywhere.

Here are details we have seen go wrong—or too slowly—because someone had never been told "just how," or had forgotten and needed a reminder.

Here are answers to questions that are being asked every day by workers who are willing to help lift the load in the office, if they know how.

The 50 short chapters on 50 pointed subjects are listed in the table of contents on page vii. An alphabetic index for quick reference begins on page 145.

If you are too hard pressed to write an office manual or to revise your old one, you can make this practical manual serve to show your assistants what you want to have done, and exactly how.

On a busy staff no one can stop to train stenographers, typists, and clerks in the knack of office work. Why not turn over copies of THE PRACTICAL MANUAL FOR OFFICE WORKERS for your supervisors to check topics, to underscore special suggestions, to write marginal directions, or to arrow the table of contents and the index—and then to pass them along where needed? It pays to make sure that every helper knows how to

Follow instructions (Chapter 4)
Protect confidential matters (Chapter 7)
Write out telephone messages (Chapter 29)
Put things where they belong (Chapter 46)
Read over figures and check errors (Chapter 21)
Use equipment and supplies properly (Chapter 47)
Do all work quickly and on time (Chapters 3 and 48)

CHAPTER 2
Memorandum to the Office Assistant

From the desk of
the Author

To: The Office Assistant
Subject: Your Advancement

How much can you make yourself worth in your office?

"Why didn't I think of that before?" Do you ask that when you hit upon a short cut for doing an ordinary piece of work? or see someone else follow a clever way of getting work like yours done? Even though you are known to be experienced, you can enjoy increasing usefulness by learning how to do specific jobs better.

In this manual you will find replies to questions that many office assistants have had to ask, facts that many have had to discover for themselves, and ways of working that many have had to struggle to find. Some will be familiar; some, new. Perhaps a few have been simply overlooked at your desk.

Some of the things in this book are not easy to learn. The author knows because she has had to dig at them herself. If you know "just how," you can do a thing right the first time. And that is easier than to have to correct it or do it all over.

Everywhere men and women are studying their work as never before. Spend a week end with this book, and an evening now and then. Try using the manual as suggested in Chapter 3, "Getting the Knack." Use it, too, as a basis for thinking, for finding out how other people work. Talk over what you read here with your associates, with businessmen. Disagree with a point by improving on it to fit your position.

Put the knack of office work into action by knowing just how to

- Sort cards and papers
- Find a letter immediately in the files
- Use reminders
- Alphabet names perfectly
- Type from rough draft readily
- Take care of affairs while your employer is away
- Go ahead without detailed supervision

THE PRACTICAL MANUAL wants to be your constant friend. See the Pointers for your aid on page 2.

Part II. On the Move

CHAPTER 3

Getting the Knack

Do you know people who always seem to have the knack of doing things? They had to work to get that knack. The magic of success as an office assistant is in knowing just how to do this thing right and that thing right—to save time here and save time there. Try picking up definite tricks of your trade from this manual. Mark them. List them. Give them a chance to step up your output by making every day run smoothly.

How Do You Use Your Hands? There's a knack that pushes the simplest office duties along in a hurry. Take, for example, wrapping a package. How do you turn the ends? tie the knot? handle gummed paper? use the scissors?

There's a big difference between flurried haste and real speed. It is good business to take time to

Rule carefully

Paste neatly

Fold letters evenly

Stick stamps on squarely

Place papers in a folder trimly

How Do You Make Important Things Attract Attention? Plan to make an important or frequently used item catch the eye by such distinct means as color, size, and marking.

Color. Have color help in putting away, in finding, in identifying things of a kind, and in forcing special attention. Let color talk like this:

A red slip of paper says, "Rush!"

A blue manifold copy of a memorandum says, "Send to Chicago branch."

A yellow sheet in the file says, "This is a cross reference."

A green sheet in the file says, "A paper has been taken out here."

A red-inked figure in a column says, "Subtract this amount."

A blue-crayon *S* says, "Mr. Slade has seen this."

Size. Large handwriting or large type, if printed, makes a quick and strong impression. By contrast, a small slip pinned to the top of a large sheet of paper will be noticed.

Marking. Anything that sticks out or sticks up, like a thumb tab, commands attention. A label on the frame of each rubber stamp shows what it is and which side to hold toward you to print right side up. Check marks, arrows, prominent underscoring by

hand, an encircling line, or a vertical line down part of a margin will call attention and often make additional explanation unnecessary.

Does Your Spelling Improve? Make a study of every word you misspell and every word that you have to look up. Don't find yourself saying, "I always have to look up **accommodate**." Learn those two *c*'s, two *m*'s, and single *o*'s. If you find two accepted spellings for a word, such as **skillful** and **skilful**, or the plural **memorandums** and **memoranda**, learn one and hold to it. If a few words keep troubling you, make a list to have by your typewriter for reference until you master them all. Do not interrupt an associate with, "How do you spell **separate**?"

Do You Know How and When to Abbreviate Words? Learn to decide immediately when a word should be spelled out for proper appearance and when it should be abbreviated to save time or space. In ordinary correspondence follow the guide below.

Official title (civil, military, or naval) is spelled out when formality requires or when not followed by the Christian name or initial, *e.g.*, **Major Landers**. Otherwise, use such abbreviations as these:

Adjt.	Adjutant	Gov.	Governor
Adm.	Admiral	Lt., Lieut.	Lieutenant
Asst.	Assistant	Maj.	Major
Atty.	Attorney	Mgr.	Manager
Brig.	Brigadier	Pres.	President
Capt.	Captain	Prof.	Professor
Col.	Colonel	Pvt.	Private
Comdg.	Commanding	Sec., Secy.	Secretary
Comdr.	Commander	Sgt.	Sergeant
Comdt.	Commandant	Supt.	Superintendent
Corp.	Corporal	Surg.	Surgeon
Ens.	Ensign	Treas.	Treasurer
Gen.	General		

Mr., Mrs., and Dr. (Doctor) are always used, unless formality calls for **Harold M. Franks, M.D.**, instead of **Dr. Harold M. Franks**. The words **Honorable, Right Honorable, Reverend, and Right Reverend** are adjectives, not titles, and are usually abbreviated unless preceded by *the*; *e.g.*, **Hon. James Robbins** or the **Honorable James Robbins**; **Rt. Rev. Joseph Rines** or the **Right Reverend Joseph Rines**.

In names of firms or corporations, unless the full legal title is needed, the following abbreviations should be used:

Bros.	Brothers	Inc.	Incorporated
Co.	Company	Ltd.	Limited
Corp.	Corporation	&	And

ABBREVIATIONS IN COMMON USE FOR BUSINESS LETTERS

IN ADDRESS OF ADDRESSEE

Apartment.....	Apt.	Care of.....	c/o
Avenue.....	Ave.	Court.....	Ct.
Boulevard.....	Blvd.	Road.....	Rd.
Building.....	Bldg.	Street(s).....	St. (Sts.)

FOR ADDRESSES INSIDE THE UNITED STATES
(Official List)

Alabama.....	Ala.	Nebraska.....	Nebr.
Arizona.....	Ariz.	Nevada.....	Nev.
Arkansas.....	Ark.	New Hampshire.....	N. H.
California.....	Calif.	New Jersey.....	N. J.
Colorado.....	Colo.	New Mexico.....	N. Mex.
Connecticut.....	Conn.	New York.....	N. Y.
Delaware.....	Del.	North Carolina.....	N. C.
District of Columbia.....	D. C.	North Dakota.....	N. Dak.
Florida.....	Fla.	Ohio.....	Ohio
Georgia.....	Ga.	Oklahoma.....	Okla.
Idaho.....	Idaho	Oregon.....	Oreg.
Illinois.....	Ill.	Pennsylvania.....	Pa.
Indiana.....	Ind.	Rhode Island.....	R. I.
Iowa.....	Iowa	South Carolina.....	S. C.
Kansas.....	Kans.	South Dakota.....	S. Dak.
Kentucky.....	Ky.	Tennessee.....	Tenn.
Louisiana.....	La.	Texas.....	Tex.
Maine.....	Maine	Utah.....	Utah
Maryland.....	Md.	Vermont.....	Vt.
Massachusetts.....	Mass.	Virginia.....	Va.
Michigan.....	Mich.	Washington.....	Wash.
Minnesota.....	Minn.	West Virginia.....	W. Va.
Mississippi.....	Miss.	Wisconsin.....	Wis.
Missouri.....	Mo.	Wyoming.....	Wyo.
Montana.....	Mont.		

IN NOTATIONS AT THE CLOSE

Carbon copy <i>or</i> carbon copies.....	c, cc, C
Enclosure <i>or</i> enclosures.....	enc., Enc.
Postscript.....	PS., P. S.
Separate cover.....	sep. cov., Sep. Cov.

Familiar parts of the address may be abbreviated, *e.g.*, **Bldg., St., Tenn.** (See table on page 7 for common abbreviations.)

Names of states should be abbreviated by the official government list on page 7. These abbreviations are standard and avoid possible confusion, *e.g.*, of *Cal.* with *Col.* and of *Neb.* with *Nev.* Exceptions may be made by using **Kan.** for *Kansas* and **Ore.** for *Oregon*. Use **P.I.** for *Philippine Islands* and **P.R.** for *Puerto Rico*. As a rule, spell out the names of insular possessions and territories of the United States, and the names of foreign countries, such as **Canada** and **England**.

Notations at the close of a letter are abbreviated, *e.g.*, for enclosures and extra carbon copies. (On page 37, note that preference is given to small letters to avoid waste of using shift key.)

Numbers are generally spelled out at the beginning of a sentence. To meet technical requirements or to avoid extended wording, arabic numerals are allowed at the beginning of a sentence, *e.g.*, *Eighty-one thousand nine hundred and fifty-four* is written **81,954**.

Does Word Division Slow Down Your Typing? Are you puzzled about dividing a word by syllables at the end of a line? Follow one over-all rule: **Divide by pronunciation.** Study the "First Aid for Word Division" on page 9 so that you will not have to take time to look up words. Run through dictionary pages until you see just how this principle works out. Try copying a list of words from this book, dividing each one into its syllables as you type; then check your division as shown in the dictionary. As soon as you can relate the writing of the hyphen to the speaking of the word, you will rarely have to hesitate or to erase an incorrect division.

When Can You Make a Machine Do the Trick? Learn how to manage all sorts of equipment in the office, if it promises to give you real help. Whenever a machine—the duplicating machine, the adding machine, or other calculating machines—can save time on a large job or even on a small one, make it do your work.

On your typewriter, make full use of the tabular stops, the marginal stops, the carriage-release levers, the shift-key lock (for solid capitals, underscoring, or asterisks), the paper guide, the paper release, the margin release, and the card-holding appliance.

Do You Let Small Equipment Count? Are you getting along needlessly without some inexpensive article that could save minutes and actually improve your work? For example, do you get the best service from a variety of fasteners to hold things in place for temporary or permanent use—staples, pins, clips? Do you use a large spring clip for a temporary accumulation of papers? let paste or mucilage fasten a small paper to a larger sheet? place hinged stickers at the edge of what must be viewed on both sides?

Study the window displays of supply stores. Look around at a good stationer's for such aids as are on the market, and get them into use.

FIRST AID FOR WORD DIVISION

A. Try to avoid divided words at the ends of lines because such division makes reading more difficult.

1. Keep a word whole at the end of the line, unless it would run conspicuously into the margin. In that case, type the whole word at the beginning of the next line, unless a conspicuous gap would be left.
2. Never allow hyphens to end three successive typed lines.
3. Do not divide a word that is pronounced as one syllable, even though it looks like two syllables (such as **planned**).
4. Do not divide a word on one letter (**again** or **over**, never *a-gain* or *o-ver*).
5. As a rule, do not divide so that only two letters are left either before or after the division (**extra**, **fifty**, or **didn't**, not *ex-tra*, *fif-ty*, or *did-n't*).
6. Do not divide proper nouns (**Brazil**), unless very long (**Saskatch-ewan**), or abbreviations (**M. D.** or **6:00 p.m.**), or figures (**\$7,058,293.05** or **100%**).

B. If the right-hand margin would be made ragged by keeping a word whole, apply the following rules:

1. Divide a compound word on its hyphen to avoid two hyphens (**second-rate**, not *sec-ond-rate*).
2. Divide a word to carry the meaning to the reader (**pocket-book**, not *pock-etbook*).
3. Avoid dividing the syllables of a proper name (**Robert** or **Elizabeth**), the initials of a proper name, a street address, or a date. If necessary, divide

Mr. F. L. Hall after *Mr.*
73 Oak Street after *Oak*
July 7, 1944 after the comma

THE CHIEF RULE

4. Divide a word by its pronunciation into syllables. Every word may be pronounced with a slight pause to mark off each syllable. With a few exceptions, these pauses mark the correct word division for typing. (The noun *record* is pronounced and therefore divided **rec-ord**, but the verb *record* is pronounced and therefore divided **re-cord**.) When in doubt, let the dictionary decide the right way and fasten it in your memory.

Following Instructions Plus Taking Initiative

Have you ever put a piece of work through so blindly that your employer had to say, "Just what does that mean?" Do you try to see the point of everything that is assigned to you?

Have you learned which details your employer likes to have you carry without being told? which he would rather not have you touch without instruction? which he is glad to have you offer to do? Can he rely on you to pick up your work? go ahead with it? leave it done right?

Your pay has to be less whenever your employer or a supervisor has to be paid to

Lay out work for you
Tell you how to start it
Show you how to carry it through
See that you get it done
Look it over in detail

Getting Complete Instructions. Take instructions in writing. Always go to your employer's desk with a notebook or pad and a pen or pencil. Listen attentively; ask necessary questions. Jot down any brief reminder that may be needed. When you go back to your desk, know

What you are expected to do
How you are expected to do it
When you are expected to get it done

Doing What Is Asked. Your employer has confidence that he can dismiss from his mind each item that he gives to you. When he asks you to look up a man's full name and to find a certain bulletin, he expects that name and that bulletin to come to his desk without further thought from him. If you fail, he may overlook just that piece of business he meant to attend to.

Finishing Each Job. Carry through what your employer turns over to you just as far as you can. Only be sure you do not go beyond your authority.

Plan your work to be right the first time. Think each piece of typing through from start to finish so that you will not need to throw trial copies in the wastebasket. Even though you hold an advanced position, it will pay to watch your errors and study how to cut them down.

Holding your attention. Put your undivided attention on the work, except for necessary interruptions. Avoid looking up when someone near you moves or when a person enters the room or passes your desk. Don't be afraid of "missing something that is going on."

Whenever you can, finish a job without having to pick it up a second time. Handle a paper just once, if once will get it properly out of the way.

Checking off what is done. Use a check mark beside, or a horizontal line across, any memorandum that has been followed through. When items in a shorthand notebook have been cared for out of order, do not slip the elastic band along until each page included under it has been entirely canceled with a vertical line.

Taking Criticism without Excuses. Can you think of criticism as simply a pointed suggestion to make work go easier and better? Don't make personal excuses such as

“I thought you said just one copy.”
 “I didn't know you meant today.”
 “I thought it was near enough right.”
 “I can't see what is wrong about that.”
 “I didn't think that would matter.”
 “I thought it looked all right.”
 “I didn't notice that.”
 “I didn't think it seemed quite right at the time.”
 “I thought it meant the same thing.”

It is not always easy to admit error, to take advice, to begin over, to keep on trying; but it pays. Listen to criticisms. Don't repeat mistakes. Then when there is need for promotion (and good office assistants are scarce), you will be ready to step up.

Using Your Initiative. Don't be afraid to tackle work such as you have never handled before, if it is given you to put through.

Be independent of consulting others unless it is really necessary.

Check yourself. This saves your employer from feeling that he must check you. It saves you from the feeling of being checked.

Make suggestions after they are well thought out, but choose the right time and the right way.

Lifting the Load. While you are following definite instructions about part of your work, watch also for the chance to do a bit more than is expected of you. Look out for the thing that nobody seems to be attending to; find out whether you can help by making it a part of your job. Someone, for example, has to see that all questions received in correspondence are answered promptly, all requests attended to, all promises kept. Can you qualify for these three responsibilities by studying and by watching your employer and other members of the staff?

If you find you are going to have spare time, ask whether there is anything you can do. Enjoy the satisfaction of knowing that you are more than just a helper—that you are actually lifting your share of the office load.

CHAPTER 5

Bringing Back the Information

Your employer may need to have you look up information for him before he can go ahead with a certain piece of business. Be sure you know exactly what he wants you to find out. If it will help your search, learn also why he wants it. Get all the items asked for. Depend on yourself for finding, keeping, and remembering information.

Keeping All Reference Matter in Regular Places. At your desk, have a definite place for material frequently needed for reference, such as

- Desk dictionary
- Telephone directory
- Lists of telephone numbers and addresses
- Handbook of English usage
- United States Government Printing Office Style Manual*
- Specialized catalogs and bulletins
- Books most used in your daily work

In files, on shelves, or on a flat surface, keep further material in proper order, such as

- City or town directory
- Unabridged dictionary
- Thesaurus
- Encyclopedia
- Official Postal Guide
- Atlas
- Directories of organizations
- Information of business or personal interest to your employer

Having Reference Matter Up to Date. Have the latest tables of mails and train service; postal, express, and telegraph regulations; mailing lists; and business catalogs. Remember that the post office, the telegraph office, the telephone office, the express office are always ready to give you up-to-date help.

Knowing Where to Look. Become acquainted with all sources of information in your office and with standard works on the reference shelves of the nearest library. Learn where to find a given kind of fact for your business, what directory to turn to, what magazine or bulletin to look for, and how to find the book you want.

Discover how to use your reference books for all they are worth. For example, study the make-up of the classified section of your telephone directory and make it fill your need for all the kinds of information it can produce. Know what sorts of information are in your dictionary outside the main word section. If you refer often to any part, such as the gazetteer or a list of places in the United States, put a typed marker at the first page of the section.

Knowing How to Hunt. In a book index, look first for the most likely key word. Persist until you find the needed reference. (For detailed help about alphabetic finding, refer to Chapter 38, "Finding Words, Names, and Subjects.")

Reading Quickly and to the Point. Do not let your eyes wander over paragraphs that are not in line with your immediate search.

Getting Information from People. If you are forced to get help from a person in your office or from a reference librarian, interrupt graciously, speak clearly, come straight to the question, listen to the answer, say "thank you," and dismiss yourself quietly.

If you have to write for information, be courteous, clear, brief. Enclose a stamped addressed envelope for reply.

Taking Notes and Setting Up Information. Make a written note of an address from a file, a figure from a report, or information of greater length. Have a place to keep every note which promises to save repeated hunting. Whenever possible, take a book to your typewriter to copy an item direct. Otherwise, use shorthand, making careful word-for-word outlines; then transcribe your findings in orderly form for reference. Copy only what is needed, always noting the source in sufficient detail.

Raiding for That Mislaid Paper. Cultivate your imagination and sense of humor so that you can raid the whole office successfully for a paper that is "lost." You will be a decided asset to your employer, if you can relieve this annoying situation.

What would you add to the following to help someone who wishes to be a good raider?

Self-control. Don't imply by voice or motion that your employer or an associate has been careless or thoughtless, whether or not that may be the truth.

Thoroughness. Be a good surface raider, but go down under, too. Don't make it necessary to look twice in the same place.

Recollection. Where was that paper last seen? Who handled it last? Has it been put away somewhere, or is it still at large in the office? Don't stick to the recollection that it was a "small blue paper," only to discover in the end that it was a large white paper.

Reason and imagination. Apply both your reason and your imagination to the raid. Has a metal clip stolen it with other unrelated papers? Who might have been using it, and for what? What may you yourself have done with it? Run over the possibilities like a good detective. Is it under the corner of the large blotter on your employer's desk? Is it in that coat pocket where he sometimes "files" matters he is thinking over? Did he take it home?

Perseverance. When you are ready to give up, hold out a little longer. Perhaps you will get a new thought as to where the paper is.

Delay. After due hunting, if the paper isn't needed at the moment, try the it-must-show-up method, and continue to watch out for it.

Final resourcefulness. As a last resort, try to replace the lost paper by getting a copy from the person who sent it; by asking for a copy from the person to whom you sent the original copy; by looking back in your shorthand notebook; or by getting together the data, as far as possible.

CHAPTER 6

Using Reminders

Find the best ways to remind yourself of every duty at the right time. Make use of

Desk calendar pads
Memorandums for yourself
Methodical ticklers
Resulting brief notations for your employer

Two Calendar Pads. If a daily calendar pad, as printed, is not divided into hours, put the hour and minute prominently at the left for every timed reminder. All others should be entered in a way to show that they must be cleared, though not at a definite time.

Your employer's desk pad. Take responsibility for entering your employer's appointments and reminders; be sure that they do not conflict.

Write clearly, and not too briefly, so that neither you nor your employer will have to puzzle over an entry when the time comes.

When an appointment is canceled or the hour changed, cross off the original entry and record any change. If it seems advisable, call your employer's attention to the change, either orally or by a brief memorandum such as

2/14/45

Mr. Wright had to cancel today's
appointment. He will come in
tomorrow, Thursday, at 10 o'clock.

M. A. R.

Your desk pad. Use your own calendar pad for your office appointments, special work that must be put through on a given day, matters to be followed up, and the appointments of your employer as far as you know them. Choose a pad with enough space to put notations for the busiest day in proper order.

Do not clutter your business reminders with memorandums of your personal affairs.

Keep your calendar pad within easy reach of your telephone; never hidden from sight.

Draw a line through items as they are cared for, so that work yet to be done will always stand out.

Toward the end of the day, glance ahead and remind your employer of any evening appointment or early appointment for the next day.

Before turning to the next leaf, see whether any notation still stands. If so, make a note wherever it should be carried forward—on the pad for another day, or on a separate memorandum. Remember that neither you nor your employer will be looking back to pages that have been turned over.

Memorandums for Yourself. Strike the happy medium between relying on "a good memory" and relying on a good memorandum. To jog your memory, write small memorandums for varied items or one running memorandum of several related or short items.

Break up unrelated reminders for yourself or others into clearly separated parts, well-spaced or distinctly numbered.

Jot down questions and reminders of what you must mention when you go to your employer's desk. Present these definitely and swiftly; *e.g.*, if your memorandum reads:

Mr. Lord to see Mr. E.

Call Mr. Putney

say to your employer, "Mr. Lord would like to see you as soon as possible," and "Shall I get Mr. Putney on the telephone for you before Mr. Lord comes in?"

Ticklers. Make ticklers remind you of work to be carried through on special dates; or at regular intervals, such as weekly reports, monthly bills, quarterly payments, annual announcements.

For each purpose select the most suitable kind of tickler and use it systematically; for example,

1. Follow-up sheet. Make up dated sheets to trace follow-up work requiring more or less regular attention, such as sending a notice of a meeting or getting a bank statement.

2. Suspense file. Have a series of day folders marked for each day of the current month and of the next month, with ten successive folders for the next ten months. This makes a "suspense file" in which papers and memorandums will automatically appear at the proper dates for attention.

Suppose today to be March 1, 1945. At the front of your suspense file you will have a guide tab marked **March**, followed by folders dated **1 to 31**, with reminders for the current month. Behind these, with a guide tab marked **April**, will be folders dated **1 to 30**. Next will come folders for the months of May 1945 through February 1946, *not* subdivided by days.

At the close of each month, shift matter that has collected for the second month ahead into day folders. For instance, on March 31, 1945, May memorandums should be sorted into day folders. On April 1, a folder for the month of March 1946 will be started at the back of the suspense file. By this method, you will always have from one to two full months conveniently sorted ahead by days, with the rest of a full year divided by months.

3. Pending folder. Let a single pending folder (preferably with alphabetic divisions) hold reminders of unfinished work that must be kept in sight and of replies that are expected within a reasonable time. You should run through this folder at least once a week to see what needs to be followed up.

4. Special ticklers. Equipment may be had for specialized ticklers which utilize color, cards with movable tabs, and other devices that you may find applicable to your work. Choose the simplest system that will meet your needs; then follow it with regularity.

Reminders for Your Employer. Give your employer a courteous reminder of any business item that may be overlooked in the pressure of the day's work. Do this by word of mouth when you go to him for other purposes; or lay on his desk a small memorandum such as

3/9/45

You wanted to be reminded to talk
with Mr. Gordon before noon.

M. A. R.

Call his attention to any important point which he might not notice; for example,
attach a small slip to an incoming letter, reading

5/3/45

Please note that the postscript asks
for an immediate reply by wire.

M. A. R.

Remind him of appointments and of what he may wish to take along to them. For
instance, in the late afternoon put on his desk

9/6/45

Do you want to take this report home
tonight to have with you when you call
at the bank to see Mr. Howe on your
way to the office tomorrow morning?

M. A. R.

Part III. As Precious as Money

CHAPTER 7

Protect Confidential Matters

Follow the unwritten code of honor that makes a business staff closemouthed. Have no share in letting information leak out. Think *before* you speak.

Earn the confidence of your employer, the respect of your associates, and your own self-respect. Keep business matters absolutely confidential.

What Do You Know? What information do you hear or read or have dictated in your particular position?

Are you a secretary? Can your employer say, "I never have to wonder whether my secretary will talk about my business or private affairs outside the office"?

Are you in an accounting department? Do your associates know that you "never give out any figures about costs, or profits, or salaries"?

Are you at a switchboard? Is everyone right in trusting you not to "listen in" or to tell what you may hear?

Are you in a filing department? Do you hold the trend of correspondence in your head for filing purposes but not for discussion with others inside or outside the office?

By Way of Conversation. In conversation and in personal correspondence, do not relax your secrecy for the entertainment of your friends or family. It is too late when you have to make the excuse, "I don't see how that got around; I asked everybody I told not to tell."

Play safe in talking with even your business associates. Someone near by may put what you tell with what he or she knows. A vital secret may be out, which will hurt the business and may also hurt you or some other person.

Do not listen to gossip or spread it. Let it be recognized that you are too busy to be a busybody.

Refuse to receive or to give harmful insinuations. A telling gesture of the hand or lift of the eyebrow may imply enough to cause real mischief.

Caution at the Telephone. Avoid telephone "broadcasts." Give out no information unless you know who is at the other end of the line.

Make no statements, ask no questions, answer no questions in such a way as to give confidential information to anyone near you. If necessary, you may say, "We shall be glad to put that in writing for you in today's mail" or "If you will hold the line, I will go to another telephone." Even telephone booths are not always soundproof. Remember that others may be listening, either intentionally or unintentionally, along the line.

What to Keep to Yourself. Be sensitive about detecting when matters are private. Keep to yourself, for instance,

Information about the pay roll
 Proposed changes in staff
 Plans for furthering or changing the business or its methods
 Affairs discussed in special conferences
 Data which might be of interest to competitors

Be cautious about giving information in any way regarding the firm, the employees, or the business. Credit companies, for example, may call for information about the pay and standing of employees. Turn such an inquiry to the person in authority.

How to Meet Curious Questions. Meet all queries with skillful answers that will serve to quiet questioners, such as

"I do not know whether Mr. Adams bought more stock yesterday."
 "I think you will understand why I am not permitted to give facts about salaries."
 "I think Mr. Adams is not ready to make any statement yet."
 "I can't tell you until the list is announced."
 "I really can't give out that information."
 "Sorry, but I am not at liberty to tell."
 "I will ask Mr. Adams and let you know, if you will give me your name and address."

Be proud to have a fellow employee say behind your back, "I tried in every way to get her to tell me what it was all about (*or*, what he said, *or* when the change is going to be made), but she wouldn't tell me a thing."

Silence about Your Employer's Personal Affairs. Keep in sealed envelopes, or in a locked box or drawer, papers that only your employer and you should see. Protect from curious eyes all things such as carbon copies of his private letters, even when an entire office force is regarded as trustworthy.

If you receive dictation of private affairs, you may come to know much about your employer's family life, his finances, his serious interests, his recreation, and his friends. Keep to yourself all personal matters that pass through your hands. This trust holds good while you are in the employ of a given man. It holds just as absolutely after you have left his employ, or after he has left the organization.



CHAPTER 8

Guard the Valuables

Do you share the use of a vault? Do you have the care of a small safe? Do you handle money and valuable papers? Such trust shows plainly that you have a reputation for carefulness and integrity to be kept clear.

Think of the safe, the vault, and the locked drawer or box as a very special part of the filing equipment, which provides required privacy and safety. If you are the one who is responsible, see that these are closed and locked at your lunch hour and whenever they are not under your eye or the eye of someone who shares the responsibility.

Standing on the Alert. Contracts, certificates, agreements, leases, and legal documents of all sorts, as well as papers of any possible money value, must be under constant care. Are you the one who is entrusted with this care?

Intelligence about valuable papers. Keep awake to the importance of the dates, the value, and the meaning of papers given you to watch, such as

Insurance policies with dates of premiums to be paid, possible
dividends due, and expirations approaching
Securities and notes or other obligations with definite dates
of interest or principal payable or receivable

Your systematic record. Tie these matters in detail to a systematic record. If you do not understand what any kind of paper means well enough to carry out your duties, find out from some reference book, or ask your employer specific questions. Don't pretend that you know; be sure of it. Don't ever fall back on that weak excuse, "But I didn't realize. . . ."

Protection against loss. Protect valuable papers from fire, theft, and inquisitive people, and from being mislaid. In event of loss or disappearance, report immediately to your employer. At such a time your exact record of a policy or of a negotiable bond with its number will prove invaluable.

Papers of money value sent through the mail should be registered and often insured as well. A memorandum should be kept open until receipt is acknowledged.

Taking Papers from the Vault. When valuable papers are taken out, write a special memorandum for yourself to make sure that they are back in the vault before it is closed for the night.

Write definite guides to help any authorized person trace papers that are kept in the vault, when you are not at hand. For example, put a cross-reference sheet in the correspondence file, reading

Johnson & Drake—Contract 5/29/45
See Contract folder (or Contract drawer) in vault

Arranging Valuables in Good Order. Use labeled drawers, index boxes, folders, trays, and boxes to contain things of a kind, such as

Keys in a box
Stock of postage stamps in a folder
Cash in a metal container

Keep in a full-sized expansion case documents that can best be handled when opened flat. Label the case on the end toward the door of the safe. If the contents are varied, keep in the case a sheet with a running index to show the order.

Watching over Money. Look out for funds or valuable papers that you take to the bank, post office, or lawyer's office, or from one department to another. Don't lay down a bag, a purse, a box, or an envelope that holds money, papers, records, or statements, without keeping an eye on it every minute.

In connection with your banking, guard the passbook, duplicate deposit slip, or other evidence of deposit. See that incoming checks are endorsed and deposited without delay. Reconcile bank statements promptly.

Do not hesitate to ask the officials of your bank for advice as to just how this or that should be done.

If petty cash is furnished for minor expenses, keep a strict account of payments and reimbursements.

Getting incoming receipts. Take receipts for bills or expenses for which you make payment in cash. Notice whether the receipt is properly filled out and signed before accepting it. If payment is made by cash, stop to count the change.

If payment is made by check, note on the bill the date and number of the check; the canceled check will then act as your clear receipt, when it returns through the bank.

\ Regard as important all records of payments, such as

Check stub	Parcel post insurance receipt
Canceled check	Receipt for registered matter
Money-order stub	Express receipt
Voucher	Bill of lading

In case of claim on an account already paid, your records should show all the necessary details—date, name, items covered, and amount of insurance, if any.

Keep canceled checks and other receipts as long as your employer requires.

Giving outgoing receipts. Before signing a receipt on behalf of your employer for money which may be paid to you, remember that you will be held responsible for having received the stated amount. If it is in cash, count it carefully. If it is a check, look at the amount; see that it is written payable to your employer and that it is properly signed. You may be under special instructions as to acceptance of checks.

Getting money orders. Acquaint yourself fully with the postal regulations as to domestic and foreign money orders. Save time by typing the application at your own desk. See that enough money is taken to the post office to cover the fee as well as the order. Do not leave the order lying around. As soon as possible, get it properly enclosed for mailing. Fasten the related stub to the record of what it covers, *e.g.*, to the file-copy of the letter in which the money order is enclosed.

Guarding Your Personal Property. Safeguard yourself from possible loss by putting away your money and other valuables during office hours, in a locker or a locked drawer.

Watch any inclination to appropriate for personal use slight amounts of office supplies, postage, coin, or other property. Do not get the habit of "just borrowing."

Locking Up at Night. Follow without fail any responsibility you have for locking desk drawers, files, the safe, the vault, lockers, windows, or doors. Before locking a safe or vault at night, be certain that everything that was out for use has been put back. If you are the last one out, make sure that the door is really closed and really locked.

Part IV. When? What? Who?

CHAPTER 9

“But What Was the Date?”

“But what was the date?” Don’t get caught by that question from your employer. No matter how unnecessary it may seem at the time, date every item of the day’s work. Use pencil if you do not wish to deface the paper.

What to Date. Always write the date when a

Memorandum was written	Receipt was signed
Message was taken	Note was made payable
Bill was rendered	Report was issued
Conference was held	Shipment was consigned
Telegram was sent	Order was placed
Agreement was made	Offer was received
News clipping was printed	

Where to Date. Date each item at the point where the date will be most noticeable, giving preference to the upper right-hand corner.

Note that letters, memorandums, billheads, telegrams, and all forms which are filed by date can be speedily sorted, filed, and found only by such uniform placement. Compare the awkwardness of handling variations, as when the date is sometimes centered under the letterhead, sometimes blocked at the left-hand margin, and sometimes put at the close of a letter.

How to Think of Dates. Have in your head a clear picture of the numeric setup of the year, as it aids dating, filing, and finding.

Learn to read and to write dates in the short form by figures only, called “skeleton dates.” See quickly that

3/8/45 stands for **March 8, 1945**

An order of **2/7/45** was sent 2 days after a letter of **February 5, 1945**

4/30/45 comes just before **5/1/45**

Make full use of the list on page 23, headed “Test Yourself for Skeleton Dates (Figures Only).” Make up similar lists of your own in columns, with emphasis on whatever seems most difficult for you to translate quickly.

TEST YOURSELF FOR SKELETON DATES (FIGURES ONLY)

For dating, filing, and finding, learn to write and to read skeleton dates quickly. Study the paired dates in the list below. Then test yourself. (1) Cover the dates in Column 2 with a card. In your head, translate 3/12/45 in Column 1 and slide the card down one line to test your answer, which should have been **Mar. 12, 1945**, as in Column 2. Do this, line by line, down the list. (2) Now cover the dates in Column 1 line by line, to translate the corresponding dates in Column 2. Your first answer should be 3/12/45.

<i>Column 1</i>	<i>Column 2</i>
3/12/45.....	Mar. 12, 1945
Apr. 9, 1945....	4/9/45
Jan. 4, 1945....	1/4/45
5/30/45.....	May 30, 1945
7/8/45.....	July 8, 1945
Oct. 10, 1945...	10/10/45
12/24/45.....	Dec. 24, 1945
Feb. 2, 1945....	2/2/45
Aug. 15, 1945...	8/15/45
6/7/45.....	June 7, 1945
9/15/45.....	Sept. 15, 1945
Nov. 12, 1945...	11/12/45
May 1, 1945....	5/1/45
4/18/45.....	Apr. 18, 1945
July 31, 1945...	7/31/45
10/20/45.....	Oct. 20, 1945
Mar. 14, 1945...	3/14/45
Sept. 5, 1945...	9/5/45
2/24/45.....	Feb. 24, 1945
June 4, 1945....	6/4/45
Dec. 13, 1945...	12/13/45
8/27/45.....	Aug. 27, 1945
11/8/45.....	Nov. 8, 1945
1/19/45.....	Jan. 19, 1945

How to Enter Dates. Write each date clearly enough for anyone who may handle the item at any time. Date written matter with all three items—the month, day, and year; write

January 5, 1945 or Jan. 5, 1945 or 1/5/45

Do not omit the year, even on a slip supposed to be for temporary use; it may be held over longer than you expect.

On legal papers, spell out the date in full, *e.g.*, on this fifth day of January in the year nineteen hundred and forty-five.

On formal letters, manuscripts, reports, and other typing requiring full wording or a dignified appearance, spell the name of the month in full, *e.g.*, January 5, 1945.

In the body of a formal letter, spell out the name of the day as well as the name of the month, *e.g.*, **Captain Ford can see you on Friday, January 5.**

On less formal correspondence, abbreviate the name of the month, *e.g.*, **Jan. 5, 1945.**

On telephone messages, sheets of rough data, informal information, bills, invoices, and orders—that is, wherever business brevity is permitted—use the numeric or skeleton date, *e.g.*, **1/5/45.**

Common Mistakes to Look Out For. Little faults in dating, which make an inaccurate record and a confused file, may lead to a serious oversight or error.

Make all references to the day of the week unmistakable. Do not, for example, date a message with the day only, as *2:45, Thurs.* Add at least the skeleton date, to read: **2:45, Thurs., 1/25/45.** Do not use such words as *tomorrow, today, yesterday, or last Friday* without a clearly related date.

During the first days of each month be sure not to let the name or number of the previous month hold over into your dating. At the beginning of January of each year, cease immediately writing the old year.



CHAPTER 10

Put the Matter in Writing

You can help make your employer's business secure by putting a matter in writing at once, when you need to

- Make sure that you understand all details
- Give others the complete picture
- Put a clear record in the files of all concerned

How Far Memory Can Carry. Make a careful distinction in your work between facts that must be memorized and data that must be written out. **Memorize** whatever you are called on to know frequently or instantly, such as

- Faces and names of callers
- Meaning of correspondence recently handled
- Places where things have been put
- Places where information may be found
- Goods carried by your concern

Where the Written Word Begins. Write out whatever you cannot surely remember and what need not tax your memory. These same two tests hold for writing out what you pass along to others.

Business urges the written word for

Answer to a question
Decision

Direction
Statement

Agreement
 Promise
 Information

Suggestion
 Opinion
 Criticism

For instance, always confirm a telephone conversation in writing, if it is of any importance. The confirmation serves for the files of both parties.

If someone attempts to give you an important or involved statement during your employer's absence, get this in writing by saying, "If you will please put that in writing and address it to Mr. Hall, I will see that it comes to his attention," or "If you wish, I will take that down and read it back to you, so that I may be sure to pass it along correctly."

To Telephone? to Call in Person? or to Write? For any errand within your company, decide which of these three will be most useful:

1. **Telephoning.** This gets an immediate answer or gives direct information. But avoid the habit of taking up the telephone for errands that should be put in writing. Telephone calls always interrupt other people.

2. **Calling in person.** This serves well to show something, to get something, or to talk over a business question. But it has the disadvantage of taking you away from your desk, and of interrupting others.

3. **Writing a memorandum.** This produces something that can be taken care of at the convenience of the person who receives it.

The Very Short Memorandum. Help any associate with whom you have business by typing a clear, concise memorandum whenever this will save the time of both of you. See the two samples on page 26.

For such brief memorandums follow these directions:

Use a slip of paper of some particular size, shape, and color regularly so that it will be recognized immediately as your memorandum.

Type the date in the upper right-hand corner.

Block the paragraphs (that is, type them without indention) in single space.

Type the facts accurately and briefly. Do not waste time in revising or retyping work of this kind; acquire the habit of writing the first draft so that it will do.

Type your initials or name at the close.

Handwriting in Office Work. Use good judgment about handwriting. Always write legibly. Do not run the chance of having to puzzle over your own hasty or careless handwriting, or of making anyone else do so.

Do not run comments over to the back of a paper. Such comments cannot be glanced at readily in relation to the matter on the front, and they may be overlooked entirely.

THE VERY SHORT MEMORANDUM

For an errand within your company, decide whether it will be most useful to telephone, to call in person, or to write a memorandum. The request and the statement below take but a moment to type and do not interrupt Miss Fiske.

1/6/45

Miss Fiske:

Will you come at your convenience to see the sample desk chairs left in my office by the Marshall Company?

S. E. Clark

1/8/45

Miss Fiske:

You were right about order #E-147. The color of the paper was to be blue, not yellow.

S. E. Clark

Use the margin or a small attached slip of paper or a second sheet. If, for some unusual reason, you must use the back of a paper, put the word *over* on both sides.

Reading difficult handwriting. If possible, avoid interrupting anyone in the office to help you read difficult handwriting from another person. Apply your imagination. If you cannot make out a peculiar letter, trace it to other words until you discover just what it stands for in that person's handwriting.

Giving preference to typewriting. It pays to use the typewriter whenever you can. For example, a package is handled more swiftly all along the line of mail or express service, if it has a typed label rather than handwriting on the wrapping paper.



CHAPTER 11

Use of Your Signature

Have you stopped to think how important your signature is to your employer's affairs? Within such limits as he may authorize, your signature on his behalf may be used to save a material amount of his time.

Establishing Your Proper Identification. Adopt a fixed signature, including your first name, middle initial, and last name, unless there is good reason for varying from this usual form. Write this whenever you are required to stand personally responsible for a receipt or an agreement. This rule applies except in cases in which you are instructed to use initials only, or some special form of signature.

Using Your Signature with Caution. Be careful about signing any paper for yourself, your employer, or the concern that you serve. When asked to sign a receipt or a form of any kind, refuse to be hurried or to feel confused because someone is waiting for your signature. Take the necessary time to find out just what you are about to sign. Then be sure that it is within your authority.

Signing Correspondence and Receipts. Whenever you must sign correspondence that your employer has dictated or expected you to compose for him, read over each letter with extra care. Sign under the complimentary closing in one of the four ways shown on page 28.

For things received on behalf of a concern or individual, sign receipts as shown on page 29.

FOUR WAYS OF SIGNING CORRESPONDENCE
ON BEHALF OF YOUR EMPLOYER

Type the under-signature and sign your employer's name with your initials (or last initial only) beneath, like this:

Very truly yours,

Arthur R. Lunt

M. C. W.

Arthur R. Lunt, President

Type your employer's name and sign your name with the typed words **By** and **In the absence** of your employer, like this:

Very truly yours,

Arthur R. Lunt, President

By *Mary C. West*

In the absence of Mr. Lunt

Use your signature and the word **For** typed with your employer's name, like this:

Very truly yours,

Mary C. West

For Arthur R. Lunt, President

Use your signature with the words **Secretary to** typed before your employer's name, like this:

Very truly yours,

Mary C. West

Secretary to Arthur R. Lunt, President

HOW TO SIGN FOR THINGS RECEIVED
ON BEHALF OF A CONCERN OR AN INDIVIDUAL

For important documents or valuables:

Lunt Machine Co.
By Mary C. West

For registered mail or other things accompanied by a printed receipt:

Lunt Machine Co.

(Signature or name of addressee)

Mary C. West

(Signature of addressee's agent)

For the ordinary run of things delivered to an individual:

Arthur R. Lunt
M. C. W.

For the ordinary run of things delivered to a concern:

Lunt Machine Co.
M. C. W.

Part V. Dictation—Three Ways

CHAPTER 12

Making the Most of Your Shorthand

Are you experienced, but having to pick up the taking of dictation after some time? Or are you new at office work? If you are anxious to step up your speed, watch yourself in every little way.

Use of Notebook. Sit so that you have both hands free. Hold the notebook firmly, ready to turn each page by curling it slightly with the left hand. Take notes with a well-filled pen. Have at least two sharp pencils for emergency.

Dates. Enter the date at the head of each day's dictation. On the outside of each notebook, write the dates of the beginning and end of the contents, and the number in your series. Keep notebooks for a reasonable time, for possible reference.

Separated items. Draw a distinct horizontal line after the notes for each item, however brief. After transcribing an item, cancel the notes with a vertical line, preferably with a colored pencil.

Marks for changes. Follow a precise system of numbers for each piece of work to show the place for each change, insertion, correction, and special instruction.

The right insertion. If an insertion from typed or printed pages is called for, indicate clearly

Where the extract is to be inserted in your notes
What it is to be copied from
What it includes from the first to the last word

Correct English. During dictation, as well as during transcription, be alert for unintended slips from good English usage and make them right. For example, correct the following:

Incomplete sentence
Misplaced *only*
Misplaced *not only* and *but also*
Confusion of *shall* and *will* or of *should* and *would*
Use of an adjective for an adverb
Disagreement in number of subject and verb
Use of *who* for *whom*
Use of an extra conjunction *that* after parenthetical words (*e.g.*: The man said that, if he could get a ticket, *that* he would go.)

Full Directions. Find out and write down any direction required as to

Number of copies to be made, including file-copy
Names of those to whom extra copies are to be sent, if any
Exact spelling of name and address of the addressee
Under-signature to be typed, if any
Whether the item is to be rushed
Full information about any enclosures
Full information about anything to go under separate cover

Questions. Ask for the spelling of any strange words, foreign phrases, or proper names which you do not know and have no way of finding out, *e.g.*, when the name *Mr. Green* is dictated, and the spelling might be *Greene*, ask, "Final e?" Ask any necessary question right after the dictation of an entire item, if the course of thought should not be interrupted.

Keeping Up. If any part of a letter is dictated too rapidly or too indistinctly for you to get complete notes, indicate this. Do not expect to fill in later by guesswork.

Speed with accuracy. Learn the vocabulary of the business as thoroughly as possible.

Devise your own special shorthand symbols for frequently written words, phrases, trade names, and names of people and companies.

Try to catch figures exactly and hold them in mind until you have written them down. Beware of reversing the order of figures, *e.g.*, \$76.57 instead of \$76.75.

Difficult Demands. Apply steady attention to the words that are being dictated to you. Concentrate under necessary confusion. If others are working, talking, telephoning, or moving about in the room, learn to shut out such distractions as though you were actually shutting a door.

Accept dictation as it happens to come—in continued monotony, in quick gushes, or in slow phrasing. When receiving prolonged dictation, stay at work evenly without showing fatigue. Shift your position quietly from time to time to prevent muscular strain, but keep a good posture. Adjust yourself so that you will respond with equal ease to being called for only one letter, one instruction, or one request, or for many.

Related Papers. During dictation, see that letters that are being answered and their related papers are turned face down, so that they will appear in order at your typewriter. When leaving dictation, gather all papers carefully and turn them face up.

After Dictation. On returning to your desk, attend first to any rush duties. Then resume your work at the point where it was interrupted.

Skill at the Dictating Machine

The more familiar you make yourself with the dictating machine in your office, the more you will appreciate its possibilities. It will pay you to be ready and willing to transcribe from records, even though you may at first prefer taking dictation in shorthand.

Perhaps your employer likes both means. When you are not at hand, or when he wants to dictate either a brief bit or something needing time to think through, he may find the dictating machine very convenient for getting work out of his way. Cooperate with him by improving your own skill.

Saving Motions in Dictating-machine Work. Make a habit of arranging everything to avoid waste steps, waste motions of the body or hands, unnecessary reaching.

Routing Records. Remove dictated records promptly from your employer's desk and have empty records ready for him in just the right place.

Have an absolute system for transferring untranscribed, transcribed, and shaved or new records to regular places so that you will

Never shave an untranscribed record

Never give an unshaved record to your employer for dictation

Organizing Work in the Right Order. Glance through all records for rush items. Carry them through and check them off.

If you have records from more than one person, study the relative importance of whatever is turned over to you.

Dispose of all pieces of correspondence and other papers as methodically as when transcribing from a shorthand notebook.

Attending to individual items. For a letter, select the appropriate paper in kind and size. For a memorandum or other regular office transcription, choose the right printed form. For an instruction, request, or errand, make a brief reminder by hand or on the typewriter.

Covering every item. When items are cared for out of their order, check off each one as done. Then run through carefully to see whether any is unchecked.

Watching the indicator. Read the indicator faithfully for corrections, substitutions, inserts, changes, additions, postscripts, directions about extra copies, and other data written for your guidance.

Look ahead for any warning or remark. Then listen before typing the part affected.

Hearing and Retaining Words. Follow phrase by phrase and sentence by sentence. Punctuate to carry the meaning.

Cultivate such attention that you lean less and less on the repeat device because of failure to catch or to hold words. When a word cannot be understood, do not leave a gap in your typing. Substitute one that will give what you believe makes the intended sense.

If you are still uncertain, put a light penciled question mark in the margin to query your employer when the letter is being signed.

Meeting Interruptions. Do not let telephone calls or other interruptions affect your typing. If you can, remember just where you stopped. Use the repeat device, if necessary, so that you will pick up the dictation at the exact point, without omitting or repeating any word or phrase. You can train yourself to do this.

Recognizing Difficulties. Study the individual habits of the one or more people whose records you transcribe. For each one, learn how far ahead it is advisable to listen, to be sure of transcribing without error. Notice, for instance, whether a certain kind of hesitation means that a change of phrasing is likely to follow. Watch for incomplete sentences, dangling participles, and other grammatical slips that must not creep into the typewritten result.

If you have had sufficient training and experience, but find that you are wasting time in an effort to understand the run of dictation, let your employer know your difficulty. Together you may discover that he does rush occasional phrases so that they become blurred on the record, or that he does drop his voice at times beyond recognition.

But before you suggest that his speech is difficult for you, be sure that the difficulties are not your fault and possible for you to overcome without help. Try adjusting the machine for speed, tone, and volume. Make every effort yourself, because it is not easy for anyone to think of how he is speaking, when he is thinking hard about what he is saying.

Using the Devices. Be prepared to adapt your knowledge and experience to diverse models of dictating machines, just as to different makes of typewriters. If you are asked to handle an unfamiliar model, study the devices and instructions. Then practice until you are in full control of the whole apparatus.

Caring for the Equipment. Keep the receiving and transmitting machines dusted and in good repair, both for efficiency and for economy of upkeep.

Shave a record enough, but without waste of wax.

Take special care never to drop a record. It is impossible for a person to recall everything he said, after he has dismissed it from his mind.



CHAPTER 14

Dictation Direct to the Typewriter

If your employer sometimes gives rush dictation to the typewriter direct, be prepared for it. When he comes to your desk, he will need to dictate without waiting.

Readiness with Paper. Have supplies assembled so that you can quickly insert in the machine the right combination of

Letterhead, memorandum form, or telegraph blank
Carbon paper
Manifold paper for the desired number of copies

If a letter is to be dictated, ask whether it is to be long or short. Choose paper and set marginal stops accordingly.

Quick Setup. Type the date in the upper right-hand corner, if there is time. But, if waiting for this seems likely to distract your employer, skip dating until you have typed the last sentence. Then remember to turn the paper back to enter the date in its usual place.

Show that you are at attention for the name and address of the addressee. If the name is unfamiliar and the dictator has a letter containing it in his hand, ask him to hold it before you for accurate copying.

The Dictation. Listen calmly for an entire sentence or a long phrase. Your employer cannot readily go ahead while the keys are clicking.

Corrections. Make every effort to have no mistakes. If there was an error, and your employer is in a hurry to sign the letter, slip a small cardboard behind the mistake on the original copy, erase, remove the cardboard, and strike the correction. While he is signing the original, make the strike-over correction clear on the file-copy.

Part VI. Mail Coming—Mail Going

CHAPTER 15

As Soon as the Mail Comes In

Have you been opening mail for your employer for many years? Or have you just begun to work for him and do you feel a little uncertain about it? In either case, run through these questions about everyday routine.

Tending to the Envelopes. Do you always leave **Personal** or **Confidential** mail unopened?

Do you sort and stack envelopes for rapid opening?

Do you shake down the contents of envelopes by hitting a pile against the desk? then run a paper knife along the top and down the next end of each envelope?

Are you sure to take everything out as you go along?

Do you make certain, before destroying an envelope, that the date and the address and signature of the sender are on the letter? If any one of these three items is missing, do you transfer it from the envelope to the letter? Or, if it seems better, do you pass the letter along with the envelope attached?

Checking the Contents. Do you glance through the letter, checking enclosures that are indicated and making a note of what is promised under separate cover?

Do you open packages, note contents, and check with mail previously received?

Noting Date of Receipt. Do you date-stamp the receipt of every incoming letter, memorandum, circular, blueprint?

Sorting. As you go ahead, do you sort the mail into

Rush items

Pending items

Ordinary mail

Employer's personal mail

Things received under separate cover

Advertisements and periodicals

Matter for your special care

Starting the Work. Do you leave papers unfolded, ready for use?

Do you set things in motion by going as far as you can with every piece of mail?

Do you match previous correspondence or other papers that will be useful to your employer, clipping related things together in helpful order?

Getting the Mail to Your Employer. Do you play into your employer's schedule by having the morning mail, or his part of it, on his desk when he comes in?

Do you lay the mail in piles for his convenience, covering up none of the work already on his desk?

Do you take in further mail as it comes during the day and place it near him, with the most important items on top?

Sending Acknowledgments. Do you follow some definite plan as to what mail should have formal acknowledgment on the day of receipt? When it is not possible to make full reply, do you indicate when further attention may be expected; for instance, "tomorrow," "within a day or two," or "at the earliest possible day"?



CHAPTER 16

Saving Time by Following Typed Models

In a government position, keep strictly to the established style for official correspondence and documents.

In a business office, follow the models standardized for typists by your company. If these models have not been recently revised, or if no set is provided, find out whether your employer is willing to have you adopt the up-to-date short cuts for typing found in this chapter. In every office where special thought is given to economy of time for regular work, these details are definitely considered.

Timesaving Setup for Closing Notations. See on page 37 the examples of setup of necessary notations. Notice that it takes less time to strike the key for a small letter than to strike the shift key and the key for a capital letter. It takes less time on many machines to strike a period between small letters than to strike a colon or an oblique line.

These differences are not vital to the reader, but the day's difference in time consumed by the typist is important. On incoming mail you will find many styles.

Models for Simplifying Work. Correspondence models in this chapter are based on what businessmen think looks right and at the same time find practical. They want

Clearness for the reader

Convenience for active use by both writer and receiver

Economy in typing

Speed in filing and finding

SETUP FOR CLOSING NOTATIONS

If your employer approves, give preference to the up-to-date short cut given below in Setup 1. This makes the record clear as to

Who dictated a letter

Who transcribed it

How many enclosures are to be checked by both the sender and the receiver

How many pieces under separate cover are to be checked by both sender and receiver

To whom extra carbon copies are to be sent

<i>Setup 1</i>	<i>Setup 2</i>	<i>Setup 3</i>
jha.s	JHA.S	JHA/S
enc. 2	enc. 2	Enc. 2
sep. cov. 1	sep. cov. 1	Sep. Cov. 1
c: Mr. Grant	c: Mr. Grant	C: Mr. Grant

Setup 1 (**Up-to-date**), which has been coming rapidly into use, has capitals only as necessary—in the names of people to whom extra copies are to be sent.

Setup 2 (**Middle-course**) takes time to hit the shift key for capitals to stand for the initials of people, but types small letters for things.

Setup 3 (**Conservative**) demands wasteful use of shift key for capital letters.

Getting help from Models 1 to 4. On pages 41 to 44, look thoroughly over the four models of a full-page letter, short or semishort letter, interoffice memorandum, and personal or social letter dictated by the employer. Model 1, for example, is a full-page letter planned to save time of the typist. Note the economy of regular block style, which allows the carriage always to be shifted to the left-hand marginal stop, except for date and complimentary closing with under-signature. See the use of accepted abbreviations and of small letters for final column of notations. Study the similar description under Models 2, 3, and 4, keeping in mind the typing you are called on to do. Then see the answers to "Common Questions about Letter Setup" in the remainder of this chapter.

Adapting models to your regular use. On your office stationery set up counterparts of Models 1, 2, and 3. On your employer's personal stationery (with or without printed letterhead), set up a counterpart of Model 4. Use material from your files with your employer's name and his and your initials. Plan subject matter that will make use of such special lines as the subject line, "confidential" line, attention line, postscript, and all the closing notations so that you will have before you a full model to follow in each case.

Submit these patterns to your employer. He has only to indicate any changes he wants made. Adapt your typing to his preference, using every short cut that comes within that preference. When you have set up approved models, use them in your daily work as a matter of habit.

Common Questions about Letter Setup. Do not let the varied typing that comes from other concerns confuse your choosing one good way for each detail of your own letters and holding to it. The following topics cover questions commonly asked by typists about details shown in the models.

Spacing. Drop date line 2 spaces below the last line of letterhead, to make file copies uniform. Do not let the date run into the right-hand margin of the letter.

Place **Personal** or **Confidential** at left in prominent place.

Leave space above name of addressee in proportion to length of letter.

Allow 3 blank lines for the signature. Type the under-signature on the next line.

Then throw carriage to the left with the single line spacer, so that the column of notations will start on the next line.

Allow 1 blank line before a postscript..

Margins. Gauge the letter and set marginal stops for an even white frame around the typing as a whole. Avoid having any line longer than the first line. Center a very short letter with care.

Block style. For what is called "regular block style," start all items at the left-hand margin except date, complimentary closing, and under-signature. Center the subject line or the attention line *only* if your employer requires it. Good centering of such lines, gauged from shorthand notes or dictating-machine records, takes time. Indent paragraphs only if so instructed, as this also takes time.

Punctuation. Do not type punctuation at the end of any line outside the body of the letter except

Period to indicate an abbreviation

Colon after salutation

Comma after complimentary closing

Abbreviations. See page 7 in Chapter 3, "Getting the Knack."

Subject line. Make the subject line a safeguard against dealing with more than one subject in a single letter. On incoming mail, you will find this subject line in a variety of places and styles: above the name of the addressee or after the salutation; centered or blocked at the left-hand margin; with or without underscoring; introduced by *Subject*, *Re*, or *In re*, or without introduction. Often it is omitted entirely.

See the form typed on Model 1, one space below the date line at the left-hand margin. This is widely used to

Inform the reader immediately

Catch the eye when the letter is among unfinished work on the desk

Stand out in the ordinary direct-name file, when the letter is called for from a folder as "that letter from Mr. Anderson about ideas from office assistants"

Stand out for subject filing or for cross reference to subject

Attention line. If your employer approves, use Number 1, below, as seen on Model 1:

1. Attention of Mr. Albert L. Owen

(Courteous form, widely preferred)

2. For the attention of Mr. Albert L. Owen

(Courteous, but longer)

3. Attention: Mr. Albert L. Owen

(Brief but brusque, for outgoing correspondence)

4. Att.: Mr. Albert L. Owen

(Curt abbreviation)

Salutation. Make salutation agree with name of addressee as to gender and number, regardless of the name that may be typed in an attention line. See "Approved Salutations" on page 40.

Study good usage in up-to-date textbooks and desk handbooks, where many specific cases are covered. Apply the varied forms with judgment, according to the nature of your correspondence and the people addressed. For accepted ways of addressing officials in government, military, school, church, and other fields, have at hand a book that makes these clear for quick reference. Learn those that you use frequently.

Complimentary closing. Start near the center of the page, allowing for width of your employer's signature. Follow by comma. If a closing is not dictated, type the most appropriate of these:

Very truly yours,
Yours very truly,
Yours truly,

Sincerely yours,
Cordially yours,
Respectfully yours,

Blocking this complimentary-closing line at the left-hand margin is not in general use because this position makes signing of letters awkward.

Under-signature. Type this, to make clear the spelling of a hurried signature.

When desired, give the official title or department, as well as name, of the signer. Indicate in parentheses before a woman's under-signature whether she is to be addressed as *Mrs.* or *Miss.*

Closing notations. See setup on page 37.

Pages 2, 3, etc., of a long letter. Type a letter on *one side of the sheet only.*

For a "second" sheet, choose paper matching the quality of the letterhead for the first sheet, with printed or typed heading. On page 45 see Model 5, showing the top of page 2 of a letter. Make up a counterpart of it for your own use, to keep with those made for Models 1 to 4 (see page 37, "Adapting models to your regular use").

APPROVED SALUTATIONS

<i>Name or Names Addressed</i>	<i>Optional Forms for Salutation</i>
Mr. John French	Dear John: (<i>informal</i>) Dear Mr. French: (<i>formal</i>) My dear Mr. French: (<i>more formal</i>) Dear Sir: (<i>most formal</i>)
Mrs. Andrew L. Gage <i>or</i> Miss Olive Gage	Dear Mrs. (<i>or Miss</i>) Gage: My dear Mrs. (<i>or Miss</i>) Gage: Dear Madam:
Misses Eleanor and Alice White	Dear Misses White: My dear Misses White: Ladies:
Misses Anne Dobbs and May Roy	Dear Miss Dobbs and Miss Roy: My dear Miss Dobbs and Miss Roy: Ladies:
Mr. and Mrs. James T. Mackay	Dear Mr. and Mrs. Mackay: My dear Mr. and Mrs. Mackay:
Messrs. Frank Sims & Sons <i>or</i> The Frank Sims Company	Gentlemen: (<i>most widely preferred</i>) Dear Sirs:
(Corporation conducted by women) Arnold-Greene, Inc. (Officer of such a corporation) Miss A. M. Greene, Treasurer Arnold-Greene, Inc.	Ladies: (<i>or begin letter without any salutation</i>) Dear Miss Greene: (<i>more personal than the above</i>)
(Firm composed of women) Crease & West	Dear Mrs. Crease and Miss West: My dear Mrs. Crease and Miss West: Ladies:
(Firm of men and women) Fen and Law, Decorators	Dear Mrs. (<i>or Miss</i>) Fen and Mr. Law: My dear Mrs. (<i>or Miss</i>) Fen and Mr. Law:

MODEL 1

THOMAS LUDLOW MFG. CO.

450 WILLIAMS STREET
PITTSBURGH 6 PENNSYLVANIA

April 18, 1945

Subject: Ideas from Office Assistants

Crane Supply Co., Inc.
4500 Long Ave.
Detroit 2, Mich.Attention of Mr. Albert L. Owen

Gentlemen:

In reply to your personal letter of the 16th to our Mr. Grant, I am sending under separate cover a copy of our recent house organ with its partial list of suggestions from employees.

The committee received over seven hundred ideas for quickening our service here in the plant. In this copy you will find the prize ideas from the secretarial staff, to which you referred.

I am enclosing a copy of the mimeographed questionnaire which was distributed for the competition. To make the appeal more personal, we found it worth while to type the name of each member of the staff on a questionnaire before distribution. This kept the file of replies in good order for the judges.

If I can be of further help to you, let me know.

Very truly yours,

John H. Anderson

John H. Anderson, Office Mgr.

jha.s
enc. 1
sep. cov. 1
c: Mr. Grant

PS. You will note that I am sending a copy of this letter to Mr. Grant's desk. He is away on an extended business trip.

MODEL 2

MARK G. HARDY & SONS

570 NORWAY STREET
ALBANY 5 NEW YORK

June 5, 1945

PersonalMr. H. L. Rand
Superior Printing Co.
Dayton 4, Ohio

Dear Mr. Rand:

Your letter about Miss Harriet Stevens is of interest to Mrs. Hardy and me. She served our company faithfully for many years, as you know, before she went to Dayton.

Will you add the enclosed check to the fund for her?

Very truly yours,

Mark G. Hardy

Mark G. Hardy

mgh.n
enc. 1

Model 2. Short or semishort letter planned to save time of typist. Get the habit of using a half-sheet when possible, to save letter paper, carbon paper, and manifold paper. The form written *horizontally*, as above, is filed among full sheets in a folder more readily than the vertical half-sheet.

MODEL 3

INTEROFFICE MEMORANDUM

7/3/45

Office of the President**Subject** Slogans for the office**To** Miss Mary O. Hurd, Office Supervisor**From** E. T. Allen

Please see me about posting a slogan each week for the staff, to help us build better office habits. These are suggestions that have occurred to me:

~~Save-Supplies Week~~
~~Check-for-Accuracy Week~~
~~Cut-Telephone-Calls Week~~
~~Save-Scraps-of-Time Week~~
~~Take-Care-of-Equipment Week~~

For catchy slogans honorable mention might be offered.

eta.s

Model 3. Interoffice memorandum planned to save time of typist. Use a half-sheet form whenever possible, with a half-sheet of manifold paper for the file-copy and a half-sheet of carbon paper. Follow the up-to-date practice of having the lines on a printed form aligned as shown above. This allows quick shifting of the typewriter carriage to a single starting point by use of left-hand marginal stop (see words *Subject*, *To*, and *From*). But for filing convenience enter skeleton date (figures only) in the upper right-hand position. Take only important memorandums to your employer for signature. As a rule, let the name typed in the "from" line serve the purpose.

10 UPLAND ROAD
Wayne, Pennsylvania

February 28, 1945

Mrs. Randall J. Price
5 Mole St.
Philadelphia 2, Pa.

Dear Mrs. Price:

The errand work that your son John has been doing in and out of my Philadelphia office has proved very satisfactory.

Now that the office is not open on Saturdays, Mrs. Hersey and I are wondering whether he could come regularly on that day to help us at our house in Wayne. The work would not be difficult. We should expect to pay his train fare and the same hourly rate that he has as errand boy.

As I understand that John usually helps out at home, I am writing first to ask your permission to take this up with him.

Sincerely yours,

George R. Hersey

Model 4. Private letter dictated by the employer for his personal printed stationery. If a vertical half-sheet is provided, type the date in the position shown, so that it will stand out for easy filing. Compare with the description of the horizontal half-sheet, Model 2. A plain sheet or half-sheet may be used with the home or business address typed above the date. Gauge placement of brief letters with good judgment.

MODEL 5

Mr. Roy Ames—Sept. 4, 1945

2

This shows the top of the second sheet of a letter with the three necessary items: name of addressee, date of writing, and page number. On the printed and typed second sheets of various concerns, these will be found in a variety of positions and sequences. The above style is economical for the typist. Because of the wide variation in the lengths of names, the time of estimating placement of the name of the addressee is saved by beginning at the left-hand margin. The placement of the page number in the right-hand corner makes for convenient handling.

Model 5. Good form for identification of sheets 2, 3, etc., of a long letter.

Heading. Drop the heading about three-quarters of an inch from the top of the page, blocked at left-hand margin.

Division between pages. When starting a new page, divide between paragraphs, if possible. If not, divide a paragraph to leave at least three lines at the foot of a page and to carry at least two whole lines to the top of a page. Do not divide a word between two pages.

Full page. Plan any full page with four margins similar to side margins on page 1 of the letter.

Final page. Make the final page (usually page 2) look well as a whole. If there is a short runover, drop it two inches from the heading. Do not let the complimentary closing and the signature stand alone on the final page.

Letter Writing That Saves Your Employer's Time

Your employer may allow you, or even urge you, to compose letters for him. Such completed work from your desk saves him the time of dictating. For part of the correspondence he may save time also by giving what is called "skeleton" dictation or by expecting you to use a form letter or a form paragraph as part of a letter. These methods may take less of your time, too.

Sending Out a Printed or Duplicated Letter in Quantity. When a mailing list is to be covered by a letter that has been printed or run off on a duplicating machine, personalize each letter, unless otherwise instructed:

- Enter the date, to end at the right-hand margin
- Place the name, address, and salutation to look like a letter composed for this one person
- Have the same size of type as that of the letter, if possible
- Use a ribbon and a stroke on the keys to make your typing look like the type of the letter
- Set the paper guide and the left-hand marginal stop for uniform insertion of the run of sheets; set a tabulating stop for the beginning of the date line

Copying a Form Letter. Your employer may provide or approve a series of form letters and form paragraphs to cover situations that are repeated frequently.

Keep a master set of such forms for ready use. At the top of each, type a number and the subject. Keep the series in a folder or loose-leaf notebook, in numeric order. Have a subject index at the front because your employer may refer to a form by subject instead of by number.

When asked to use a given form, type a letter that will seem dictated especially for the one person addressed, with your employer's signature in his handwriting, or in yours with your initials (or last initial) underneath.

If it is left to you to choose a form for a routine letter, be sure to take the appropriate one, omitting any portion that does not apply.

When a form has been copied, record the form number and date of writing under the date of the letter to which it acts as an answer, for example:

May 7, 1945

Form 9 — 5-10-45

This saves time and the space taken by a file-copy.

Following "Skeleton" Dictation. Be ready to base a complete letter on a mere suggestion from your employer. This may be in the form of "skeleton" dictation, such as

"Find the answer to this query from Mr. Roche and send it to him."

"Give Mr. Trowbridge an appointment for next Thursday afternoon."

Or a written note may be made in the margin of the correspondence which is to be answered, such as one of these:

Tell him Yes.

Nothing needed now.

Or there may be dictation of changes to be made in one of the form letters, or dictation that makes use of one or more form paragraphs. Take such instructions with care, as this work often seems more clear at the moment than when you start to type it.

Composing Satisfactory Letters. If you show that you are up to it, your employer will often depend on your initiative to compose letters for him, especially when he is under pressure, in conference, or away on account of business or illness.

Pattern. Study the phrasing of your employer's routine letters. Follow the pattern of his clearness, brevity, and courtesy. A brief letter should not be curt. A long letter is seldom necessary.

Observe incoming letters and imitate whatever is simple and effective in arrangement. For example, imitate the second, indented form for the information below, within the body of a letter:

The latest address we have is Mrs. Laura Thomas,
76 Green St., Hastings, Ill.

The latest address we have is

Mrs. Laura Thomas
76 Green St.
Hastings, Ill.

Purpose. Make a mental check-up of the business involved. Be sure that your letter reflects the general policies and practices of your company.

Single subject. In ordinary business correspondence, do not allow a letter to deal with two or more unrelated subjects. Remember that when such a letter reaches its destination, the several subjects may have to be handled by different persons or departments, or at different times. (Prevention of filing difficulties is outlined on page 116, under "Different subjects in one letter.")

Completeness. Cover every point. For instance, in a letter giving or receiving an order, cover the price, date of delivery, amount and kind of goods, and terms of payment; in a letter enclosing a remittance, make clear the amount, whether by check, money order, or postage, and what is being covered by the payment.

Think through your points in good order before you start, to avoid retyping. Jot down a few shorthand notes as a guide, if it will help.

Tone. Keep in mind that a letter speaks to the reader and imagine how each sentence will sound to him.

Avoid outworn business phrases and useless repetition.

Never allow your letter to show irritation.

Signature. Sign on behalf of your employer when you know that this will be acceptable to him. Before signing, check spelling, grammar, punctuation, figures, names, and statements. Submit for his approval letters about which you are in doubt.

Routine letters. Guard against letting a form letter answer a complaint about something which the form does not fit and which therefore should be straightened out in a more personal way. Accumulate a set of copies that you have composed to cover routine correspondence. Keep these for reference with the regular form letters.



CHAPTER 18

Rolling Work from the Typewriter

How good is your typing speed? How much actual finished work does that speed turn off by the end of the day? Try increasing your output to the point of expert typing—whether from shorthand notes, dictating-machine records, rough draft, or other copy.

Assembling Your Equipment. Have these necessities at hand in regular places:

- Colored pencil, to cancel your notes or to check off items on rough copy
- Eraser, with brush
- Small cardboard to back erasing
- Creased strip of paper for insertion of a run of copies (as described under "Extra carbon copies" on page 49)
- Letterheads, manifold and carbon paper, envelopes
- Dictionary

Having Your Material in Order. Make a systematic layout of the space within reach for

- Notebook or dictating-machine records and related papers
- Sheets to be used, such as rough drafts
- Finished letters or other typing ready for your employer's desk
- Carbon copies, envelopes, and papers to be matched with the typed work that is to return from your employer

Getting Set for Efficient Typing. Take advantage of the most favorable light, ventilation, temperature, and humidity that the office affords you. Have a chair that makes proper posture natural, with the desk or table at the right height.

Whatever you are copying from, have it at the right range, angle, and height to avoid straining your eyes, neck, or back. For example, if you are stooping slightly to make out

rough draft, rest it on a support. Use a thick book or a stack of large magazines, if you have no more convenient equipment.

Stretch an elastic band across a book from which a quotation is to be copied, to hold the pages flat. Hold open the pages of a magazine with a book, weight, or heavy desk clip.

Keeping the place. Keep the place by holding your eye steadily on the notes you are transcribing or the page from which you are copying. For exacting work from a page with lines close together, an upright mechanical line guide is valuable to hold the copy. For ordinary work, slide a ruler along the copy, one or more lines at a time, as it lies beside the typewriter.

If interrupted, make a check mark to guide to the point of return. Be especially careful to pick up typing at the right place when turning to a new sheet of copy, or when a word, phrase, or number is repeated in two lines near each other.

Canceling Your Notes. Cancel shorthand notes with a vertical line. Shift the elastic band to lock away previous pages that have been entirely canceled—and no others.

When copying a list in changed order, check-mark each item as you type it. **Leave no item unchecked.**

Making the Carbon Copies. Arrange a single run of paper for a complete job whenever possible. For some work, very thin paper can be used to make enough copies in the one run. If a second run has to be typed, check it in every detail.

File-copy. Make and keep a file-copy of every letter, every memorandum, and all other typing that should go on record.

For the file-copy of a two-page letter use two sheets of manifold paper, since it is inexpensive, instead of trying to utilize both sides for carbon impression.

Extra carbon copies. When setting up a run, always include an additional sheet for the file-copy.

Set the sheets in exact alignment at the top and keep them true by this process:

Release the paper release on the machine.

Have at hand a strip of paper $8\frac{1}{2}$ inches by 3 inches, with a lengthwise crease dividing the 3 inches into $1\frac{1}{4}$ and $1\frac{3}{4}$ inches, making an overlap that is easy to handle.

Slip this temporary binding firmly over the top edges of the run.

Insert this bound run of paper squarely in the machine.

Catch it by springing the paper release.

Turn the roller and remove the binding.

Set the run at the point of writing.

Be sure that every carbon copy sent out shows the name and the address of the sender. Otherwise, it may be a "blind" copy to the one who receives it. (If desired, use form for "Typed Signature on a Copy," shown on page 55.)

Follow with care routine instructions for making regular extra carbon copies, until you have no need of repeated reminder.

Type the notation for extra carbon copies as instructed on page 37. If there are two or more names, list them in a column below the initials of the writer and the typist like this:

jah. ft
c: Mr. Dane
 Mr. Forbes
 Miss Short

When you are ready to send out a run of extra copies, leaf through the sheets, making a clear check mark against one name after another as you go through. This should ensure one copy being properly routed to each name.

It is usually desirable for all persons receiving copies of a letter or memorandum to know who else has received the same information. As a rule, therefore, strike the names on all copies. If for any reason the name or list of names ought not to appear on the entire set, type it on your file-copy only, for your guidance and as a record.

Caring for Typing Accidents. Take all possible measures to prevent typing errors. Recognize what your frequent mistakes are. Watch for them. Cure them. Look up or make up a drill for each kind of error and practice for five minutes before office hours, during the noon hour, or at home. If you have not tried such finger studies recently, you may be surprised to find how swiftly you can profit by them.

When to erase. Catch errors by reading over all typing before removing it from the typewriter. Do not destroy paper because of errors that can and should be erased.

Where to do the erasing. Shift the carriage to the right or the left, to avoid dropping eraser particles into the type basket.

How to erase. Try the method below; it is quick and it wastes no carbon paper by needless rubbing.

Turn the point of error above the roller.

Place a stiff piece of cardboard behind the error on the ribbon copy; one 6 by 4 inches is handy.

Hold all firmly together with the left hand, but avoid creasing the paper against the edge of the cardboard while using the eraser with the right hand.

Repeat the erasure on the successive carbon copies.

Allow no eraser particles to cling to the carbon paper.

Remove the cardboard and type the correction.

It will be found that this cardboard can be kept clean more easily and handled more efficiently than several strips of paper, which become smudged with carbon. This method also prevents the mistake of leaving strips of paper in the run, with the result that the correction fails to print on the carbon copies.

CHAPTER 19

The Envelope

Have you ever had an unopened envelope come back with the warning finger of the official rubber stamp from the post office? Which one of the following was checked?

RETURNED TO WRITER
REASON CHECKED
Unclaimed...Refused.....
Unknown...Deceased....
For better address.....
Moved, left no address.....
No such office in state.....

The address on every envelope is important. Delay from a returned letter may cause serious loss to someone somewhere.

Window Envelopes. Use window envelopes with printed return address whenever practicable. These save time and avoid the possibility of error in copying the address.

Type the name and address on the main enclosure (which may be a letter, bill, or advertising matter) to show through the window in the correct position when folded. Avoid the expense of long envelopes, when shorter ones will hold properly folded contents.

Typed Envelopes. Prepare the envelope when typing its letter. Think of each letter, with its envelope, carbon copies, and enclosures, as one block of work. Type envelopes for extra copies and attend to all other related steps so that each letter can be cleared as soon as it has been signed.

Return address. Have a printed or typed return address on the left-hand upper corner of the envelope. From a large concern, the name of the sender or of the department is sometimes added. Stamped envelopes of varying sizes and denominations with printed return address may be ordered through the post office.

Name and address. Begin the first line below and to the left of the center. Use no fewer than three lines, block style (that is, no indentions), single spacing, with punctuation only after abbreviations.

Be sure that you have before you the exact name and the most recent full address. Copy them word by word.

Type the name of the person just as he signs it. Place his professional or business title on the line with his name, unless either runs long; in that case, use the second line.

Type the street number as well as the name of the street. Use the common abbreviations listed on page 7.

Always spell out the name of the town or city. The mere word *Town* or *City* is not safe as a direction for local mail.

In many cities, more speedy delivery is assured by adding the number of the postal zone immediately after the name of the city, as requested by the Post Office Department, thus:

330 West 42nd St.
New York 18, N. Y.

Be sure that your correspondents are informed of the numeric key of *your* zone, if any.

When the address is outside the United States, type the name of the country in full, in capital letters on a separate line.

Type the name and address consistently on the letter, the envelope, and the label for any accompanying package.

Confidential delivery. For confidential delivery of private matter to an individual, mark an envelope at the left:

PERSONAL or CONFIDENTIAL

Direct delivery. To call for direct delivery to a specific person or department, when the company is the main addressee, type within the lower left-hand half of the envelope:

Attention of or Credit Dept.
Miss Drake

Special requests. To assure the holding of a letter until the addressee arrives at the address, type at the left:

PLEASE HOLD

To request the forwarding of a letter to an addressee who is thought to be away from the address given, type at the left:

PLEASE FORWARD

Special services. If a letter is to go through your mailing department, indicate any special service within the upper half of the envelope, for example:

SPECIAL or REGISTERED or REGISTERED
DELIVERY RETURN RECEIPT REQUESTED
or REGISTERED
DELIVER TO ADDRESSEE ONLY
RETURN RECEIPT REQUESTED

For air mail, use air-mail envelopes as far as possible. If they are not available, type on the envelope the words:

AIR MAIL

Mailing Lists. Give incessant care to mailing lists. Add, eliminate, correct, as soon as information comes from any reliable source.

For the name and address consult the latest communication received.

Avoid guessing at a suburban post-office address from the name of the exchange in the telephone directory.

Keep every list in such perfect alphabetic order that duplicates cannot by any chance be mailed to the same person.

List of people frequently addressed. Do not be too sure that you are carrying a familiar address correctly in your mind. For quick reference, have a small card index or other convenient indexing device accessible in or on your desk. Make this index so inclusive that it will help anyone who substitutes during your vacation or other absence.

Lists of small organizations or groups. Keep up-to-date lists of directors, trustees, committee members, sales representatives, or other groups to which notices, reports, or instructions are sent. Label every list clearly.

At the close of addressing a set of notices to such a list, always check the count of notices by the number of names listed. If the list is a long one, check the count by sections.

Lists for circularizing. Keep extensive lists in card-index or stencil form. Think of these lists as living, active aids to business. Enter each name and address accurately at the start; then keep it correct day by day.

Errors in the spelling of a name or in the details of an address irritate the addressee and they are expensive for the company if they lead to nondelivery. If mail is returned, find out what was wrong by checking it against your list and, if possible, remail to the correct address.

Quantity Runs of Envelopes. If an addressograph is not available, establish a regular routine for addressing a run of envelopes for circulars, form letters, notices, questionnaires, or other mail in lots. Study economy of motion. For example, set the paper guides or bail and the left marginal stop for the entire run.

Handling the list. At the right of the typewriter place the mailing list. If the list is on paper, follow down the line of copying with a card or ruler, to avoid omissions.

If it is a card list, be careful not to skip a card. Fan the cards toward you. As they are copied, stack them face down, top away from you, to keep in original order.

Handling the envelopes. Fan a stack of envelopes with the flaps up; place the stack at the left of the typewriter with the flap edge toward you.

With the left hand insert the first envelope, flap toward you, straight in the machine with a single motion. Turn the thumb wheel with the right hand to bring the envelope directly to the writing point.

Feed a fresh envelope into the machine while the addressed one is being rolled out, keeping the right hand on the thumb wheel.

Place the addressed envelopes face up on the desk behind the blank envelopes so that, if you are interrupted, your eye can check the name last copied.

Insertions in a Run of Envelopes. Before starting to insert a quantity of advertisements, form letters, or the like into a series of addressed envelopes, look at your available desk or table space and make a plan for efficient action. You can save many minutes on such mechanical jobs—and save physical fatigue, too.

Make a single process of folding a lot of circulars.

Take a convenient stack of the folded circulars and a convenient stack of envelopes, fanning the edges of each stack

close to you for the easiest possible lifting of one at a time from each pile.

Place the two stacks where they will play smoothly into each other, using both hands in skillful teamwork.

Have the flap of the envelopes in the direction of the insertion, and the work will fly.



CHAPTER 20

Get the Letter and the Package Off

The letter that has been dictated to you is of no use until it reaches the addressee. See whether anything that you transcribe is slowed down at any one of the steps needed to get it off—and, if so, why.

Having the Letter Signed. Pass letters along for signature as soon as possible.

Keep each envelope face up on your desk with the flap folded under the file copy of its letter and other related papers.

Collect letters promptly from your employer's desk.

Folding the Letter. At the moment of folding, check the 6 items below.

Signature. Has the letter been signed? An oversight of this detail is unpardonable.

Changes. Has the signer made any additions or indicated any changes? If so, type corrections on the ribbon copy and on any extra carbon copies, one at a time. On the file-copy you may save time by making corrections by hand, but they must be legible.

Right envelope. Do the name and address on the letter and on the envelope agree? Confidential information or business requiring immediate attention—or even ordinary matters—must not go to the wrong person or to the wrong address.

Enclosures. Is there notation of enclosure? Place it within a fold of the letter so that it will surely come out when the envelope is opened. Make a list to identify enclosures of special value.

Is a return envelope necessary? If so, place it with other enclosures, following the suggestions on page 55, "Sending Return Envelope for Reply."

Matter under separate cover. Is there notation of any envelope or package to go under separate cover? Make sure that it is sent to the identical name and address by second-class mail, third-class mail, parcel post, or express, as may be best in view of the

Kind of matter

Expense of transportation

Urgency of delivery

Extra copies. Are there extra carbon copies? Enclose outgoing copies in the envelopes that have been made ready for the mail. Put carbon copies for members of the staff where they will be collected for prompt distribution.

Copying a Letter for Enclosure. If your employer needs to send off the information that is contained in some letter, type a copy of the letter as described below. Keep for your files all original signed letters received, unless it is required that the original be sent away.

When your employer dictates in a letter to Mr. Duncan, "I need your opinion about the enclosed letter from Mr. Ames," find out whether this indicates that the original letter is to be sent to Mr. Duncan. In such case, make an exact copy to be kept with whatever matter is awaiting Mr. Duncan's reply.

Or the dictation may run, "With regard to the ruling of last May about this building zone, I am sending you a copy of the letter which I wrote to the Mayor at that time." In this case, make and enclose an exact ribbon copy of the carbon copy of your employer's letter to the Mayor, as found in your files.

The word COPY. Show clearly that a copied letter is a copy by centering at the top of the sheet:

C O P Y

Letterhead. Copy enough of the letterhead to give the source of the letter, such as the company name and address. This detail, which is often overlooked, may be needed by the person who receives or files the copy.

Details of the letter. Copy the date, the addressee's name and address, and every detail of the letter. Be certain that every figure reads as on the original copy.

Typed signature. Type the signature in, with the word **Signed** in parentheses as follows:

Penned Signature on Original

Very truly yours,

A. F. Newton

President

Typed Signature on a Copy

Very truly yours,

(Signed) A. F. Newton

President

Sending Return Envelope for Reply. A return envelope addressed to your office may be one of these:

1. An ordinary addressed envelope with proper stamp affixed.
2. A special return envelope, conforming to postal regulations, with the permit number of your company printed in the upper right-hand corner. The advantage of the special return envelope is that, if the envelope does not come back, it costs your company no postage. If it is returned, it costs your company one cent in addition to regular postage.
3. An addressed envelope with no return postage. In some cases it may be correct and not discourteous to make such an enclosure. Too often the propriety of providing return postage is overlooked. But avoid needless expense for your company by over-free sending of stamped return envelopes.

Gauging Postage. Reckon correct postage before mailing, unless government frank is allowed.

Use stamped envelopes as far as possible, if a mechanical postage meter is not supplied.

Keep abreast of changes in postal rates. Make a written note of any fresh information.

Distinguish carefully between

First-class mail going at the usual three-cent rate per ounce
over a wide area

Foreign mail which demands special attention as to rate

Overweight mail requiring extra postage

Rush mail, requiring air postage or special delivery

Registered mail for valued contents

Unsealed mail and second- and third-class rating

Mailing the Letter. If you have the service of a central mailing department in your concern, cooperate by following the routine required by that department. Have mail ready for regular collections.

If the entire duty of mailing is yours, make every motion count in moistening, sealing, weighing, stamping, and stacking.

Mail letters at the first opportunity for the earliest possible collection. Keep a mail schedule at your desk. Make a study of the best service offered at the nearest mailbox or mail chute or local post office, to start mail in various directions. A half-hour's difference in mailing a letter may make a day's difference in the time of its receipt.

Recording Date of Reply. Stamp or write the date of reply on every letter that is answered, such as

Date on letter received: February 15, 1945

Your handwritten entry below: *Ans. 2-17-45*

This will help make your files more useful by linking your carbon copy of 2/17/45 with the letter of February 15 which it answered.

If several subjects in one letter have been replied to on different dates, enter each date in the margin against the subject taken care of.

Disposing of Papers. Put the file-copy and related papers into your filing tray as soon as you are sure they are no longer needed. Do not leave on your desk or your employer's desk any paper that ought to be in its place in the file.

Papers ready for filing. The person authorized to release a paper for filing should mark an F (or some other regularly recognized filing sign) close to the upper right-hand corner before passing it along for the file. A filing clerk should file no paper that is not properly marked.

Mark an F on the carbon copy of an outgoing letter that is ready for your filing basket.

Pending correspondence. If one or more items remain unfinished, mark the letter instead with a **P** (for pending).

Draw a vertical line down through the parts of the letter which have been attended to, or use check marks, or enter dates in the margin, as suggested above. This will make the pending items stand out. Then

Keep that letter on your desk for active attention, or
Put it in a folder marked **PENDING**, which you should follow
up regularly and frequently. (See also item 3, "Pending
folder," on page 15.)

When the last item has been disposed of, cross out the **P** and mark an **F** for filing.

Let at least one other assistant know where your pending items can be found, in case you are out.

Prompt filing. See that all papers are filed as promptly as possible. Any one of them may be wanted the next day.

Part VII. Yes, Typing Must Be Just Right

CHAPTER 21

Check for Precision Accuracy

It isn't enough to be fairly accurate. Checking in business, like the checking of scientific instruments, should be done to the point of "precision accuracy." Try to do everything right the first time.

Yet any person in an office may make a mistake. Be keen to discover and correct an error before it can do any harm. When you make one, notice how it came about. Whatever you do to make your typing clear and right in the beginning will help checking.

Self-checking. There are two ways of checking: reading over your own work, or reading over with another person. In either case, do not skim.

Comparing the old and new copies. Compare every word and every detail of punctuation and paragraphing with the details on your copy.

If you are checking alone, trace down the source copy with a ruler while you follow down the copy in the machine with the left forefinger. Take in only what the eye can hold for accurate comparison, as you look back and forth.

For quick comparison of two sheets, curl the sheet of the old copy against the sheet in the machine so that your eye can conveniently match one sentence after another. In this way, follow down the two sheets together.

During prolonged typing, relieve the tension by comparing a paragraph at a time, as you go along. Check off the old paragraph on the source copy with a vertical line or a check mark and go on with the typing of the next paragraph.

When checking a list of items in a column, count the number on both copies to detect doubling or omitting.

Catching repeated mistakes. Be persistent about finding common errors, such as transposition of letters or figures, omission, repetition, failure to capitalize or underscore, or typing of a similar word that is not the word for the place, such as

of	for	or
then	for	than
word	for	work
make	for	made
hear	for	here
there	for	their

Checking with Another Person. When copy is especially important, detailed, or difficult, read it over with another person, if possible, after it has been removed from the machine. Be ready to ask for (or to give) such help as is occasionally exchanged between

office assistants, but do not impose on busy associates for work that you should handle alone. The rules given here for checking typewritten work may be applied also to proof-reading, when one holds the "copy" and one the proof.

Reading. Have the typist hold the fresh transcription so that she can catch errors and indicate the corrections to be made.

Have the second person read aloud from the source copy. The voice should not drop to a monotone, for that tends to make both reader and listener drowsy. Read naturally, in a distinct tone, not too loud.

Read for accuracy as of first importance, making everything clear that might be overlooked or misunderstood. Speed comes second in importance.

Read thoroughly, indicating each detail of wording, type, indention, and setup. Sound short words, such as *on* and *in*, as clearly as long ones. Make plural and all other endings distinct. State exactly which word or words are underscored.

Call off figures and amounts of money definitely. After saying unusual names of people and places, and strange or foreign words, spell them out.

At the end of a sentence, pause; if there can be any doubt in the mind of the listener, say "point," which means a period.

Mention the beginning of each paragraph, each apostrophe in a contracted word or a possessive, each hyphen in a compound word, ditto marks, or a dash.

Call attention to a space between words, when this might be questioned (as "post card—two words"), or the uniting of two words (as "proofread—one word").

Saving seconds. If you are the listener, let the reader know that you are keeping pace with a series of items by saying quickly after each, "Check" or "Yes."

To become an expert reader, practice with a clear abbreviated code to indicate familiar or frequently repeated words or marks, such as are shown on page 60.

Be sure that you and your co-reader always understand each other's short cuts. This is especially important in the reading of figures. For example,

345.2 may be briefly read "three forty-five point two," omitting the word *hundred*.

\$264,510 may be read "dol two sixty-four, five ten," omitting the words *thousand* and *hundred*.

840 may be read "eight-four-oh, three times," instead of
840 calling out the three identical numbers.
840

Holding attention. Guide your eye from line to line by running the edge of a ruler, card, or paper down the page.

Do not allow an error to be overlooked in a moment of wandering attention of either the reader or the listener. If necessary, ask to have a sentence or a word repeated.

Avoid being interrupted as far as possible.

When items have been purposely copied in a new order, check each one off on the source copy with a check mark as it is read, and look out for any item left unchecked.

ABBREVIATIONS IN CHECKING TYPED COPY AND IN PROOFREADING

<i>For</i>	<i>Say</i>
apostrophe.....	pos
capital letter.....	cap
capital letters.....	caps
cipher (zero).....	oh
Co.....	co
comma.....	com
decimal point.....	point
ditto marks.....	ditto
dollar sign.....	dol
exclamation point.....	'sclam
hundred.....	hun
hyphen.....	hyf
Inc.....	ink
italic <i>or</i> italics.....	ital
million.....	mil
paragraph.....	par
parentheses.....	paren—close paren
period.....	point
question mark.....	quest
quotation marks.....	begin quote—end quote
semicolon.....	sem <i>or</i> semi
thousand.....	thou

Noting errors. When an error is found, pencil a check mark (✓) in the margin and lightly underscore the error. Put a caret (^) to show where an insertion should be made. In the margin write the shorthand for any words to be inserted.

Correcting Errors. Correct whatever is wrong—and so cleverly, if possible, that recopying of an entire page is not needed. Erase all penciled reminders of mistakes. If recopying ever proves necessary, repeat the checking.



CHAPTER 22

Fit Typing to Its Many Uses

Experience in office work makes it more and more easy to judge immediately how to do any piece of typing—just how to set it up, just how little time to spend on the final polishing.

Learning to Do Suitable Typing. If your employer specifies the setup for a piece of work, follow the same course in other similar typing.

Find out from the files what has been acceptable for records, reports, notices, and tabulations.

Adopt good points from typewriting that comes from other offices.

Deciding on the Form. Follow a clear, consistent method for every typed page. Choose a form that will be

Attractive and plain to the reader
Convenient for handling and filing
Easy for future reference

Plan to use the most practical stationery, the most telling arrangement, and a forceful variety of type from the keys of the typewriter. See the "Guide for Practical Typing" on page 62.

Working for the Required Finish. Fit your typing to the fact that all copy does not need the same degree of perfection. All copy *must* pay strict regard to legibility, correct spelling, good English usage, and accuracy of facts, names, and figures. But the typist who is overfussy about unimportant details cannot do a satisfactory quantity of work.

For the proper polish, think out the answers to these three questions:

By whom is this to be used? Is it going out of the office to an important person or a customer? or to a representative of the company? Is it going within the office to an executive? or to an office assistant?

What purpose must this serve? Is it a report for permanent record in your files and the files of others? Or is it merely a temporary reminder?

What standard is required? Is this an agreement that must be without any typing flaw, to be legally binding? Or is it copy for a circular that your employer is to revise and have you retype?

The following examples show common grades of polish:

1. **Copy that is to be redrafted may be somewhat roughly typed, but must be readable.** Copy needed quickly for revision must have every word clear and the order right. But time must be saved; for example,

If you type the wrong word, cross it out ("x it out") with your x-type, instead of stopping to erase or correct it; then type the right word above the x'd word, with a caret to show where it is to be read. Or let the correct word follow next after the one crossed out.

Insert an omitted word or phrase between lines, with a caret. Make marginal corrections with a caret leading to a penciled loop.

Do not stop to divide words to keep the right-hand margin even.

GUIDE FOR PRACTICAL TYPING

1. APPROPRIATE STATIONERY

*Select**For*

Very thin paper.....	A run of many copies
Durable cards.....	Vigorous service
Ruled paper.....	Handwritten entries
Punched paper.....	Loose-leaf data
Printed form.....	Ordinary legal document

2. USEFUL ARRANGEMENT

*Plan**For*

Wide margins with double } or triple spacing	{ Rough copy requiring revision
Narrow margins with } single spacing	{ Material that needs to be crowded onto a single page
Wide left or top } margin	{ Sheets to be bound at the left or top
Block indention.....	{ A list or a quotation of several lines
Centering.....	A heading or subheading
Indention, figures, and } letters of the alphabet	{ An outline or carefully organized statement

3. FORCEFUL VARIETY OF TYPE

*Use**For*

Capitals.....	A title
Underscoring.....	{ An important word, phrase, line, or heading
Row of asterisks.....	{ Separation of distinct sections
Dotted line or "leaders" across an open space (as on this page) }	Guide to the eye

2. File-copies must be readable and complete. When the signer of a letter calls for corrections, do not reinsert the file-copy in the machine for changes that can be made by pen or pencil. But be sure that each change, especially if it is in figures, shows clearly.

3. Typing for ordinary office use must be orderly. Words may be crossed out or written between lines, however, in hasty informal messages between office associates.

4. Letters must have reasonably nice finish. No changes should be evident, unless made in ink by the signer.

5. Statistical sheets must be exact. Make figures unmistakable on all copies.

6. Legal documents must be perfect. Allow no sign of any changes or erasures. The original and the carbon copies must be exactly alike.



CHAPTER 23

Typing in Tabulated Columns

Can you type tabulated columns without waste of time? If you repeatedly type a certain kind of table—perhaps a report—do you keep a skeleton guide of it, showing the usual headings, column widths, ruling, and placement on the sheet?

Give special attention to tabulating unfamiliar material. Study good printed tables for spacing, headings, ruling, sequence of columns, and use of type as far as it can be imitated on the typewriter.

Typing Correctly the First Time. Before beginning to type, be sure that figures are verified and totals are proved. It is difficult to correct an error on all copies of a complicated table either in the typewriter or after removal. Taking time to recopy such a table is out of the question in an office of today.

Use the shift key carefully for frequent shifts from small letters or figures to the dollar sign, number sign, capitals, underscore, and per cent sign. Do not strike over a figure error; erase and correct on all copies.

Planning the Tabulation. On a sheet of scratch paper, work out in the typewriter an accurate draft of columns that you are to copy in tabulated form.

Paper. Use the right paper to make the right spacing on a single sheet, whenever possible. For example, place a

Long table on legal-size paper

Wide, brief table on letter-size paper used sidewise

Wide, long table on special paper

Spacing. For the trial draft, type across the page one or two of the lines of text that will require the greatest width within the columns. This test should allow each column full width for its longest item, with at least three spaces (preferably five or seven) between columns.

Headings. Over the trial lines on the draft, try the column headings so that the whole plan will be adjusted to your paper before you start the actual copy.

Make each heading clear but brief, on a single line if not too long. Center each line of a heading over its column.

Avoid a crowded appearance. For either single or double ruling, allow horizontal space above and below headings, and vertical space between columns.

Type. Choose varied type to pick out headings. But keep the plan consistent and as simple as possible. For example, try

All-capitals for a main heading

Capitals for the first letter of each important word in a sub-heading

Underscoring for headings of a kind

Use periods to lead the eye across an open space between columns.

Paging. If you must run beyond one page, break a table between pages in a way that can be easily understood. Repeat the column headings in full or in clear abbreviation on each page. Consider whether to make subtotals and carry them forward.

Number the pages at the upper right-hand corner.

Copying from the Prepared Setup. On the top sheet for the run, mark points in pencil that will guide you to correct placing. Do this before making up the run, curling the rough draft against the sheet, first horizontally and then vertically, so that you can point up the

Beginning of each heading

Column widths

Location of at least the first horizontal rule

When the run is in the typewriter, set tabulating stops to fit the plan, if the quantities in the columns are regular in width. If the quantities are irregular, use your eye to assure perfect placement of each item. Take time to guard against misplacement to the right or left which may involve difficult erasing of figures or even recopying of an entire page.

Ruling. Rule each run of tabulated pages by the quickest method that will make them look satisfactory. Try out different schemes until you find the one that fits the case. Remember that carbon copies of tabulated sheets are often given important use.

Typed ruling on the machine. For a horizontal rule, lock the shift key and strike the underscore continuously across the page.

Vertical ruling on the machine is not recommended. It taxes both typewriter ribbon and carbon paper, and it may take considerable time. Often the typewritten columns stand out so clearly that no vertical rules are necessary.

Pen or pencil ruling. While the run is in the machine, make penciled dots through on all copies to show the direction and the extent of rules. Avoid double rules as far as possible.

Use your variable line spacer, together with definite marks on the metal ruler of your typewriter, or any other device that will help even and accurate placement of

At least two dots to guide each rule.

Remove the sheets and use pen or pencil to rule through these dots. Then erase penciled dots.

If ink is used, care must be taken to keep the edge of the rule well away from the paper, to avoid blotting. Use a ruling pen and india ink or a fountain pen with good black ink. Make ruling just heavy enough to look well with the typing. Do not blur rules with your blotter.



CHAPTER 24

How to Type Cards

There is a best way of setting up cards for a record, an account, a subject index, an index to a numeric file, a mailing list, or whatever your business requires. For *your* card file think out the setup that will be most readily typed and most practical for everybody who uses it. (Chapter 25, "Planning and Filling In Printed Forms," includes up-to-date arrangement for cards that are printed.)

Machine Devices. Get the most out of every device that is available for card typing.

Paper guide. Set this so that each card can be automatically entered against the guide.

Left-hand marginal stop. Set this so that the first point of typing can be the same throughout a series of cards.

Tabulating stops. Set the tabulator to help in typing entries or specific items in columns which begin at the identical point on a run of cards.

Bail, paper fingers, or card holder. Adjust your device to hug the card close against the roller, to avoid blurring.

Variable line spacer. For ruled cards or cards printed for typed entries, free the line spacer if the spacing does not agree with the line spacing on your machine. Otherwise, use the line spacer, writing evenly a little above a ruled line.

Motion Saving with Cards. Fan a stack of cards face down at the left of your typewriter, with the edges slanting toward you so that you can pick off one at a time with the left thumb and forefinger. If the cards are printed, have the top edges toward you so that the cards will come in sight around the roller right side up.

Check the typing on each card before rolling it from the machine. Be sure that any corrected letter or figure is struck in exact position.

Feed the next card into the machine with the left hand while the card just typed is being rolled out.

Stack typed cards face down as you type them, if you wish to keep them in the order of typing.

One Side Only. Making entries on the reverse side of a card may be false economy. If it is necessary to use a series of cards for the same subject or name, write on one side only. Then all data can be seen at a glance when the related cards are laid down in order.

When a second card for a name or subject is started, number the first one in the upper right-hand corner with the figure 1, and succeeding cards with the figures 2, 3, and so forth. Repeat the main heading on each card in the same location as on the first card; see the samples below which show the tops of cards from a name index and from a stock record:

Lunt, Frank G. 1	Supplies—Janitor 1
Lunt, Frank G. 2	Supplies—Janitor 2

(NOTE: If for special reason the reverse of cards must be used, be sure that the word **over** is placed conspicuously on both sides. Number the first side 1 and the reverse side 2; number the two sides of the next card 3 and 4; and so forth.)

Setup for Index Cards. Choose the appropriate standard-size card for each kind of index. Plan to use restricted space economically, without running too close to the base of the card for good typing.

Uniformity. Follow a setup that will put the same item in the same spot on a set of cards, whether printed or unprinted. For example, when using unprinted cards, start the first line of writing at the same distance from the left-hand edge and from the top on all cards in an index.

Key word. Type the last name or the key word first for ease in indexing:

Benson, William T. or Labels, Gummed

Placement of items. Plan the location of all items on the card for the most effective use of the information and for speed in typing, sorting, filing, and finding.



CHAPTER 25

Planning and Filling In Printed Forms

Make printed forms save as much work as possible, both for your employer and for you. Many standard forms can be purchased from filing-equipment concerns. Forms for your special routine work may be made up for the printer, or run from a duplicating machine.

Up-to-date Alignment. For a printed form follow this up-to-date alignment:

**Right-hand alignment for a column of printed items, which
lead to spaces for the easy
Left-hand alignment of a column of typed items**

This setup saves time for the typist and for everyone concerned.

If old forms must be used up for economy's sake, fill them in with the left-hand alignment of typing if possible. Compare the three schemes on page 68 for "Time-saving Alignment on the Printed Form." (See also the interoffice memorandum, Model 3, on page 43 and the message form on page 88.)

A column of amounts should of course be aligned at the right. But a column of data involving figures and words or names should be aligned at the left for swift typing. On page 69 see the up-to-date alignment on a sample card from an active insurance record.

Double-stop arrangement. When more than one column is to be filled in on a printed form, think of it as a double-stop or triple-stop form. Follow one of these methods:

1. If your machine allows free shifting of the left-hand marginal stop to the right, set the stop, then type down column 1; shift the stop to the point for column 2, then type down; and so on.

2. Use the left-hand alignment by setting a tabulating stop for each column and typing across the form.

Filling in Routine Office Forms. For a clear carbon impression when filling in a duplicate form on the typewriter, align the printing perfectly with that on the duplicate sheets.

Read over every printed line to see that you have filled in every blank.

See whether the form runs over to the back of any page.

Watch for special directions such as

**Name (last name first)
Do not fill in here
Please leave blank**

Fill in brief details such as **Mr.**, **Mrs.**, or **Miss** in the space for name beginning **M. . .**, and the **year**, as well as the **month** and **day**, in a line like this:

Date _____ 19__

Filling in a Blank or Questionnaire. When a blank is to be filled in, such as a declaration of property, a questionnaire, or an application, follow the above rules.

On blanks that are prepared for entries in either handwriting or typing, ruled or dotted lines may appear. Set the variable line spacer, if necessary, to avoid having such a line pass through typing.

For a negative answer state clearly **No** or **None**, to show that no item has been overlooked.

When a choice is given, cross through the words not chosen, with the hyphen key or a pen.

Be careful not to *type* a signature in a space intended for one in *handwriting*.

TIMESAVING ALIGNMENT ON THE PRINTED FORM

1. UP-TO-DATE FORM

To aid the eye of the person using the information, **plan right-hand alignment of a printed column.** If a line is too long, it must be planned for two lines. **Plan left-hand alignment of typed items,** to quicken typing by return of the typewriter carriage to the same point for every line. Leave ample space for entries.

Date	1/12/45
Shipping address	Richard Cole & Co. 127 So. Central St. Winston-Salem, N. C.
Valuation	\$2700

2. COMMON FORM

Forms already printed with the old-fashioned left-hand alignment of items should be typed with a single left-hand alignment as shown here:

Date	1/12/45
Shipping address	Richard Cole & Co. 127 So. Central St. Winston-Salem, N. C.
Valuation	\$2700

3. WASTEFUL FORM

Date	1/12/45
Shipping address	Richard Cole & Co., 127 So. Central St., Winston-Salem, N. C.
Valuation	\$2700

Compare 3 with 1 and 2 above as to difficulty of reading data and waste of time in typing.

Layout for a Printed Form. Plan each form to meet as many routine office needs as possible.

Coverage. Make the wording cover every point briefly but clearly for all who may fill in the form or may read it when it has been completed.

Order. Arrange items in logical order. What should come first? what last? Have date and filing name, filing subject, or filing number placed to save you time in sorting and filing.

Type. Vary the style of typing to stress important words and to subordinate others.

Horizontal spacing. Have the printing carefully spaced between lines to fit regular use of your line spacer down the page. Omit rules and dotted lines in spaces to be filled by typing.

UP-TO-DATE ALIGNMENT FOR A CONTINUING INDEX CARD

Plan right-hand alignment for a printed column, such as the one at the left below, calling for varied data. Plan left-hand alignment for typed columns, such as those in typewriter type at the right below, involving figures, words, and names.

Study the alignment of all the blocks of typing on the card for an insurance record given below, showing one unused space at the lower right-hand corner for another renewal.

Note the short cut of omitting the dollar sign in such amounts as \$5,000, \$1,000, \$6,000, \$33.20, when to all users of this card the sign is clearly implied.

NAME	Clark, Robert W.			
CITY OR TOWN	Center City, Ohio			
ST. & NO.	54 Middle St.			
PROPERTY	5000 Dwelling 1000 Outbldgs.			
KIND OF INS.	Fire & Ext. Cov.			
COMPANY	Pennlin			
POLICY NO.	400313	494355	791299	
AMOUNT	6000	6000	6000	
PREMIUM	33.20	33.20	33.20	
EXPIRES	4/10/40	4/10/43	4/10/46	
(673-4-1-36)				

See the code number and date above: Form No. 673, issued April 1, 1936.

Vertical alignment. Plan for the up-to-date vertical alignment of printing and typing described on page 67.

Coding. Make a code number to identify each form. Have this coding printed in the lower left-hand corner, with or without the date of issue. For example, see the foot of the sample card above, where 673-4-1-36 stands for Form No. 673, issued April 1, 1936.

Reverse side. If the reverse side must be printed, have the word **OVER** in boldface capitals at the lower right-hand corner on both sides of a sheet or card.

Supply of Forms. Keep printed forms in the stockroom or in your small supply closet by an orderly system. Number the shelves. Label their edges. Have the descriptive name or the form number show on the end of each package or box.

Samples of Printed Forms. Mark one copy of each printed or duplicated form **SAMPLE**. Keep a complete set of samples ready for reordering, and note any suggested changes on the sample.

Care for your folders of samples so that they will be clear to anyone who may need to refer to them at any time.

Part VIII. Some Special Typing

CHAPTER 26

Typing and Handling Author's Manuscript

Special requirements for typing author's manuscript are illustrated here in a four-page model entitled "How to Type a Manuscript for the Convenience of the Editor and the Printer." Study pages 71 to 77 with any such work of yours in mind, noting that they

Give information about the preparation of a manuscript for publication and

Illustrate that information by showing how certain of the points about typing *look* when they are carried out

Directions for Typing. For full directions read the following:

Chapter 26: Four model pages for

 Their appearance

 Details as described within the manuscript

Chapter 27: "Typing from Rough Draft"

Chapter 28: "Typing Quotations and Footnotes" for

 Placing, punctuating, and acknowledging reprinted quotations

 Setting up footnotes

Directions for Shipping. Do not fold or roll copy for the printer, if it is longer than three pages. Never bind sheets together; even two pages should not be stapled, clipped, or bound together in any way.

Short manuscript. A manuscript of one or two pages may be folded twice for a long envelope. A longer manuscript should be kept flat in a large manila envelope, preferably with a cardboard backing. Mail either of these sealed for first-class postage. Enclose a brief letter to identify the manuscript by title, and include enough postage for possible return. Register an especially valuable manuscript.

Long manuscript. A lengthy manuscript, such as one for a book, is usually shipped by express, prepaid and insured for a suitable value. Send a brief letter by mail, giving the title and date of shipment, and offering to pay express collect, if the manuscript is returned.

Proof stage. After a manuscript has been set up in type and you receive it—or a part of it—back with related proof, see that the proof is examined with great care. Corrections of all errors should be indicated, but no changes should be called for except such as are really necessary.

Return the proof and manuscript together promptly to the publisher or printer by parcel post, insured for a nominal amount to allow tracing in case of delay.

Follow-up. Save all mail and express receipts until some further acknowledgment has been received.

From Richard M. Gibson
23 Center Street
Paxton, Michigan

1

About 1,000 words

HOW TO TYPE A MANUSCRIPT FOR THE CONVENIENCE OF THE EDITOR AND THE PRINTER

Your preparation of any manuscript for publication involves typing for a special use. Plan every detail for the convenience of the editor who reads and edits it, the copy editor who prepares it for the printer, the typesetter who follows the copy, and the proofreader.

Paper. Type on bond paper, 8½ inches by 11 inches, on one side only.

Ribbon copy. Make a clear copy for the publisher with a reasonably fresh ribbon. Use a machine with pica type, if possible, as elite type is more taxing for the eyes of the many who must handle a manuscript.

Carbon copy. Keep a carbon copy for the files of the author.

Margins, spacing, and indention. For additions, changes, queries, or instructions to the printer, leave an inch margin at all four edges, with the exception of the top of the first page, as shown above. Use double spacing to make reading easy and to allow for any editorial marks. Indent paragraphs five spaces.

Identification. Type the name and address of the author, followed by the approximate number of words in the manuscript. Block these in the upper left-hand corner of the first page of a short manuscript, or on the title page of a book manuscript.

HOW TO TYPE A MANUSCRIPT - 2

Calculation of length. When the manuscript has been typed, count the total number of words in a group of 10 lines, for example, 101. Divide by 10 to get the average number per line (10 words). Suppose the count of lines on a full page to be 27. Multiply 27 by the 10 words per line; then multiply by the number of pages, for example, $3\frac{1}{2}$, for the approximate total, 945. At the head of the first page type: About 1,000 words.

Page numbering. Set the page number 1 about three-quarters of an inch from the top and an inch from the right-hand edge of the first page. Let this establish the uniform corner position for all page numbers. Avoid centering the page number; centered numbers on a series of pages are inconvenient for continued handling by typist, editor, author, printer, and proofreader.

Title. Center the title in capital letters, two inches from the top of the first page. Divide a long title at a point that will keep the meaning clear, centering each line (see the previous page). On succeeding pages, abbreviate the title in capitals just before the page number. (Compare the heading of page 2 above with the full title on page 1.) Backspace to place the heading on page 2, as above; note this starting point on the typewriter scale as your guide for succeeding headings.

Split paragraph. When dividing a paragraph between pages, leave at least two lines at the foot of one page and carry at least two to the next page. Never divide a word between pages.

Insertions. An added, omitted, or substituted word or brief phrase may occasionally be inserted between lines of typing, with a caret, or underscore and oblique line, to show position,
its/as in this sentence.

HOW TO TYPE A MANUSCRIPT - 3

Footnotes. Write a footnote between two rules directly after the line in which the reference occurs. Double spacing is useful to the editor and the printer, as shown below.¹

¹Footnotes are often typed in a well-spaced series at the foot of the manuscript page to which they refer, as at the foot of a printed page. A line is ruled to separate them from the text. Paragraphs are indented. The typist must measure carefully to allow space at the foot of the page for all the footnotes. Publishers prefer the inserted method illustrated by the placement of this footnote, because it is more readily handled in the printing process.

Indent every footnote as for a paragraph. Enter consecutive numbers to identify footnotes throughout an article or a chapter (see footnotes 1 and 2 on this page, footnote 3 on the next page). By use of the variable line spacer, type the number of a footnote slightly above the line of writing at the end of the last word of the reference; type the same number, slightly raised, at the beginning of the footnote.² Set each rule in such a way that it

²Signs, such as the asterisk, may be typed in succession on a page, but a figure is easier for the eye to follow from the text to the corresponding footnote and this system permits consecutive numbering throughout a piece of writing.

cannot interfere with the underscoring of single words in the line of typing just above the rule.

HOW TO TYPE A MANUSCRIPT - 4

Revisions. Type a brief revised passage on a strip of paper and paste it over the original version. Type a longer revised passage or an insert on a full sheet. Number such a sheet with relation to the page on which it is to be inserted; for instance, 15a, to match the number on page 15, where the point of insertion should read, Insert p. 15a. If there is more than one insertion for the page, mark and cross-reference them consecutively as Insert 1, p. 15a, Insert 2, p. 15b, and so forth.

Illustrative pages. When one or more pages with photographs or other illustrations are first referred to in the text on page 20, for example, number the illustrative pages 20-A, 20-B, and so forth. Refer to the illustrations by these page numbers at the points of reference in the text.³

³Copy all illustrative plates with absolute exactness. The rule for the printer is to "follow copy." If there are errors in placement, paragraphing, order, or any other details on a plate, these are likely to appear as errors on the first proof.

End marks. Indicate the end of a manuscript by centered number signs, as shown below.

Book manuscripts. Before typing the manuscript of a book, consult a manual of style or a handbook regarding the setup of chapters, parts, table of contents, bibliography, index, and special additional notes or references. If it is known who the publisher is to be, follow the setup acceptable to that company.

###

Typing from Rough Draft

Before starting to type from rough draft, make sure that you have all that is to be copied. Then see that the sheets and slips with inserts are in proper order and numbered to show how they go. Remember that any error in setup usually involves the retyping of an entire page, or even more.

Necessity of Making Everything Out. Study the rough draft so that you can make everything out with ease as you copy.

Handwriting. Learn to decipher handwriting. Discover what is likely to be written indistinctly—perhaps the letter *d* to look like *cl*, the figure *5* to seem like *6*, or the whole word *the*, *and*, *or*, *to*, *that*, or *in* to be unreadable by itself.

Substitution or insertion. Mark every change in the rough draft so that you will not copy discarded words or omit new ones.

Look for written inserts

Between the lines

In the four margins

On the back of the sheets

On separate slips of paper, pinned or clipped to the draft

On separate pages

Change in sequence. If changes in order of words, sentences, or paragraphs have been indicated, mark with arrows, carets, curving lines, or numbers to guarantee straight reading while you type.

Proofreaders' marks. On rough draft you may find some of the proofreaders' marks that are shown in a dictionary or a handbook, in the section about proofreading. On page 80 see the description of marks most frequently used to direct the typing of rough draft.

Correctness. Make your typing correct in each of the details given below.

Data. Check especially anything that is blurred on the draft. Check all data; for example, every

Quotation

Name and address

Amount of money

Total of a set of figures

Spelling, punctuation, and grammar. Take responsibility for good English usage. Catch snags ahead of the typing.

Spell out words and figures that should not be abbreviated, even though not spelled out on the sheet from which you are copying.

For help in word division at the ends of lines, study the "First Aid for Word Division" on page 9.

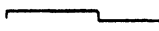
INSTRUCTIONS FOR TYPING FROM ROUGH DRAFT

1. **What to type.** Restore crossed-out words marked **stet** (meaning **let it stand**) or **do not omit** or **keep**. Omit what is crossed out or marked **omit** or **delete** (sometimes shown by the sign Ø).

2. **How to space.** Leave more space between words or lines when called for by the number sign (#), or less space when called for by the close-up sign (⊖). Indent for the paragraph sign (¶). Omit paragraph indentation for no ¶ or for the words **run on**.

3. **When to spell out.** If a figure or abbreviation on the draft has been encircled, spell it out; *e.g.*, if *etc.* is encircled, type it as **and so forth**. But if a figure which is spelled out on the draft has been encircled, type the figure; *e.g.*, copy four as **4**. That is, a circle calls for the typing of the opposite form.

4. **What to change and how.** Substitute, add, or change the position of a punctuation mark, letter, word, sentence, or paragraph as called for by the following signs:

Double-curve line () for transposition of letters or words that are close together

Caret, loop, arrow, or tr. (meaning **transpose**) for transposition of a paragraph, sentence, or phrase

Numbers in circles, showing change in sequence

Letter, number, or star leading to insert marked with the same sign

See below, over, or next page

5. **How to copy punctuation.** Type a period wherever a ring is run around a comma or any other mark of punctuation. Type a hyphen for two short parallel lines in the draft (=). Type a dash (two hyphens) for a single long line.

6. **How to follow indications for type.** Type a small letter in place of a capital which has an oblique line drawn through it, whether or not the mark **l.c.** (**lower case**) appears. Type a capital (**u.c.**, **upper case**) in place of a small letter that is underscored three times, whether or not the abbreviation **cap.** (**plural, caps.**) appears. Underscore a word that is underscored with a single line in the rough draft; this calls for printer's italics (*ital.*). Pen a wavy line under a word to indicate printer's heavy type, called **boldface** and sometimes marked **b.f.**

Setup for typing. Before setting up your copy, you should know

- What title or heading to use
- How many copies to make
- Whether single, double, or triple space is desired
- Whether the usual margin is expected
- In what particulars (if a manuscript) the setup should follow the model on pages 71 to 77

Mark the details of style. Be sure to **center, underscore, capitalize, space, or indent all the same kind of text in the same way.**

Make a paragraph sign (¶) at the beginning of each paragraph that is not indented on the rough draft.

Make a mark in the margin against the longest line in a rough list that is to be typed as a centered column. Center the whole list by gauging the placement of that longest line.

System for Handling Sheets. Handle all sheets by a regular system.

Rough draft. As you copy, keep the sheets of rough draft in their original order by turning them face down.

Before starting to copy a long insert, make a colored mark on the rough draft to guide your eye back to the right place.

As you go ahead with the typing, cancel completed paragraphs or insertions with a vertical line, preferably with a colored pencil. Avoid omissions by making sure that all the rough draft has been canceled by the vertical line. (See also "Keeping the place" on page 49.)

Return the rough draft, with its pages clipped together, under the ribbon copy of the fresh revision.

After copying rough draft of any kind, keep the previous version as long as, by any possibility, it may be needed for reference. Then destroy it.

Carbon copies. If there are two or more carbon copies, keep those for each page together, in crossed piles. Then any correction can be transferred to them readily, like any change that may have to be made on the ribbon copy.

Sets of pages. After final approval, start to make up the sets of pages by laying the copies of page 1 face down in a row along a desk or table. Follow these with page 2, also face down, and so on, until each set is complete. Begin at the same end of the row each time so that the "print" of each set will be of uniform blackness. Then run through the page numbers of each set to see that it is complete.

Typing Quotations and Footnotes

You can gain a feeling of assurance about typing quotations and footnotes. If you learn how, you will not have to hold back while you try to decide each little detail of such work at your machine. Keep noticing how quotations appear in good typed and printed matter. Before beginning to copy a quoted phrase, sentence, paragraph, or poem, think out the whole setup.

Extent. When a quotation is dictated as part of a letter or of other writing, make careful shorthand signs in your notes to show the extent of the quotation—usually made known by the dictation of the words “begin quote” and “end quote,” or “quote” and “unquote.” When instructed to include an extract which is not dictated, but is to be copied, make note of the exact portion to be typed.

Setup for Varied Quotations. See the length of the quotation and plan typing accordingly.

Very brief quotation: run into the body of typing, as for the three quoted parts of this sentence:

What is often called a "confirming letter,"
or a "letter of confirmation," is a clear
illustration of the need of the request,
"Will you please put it in writing?"

Poem, list, or narrow tabulation: type in single space, centering the whole horizontally. Base the centering on the length of the longest line.

Paragraph: set in all lines of the quotation at least five spaces from both side margins of the typing; use single spacing. For a quotation of more than five lines it pays to set the marginal stops so that you do not have to look away from what you are copying. See the illustration of “Indention and Punctuation for Quoted Paragraphs” on page 85.

Full page: plan for an inch margin all around.

Punctuation. Quoted paragraphs or stanzas are often *printed* in a smaller type than that for the main text; this smaller type may be taken to indicate a quotation without the addition of quotation marks. But on the *typewritten* page, where all type must be of one size, quotation marks are advisable, even though indention sets off the quotation from the body of the text (see top of page 85).

Study the following common rules until you have them at your finger tips.

Single quotation. Type quotation marks

For Prose

Beginning of every paragraph;
End of final paragraph only.

For Poetry

Beginning of every stanza;
End of final stanza only.

Double quotation. To enclose a quotation within a quotation, type single quotation marks (apostrophes); for example:

He exclaimed, "I'm going to see this work through even, as the general said, 'if it takes all summer.'"

Quotation marks with other punctuation. Learn the "Relation of Quotation Marks to Punctuation" at the foot of page 85, as an essential part of your knowledge of typing.

Quotation following a leading word. Type a colon or a comma after a word or phrase that leads to a quotation, such as

He mentioned the following: "Books, magazines, bulletins, and catalogs."

All her sentences were short; for example, "This is superb."

Omission within a quotation. Indicate an omission within a quotation by periods. Type 3 periods at the beginning or in the middle of a sentence, such as

"For secretarial work...a thoroughgoing acquaintance with the alphabet is needed."

Type 4 periods for omission at the end of a quoted sentence, such as

"Watch yourself, or watch someone else, start to look up a word in a large dictionary...."

Type a row of periods in place of an omitted paragraph or stanza.

Permission. Ask for the necessary permission from both publisher and author to reprint a quotation from copyrighted material. Send a stamped, self-addressed envelope with the request. Make courteous acknowledgment of the permission. See that printed copies are sent later for their files.

Give proper acknowledgment in the preface of a book. If the publisher requests printed acknowledgment on the page of the quotation, type a double-spaced footnote in the form called for. If no form is specified, follow this common model:

¹Reprinted by permission of the publishers from
The Epic of America, by James Truslow Adams, Little,
Brown, and Company, Boston, 1931, pp. 241-242.

Brief Credit Line. For a quotation not copyrighted or too brief to require formal acknowledgment, or in material that is not to be printed, such as a letter, give the author credit as illustrated below. Mention also the book, periodical, article, chapter, or poem, if force or interest is gained by naming the source.

Preceding the credit, type two hyphens to indicate a dash. The examples below show the difference between the setup for (1) a prose quotation with a "run-in" credit preceded by a dash; and for (2) a quotation from poetry with the credit preceded by a dash, but on a separate line.

1. "No adventure in life is more interesting than meeting a new person."—Gelett Burgess in The Rotarian.
2. "The world is too much with us; late and soon,
Getting and spending, we lay waste our powers...."

—William Wordsworth

Full Footnote Acknowledgment. In copy for printed publication, such as the manuscript of a magazine article, thesis, formal address, or book, type a detailed footnote in double space to give credit to the source of a quotation.

Placement. For footnote placement see page 75 in the chapter called "Typing and Handling Author's Manuscript," which shows page 3 of a model manuscript.

Standard forms. When typing source references, follow consistently one standard form in a single piece of work for

Order of details
Underscoring (calling for printer's italics)
Quotation marks
Punctuation

If your employer has articles printed frequently in the same publication, type the footnote setup preferred by his publisher. If the setup is left to your judgment, adopt the standard forms listed and illustrated for

Quotation from a book, on page 86

Quotation from a magazine, newspaper, pamphlet, or bulletin, on page 87

When in doubt about your employer's preference, submit a typed sample to avoid the waste of retyping footnotes.

INDENTION AND PUNCTUATION
FOR QUOTED PARAGRAPHS

The following paragraphs are from an offer received from Mr. Henderson last week:

"Activated carbon, as you of course know, is a black, granular substance. The particles are capable of absorbing poisonous gases.

"Now our activated carbon purifiers are used with air-conditioning installations to make air really fresh. In a plant like yours, it is especially important to have air kept freshened. This we can absolutely guarantee."

I wish you would see this Mr. Henderson about equipping the Edgeville plant to promote better health and greater efficiency.

RELATION OF QUOTATION MARKS TO PUNCTUATION

After a period:

She said again, "He is always prompt."

After a comma, even when only one word is quoted:

The man said, "infer," when he meant "imply."
"This," she repeated, "is right."

Before a colon or semicolon:

The following catalog numbers are "color-fast": F-275, T-204, and N-76.
She called the book "first-class"; he called it "dull."

After a question mark, if it is a part of the quotation; otherwise, before:

He asked, "What makes that excellent?"
Did he mark it "perfect" or "excellent"?

After an exclamation point, if it is a part of the quotation; otherwise, before:

He shouted, "Stop!"
Imagine it! he would not undertake the job because it seemed "beneath him"!

STANDARD FOOTNOTE FORMS FOR TYPING

A. For a quotation from a book, type any or all of these details, as may be required by the nature of the source. See the sample footnote below, which is made up of

1. Author's name in the usual order: Carl Sandburg.
2. Title of book, underscored (calling for printer's italics), with each important word beginning in a capital letter: Abraham Lincoln.
3. Name of publisher: Harcourt, Brace & Company.
4. Place of publication: New York.
5. Date of publication: 1926.
6. Volume number (if any) in Roman numerals: Vol. I.
7. Page number or page numbers of reference:

Single page: p. 102.

Pages in sequence (inclusive): pp. 117-120.

Indefinite number of pages: pp. 51 ff. (*ff.* meaning *and certain of the pages following*).

Note 1. When more than one successive reference to the same source is made at the foot of the same page, do not repeat the above in full. Type the underscored abbreviation *Ibid.* (for Latin *ibidem*, meaning *the same*), followed by the page reference:

¹Carl Sandburg, Abraham Lincoln, Harcourt, Brace & Company, New York, 1926, Vol. I, p. 102.

²Ibid., pp. 117-120.

³Ibid., pp. 51 ff.

Note 2. When the same source is repeated on later pages, the name of the publisher, city, and date need not be repeated. Type the form:

⁴Carl Sandburg, Abraham Lincoln, Vol. I, p. 118.

Note 3. For preferred placement of a footnote *at the point of reference* on a page of manuscript, see "Footnotes" on page 3 of the model manuscript in Chapter 26.

STANDARD FOOTNOTE FORMS FOR TYPING

B. For a quotation from a magazine, newspaper, pamphlet, or bulletin, type any or all of these details, as may be required by the nature of the source. See the sample footnote below, which is made up of

1. Author's name in the usual order: E. K. Rand.

2. Title of article, story, poem, or pamphlet in quotation marks, with each important word beginning with a capital: "Bring Back the Liberal Arts."

3. Name of magazine or newspaper underscored (calling for printer's italics): The Atlantic Monthly.

4. Volume and number of magazine (or volume and number of the series of a pamphlet or bulletin): Vol. 171, No. 6.

5. Date of issue: June 1943.

6. Page number or page numbers of reference:

Single page: p. 79.

Pages in sequence (inclusive): pp. 83-85.

Indefinite number of pages: pp. 80 ff. (*ff.* meaning *and certain of the pages following*).

Note 1. When more than one successive reference to the same source is made at the foot of the same page, do not repeat the above in full. Type the underscored abbreviation *Ibid.* (for Latin *Ibidem*, meaning *the same*), followed by the page reference:

¹E. K. Rand, "Bring Back the Liberal Arts," The Atlantic Monthly, Vol. 171, No. 6, June 1943, p. 79.

²Ibid., pp. 83-85.

³Ibid., pp. 80 ff.

Note 2. When the same source is repeated on later pages, the name of the magazine, volume, number, and date need not be repeated. Type the form:

⁴E. K. Rand, "Bring Back the Liberal Arts," p. 79.

Note 3. For preferred placement of a footnote *at the point of reference* on a page of manuscript, see "Footnotes" on page 3 of the model manuscript in Chapter 26.

Part IX. The Message and the Caller

CHAPTER 29

Taking the Message

How far can you relieve your employer from telephone calls and from callers? Have you learned to judge correctly the relative importance of the person and the urgency of his errand?

MODEL 6
<p>Message to Mr. Spencer Hour 10:00 a.m. Date 1/8/45 Name MISS JAMES IN THE PURCHASING DEPT. telephoned X called in person Tel. No. Message taken by A. T. D.</p>
<p>Miss James came for all the current correspondence with the Conrad Stationery Co., which I took from the folder of pending matters on your desk.</p> <p>When she has talked over the whole question of paper needs with Mr. Clark and Miss Duncan, she will make an appointment with you.</p>

Giving Attention. Let your attention convince the caller that his errand is getting the interest it deserves.

Make a start by asking, "May I take the message?"

Writing the Message Down. Always have pencil and pad ready. For short messages use a printed form to cover every detail.

Take entire care of an errand, when you are sure that it is within your province, but keep your employer informed (see Model 6 on page 88). If your employer must take care of the matter himself, put it in writing for him (see Model 7 below).

Have the printer set up your message form for exact use of the line spacer on your typewriter, as shown on these models. Use the up-to-date alignment which calls for (1) shifting of the typewriter carriage to the same point for all items at the top of the form and (2) shifting of left-hand marginal stop to the left for full-width block-style paragraphs below to give space for the message.

Give full identification of the person from whom the message is received.

Record the message briefly, but clearly and completely.

State any request for a definite reply by a given time.

MODEL 7
<p>Message to Mr. Spencer Hour 3:30 p.m. Date 1/10/45 Name MR. MILLS OF RAY & JACKSON CO. X telephoned called in person Tel. No. Bigelow 3100 Message taken by A. T. D.</p>
<p>Mr. Mills and Mr. Jackson are going to Buffalo on Friday, the 12th, for two weeks.</p> <p>They want to come to see you on Wednesday of this week or on Tuesday, February 6.</p> <p>If you cannot see them until the latter date, Mr. Mills would like to have you call him sometime tomorrow morning.</p>

Write a brief message in legible longhand. If the message is long or is spoken rapidly over the telephone, take it in shorthand and type it later in simple form.

Insisting on accuracy. Take every message accurately, especially as to names, dates, figures, and facts. At the time, do not hesitate to ask how a name is spelled or to have

figures repeated. To make sure that you have a difficult message right, ask, "May I read back that message?" Always check back

An amount of money
 An unusual proper name
 A telephone number
 The hour and date of an appointment

Timing the Delivery. Avoid interrupting your employer unnecessarily. Unless a message demands immediate care, wait to deliver it until you enter his office on other business. Lay messages where they are sure to be seen.

Following Through. See that the object of the message is followed through within a reasonable time.

Keeping a Record. Do not make a file-copy of a message. But keep the original for the file, if it records an important step in a transaction.



CHAPTER 30

Steer Appointments Straight

How much can you do to make your employer's appointments profitable to his business? In guarding his schedule, remember that he is as anxious to give time to certain people as he is to avoid wasting time with certain others.

Asking for an Appointment. When your employer wishes you to ask for an appointment, save his time by getting the other person to come to him, except in the case of a higher official. This also gives your employer the advantage of having at hand any papers he may need.

Sealing an Appointment. Be sure that all parties to an appointment understand

The hour
 The day of the week
 The date
 The place of meeting
 The people who are to meet

Adapt the illustrations of sealing appointments given below.

By mail: Mr. Ordway is glad to make an appointment with you and Mr. Bond at his office at 4:00 p.m. on Friday, May 4.

By telephone and then confirmed by mail: This will confirm your telephone appointment to meet Mr. Ordway and Mr. Bond at Mr. Ordway's office at 4:00 p.m. on Friday, May 4.

Keeping the Schedule Full. Watch the length of time taken by various types of callers so that you learn to judge how much time to allow for such appointments. Have a clear understanding as to the parts of the day your employer considers open. If you work for a professional man such as a doctor or dentist, keep the schedule full so that no time is wasted.

Do not assume that you know of all appointments that your employer makes. If an unexpected caller comes, ask, "Have you an appointment, please?"

Tentative appointments. If your employer is in conference or out of the office for part of a day and you do not know his plans, make tentative appointments; then, as soon as possible after his return, notify the persons concerned. Such a method on your part may hold a good customer or hasten a much-desired appointment.

Providing for the Emergency Appointment. Manage in some way to economize your employer's conference hours so that time is made for him to see everyone he needs to see. The important, though unexpected, visitor from a distance must be given consideration.

Handling the mistake. If a caller is delayed or comes at the wrong time through a misunderstanding, show him all courtesy. Fit him in as best you can. If possible, keep this from happening again with the same person.

Breaking Appointments. When someone breaks an appointment, try to settle on another convenient hour. If there is a waiting list of people who want appointments or whom your employer wishes to see, reach the person next in order, and so on down the list, until you find someone outside or inside the building who can fill in the broken time to the advantage of your employer. Say, for example, "Mr. Ordway unexpectedly has time open at two o'clock this afternoon. Would that be convenient for you?"

If your employer has to break an appointment, consider the other person by giving a good reason and offer to make a substitute appointment. Be as definite as this, whenever it is wise:

"Mr. Ordway has been unexpectedly called out of town."

"Mr. Ordway is ill and cannot keep his office hours today."

"Mr. Ordway has been summoned to court."

"Mr. Ordway telephoned that he will be unavoidably delayed in reaching the office and is sorry that he will not be able to see you this morning."

CHAPTER 31

Satisfy the Caller

Carry the instincts of a host or hostess into your contact with callers. As everybody knows, it pays to keep the good will of those who have dealt with a concern and to build up the good will of newcomers.

Meeting the Caller. Call each person by name when possible, as:

“Good morning, Mr. Lawson.”

“How do you do, Mrs. Mackenzie?”

“What can I do for you, Miss Wright?”

Or, if you do not know the name, say, “May I ask your name?” Then soon after include mention of that name:

“I am sorry, Mr. Richards, but Mr. Horn will be at a meeting until noon.”

When you greet callers, you speak for your employer. But think also about the caller and what the call means to him. Help him tell his errand without waste of time in extended conversation.

Getting Down to Business. Find out the name and connection of the caller and the nature of his errand before interrupting your employer. If a less important member of the staff can see the caller instead, make such arrangement. If you are a receptionist for a company, make a constant study of the special province of each official so that you will satisfy the caller and the needs of the business as well.

Whenever possible, take care of the caller's errand, as described in Chapter 29, “Taking the Message.”

If the caller has an appointment or your employer consents to see him, usher him in with, “Mr. Horn will be glad to see you now, Mr. Rand.”

If the caller is unknown to your employer, pronounce the name distinctly, for example, “This is Mr. Rand of the Halsey Company, Mr. Horn.” Close the door quietly after you.

Keeping the Caller Contented. Be considerate of anyone who cannot be seen immediately. When an emergency appointment has been crowded in, or a conference has taken longer than expected, make a definite statement to anyone who may be waiting. Say, for instance, “Mr. Horn will be able to see you in about fifteen minutes,” or “I am sorry that an emergency is delaying Mr. Horn. He will hardly be ready for another half-hour, but I know that he wants to see you.”

Physical comfort. Do what you can to see that proper chairs, lighting, and ventilation are provided for the comfort of each caller.

Up-to-date reading matter. Have attractive, fresh magazines at hand. Notice which periodicals become most worn and you will know what the run of visitors enjoy.

Stamp the name of your company on periodicals so that they will not be removed by mistake. You may call attention to any advertisement of your own concern—by a red arrow, for example.

Refusing the Would-be Caller. If it is necessary to refuse time, be tactful. Do not give away your employer's time to fanatics, promoters, or others whom it is not profitable for him to see. When you must give a refusal, try to satisfy the person with some definite reason, such as, "Mr. Horn has just returned from a business trip and is unable to see you," or "is always especially crowded at this time of year," or "is just going on an extended trip."

Giving Fair Play. Remember that everybody's time is precious—your employer's, the caller's, and your own.

Avoid seeming to be a "respector of persons." Be slow to judge people by their outward appearances. Every man who has a valuable errand with your employer deserves respect.

Understanding the Outcome. Take an interest in the purpose and the results of your employer's conferences. Link them thoughtfully to whatever follows in related dictation, incoming mail, and further appointments.

Part X. Words on the Wire

CHAPTER 32

Telephoning

Train yourself to make the most of every fraction of a telephone minute. It is easy to take four minutes for what you might do in two.

Answering the Call. Lift the receiver promptly. Answer with the name of the company, of your employer, or of the department; for example, one of these:

“Farnham Heating Company”

“Mr. Farnham’s office”

“Mr. Farnham’s secretary speaking”

“Farnham Heating Company, General Manager’s office”

“General Manager’s office”

Always find out who is calling your employer. Transfer to his desk no call that should be attended to by you or someone else. (See Chapter 29, “Taking the Message,” pages 88 to 90.)

Placing the Call for Your Employer. Put through connections quickly. Get the other person on the line before calling your employer. Then, without the loss of a second, ring the buzzer or say to your employer, “All ready with Mr. Clinton.”

Clinching the call. Wait a reasonable time for an answer. When your call does not go through because no one answers, or the line is busy, make a note to follow it through soon. If you receive an answer but do not get the person desired, leave a message stating your telephone number; who is to be called; and when he is likely to be found in.

Carrying Through an Entire Call. Take care of all possible calls for your employer from start to finish, reporting results to him if necessary. Before you make a telephone call inside or outside the office,

Know the name of the person you need to reach

Plan what you have to say so that you will

Use the wires a minimum of time

Hold up the other person a minimum of time

Know what information you are to give

Know what information you are to get

When you make the call,

Call or dial the right number
Speak in a low, distinct voice
Listen attentively
Think quickly
Take careful notes so that you will not have to call back
Do not let the other person prolong the call

Telephone voice. If people have to ask you to repeat what you have said, practice holding your lips at a different distance from the mouthpiece, lowering your voice, and enunciating slowly and clearly. If, on the other hand, you have difficulty in understanding someone else, ask, "Will you speak a little more slowly, please? I can't seem to hear you."

Take to a telephone conversation no irritation of voice from anything that may have annoyed you.

Knowing the Number. Do not get into trouble by relying on memory for telephone numbers. In plain sight near your telephone, keep an up-to-date alphabetic list of those frequently called.

Refrain from calling "Information" for a number that you can and should find. If you cannot find a business or professional name in the alphabetic directory, look in the classified directory at the back of your telephone book, for instance, under *Gas Companies*, *Hospitals*, *Hotels*, or *Plumbers*. If you do have to call "Information," be definite in giving all you know of the name and address.

Saving Time, Money, and Service. Keep your telephone where you can reach it readily. Treat the instrument with care; replace the receiver quietly.

When to telephone. Think twice before you use the telephone. Is it really necessary? Especially with a toll call, can a letter take its place?

Plan all the toll calls you can for the afternoon between 1:00 and 3:00 p.m., when lines are usually less congested.

Brevity. Do not hold anyone an instant longer than necessary—especially if he is at a pay telephone or on a long distance call.

Record of toll calls. Keep a simple record of outgoing and reversed toll charges, noting date, hour and minute, and telephone number. Check this record with the monthly bill.

Getting the Most out of the Telephone Book. Even though you are experienced, it will pay you to look over the information at the front of your telephone directories. Study about the types of service, such as the "person-to-person" call. Learn when to ask the supervisor for aid, when to ask for the toll operator, and when to offer to be called back with information about a call, instead of holding the line.

If a call does not go right immediately, your patience may help more than anything else to shorten the delay.

Avoiding Personal Use of the Telephone. Refrain from the practice of either making or receiving personal calls at the office—that is, calls that do not concern the business of your employer.

Keeping All Telephones Covered. When you leave your desk, see that someone takes care of your bells. Say to an associate, “I am going to Miss Torrance for dictation. Will you please listen for my telephone and buzzer?” Or, “I have to go to the cashier’s office for an hour or so. Will you please have any calls for me transferred there?”

When you cover another’s telephone, take the message or take the name and telephone number and say, “I will ask her to call you.”



CHAPTER 33

Telegraphing

Do you know how to handle the details that make telegraphing worth the cost? Keep a schedule of current rates for such urgent messages as pass through your hands—telegrams, night and day letters, full-rate and deferred cables, radiograms, and other forms. Study the services as to speed, distance to be transmitted, and relative expense. Learn all you can by watching messages that are received.

Handling the Incoming Message. Take clear-cut responsibility for receiving each telegram.

Open it immediately. If it is received by telephone, write it down word for word and read it back to the telegraph operator; add the hour and date when you received it.

Get the message promptly to your employer. If he cannot be reached, turn it over to the next in authority; or take care of it personally, provided you are sure you know what to do.

Follow through to be certain that complete attention has been given to the contents. If a telegram asks for a reply, see that it is answered promptly. If complete data are not immediately available, send a telegram explaining delay and stating when full information may be expected.

Handling the Outgoing Message. Take the dictation with the utmost accuracy. Read your notes to your employer. Transcribe the notes and transmit the telegram immediately to the telegraph office.

Keeping a triple run ready. Always have ready a three-sheet run of telegraph blanks arranged with carbon paper:

Original for the telegraph operator
Copy for confirmation to the addressee
File-copy

When you have sent off one telegram, prepare a triple run of sheets for the next.

SPELLING AID FOR TELEPHONING NAMES, ADDRESSES,
AND DIFFICULT WORDS

A as in Adams	J as in John	S as in Sugar
B as in Boston	K as in King	T as in Thomas
C as in Chicago	L as in Lincoln	U as in Union
D as in Denver	M as in Mary	V as in Victor
E as in Edward	N as in New York	W as in William
F as in Frank	O as in Ocean	X as in X-ray
G as in George	P as in Peter	Y as in Young
H as in Henry	Q as in Queen	Z as in Zero
I as in Ida	R as in Robert	

Filling in the blank. Become familiar with blanks so that you can recognize quickly whether you have filled in all the details.

Indicate the kind of service desired.

Date the blank.

Check the name and address of the addressee.

Type in all capitals; do not divide any word at the end of a line.

See that the message bears the proper signature in full.

Watching the cost. Make wording clear but brief. Learn how and when to cut out words without changing the meaning. See the short outline of services and of the rules for counting words for Western Union on pages 98 and 99. These are as of the publication date of this manual and are subject to change; keep them up to date and ready for reference. Ask necessary questions of a telegraph operator and make economical use of specific advice. If you are required to send cablegrams, keep a reference schedule to cover special information needed.

Save your company needless expense by learning the best way to send a message to each place for prompt receipt. Find out, for instance, the comparative speed of *air mail* (with and without special delivery) and a *telegram* directed to persons frequently addressed on urgent business. When you estimate the hour of probable delivery, do not overlook the difference in the hours between time zones.

Getting the message off. Dispatch it with all speed. If you send it over the telephone, get the telegraph operator to read the entire telegram back.

Ask what the charge will be and note it on your file copy.

Mail the confirmation promptly to the addressee; for instance, "We have wired today:" followed by a copy of the telegram with any amplification that may be desired.

Preventing errors. Have at the tip of your tongue the standard alphabetic list for making names, addresses, and difficult words clear over the telephone, as shown above.

Avoid confusing letters of similar sound, such as **F** and **S**, or **E** and **T**. For example, read off **F. T. White and Company**; then reread, spelling out the initials: **F-as-in-Frank, T-as-in-Thomas, White-W-h-i-t-e and Company**.

Observe closely the reading methods of skilled operators who repeat messages to you.

READY REFERENCE SHEETS ABOUT TELEGRAMS
(To be kept up to date)

A. TYPES OF SERVICE
Applying to United States of America

1. Fast Service

Full Rate. First 10 words at minimum charge; increase with each extra word. Sent at once.

Serial telegram. Messages sent in sections on the same day by the same sender from the same originating point to the same addressee at the same destination. Total number of words counted at end of day and charged for at special rate, but no message under 15 words counted as part of serial. Each message sent at once.

2. Deferred Service

Day letter. First 50 words at minimum charge, which is $1\frac{1}{2}$ times charge for 10-word-minimum telegram. Charge increases with each 10 extra words. Delivered the same day but goes more slowly than full-rate.

Longram. 60 words or more. Day-letter service at special rate.

Longram serial. Series of longrams similar to serial telegrams, but delivered more slowly.

Night letter. First 25 words at minimum charge. Less expensive than day letter. Charge increases with each 5 extra words. May be filed until 2:00 a.m. Delivered in the morning.

Tourate. Message about a trip—times of arrival, departure, and so forth—usually requiring inquiry to the telegraph operator about phrases allowed. First 15 words at minimum charge; increase with each extra word.

Following up a reply. Watch for a reply, if one is expected. Whenever your employer's need of a reply is urgent enough, add or remind him to add: **WIRE COLLECT.**

Keeping the Record Straight. Keep an up-to-the-minute account of outgoing messages marked **Charged** or **Paid**, and of incoming messages received **Collect** or with **Charge reversed**. Set up a running sheet with columns for

Date	Hour	Place	Name of Addressee	Name of Sender	Charge (if known)
------	------	-------	----------------------	-------------------	----------------------

Such a sheet is indispensable for checking the monthly bill.

READY REFERENCE SHEETS ABOUT TELEGRAMS
(To be kept up to date)

B. METHOD OF COUNTING WORDS
Applying to United States of America

Languages. Dictionary words in any one of eight languages counted at regular rates: English, Dutch, French, German, Italian, Latin, Portugese, Spanish.

Date and addressee. Date and name and address of addressee not counted. Alternative name counted; for example, WALTER FISH OR STEPHEN CLARK, counted as 3 words. Alternative address counted; for example, 74 DANE AVE. OR 365 MEDIA ST., counted as 4 words.

Sender. Signature not counted. An extra signature counted; for example, GEORGE WALLACE AND HENRY HOOD, counted as 3 words. A family signature, such as RAY AND ALICE, counted as one signature, with no charge. One title after the signature not counted; for example, PRESIDENT, DIRECTOR, MANAGER.

Names and places in body of message. Each initial of a name counted as 1 word; for example, L. A. WOOD, counted as 3 words. City, state, or country having more than one word, each word counted; for example, SOUTH DAKOTA, ST. PAUL, DES MOINES.

Abbreviations. Each counted as 1 word; for example, C.O.D., F.O.B., O.K., DEPT., CO.

Punctuation. Periods and other punctuation necessary to the sense relayed without charge, if especially asked for. Otherwise, the whole will be run together. (The word STOP, put between sentences for a period, counted as 1 word.)

Reply request. WIRE REPLY or WIRE REPLY COLLECT—each word counted (contrary to former rating).

Numbers. In a number, 5 figures counted as 1 word; for example, 517224, counted as 2 words. A fraction with a whole number counted as one of the figures. A fraction alone counted as 1 word.

Ordinal numbers each counted as 1 word, if total of figures and letters is not over 5; for example, 5TH or 200TH, counted as 1 word.

A mixed combination of 1 to 5 letters and figures counted as 1 word; for example, AB205. In a longer combination, with no space, each group of 5 characters counted as 1 word, including 1 count for final group of 1 to 5 characters; for example, 436ABC2945D, counted as if typed as 3 words, 436AB C2945 D.

Each of the following, when used with group of figures, counted as 1 character: #, \$, ¢, %, /. For example, \$43,729.75 counted as 2 words for the 8 chargeable characters—dollar sign and 7 figures—with no charge for comma or period.

Part XI. Importance of the ABC's

CHAPTER 34

Letting the Alphabet Help the Office

Is there someone in your office who is always mixing up the files because he or she doesn't know how to put names in alphabetic order—or to "alphabet" names, as it is often called? How correct are you at putting each name just where it belongs? (See "How Did I File That?" at the foot of this page.)

Making Quick Work. If you have anything to do with the indexes or files in your office, it is important to the whole staff for you to know how to

Put each name in the one right place
Look for it in the one right place
Return it to the one right place

Without hesitation, you should be able to

Index John F. Rand after J. Frank Rand
Find Albert McDonald after Albert Macdougall
Put back N. Y. Textile Co. after New York Tailors, Inc.

In the following pages you will come to the direction for each of these pairs of titles, and for other common indexing problems.

HOW DID I FILE THAT?

Do I "guess" how to index names?
Why make myself and others *hunt*,
When I can buckle down and learn
The rules—a common business stunt!

Nobody likes to learn a rule.
But who prefers to chase in vain
For letters, papers, and the card
That "someone has misfiled again"?

Nothing slows down a busy day
Like taking office time to trace
A letter from James A. McKay
Because his name is out of place.

“Easy when you know just how.” All the aids in Chapters 35, 36, and 37 are in line with the most usual way of alphabetizing. If you want a thorough brushing up or if you have never learned the necessary directions, study and follow these aids carefully so that your files will be kept in correct order.

In this way, you and all others who go to those files now or in the future will be able to find names in the familiar arrangement of the telephone directory. If you know the standard directions, you can pick up the work of any other office assistant who also follows the most common rules for ready indexing and ready finding.

Make opportunities to study the telephone directory and the dictionary for accepted indexing of names and of words.

Really Knowing the Alphabet. Are you sure that you have learned your alphabet so thoroughly that you do not have to stop an instant to think just where to place the first letter of a name, when you start to index it or to find it?

Get firmly in mind the exact position of each letter with relation to the other twenty-five. It may help you to turn to the right place quickly if you imagine certain landmarks as dividing the alphabet approximately into quarters, like this:



See whether you make a little pause in placing some letters; if so, don't be satisfied until you can find them instantly.



CHAPTER 35

Spotting the Key Word for Indexing and Filing

Do you have all sorts of names of people, firms, and corporations for your indexes and files? Can you make a sure start at indexing even a complicated title because you are quick to see the “key to the situation”?

Choosing the Key Title. Think of each piece of correspondence or index card as belonging under the index title that anyone would naturally look for first. Choose for this title one of the following:

Name of the company Munson Mfg. Co.
Name of the principal person, if there is no
company name Walter Kingston
Subject (for subject file) Rivets
Place (for geographic file) Detroit, Michigan

Then think of each index title as having a key word that anyone would naturally look for first. This key word determines the alphabetic place for the whole title. For example,

your own full name would be a key title in a card index; your last name would be the key word to determine the alphabetic place in the index.

Position of the key word. For easy reference on a card or on any alphabetic list, put the key word first, as in a telephone directory.

When you are filing correspondence or printed matter, see the title in your mind's eye as if the key word stood first.

In the examples of six common kinds of keying work given under the next six headings, you will see that the heavy type shows the key word or words which determine the indexing of each title among other titles.

Keying the Last Name of a Person. Put the last name of a person in key position.

<i>Titles to Be Keyed</i>	<i>Keyed for Indexing</i>
Mr. Grayson T. Bank.....	Bank , Grayson T.
Miss Mary Xavier.....	Xavier , Mary (Miss)

Keying Titles as They Stand. Index the following just as they are written:

Simple title of a firm.....	Akron Rubber Co.
Simple title of an organization.....	Young Men's Club
Simple title of an institution.....	Fairside Home for Children
Religious title without a surname.....	Sister Anna Maria

Keying Titles Beginning with a Person's Full Name. If the full name of a person begins a longer title, put the last name in key position, then the given name and middle initial, followed by the rest of the title.

<i>Titles to Be Keyed</i>	<i>Keyed in Alphabetic Order</i>
Wilton H. Dana & Sons.....	Dana , Wilton H., & Sons
The Stanley P. Ernst Stores.....	Ernst , Stanley P., Stores (The)
B. M. Fitz Bros., Inc.....	Fitz , B. M., Bros., Inc.
Daniel Zimmerman Free Clinic.....	Zimmerman , Daniel, Free Clinic

Keying the Important Word First. If the title begins with secondary words of description, put the key word first.

<i>Titles to Be Keyed</i>	<i>Keyed in Alphabetic Order</i>
Trustees of Associated Charities.....	Associated Charities , Trustees of
Finance Committee of the Boys' Club...	Boys' Club , Finance Committee
Estate of Alan Rhodes.....	Rhodes , Alan, Estate of
University of Vermont.....	Vermont , University of

Keying Government Titles by Government Names. Key a government title in this order: name of the government, the department, the specific branch of the department. A good example of this is found in a telephone directory, where the *Collector of Internal Revenue* is found by tracing these successive headings:

**U S Government
Treasury Dept
Internal Revenue Bur of
Collector**

Such a phrase as *Board of, Bureau of, Dept. of, and Commission of* may be put in parentheses after the word it modifies.

<i>Titles to Be Keyed</i>	<i>Keyed in Alphabetic Order</i>
Probate Court of Bucks County.....	Bucks County, Probate Court of
Public Library, City of Dayton.....	Dayton, City of, Public Library
State House, Commonwealth of } Massachusetts	{Massachusetts, Commonwealth of, State House
Registry of Motor Vehicles of } New York State	{New York, State of, Registry of Motor Vehicles

Keying by Cross Reference. When necessary, choose not only a main key title but also a secondary title to index as a cross reference. Do just enough cross-referencing, keying only a word or title so important that it might be looked for first.

Make a cross reference lead directly to the main key title. Type the cross-reference title on a separate card for a card index, with the cross-reference key word first, as shown in the illustrations below. Use the word *See* to lead back to the main title. Always let the key word of a cross reference take its alphabetic place among other titles. The method of cross-referencing in a correspondence file, which follows the same plan, is given on page 117.

Main Key Titles, with Their Cross-reference Key Titles

(Cross reference for a second partner's name)

Crane & Elson, Inc..... Elson
See: Crane & Elson, Inc.

(Cross reference for a married woman's name)

Ernst, Jane T. (Mrs.)..... Ernst, Thomas A. (Mrs.)
See: Ernst, Jane T. (Mrs.)

(Cross reference for a former title)

Frick and Haas, Lawyers..... Ogden, Frick, and Haas, Lawyers
Successors to Ogden, Frick and Haas See: Frick and Haas, Successors

(Cross reference for the head of a concern)

Popular Grocery Stores..... Ziegler, E., Prop.
E. Ziegler, Proprietor See: Popular Grocery Stores

Hitting the Exact Place in the Index

Do you sometimes hesitate about indexing a group of titles made up of names, initials, and words, even though you recognize the key word in each title?

Indexing Titles by Words That Count. Look at each title for your index as a series of words. Find the key word. Note that any initial in a title counts as a word. Type commas in a keyed title to keep the sense, but ignore them while indexing.

Recognizing initials and important words. For alphabeting, count as a separate word the following:

A surname, a given name, or an initial, such as the 3 distinct parts of the keyed name, **Kirk, John F.**

Each part of the name of a firm or institution, such as the 5 distinct parts of the keyed title, **Kirk, John F., Radio Store,** or the 4 parts of **S.P.C.C.**

Ignoring unimportant words. For alphabeting, ignore the following words, typing them with commas, or in parentheses if desired:

A, an, and, &, for, of, the, for the, of the

Words of personal distinction such as these, whether abbreviated or spelled in full: **Agt., Capt., Dr., D.D., Esq., Jr., Mgr., Mayor, Miss, Mrs., Pres., Prof., Rev., Rt. Rev., 2nd, Sr., Treas.**

Light type in the keyed titles below shows which words are to be ignored in indexing:

Cornish and Leavens Motor Co.
Home for the Aged
McCord, Daniel (Dr.)
Ross the Tailor
Xtra Coffee Company (The)

Indexing Titles Word by Word. Correct indexing depends on seeing the key words and arranging them in strict alphabetic order, following the exact method of a dictionary, **A to Z.**

All somewhat similar key names or words are bound to come close together in an index or file; for example, all titles beginning with the key surname **Laws.** Watch carefully all your indexing of titles that begin with one or more parts alike or nearly alike.

Index together a set of titles having the same key word, by watching the spelling of word two, or of words two and three. Put the simplest form first; for example, an initial before names beginning with that initial (**Laws, B. H.** before **Laws, Bernard**). See how the neighboring titles are arranged in the following list:

Keyed and Indexed Alphabetically

Laws	Laws, F. Kenneth
Laws, B. H.	Laws, Frank K., Dairy Co.
Laws, Bernard	Laws of Franklin, Inc.
Laws, Bernard L.	Laws & Franks
Laws, Bernard Lane	Laws Garage (The)
	Laws Garage Service, Inc.
	Laws, Garrick & Moore



CHAPTER 37

Indexing the *Mac's* and Other Common Puzzles

Are you able to deal with indexing problems that seem tricky to some office assistants? Here are the answers to three of the most frequent questions—how to index prefix names, how to index abbreviated words, and how to index identical titles. In the indexed lists of examples, note that heavy type brings out the *part* of each title which determines the placement of that title among its neighbors.

Indexing the Prefix Names. Under the heading, “Aid to Indexing the *Mac's* and Other Prefix Names” (page 106), is the common rule for indexing last names which include prefixes. A mistake in indexing such a name makes it hard to find a card or a piece of correspondence. It will pay you to study the five sets of titles which show how to weave puzzling prefix names in with simple names, just as they should come in your indexes and files.

Indexing Abbreviations That Count as Full Words. Treat as if spelled in full such abbreviated words as those spelled out below. Think of

Assn.	as	Association
Bros.	as	Brothers
Co.	as	Company
Corp.	as	Corporation
Ft.	as	Fort
48th (Forty-eighth)	as	Fortyeighth
Geo.	as	George
Inc.	as	Incorporated
Ltd.	as	Limited
Mfg.	as	Manufacturing
Mt.	as	Mount
N. Y.	as	New York
St.	as	Saint
20th	as	Twentieth
Wm.	as	William

AID TO INDEXING THE MAC'S AND OTHER PREFIX NAMES

Treat as a single word a last name which includes one or more prefixes, whether the prefix is spelled with a capital or a small letter, such as d', da, de, de la, del, di, du, l', la, le, M', Mac, Mc, O', St. (as if spelled out as Saint), Ten, Van, Van Der, Von, von.

Index such names in dictionary order, using the first letter of the prefix as the key to alphabiting, as shown in the lists below.

*Last Names as Spelled**Indexed as if Spelled*

d' Este.....	Deste
De Felice.....	Defelice
Mac Auley.....	Macauley
MacKay.....	Mackay
McKay.....	Mckay
St. Clair.....	Saintclair
Van Der Merlen.....	Vandermerlen

(Read the Two Columns in This Section Consecutively.)

Mabie, Raymond	MacKay, John M.
MacAuley, George	MacKenzie, T. P.
Mac Auley, Katherine (Mrs.)	Magee, Horace
Macauley, Leo	M' Cauley, Andrew (Rt. Rev.)
Macdonald, Preston	McCarthy, John
MacDonald, Robert	McElroy, Daniel
Macey, Edgar (Mgr.)	Mc Elroy, Edwin
MacFadden, Donald	Mc Kay, John A.
MacIntyre, T. M.	McKenzie, Hugh
Mack, John T.	Mc Williams, Matthew
Mackay, John L.	Mead, Roger P.

Delafield, Marie (Miss)	Lacey, F. Adelaide (Miss)
de la Mare, Nelson	La Crosse, Nicholas
Delta Machinery Co.	Lacy, Homer (Agt.)
Demarest, Paul	La Mode Shoppe
De Merritt, Stephen	Lamont, Emily (Mrs.)
d' Este, James	La Montagne, Walter D.

Ober, S. H.	Van Buren, Una (Mrs.)
O'Brien, Wallace	Vance Brothers, Inc.
Ogden, F. T.	Van de Bogert, Otis
O'Hara, Patrick	Van Der Wyck, Louis
Older, T. S., & Sons	Vanity Box
Omaha Transportation Co.	Von Berg, Frederic
O'Malley, James	Vonda Service Bureau
O'Meara, Joseph	von Detten Hotel (The)

When indexing, spell out, in your mind's eye, such abbreviations as those listed above. In the typical titles below, for example, **Cornish, Ltd.** should be seen as if written **Cornish, Limited.**

Groups Indexed in Alphabetic Order

(Read the two columns consecutively.)

Cornish Leather Store	King Brotherhood
Cornish, Ltd.	King Bros.
Cornish, Little & Mann	King, Brotherton & Ames
Firestone, Lawton P.	Nesbit, T. K.
First Street Metal Shop	N. Y. Jewelry Co.
48th Street Social Center	New York Life Insurance Co.
42nd St. Clothiers	N. Y. Market, Inc.
	New Zealand Shipping Co.
Gray, Collins & Fiske	
Gray Co.	Sage, David
Gray Corp.	St. Clair, Thomas
Gray & Corrs Motor Works	Saks Antique Store

Indexing Identical Titles. Index two or more identical titles together in one of the following ways:

*The Same Company Name or Personal Name
Indexed Alphabetically by Cities*

Kaan Paper Co. 2000 West Ave. Chicago 3, Ill.	La Farge, John 55 Vane St. Pittsburgh 16, Pa.
Kaan Paper Co. 451 Boulder St. Denver 6, Colo.	La Farge, John 4 Ames St. Rochester 10, N. Y.
Kaan Paper Co. 66 Palm St. Norfolk 2, Va.	La Farge, John 89 Fork St. Washington 7, D. C.

*The Same Name in the Same City
Indexed Alphabetically
by Streets*

McHenry, Edward M.
34 Allen St.
Hartford 5, Conn.

McHenry, Edward M.
570 Charles Rd.
Hartford 5, Conn.

McHenry, Edward M.
2 Ware Ave.
Hartford 5, Conn.

*The Same Name on the Same Street
Indexed Numerically
by Street Numbers*

O'Leary, James
56 Central St.
Los Angeles 19, Calif.

O'Leary, James
541 Central St.
Los Angeles 19, Calif.

O'Leary, James
1020 Central St.
Los Angeles 19, Calif.



CHAPTER 38

Finding Words, Names, and Subjects

Do you know how to make speed at finding names in the telephone directory? Can you turn easily to a subject in an encyclopedia? to a topic in a book index? to a name or title in a card index? to a word in a dictionary?

Finding Alphabetically. You can find, as well as arrange, words more readily by knowing the alphabetizing aids given in the three previous chapters.

Key words. Apply the key-word principle when looking up words and names. Expect to find a name or word group printed with the key word first, for example:

<i>Place of Reference</i>	<i>Word Group</i>	<i>Keyed as</i>
Directory	David Holden & Sons	Holden, David, & Sons
Encyclopedia	William Shakespeare	Shakespeare, William
Book index	Proper nouns	Nouns, proper
Business catalog	Sport shoes	Shoes, sport
Library catalog	Thomas Jefferson	Jefferson, Thomas

Letter combinations. Glance at the first few letters of the key word. Then start to look for **Holden**, for instance, not under just **H**, but toward the end of the **H**'s under **Ho**, or **Hol**, or even **Hold**. This will help the word **Holden** to stand right out on a page or in a series of cards.

Alphabet divisions. If there are printed alphabetic divisions, find the one including **Hold**; for example, **Hill-Holman**, or **Hi-Ho**.

Tracing Subtopics. If one particular key word does not lead you to the right place, try other important words in your word group.

If none of them can be found, think of a more general topic under which there may be a sublisting. Then try your key words again as leaders to a subtopic. For example, **Yellowstone Park** may not be alphabeted as **Yellowstone Park** or as **Park, Yellowstone**; it may be found as a subtopic under **Parks, National**.

In a similar way, look for divisions of a large organization under the name of the organization. In your telephone directory, see examples like these:

<i>If You Want to Find</i>	<i>Look Under</i>
Local post office.....	U S Government, then Post Office
Registry of motor vehicles.....	Name of the state, such as Ohio
Local fire department or library....	{Name of the city or town, such as Boston, City of
Court House.....	{Name of the county, city, or district, such as Allegheny
Railroad station.....	{Name of the railroad, then the name of the station, such as Pennsylvania R R, then Harrisburg

Trying Various Spellings. It is easy to hunt for a key word when you have it in writing or when it is familiar. It is difficult to scout for a word that you hear, when it is not spelled as it sounds and might be spelled in any one of several ways.

If you do not find a word at once, try different spellings for the vowels and for the consonants. For example, when you are asked to get on the telephone what sounds like **Mr. Lewis Makintire**, you may find the key word spelled in the directory **Mackintire**, **McIntire**, or **McIntyre**, and the first name spelled **Louis**. Or when you have the word **knots**, **nautical**, **nought**, or **naught** dictated, you will be expected to know that the sound **not** may also be spelled **knot**, **naut**, **nought**, or **naught**.

Names of people. When you have found a difficult name, notice what the difficulty was and how you solved it. Study the differences within each of these sets:

Pearce, Peirce, Pierce	Lay, Ley, Leigh
Page, Paige	Caine, Kaine, Kane
Potter, Porter	Macey, Massey, Massie
Weston, Western	Paine, Payne
Minton, Minturn	Myer, Meyer, Myers
Philips, Phillips	Finney, Phinney

Watch the spelling of names of visitors who may later be called by telephone or have letters addressed to them.

Geographic names. By close observation of the spelling of places, learn to relate a sound to more than one spelling, for example:

<i>Sound</i>	<i>Spelled</i>
sk in Skowhegan.....	{sch in Schenectady sc in Scranton
sh in Shenandoah.....	{ch in Chicago ch in New Rochelle
o in Florida.....	{a in Raleigh au in St. Paul aw in Dawson

Trade names. Many trade names may be found by looking for ordinary words purposely misspelled according to sound, such as **E-Z-Klasp** for **Easy Clasp** and **Watertite** for **Watertight**.

Words. Persist in finding a word in the dictionary by reasoning from words that you know, not by hit-or-miss guessing. For example, if you know that the beginning of **physical** is **phys**, not **fiz** as it sounds, you can find **physiological**; if you know that the beginning of **psychology** is **psych**, you can find **psychiatry**.

Following the Guides. Get all the help you can from the seven kinds of guides listed below. These are commonly provided to save time.

1. **Thumb index.** Open a dictionary with the thumb at the indented letter for the word to be found, *e.g.*, **S** for **separate**.

2. **Page and column guide.** Look at the alphabetic headings of pages and columns to find a word quickly, for example:

<i>Place of Reference</i>	<i>Word to Be Found</i>	<i>Page Heading</i>
Dictionary	mint	milk—money
Encyclopedia	Idaho	ICELAND—INDIANS
Directory	Bourne	Bor—Bra or BOR—BRA

At the top of a page, the key to the first and last words will show you at a glance whether you have the right page or whether you should turn backward or forward.

3. **Volume or issue guide.** Take from a shelf the right volume of a series of books by noting the guide on the binding, called the "shelfback." This guide may be a volume number or a date or the first-to-last words, showing what the volume includes. Select the right issue of a magazine or bulletin by noting the number or date on its shelfback.

4. **Book or magazine index.** To find a chapter or an article quickly in a book, atlas, catalog, report, bound magazine, or newspaper, or in a timetable for train, bus, or air service, turn to the detailed index in the back of a book, or on the front cover or one of the first pages in a periodical. Avoid thumbing pages back and forth when a topic or the title and name of the author of an article can be directly traced with the help of the index.

5. **Table of contents.** In a book or a single copy of a magazine that does not have an alphabetic index, open at the table of contents, where the title of a chapter or article will guide you directly to the page you need.

6. Drawer guide. Make skillful use of the printed or typed guides on the front of the drawers of a file or card catalog. If papers or cards run alphabetically or numerically in a series of drawers, the guide should point out the first and last item within, such as O-R, which includes all names beginning with O, P, Q, and R, or 5000-5999, which includes these two numbers and all between.

If several kinds of matter are kept in a drawer, the guide should list them in order, for instance:

Maps
Timetables

Study the drawer guides in your office so that you will always go directly to the right place.

7. Tab guide. Inside a drawer of cards or papers, glance first at the tabs of the stiff guide cards. These stand at intervals in alphabetic or numeric order. Each tab shows either the beginning or the entire range of what belongs in back of the guide. A series of tabs may read in any one of these five ways:

1	1-99	A	A	A-Am
100	100-199	B	An	An-Ar
200	200-299	C	As	As-Az
300	300-399	D	B	Ba-Bi

In a file of papers, after seeing the tab of the right guide card, find quickly the tab of the right folder among those behind the guide card.

(NOTE: For specific help about getting information for your employer, refer to Chapter 5, "Bringing Back the Information," beginning on page 12.)

Part XII. Cards and Papers by the Thousand

CHAPTER 39

How to Sort Quickly

Does your office have a mechanical "sorter" with guides to match divisions of your index or file? If not, do you devise quick ways for sorting alphabetically and numerically?

Alphabeting a Written List. To arrange a brief list of names alphabetically for convenient reference, use the method shown on page 113.

Methodical Numbering. Make the most of numeric arrangement for printed forms, cards, orders, or folders. A number on a purchase order, for instance, is the

Quickest reference when the order is called for
Best way to identify the order in a letter, memorandum, or bill,
or over the telephone
Most reliable handle for filing

This system, then, is helpful to an officer of the company, a secretary, a bookkeeper, a billing clerk, a shipper, and a customer.

Understanding the system. Get the meaning of the particular methods of numbering by code in your office—whether a simple series or definite combinations of figures and letters, with or without dashes or decimal points. It may be any one of these four:

1	200.1	A-1	AF-1
2	200.2	A-2	AF-2
3	200.3	A-3	AF-3
4	200.4	A-4	AF-4
etc.	etc.	etc.	etc.

Size, quality, color, price, date of issue, department, may be listed by code numbers or letters, or by combinations of the two. Customers' names may be numbered for ready index work and for billing.

Placing the number. Note the position already established for the numbering, paging, and dating of a series of similar items. Mark further items consistently. As a rule, the upper right-hand corner is the most practical position.

Being exact with the number. Be certain of every figure and every letter before marking, looking for, asking for, or referring to an item.

HOW TO ALPHABET A BRIEF LIST

In a rough list (see names in left-hand column below), look at the combinations of letters beginning the **A-words**. With a pencil (preferably colored) number the **Ab's, Ac's, Ad's**, etc., in alphabetic order. Carry along the numbering through the alphabet, letter by letter. If there are two **A-words**, the first **B-word** will be numbered 3.

Copy the items in the numbered order with the key name or key word first (see right-hand column below), but do not type the numbers. As a part of checking, count the items to catch possible omission.

<i>Rough List</i>	<i>Same List Alphabetized</i>
3 Harry Blackstone	Aiken, L. P.
8 Francis Eaton	Akeley, Flora (Miss)
14 Miss Amy F. Kerr	Blackstone, Harry
4 Grant Blake	Blake, Grant
18 Charles O'Brion	Dean-Allen, Robert
23 Edward Trent	Deane, Robert
12 Thomas R. Jones	Easton, Paul
1 L. P. Aiken	Eaton, Francis
22 E. Maurice Trent	Griggs, K. James
20 Miss Mary Rosenwald	Grigor, Nancy (Miss)
15 John MacHugh	Jones, Thomas M.
25 Mark Van Deman	Jones, Thomas R.
11 Thomas M. Jones	Kerner, Arthur
29 F. B. Willard	Kerr, Amy F. (Miss)
17 A. R. Noyes	MacHugh, John
16 Mrs. Joan McHenry	McHenry, Joan (Mrs.)
28 George Wilbur	Noyes, A. R.
2 Miss Flora Akeley	O'Brion, Charles
13 Arthur Kerner	Obst, Carl
5 Robert Dean-Allen	Rosenwald, Mary (Miss)
26 Leonard Vander	Rossiter, Marie (Mrs.)
19 Carl Obst	Trent, E. Maurice
6 Robert Deane	Trent, Edward
9 K. James Griggs	Uzzell, David
21 Mrs. Marie Rossiter	Van Deman, Mark
7 Paul Easton	Vander, Leonard
24 David Uzzell	Very, Louis
10 Miss Nancy Grigor	Wilbur, George
30 Joseph Yates	Willard, F. B.
27 Louis Very	Yates, Joseph

QUICK WAYS OF SORTING

I. ALPHABETIC SORTING

A. For a small number of units

Step 1. Sort 50 or so cards or papers into a few large divisions, watching only the initial letter of each keyed title, for example:

Pile 1	Pile 2	Pile 3	Pile 4
A-F	G-M	N-S	T-Z

Step 2. Sort each pile into smaller divisions, for example, **Pile 1** into these 6 piles:

Pile 1A	Pile 1B	Pile 1C	Pile 1D	Pile 1E	Pile 1F
A's	B's	C's	D's	E's	F's

Step 3. Set the **A's** in exact order, such as **Adr** between **Acc** and **Aft**. Lay these face down. Lay the sorted **B's** crosswise on the **A's**, face down. Repeat steps 2 and 3 for the remainder of the alphabet.

Step 4. Take the crossed stack to the file or index, ready to sift each item into place among the papers or cards already filed.

B. For a larger number of units

Sort more than 50 items into 24 alphabetic divisions. Keep a set of 24 slips marked with the letters of the alphabet, with the 24th reading **X-Y-Z**. Spread these in rows to mark piles, while sorting and stacking crosswise as in steps 2 and 3 above. Then proceed with Step 4.

Do Not

Double, omit, or transpose figures
 Add or omit a zero
 Put a decimal point out of place
 Omit a dash

Finding the number. When leafing over papers to find a numbered item, curl back the corners of consecutive sheets lightly with the craser end of a pencil or a rubber finger tip.

To find a card in a drawer, make both hands work together. If cards are grouped outside a drawer, fan a stack so that the edges run slantwise for easy flipping with thumb and finger. Slant the right-hand edges or the top edges, according to what your eye needs to catch on the cards. Discover the easiest way to make *your* hands find a card.

QUICK WAYS OF SORTING

II. NUMERIC SORTING

A. For units that fall close together numerically

Step 1. Sort cards by 100's or 50's when the numbers run close, for example:

Pile 1	Pile 2	Pile 3	Pile 4	Pile 5
1-49	50-99	100-149	150-199	200-249

Step 2. Sort Pile 1 into 10's:

Pile 1A	Pile 1B	Pile 1C	Pile 1D	Pile 1E
1-9	10-19	20-29	30-39	40-49

Increase the number of divisions according to the number of items to be sorted—whether 20 memorandums, 75 receipted bills, or 350 cards.

Note that in steps 1 and 2 the first pile ends with a 9 and all the piles thereafter begin with a multiple of 10, that is, 50, 100, etc., or 1, 10, 20, etc.

Step 3. Spread out the cards in **Pile 1A** and pick them up in consecutive order. Place them face down, stacked crosswise, and continue until you have a handy lot to file.

Step 4. Take the stack to the index and sift into exact places.

B. For units scattered over a wide numerical range

Sort widely scattered units (such as separated cards that have been picked out for office use) by 100's and 1,000's. Then apply step 3 above and proceed with Step 4.

Sorting. Arrange cards, letters for the file, canceled checks, requisitions, or other papers by the quickest sorting method you can think out.

Use the same short cuts regularly for a repeated job.

Begin with large divisions, then sort into smaller divisions until all are in order. See pages 114 and 115 for speedy ways of sorting by alphabet and by numbers.

Sifting into place. When all are ready to be sifted into their places in the file or index, find exactly the two papers or cards between which each item belongs. For example, place with perfect accuracy:

11,945 between **11,944** and **11,946** in an extensive index
54-C between **54-B** and **54-D** in a number-and-letter series
Rulers between **Paste** and **Tape** in a subject file of supplies
Freeport between **Franklin** and **Fulton** in a geographic file

Preparing Papers for Your Files

Is it easy to find what you want in your files because you know how to keep them well ordered? Let one question control all your filing:

**How can this be marked and placed
so that it will be found quickly?**

Handling Material for the Files. Make a full study of the filing equipment in your office so that you will be able to use it to the best advantage.

Completeness of the files. Keep a file-copy of everything that is signed by your employer.

Keep a copy of everything that comes to him over the signature of a correspondent inside or outside the office.

Separation of papers. As a rule, file pieces of correspondence singly for convenient finding by date. Do not try attaching a letter to its answer unless so instructed. If one letter with one answer clears up a subject, this may work well. But the method may instead lead to confusion in finding correspondence, if further letters on the same subject go back and forth—as well as other letters on other subjects with the same person. A simple rule, then, is to file pieces singly in order by dates, as will be seen in the next chapter.

Fasten two or more pages of the same letter together in the upper left-hand corner. Avoid clips which “steal” neighboring papers in a folder.

Different subjects in one letter. You may often find difficulty in handling varied subjects in a single incoming letter, especially if some of the subjects remain pending for a time. This proves the convenience of keeping to a single subject in one letter or memorandum, even though very brief. In ordinary business it is impossible for you to enforce this for your employer’s incoming correspondence. When the rule of only one subject to a sheet is violated, every process connected with your filing will demand special watchfulness.

To prevent such complications in your files and the files of those to whom you write, you can regularly follow four moves. (Some of these are mentioned more fully on page 56, under “Recording Date of Reply,” and on page 47, under “Composing Satisfactory Letters—Single subject.”)

1. Confine each outgoing letter to one subject. This will keep your file copies simple for filing and will make your outgoing copies simple for handling and filing by others.

2. In outgoing correspondence, make it a point, in a letter or at the top of a letter, to refer to the date of the incoming correspondence that is being answered.

3. Beneath the date of each incoming letter, note the date of your employer’s reply as soon as written.

4. If different parts are replied to on different dates, write each date against the part answered.

Regularity in filing. Keep up with your filing. Your employer cannot wait for a letter to be found in a tangle of unfiled papers. (See also, on pages 56–57, “Disposing of

Papers," including "Papers ready for filing," "Pending correspondence," and "Prompt filing.")

File-marking Papers. For correspondence and other papers that are not to be filed numerically, choose the proper division of the files and the key title for each paper.

Divisions of the files. Dispose of papers in one of these places:

Direct-name file for the majority of business letters, with the alphabetic arrangement spreading through as many drawers as are needed

Subject file, in alphabetic order of subjects, for intensive correspondence (often with several people) about one topic—all of which must be kept and used together

Geographic or other specialized file demanded by any part of the business

Personal file of such private correspondence and papers as your employer keeps in the office rather than at home

Key title for file-marking. Decide on the name of the person, the concern, the subject, or the place under which the correspondence would naturally be called for, as described in Chapter 35, "Spotting the Key Word for Indexing and Filing," on page 101.

Make this key title stand out plainly as a **permanent index for the filing and the refiling of a paper**. In this manual, such marking for the files is called **file-marking**. In other books this is often referred to as **coding** or **indexing**; these terms are less exact because they have other important meanings in office work.

File-mark the key title by underscoring it with a colored pencil. This file-marking may rightly occur at any one of six points on correspondence:

Printed heading	Key name or word in text
Name of addressee	Signature
Subject line	Under-signature

See illustration of file-marked heading at top of page 119.

Cross-reference or secondary key. Whenever necessary, underscore also, with black pencil, any secondary name or subject for cross-reference indexing, such as is described under "Keying by Cross Reference" on page 103.

Mark a cross in the margin to show that you are making a cross-reference sheet for this secondary title as an aid to finding. See illustration of such a cross on the letter at the top of page 119.

As a quick guide to the refiling of an item, try underscoring the key title always in red, the cross-reference title in blue with an X in the margin. But note that, once adopted, a color code must not be changed.

Cross-reference sheet. Follow this underscoring immediately by making a cross-reference sheet, preferably of a distinctive color. Fill in sufficient data to lead to the keyed piece of correspondence. See the cross-reference form as filled in at the foot of page 119.

File each cross-reference sheet alphabetically, as though it were an actual letter.

FILE-MARKED LETTER AND RELATED CROSS-REFERENCE SHEET



The letter on the opposite page has been released for filing (see F in upper right-hand corner). The key title (**Bacon & Wright, Inc.**) has been underscored in colored pencil as a permanent guide to filing and refiling. The cross-reference title (**James Cole**) has been underscored in black pencil, with a cross in the margin to indicate that the cross-reference sheet shown below on the opposite page has been made for the file.



The cross-reference sheet (top of which is shown on the opposite page) has been made out to trace the letter above in the file. The X'd name (**James Cole**) has been transposed for alphabetic filing. A full sheet, 8½ by 11 inches, preferably colored, is commonly used for convenience in the folder; a smaller sheet drops out of place. Note the alignment of lines at the right on the printed form, to allow for uniform alignment of typewritten lines at the left. Such forms may be run from a duplicating machine on inexpensive paper with an exact allowance for double spacing on the typewriter when the form is filled in.

BACON & WRIGHT, INC.257 MAIN STREET
MILWAUKEE 9 WISCONSIN

J

April 17, 1945

Sinclair Furniture Co.
35 Wood St.
St. Paul 2, Minn.

Gentlemen:

x This note will introduce Mr. James Cole, our new representative in your district. He has been in our office for nearly ten years and will, we are sure, extend every courtesy to you.

Very truly yours,

K. W. Holt

K. W. Holt, Mgr.

h.b

CROSS REFERENCE

(Name or Subject) FOR Cole, James

DATE 4/17/45

REGARDING Orders from Bacon & Wright, Inc.

SEE Bacon & Wright, Inc.

Cross-referenced folder. For every piece of correspondence that is to go into a subject-file folder, make a cross-reference sheet for the direct-name file. For example, each letter placed in a subject folder labeled **CABLE** must have its cross-reference sheet, to be filed under the name of the company or person involved. This keeps all correspondence about cables together in its special folder for complete and convenient use.



CHAPTER 41

Arrangement in Your Files

Have clearly in mind the most useful arrangement of your files as to

Papers.....	In each folder
Folders and guides.....	In each drawer
Drawers.....	In each filing case
Filing cases.....	In each stack
Stacks.....	In active service
Stacks.....	In the "dead" filing space

Stagger the folder tabs for quick finding and choose the best width or "cut" of tabs for each series of folders.

Guides. Stiff guide cards with tabs, such as can be had from a dealer in filing supplies, should stand out to catch the eye.

Have enough alphabetic divisions for the size of the file, such as

Ra-Rn	Ro-Rz	Sa-Sd
-------	-------	-------

Miscellaneous or General Folders. Keep ordinary correspondence in what are commonly called **miscellaneous folders**. These are general folders for matter to and from inactive, infrequent, or new correspondents.

Have the tab of each miscellaneous folder show the alphabetic division of the guide behind which the folder belongs. For example, put a letter from or to **Paul Rankin** in a folder marked like the guide above, **Ra-Rn**, together with correspondence from or to **Rathbone, Ray**, and others.

Expand folders by creasing the extra hinges.

Order within the folder. Arrange all papers to read alphabetically by their key titles from front to back of the folder.

When two or more papers are file-marked for the same key title, keep the dates in reverse order to bring the most recent letter toward the front, that is, on top when the folder is laid open flat.

Alignment of sheets. Align sheets of different shapes and sizes with the top edges together so that all dates will lie at nearly the same point.

Individual or Special Folders. When more than a few pieces of correspondence are filed under one title, start a folder for the individual company or person. In some files this **individual folder** is started when more than five pieces for one key title have accumulated and others are expected. In your files, apply whatever rule will prevent drawers from becoming unwieldy for either filing or finding.

System of wide tabs. Both the finding and the refiling of an individual folder among other folders are simplified by having tabs that are wider than those of the miscellaneous folders; for example, the following individual tab is twice as wide as the corresponding miscellaneous tab:

RANKIN, PAUL	Ra-Rn
--------------	-------

Label these wide tabs with all-capital letters, beginning always at the same distance from the left-hand edge of the tab. The above shows that Paul Rankin's papers have accumulated until they call for an individual folder.

Sequence of folders in the drawer. Follow the system established in your office—always choosing the most helpful cuts of tabs and method of staggering the tabs within that system. Choose what catches the eye quickly, using numbers and colors, as well as alphabetic divisions, if desirable.

File in alphabetic order a series of individual folders belonging to the same alphabetic division of the file. Keep this **individual series immediately behind the miscellaneous folder** from which the papers have been removed for these individual folders. For example, folders would stand from front to back of a drawer in the order shown on page 122 as the "Convenient Order for Filing and Finding in the Drawer of a Correspondence File." While reading up the series of tabs illustrated there, think of them as standing from front to back of the file in this order:

1. **Stiff guide** for an alphabetic division.
2. **Miscellaneous folder** for infrequent correspondents within that alphabetic division.
3. **Series of individual folders** for frequent correspondents, filed in alphabetic order immediately behind the miscellaneous folder. **Group of quarterly (or monthly) folders for a very frequent correspondent** filed in alphabetic order among the other individual folders, with the latest dated folder of the group toward the front of the drawer (see 4 folders for **Rathbone Paper Co.**, followed by 1 folder for **Ray, John, & Co.**).

Then 1, 2, and 3 repeated.

Cross references to individual folders. In the related miscellaneous folder, file a cross-reference sheet for each individual folder. This acts as a signal to file any *further* correspondence for the given key title in its individual folder. Have this read, for instance:

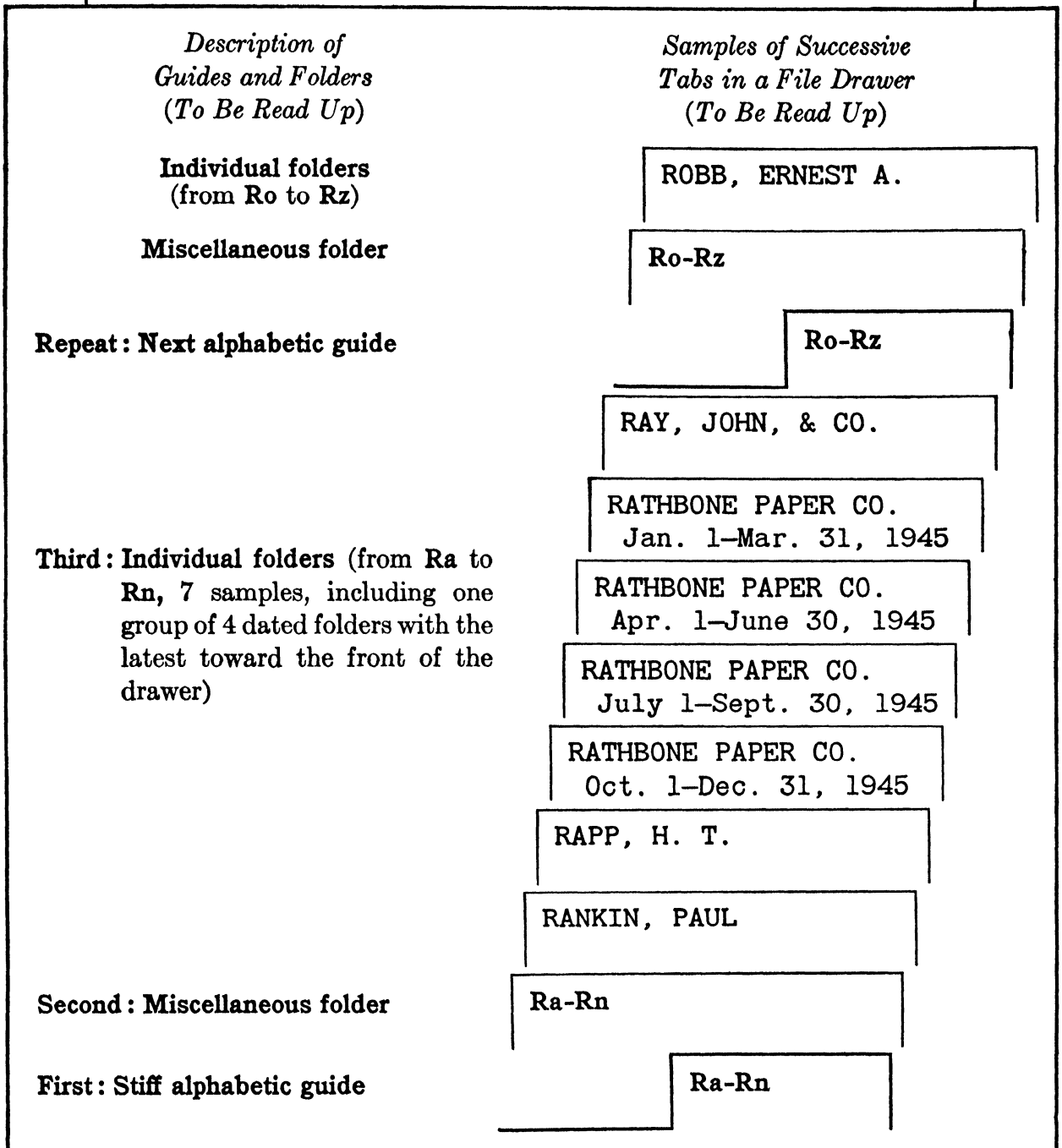
CROSS REFERENCE

FOR Rankin, Paul

SEE Special folder

Relieving the crowded folder. When the accumulation for one title crowds an individual folder, make a series of dated individual folders, one for each quarter-year—or, if necessary, one for each month of the year—as shown on page 122 for **Rathbone Paper Co.**

CONVENIENT ORDER FOR FILING AND FINDING
IN THE DRAWER OF A CORRESPONDENCE FILE



Read the sequence of tabs up the page in order as from front to back of file. Follow the items of description running up the left-hand column.

This diagram does not attempt to show three important helps to filing which should be studied with relation to your files: (1) staggering of various cuts of folders across the drawer, to attract the eye quickly, (2) numbering the alphabetic divisions successively and repeating the number on every tab in a given division, and (3) using various distinguishing colors.

Folders for the Employer's Personal File. Unless this personal file is extensive, use four alphabetic divisions for miscellaneous folders, with the tabs marked

PERSONAL: A-F
 PERSONAL: G-M
 PERSONAL: N-S
 PERSONAL: T-Z

Make individual folders for active civic, club, or personal interests, such as

COUNTRY CLUB
 HOUSING COMMITTEE
 RED CROSS

Use a distinguishing mark, or number, or label with color, to separate all these personal folders from business matters and to steer them into the personal file, for both filing and refiling.

Filed Items Other than Correspondence. The foregoing principles apply also to a great variety of other matter to be filed—some numerically, some by subjects, but in every case by the way in which each item can be most readily found.

Sometimes this means reversing the chronological order as shown below.

Bills. In a drawer, a series of paid bills may be arranged alphabetically, with the latest bill for each key title toward the front: **June 15, 1945** in front of **June 11, 1945**.

Canceled checks. Canceled checks may be kept in reverse order by number: **A-1195** in front of **A-1194**.

Bound catalogs. If you have catalogs from a given concern in your files, set them upright, with the latest issue at the front: an annual catalog for **1945** in front of **1944**, or a monthly publication for **April 1945** in front of **March 1945**.

Magazines. On a shelf, arrange a set of magazines upright in direct order, with the latest issue at the right, or lay them flat with the latest issue on top.



CHAPTER 42

Care and Use of Your Files

Take care of the files as a precious collection of papers which you keep constantly up to date.

Making Expert Motions. Let every motion of your feet, eyes, and hands count. Reach different parts of a file by standing, bending, or sitting in a good position. Keep every drawer closed when not in use.

Care of the hands. Avoid striking the sensitive skin around the fingernail against the edges of folders, as this often causes hangnails. These tend to become inflamed and make fingers unfit for typing.

Care of the folders. Keep folders upright by shifting the supporting block ("follower") at the back of the drawer.

Take a folder entirely out when inserting or removing a letter, to keep all papers in line and free from wrinkles, but do not lift the folder out by the tab. Then lay it open on a portable filing shelf hooked on a nearby drawer, or on some flat surface at a convenient height.

Quick spotting of a paper. Next, find the desired paper by lightly curling back the upper right-hand corners of the sheets in the folder, with the aid of the rubber end of a pencil or a rubber finger tip—never by moistening the finger at the lips.

Make your eye catch underscored key titles so that you can judge about how far along in the folder you should expect to find the key title that you are looking for, or the place where you are to insert a paper. In this way you will get the habit of skipping over to the right spot quickly.

Getting Information without Disturbing the Files. If you wish to use a letter for only a moment, to get an address or some other bit of information, do not take time to make an "out" slip and then to go through the refileing process.

Instead, remove the folder, lifting the folder behind it slightly as a marker for its return.

Open the folder and leaf over the contents to reach your information.

Make the necessary notes. Close and return the folder without having removed the letter from its place.

Taking Out Matter and Returning It. If you must borrow a paper or folder from the files, return it as soon as possible. If it is wanted while it is out of the files, valuable time may have to be taken to trace it, even though record of its removal has been made.

Responsibility for what is removed. Follow the system of your company regarding anything that is taken out.

If you do not touch the files directly, fill out each requisition for filed matter carefully. Check what you receive, take care of it, and return it to the filing clerk or department promptly.

If you are permitted only to get papers from the files—not to return them—see that they make good time in getting back to the filing clerk. Pick up whatever information you can about the files to become a swift finder.

If you are in sole charge of certain files—perhaps for one executive—do not take time to make a written record of what you remove, unless something leaves your immediate premises. In that case, make a record for your own use and follow it to see that the papers are returned in due time.

"Out" guide for one or more sheets. If it is practical for you to put a marker in place of a removed sheet, follow the simplest method that proves by daily experience to keep effective track until the return.

Try a durable "out" sheet, 8½ inches by 11 inches, for convenience in the folder, and preferably colored. While right at the file, enter on this, probably in pencil, such a line as

Banks, Geo. W. 2-3-45, out 2-8-45 for Mr. Bell—J. C.

It may pay to run off a lot of "out" sheets with column headings such as

Matter filed under	File no.	Dated	Taken out for	Date	By
--------------------	----------	-------	---------------	------	----

If the mimeograph is used, save the stencil for further lots.

The "out" sheet should be placed exactly where the removal is made. When the letter from Mr. Banks has served its purpose, place it in the filing tray for prompt return, with the rest of the day's filing. When it is filed again by you or a filing clerk, the "out" sheet should be removed, the entry crossed off, and the sheet used for further entries.

"Out" guide for a folder. When a folder is removed, keep run of its whereabouts. Even though it will be needed the following day, see that it is put back in the file for the night, unless circumstances make such a demand unreasonable.

Find out whether it will pay to buy a set of stiff cardboard "out" guides for folder substitutes—approximately 12 inches wide by 10 inches high. Such "out" guides have a tab reading OUT and are columned on both sides for successive entries.

Refiling. When sorting old letters for refiling, watch the year as well as the month and the day. What is called "back" correspondence should never be placed with the letters of the current year.

Do not allow others to put matter back in your files unless they know exactly how.

Carrying Transfer Filing Forward. Follow a regular, consistent system for transferring papers from the active files. Early in the year, remove the past year's correspondence to semiactive stacks.

Making the Permanent File Useful. When storing papers, have these points in mind:

Keep everything as accessible as you can, to save time of all who may use the files

Keep the files free from papers that cannot possibly serve any future need

BUT destroy no paper in the files except under explicit direction from the proper office authority

What? Where? How long? Have a permanent reference file for papers that should be kept. The law requires the holding of certain papers for a specified length of time. Other papers may be needed indefinitely for reference or for substantiation of possible claims.

For this permanent file (often called a "dead" file) there should be a clearly worded plan which outlines

What to keep

Where to keep it

How long to keep it

Clear code-marking for return to permanent file. Mark every paper definitely with its full code designation to assure return to the correct place after it has been taken from

the permanent file for reference. A rubber stamp may be used, with a space at the right to be filled in to read, for example:

RETURN TO FILE NO. *A-14-2*

The above illustration of coding stands for the **A** division of a particular file which is provided for matters about Administration of a certain company; Section **14** on Bylaws; subdivision **2** for Amendments of 1940. Keep all papers referring to such a subdivision in a folder which holds no other matter.

There should be a clear and comprehensive index to the code numbers so that the system will be understood and followed by all concerned. Papers must be found readily not only this year but in years to come, and by both old and new members of the staff.

Seeing Your Filing Procedure as a Whole. In all your handling of files or of papers for or from the files, see as one practical whole this repeated process:

<i>Daily</i>	<i>Frequently</i>	<i>Eventually</i>
Releasing	Finding	Transferring to
Keying	Removing	permanent files
Sorting	Refiling	<i>or</i>
Putting away		Destroying

If you are doubtful about the efficiency of your methods, consult your employer and your filing-equipment representative. A small change may effect a real saving of time and energy.

Study a book on filing. Better yet, take an evening course in a school where you can practice with a wide variety of interesting and helpful equipment.

Part XIII. When Heads Get Together

CHAPTER 43

Before and during the Meeting

Does your employer hold meetings of committees and boards? Is he the presiding officer or the official Secretary? If so, do you know how to help business run smoothly before, during, and after the meeting?

Can you take notes of a meeting so completely that it is easy to write the official record, often referred to as the "minutes" of the meeting? Or do you sometimes find a tangle to unravel?

Make free use of the helps about writing notes, which are given in this chapter, and about writing the record, which will be found in Chapter 44, "After the Meeting," and Chapter 45, "Form for Record (Minutes) of the Meeting." If you are in a new position, find out from the files what has been acceptable for notices, records, and reports; then adapt these suggestions accordingly.

Sending Out the Notice. Mail explicit notice of the meeting in ample time; for instance:

The monthly meeting of the Executive
Committee of the Chamber of Commerce
will be held at 11:00 a.m., Thursday,
May 3, at Mr. Waite's office.

Look out especially for the public advertisement of a meeting, when such is required.

Advance memorandum. If many matters, or any involved subjects, are to be considered, send with the notice a program of the business to be brought up, often called the "agenda." Include any data that should be thought over before the meeting. See on page 128 a notice with an advance memorandum (Model 8).

Producing the Materials. Get from the files or elsewhere everything that is likely to be wanted for reference. Avoid having the session lose time for lack of something that you should have had at hand.

Numbered program. For the presiding officer's use, type a special program of subjects to be discussed. Number these in the order in which they are to be taken up. Keep a copy for your own reference.

Related data. Clip together, or arrange in a folder, all papers applying to a subject. Mark each group with its program number. If any item is taken up out of its numerical order, be able to put your fingers on the right set of papers at once.

MODEL 8

May 22, 1945

**MEMORANDUM FOR MEETING OF THE BOARD OF COMMISSIONERS
OF EXCELSIOR, TEXAS**

In advance of the stated meeting to be held on Friday, May 25, 1945, at 10:00 a.m., the members of the Board are urged to give consideration to the following special items for discussion.

1. CEDAR STREET OPENING. Mr. Bixby and Mr. Dallas will report on their investigation regarding the opening of Cedar Street through to Fifth Street.

It has now been ascertained that the three remaining obstacles to putting through this street can be met by the following payments:

To Mr. Thomas Spar, Jr., for removal of and indemnity for his 200-year-old shade tree....\$	250
To Mr. Robert Arliss for tennis court and adjoining strip of lawn.....	7,000
To the heirs of the Joseph Marvin estate for house and land forming dead end of present Cedar Street.....	<u>12,000</u>
TOTAL INDEMNITY.....	\$19,250

It can be further stated that the five residents who objected to opening Cedar Street because of through traffic have been persuaded to waive their objections.

2. NEW TRAFFIC LIGHT. The question of a yellow flash signal at the intersection of Horn and Fifth Streets will be taken up because of the two recent accidents at that point.

Francis Houston
Secretary of the Board

MODEL 9

May 25, 1945

RECORD OF MEETING OF THE BOARD OF COMMISSIONERS
OF EXCELSIOR, TEXAS

At a regular meeting of the Board of Commissioners, held at 10:00 a.m., May 25, 1945, in the Council Room of City Hall, the President presiding, with all five Commissioners present, the following business was transacted.

The record of the last meeting was read and approved with one correction, namely, the substitution of \$550 for the sum of \$500 for new desks in the high school.

CEDAR STREET OPENING. The final report of the two commissioners appointed to investigate the opening of Cedar Street through to Fifth Street was presented in the form of the memorandum appended under date of May 22. After full discussion, it was moved by Mr. George Cable, seconded by Mr. Dexter Page, and unanimously carried that the sum of \$19,250 named in the memorandum be appropriated from the Improvement Fund for the opening of said street.

WATER SUPPLY COMPLAINT. A petition, signed by five hundred residents of Ward 4, Precinct 1, regarding the chlorine content of the water supply was read. VOTED, That Commissioner Dallas satisfy the petitioners.

SOUTH BRANCH LIBRARY. RESOLVED, That the Secretary send on behalf of the Board a letter of appreciation to Mr. Irving Lynde for his offer to finance the proposed new wing for the South Branch Library.

NEW TRAFFIC LIGHT. VOTED, That a yellow flash signal be installed at the intersection of Horn and Fifth Streets in accordance with recent such installations.

GRANDSTAND FOR ATHLETIC FIELD. Consideration was given to the demand for a grandstand at the Nevins Memorial Park. It was agreed to lay the question on the table because of the approaching hour of the luncheon for the Governor.

The meeting adjourned at 11:25 a.m.

Francis Houston
Secretary of the Board

Record book. Get out the official record book, from which the minutes of the last meeting may be read. In the course of discussion, reference to the records of meetings for some time previous may be required.

Preparing the Room. Make the room of meeting ready for the comfort of your employer's business guests. Be sure to have enough chairs. Provide for convenient disposal of hats and coats. Lay out paper and pencils.

Writing Your Notes. Be ready to take either word-for-word (called "verbatim") notes or a condensed memorandum, as each case may demand. From these notes must be written the accurate and permanent record of what was actually done at the meeting. This must be in such shape that it could be produced in court as evidence, if necessary. A form for official records is given in the next two chapters.

Making sure. If you are uncertain of the exact wording of any statement or motion, it is your duty to ask, "Have I taken that correctly?" Such verifying may be advisable after prolonged discussion, or when one or more amendments have been made to the original motion.

Keeping watch. Keep on the alert for the subject that is discussed but brought to no definite conclusion. You may ask, "How, please, do you wish this recorded?"

Gaining Possession of All Reports. Before the meeting adjourns, see that all reports to be incorporated in the record, or to be filed, are handed over to you.



CHAPTER 44

After the Meeting

Are you responsible for a definite series of duties after the meeting has adjourned?

Writing the Official Record. Write the permanent record as soon as possible. Some records must be written by hand in a bound book. Others may be typed. Use paper that is punched in the margin, if record sheets are to be kept in loose-leaf binders.

Follow some such standard form as that on page 129, which gives a straightforward record of the meeting announced in the memorandum shown on page 128. In the next chapter, entitled "Form for Record (Minutes) of the Meeting," is a full outline of the usual order of items, with optional wording to be adapted to the specific needs of your employer.

Wording. Make the wording clear and direct. Avoid needless formal phrases.

Dating. For easy reference, write the date not only within the minutes but also at upper corners of the successive pages, for example:

May 25, 1945 - A
5/25/45 - B
5/25/45 - C

The use of these letters, **A, B, C**, etc., will not interfere with consecutive numbering for the pages of the continuous record, should this be desired.

Setup. Plan a simple, uniform setup for a series of records. Let the specific topics of discussion stand out by the aid of capitalized or underscored sideheadings, such as those shown on page 129.

Make the outcome of a discussion by vote or resolution stand out by capitalizing the word **VOTED** or **RESOLVED**.

Leave a margin at the left for corrections which may be ordered when the minutes are read at the next meeting. If a change is slight, make it in ink, such as

5-25-45, amended to read . . .

For a longer change, enter in the margin a cross reference, such as

5-25-45, amended to read as on attached sheet.

Then type the amendment separately with a cross reference to the page of the record where the marginal reference has been made.

Following the Business Through. Working from the record and from memorandums you have made, question yourself as suggested below.

Mailing the record. To whom should copies or summaries of the record be sent, both inside and outside the office?

Should any special information be given to a member who was absent from the meeting?

Forwarding reminders. To whom should letters, or formal notices, or memorandums be sent, covering any part of the proceedings? These should include reminders directly helpful to your employer.

Continuing responsibility. Assume whatever responsibility belongs to you for rounding out the results of the meeting. Regarding which items should you make reminders for yourself? It may sometimes be necessary for you to follow a matter for a long time before it is brought to a definite conclusion.

Filing after the Meeting. Return everything promptly to the files. But first make sure that papers related to different subjects have not become mixed.

Guarding the Record Book. Keep the signed ribbon copy of the record of the meeting in the permanent official record book.

Order. If the record is in a loose-leaf form, file the dated minutes in reverse order for convenient reference, so that the record of the latest meeting may always be found at the front of the binder.

Reports. If a report belonging to the minutes is too bulky for entry in the record book, cross-reference it in the record and place it in a supplementary file. Such reports should be easily available to any member of the group upon request.

Index. It may be desirable, perhaps necessary, to keep a topical index to the record and to the related reports.

CHAPTER 45

Form for Record (Minutes) of the Meeting

Have you clearly in mind the items that go to make a satisfactory record of a meeting, and the order in which they should be written?

Common Order of Items. Following is a list of items which are most commonly needed for writing a record. These are suggestions only; they are subject to such variations as are necessary to meet the widely differing requirements of business meetings. Plan a simple, uniform setup for a series of records. Model 9 on page 129 is a brief illustration of a completed record.

Unless otherwise instructed, write the record from your notes, or from draft furnished by the official Secretary of the meeting, by adapting the suggestions below. **Typical wording is in heavy type.** The numbered list of possible items acts merely as a guide; these topics are *not* to be copied within the record, which should read along continuously.

1. KIND OF MEETING

At a regular quarterly meeting (or stated or special or adjourned regular meeting)

2. NAME OF GROUP

of the Board of Directors (or Finance Committee),

3. DATE AND HOUR

held at 3:00 p.m., June 6, 1945,

4. PLACE

at (state place of meeting, unless it is always the same),

5. PRESIDING OFFICER

the President (or the Chairman or Mr. Nelson) presiding,

6. THOSE PRESENT

with all ten directors present (or state names of those present and, if desired, whether they make a quorum),

7. INTRODUCTORY CLAUSE

the following business was transacted:

8. PRO TEM OFFICERS

If the President, Chairman, or official Secretary is not present, use the form: The Secretary being absent, Mr. Ames was appointed Secretary pro tem.

9. READING OF RECORD OF LAST MEETING

The record was read and approved.

10. CORRECTION OF RECORD

If any change is made, substitute: **and approved with the following correction:** In addition to noting such change here, insert the change at the right point in the former record.

11. OMISSION OF READING OF RECORD

If the reading of the record is omitted, substitute: **It was voted to dispense with the reading of the record of the previous meeting.** This may be desirable if the members have received copies of the record.

12. REPORTS

The report of the Treasurer regarding . . . was accepted as read. Make a brief summary of a report that has been agreed to, except when it contains resolutions. In that case, enter each resolution in full as adopted, not as if the report were accepted as a whole. For example, write: **The committee on . . . reported through Mr. Gray a series of resolutions which were thoroughly discussed and amended, and finally adopted as follows: RESOLVED, That** Endorse on a report the date of its receipt. Note what further action was taken regarding the report and preserve it among the records.

13. MATTERS LAID ON TABLE AT PREVIOUS MEETING

The rules may, or may not, require that all unfinished matters shall be brought up for action or for further postponement.

14. ELECTIONS AND APPOINTMENTS

Record elections in a column, rather than in a continuous paragraph. At the point of mention in the record, designate such appointments as a new committee, a member for a special investigation, or a delegate to a conference.

15. DISCUSSION

For ordinary meetings there is no object in reporting a debate. The minutes should record what is done by the group, not what is said by the members. The name of the person who brings up new business or who offers special authoritative information may be given.

16. DECISIONS: VOTES AND RESOLUTIONS

To make a strictly complete record, include in exact wording every resolution and every motion, whether adopted or rejected; in the more informal "minutes," a record of rejected measures is not required. In some cases, record the number of votes on each side. If desired, give the person's name, such as: **On motion of Mr. Dana it was VOTED, That** It is not always required that the record show on whose motion a vote was passed. As a rule, for a motion that is carried state merely: **VOTED, That** (This means: *It was moved, seconded, and carried that*) For a resolution state: **RESOLVED, That**

17. AMENDED MOTION

Record each motion in its final, amended form.

18. POSTPONED BUSINESS

If a decision is postponed at the close of a discussion, state: **It was agreed that the matter (or the question) be laid on the table until the next meeting (or until the committee makes its report).**

19. TIME OF ADJOURNMENT

The meeting adjourned at 4:30 p.m. (or: On motion of Mr. Lane, the meeting adjourned at 4:30 p.m.).

20. SIGNATURE

The record should be signed by the person officially responsible, such as the Secretary for the meeting, the presiding officer, or both. On the ribbon typewritten copy, kept for permanent record of the meeting, this signature should be in handwriting. On the carbon copies for members, type the signature after the word **(Signed)**.

Part XIV. The Business Trio: Order, Thrift, Drive

CHAPTER 46

Everything Handy

Do you have difficulty in laying your hand on everything that ought to be on or in your desk? Do you sometimes hunt through several drawers to find a special label? Do you reach to the back of a shelf for a supply of the letterheads that you need every day? Work out the most convenient places and arrangements for all office supplies.

Your Desk and What's around It. Make the best possible use of the following places, to save you time and effort:

Desk top, with labeled trays

Desk drawers, with and without partitions

Flat surfaces, such as tops of table, of counter, and of filing cabinets

Shelves, including sliding shelf of desk and book shelves

Placing everyday materials. Find the most convenient place for each item of your active equipment and supplies, such as

Telephone
Message pad and pencil
Calendar pad
Memorandum slips
Tray for incoming mail
Tray for outgoing mail
Shorthand notebook
Typewriter
Supplies for typing
Finished work

Pending work
Filing tray
Special file drawer
Card index
Stapler
Pen
Ink
Blotter
Lead pencils
Colored pencils

Date stamp
Letter opener
Ruler
Scissors
Erasers
Gummed paper
Clips
Rubber bands
Labels
Paste

Have each of these in a regular place to which you return it at once without having to stop to think.

For reference material to keep at hand, such as the dictionary and telephone directory, see page 12 in Chapter 5, "Bringing Back the Information."

Working to save work. Avoid the drag that comes from disorder. Take a little time for good housekeeping by

Grouping things of a kind, such as envelopes of the same size at the front of a drawer; clips and rubber bands in separate containers

Straightening papers in a folder, or letterheads that must not be wrinkled

Foreseeing what may cause delay, even though slight; for example:

Replacing the paper roll on an adding machine in time

Having plenty of carbon paper at your desk

Keeping an extra shorthand notebook at hand

Having your fountain pen and inkstand filled, pencils sharpened

Emptying the pencil sharpener

Heading up Matters for Your Employer. Let the following accumulate on your desk in such an orderly way that you can gather them swiftly when the buzzer or your delivery of an important message calls you to your employer:

Papers for an appointment about to be kept

Latest incoming mail, with related papers

Letters ready for signature

Other typed pages

Telephone messages

Questions about your work

The Desk of Your Employer. Learn what your employer wants on his desk and where. Make a constant study of

What will save interrupting the course of his work

What will save him the nuisance of searching or waiting

“Knowing” hands. Never remove anything from his desk unless you are certain that he is through with it. But regularly relieve his desk of all that he puts in your tray.

When you dust the desk in the morning, set papers in order. Do not disturb anything that has been purposely spread out.

Definite places. Know exactly where to put papers needing

Rush attention

Prompt attention

Ordinary attention

Stack in neat piles

Opened mail

Mail ready for signature

Advertisements

Business magazines

See that plenty of desk supplies are kept on top and in the drawers, where he expects to find them. Learn what he likes for

Kinds and sizes of paper
 Lead pencils (which should be kept sharpened)
 Colored pencils

If he often uses a slide rule or a certain printed schedule, keep it in a regular spot on the desk. If he seldom cuts with scissors, return them to some regular place out of the way. If he frequently asks for a certain book, keep it within his easy reach.

Supply Closet and Stockroom. In a small closet, have each supply in sight with a label or a sample on the face of the box or package, so that the contents will be known at a glance. A stockroom should have numbered shelves and a card index. (See also "Supply of Forms," on page 69.)

Inform the person in charge when you find any supply running low. If you are the one responsible, make careful study of the best methods of giving out stock, handling stock records, and keeping sufficient supplies always on hand. (See the next chapter, "Everybody Watching Waste.")



CHAPTER 47

Everybody Watching Waste

In each office it makes a big difference whether everybody is careful or wasteful. It is not only a question of expense; it may be that no more of this or that is to be had at the time it is most needed. "I mean to be careful" is easy to say. Run through the following to see whether you are saving.

Keeping Machines in Repair. Nothing can take the place of your own daily, intelligent care of the machines you use.

Cleaning. Clean a machine every day with brush and dustcloth.

Protection. Drop a desk head or put on an ample cover to protect a machine from dust at night and to prevent ribbon ink and oil from drying out.

Oiling. Find out where, how much, and how often to oil a machine. Do not flick eraser particles or dust into the oiled parts.

Expert help. Do not call repairmen needlessly. When a call must be given, pool your needs with those of others. Be ready to state clearly what the trouble seems to be.

Caring for Typewriter Parts. Guard the working parts and the accessories of a typewriter.

Type. Strike keys evenly to avoid piling type bars; if type does pile, separate the bars gently.

Carriage. Do not habitually jerk the carriage to the right or carelessly let it slide to the left so that it brings up hard against the frame.

Roller. Do not let a clip or other metal fastener run through with a paper. *Back* a clasp envelope out of the machine after addressing it; or better yet, type and affix a

gummed label. If the latter method is used, the return address should of course appear either on the label or in the upper left-hand corner of the envelope.

Ribbon. Make ribbons last longer by cleaning the type often.

Cover. Keep the rubber cover away from radiator or sun. Do not strain the seams.

Key caps and twirlers. Preserve rubber accessories by careful handling and cleaning.

Looking After Small Equipment. Keep an eye on indispensable tools.

Fountain pen. Keep your pen clean to preserve both point and tube. Don't drop it. Don't lend it.

Pencils. Save lead. Sharpen pencils evenly and just enough, not too sharp. Empty the sharpener often.

Erasers. Avoid needless erasing.

Rubber stamps. Don't let the date stamp and other stamps get knocked about on the desk.

Metal fasteners. Use pins, staples, and clips thriftily. Don't let them drop on the floor. Rescue clips from papers that are to be thrown away.

Fluids, paste, glue. Cover ink, cleaning fluids, paste, and glue tightly when not in use.

Counting the Cost of Stationery. Be frugal about all kinds of paper.

Letterheads. Do not use a printed letterhead when plain paper is suitable.

Carbon paper. Avoid tearing, creasing, and wrinkling these fragile sheets. Keep partly used sheets in a drawer or folder in good order so that the edges cannot curl. Make each piece last as long as it will make a legible copy.

Envelopes. Readdress an envelope received on interdepartment business, after crossing out the previous name.

Folders. Label stout folders for frequent handling but make cheaper folders serve for less active or "transfer" containers.

Stock on hand. Put all the stock to good use. What are those dusty supplies on the top shelf of the supply room, or at the back of that lowest supply-cabinet shelf? Can the reverse side of those outdated printed forms be utilized for memorandums or for scratch paper? Would these serve as well if they were cut in halves?

Making Things Do. If the equipment you prefer for a particular job is either too scarce or too expensive for your office to provide, be resourceful. Make each piece of equipment just as useful as possible. What counts is not so much what you use as how you use it.

Driving the Work

WANTED: An office assistant who will drive her work all day every day.

Can you drive without being driven? Can you go ahead and get a thing done without a lot of hesitation or needless questions?

Try watching a good office driver. Imagine her to be a secretary by the name of Miss Rowan. She has learned that, if you don't drive your work, you'll find your work driving you. Take note of her three definite ways of getting a day's work done in a day:

She has a plan for fitting everything in.

She times her work like an expert.

She overcomes or avoids whatever threatens to hold her back.

Fitting Everything In. Miss Rowan puts through work in the order of importance, regardless of the order in which it comes to her desk.

She manages to assist several people, by keeping up with the needs of each one systematically.

She has in mind what is known as "knitting work" so that she never waits for someone to tell her what to do with odd moments.

She accepts and fits into her plan

All rush work

Fresh items that keep coming by mail or from her employer

Necessary interruptions by employer, associate, telephone, caller

Small jobs that can go into crevices of time

Bigger jobs for which she must find time

Routine jobs such as getting mail off and filing correspondence

Work that can be done ahead of time to relieve periods of pressure

Because everything must be accomplished sooner or later, Miss Rowan makes it her habit to **finish today's work today**. For example, she cleans up the work in her shorthand notebook or on dictating-machine records. On Saturday she increases her speed, if necessary, to round the week out well.

Expert Timing. Miss Rowan checks herself by a ten-point scheme. To push work ahead steadily, she

Attacks each job with quick decision

Makes an immediate pickup after interruption

Finishes every job with a snap

Turns smoothly and at once to the next job

Adapts routine procedure to routine jobs
Goes at strange jobs without wasting energy
Makes full use of momentum by doing jobs of a kind in succession
Allows time for each job only in proportion to its importance
Looks ahead so that nothing crowds her
Keeps all unfinished work in order

Studying Slowdowns. Miss Rowan keeps a practical eye out for whatever threatens to hold her work back. This takes honesty, she says, but she adds that "it pays to face yourself down." It takes a sense of humor, too, but she knows how to "laugh herself out of a thing."

She caught herself going to the Credit Department three times in an afternoon for what she could have done in one trip.

She fell into the habit of looking at the upper row of typewriter keys, and kept losing the place in her shorthand notes. So she set about drilling herself back into real touch typewriting.

Her work piled up while she dealt with business callers, so she made a study of getting rid of intruders quickly, without being curt.

At the close of one day, she reckoned she had been stealing time from her job on three counts: personal chatting, personal telephone calls, and personal correspondence. She cut all three out with one stroke.

When she first took a position, she reported promptly in the morning. She does now. She discovered what always seemed to happen to her whole day, if she missed those first minutes.

She sometimes "grouched" about the weather. But she stopped short one rainy week, when she heard someone else doing that same thing.

She used to be too proud to admit making mistakes. She found that, if she doesn't "bristle up," it "takes less out of everybody."

She "didn't like" to do some kinds of work. But she came to see that yielding to such dislikes made her hands unsteady; she kept erasing needless errors. So she has settled down to "take whatever comes her way."

Part XV. The Close of Your Office Manual

CHAPTER 49

Carrying Special Responsibility

Do you bridge the gap cheerfully while other office assistants are out? Do you find yourself able to pick up their work and take care of it?

Can you carry responsibility to the satisfaction of your employer when he is away?

Helping Your Employer's Business Trip. Check the questions below in advance of your employer's leaving, and make note of others as well.

Plans for the trip. Does he wish reservations for travel and for hotel accommodations? arrangement for care of baggage?

Copies of the itinerary. Has each of you an accurate copy of his itinerary as far as planned? Does this show

Hours of arriving and leaving?

Hours and places of appointments?

Hotel addresses with dates?

Have letters been sent and replies received regarding all appointments?

Equipment. Has everything been assembled that he would like to take along, such as

Money in convenient form

Tickets

Checkbook

Filled pen, pencils

Paper, envelopes

Clips, rubber bands, and other equipment for work while away

Business periodicals to read on the way

Data for conferences

Correspondence

Reports

Specifications

Drawings

Samples

List of papers taken. Have you a list of the important papers which have been removed from the file, so that you can check their return?

Business left pending. Do you know what to do with affairs that he is leaving unfinished? Do you know how far you are expected to use your judgment and who should be consulted on questions outside your authority?

Going Ahead While Your Employer Is on the Trip. Whenever your employer has no time to give directions—and especially when he is away—use questions like the following as your guide:

- Shall I push this business ahead right away?
- Shall I pass this along for someone else to attend to?
- Shall I keep this pending? Where? How long?
- What would he wish me to do about this, if he were here?
- Do I need to talk with him or someone else before going ahead?
- How did he ask to have this done the last time?

While you are not receiving the usual dictation and other assignments, take every opportunity to get ahead on certain known tasks, for example:

- Bring filing up to the minute
- Address a stock of envelopes to frequent correspondents for whom window envelopes are not used
- Take account of supplies

Keeping Your Employer Informed. Learn how far your employer wishes to be kept informed of affairs while he is on a business trip.

- What does he want briefly reported?
- What does he expect to have forwarded as a whole?
- Is personal mail to be sent to his home, to be held, or to be forwarded?

Send messages to him, according to degree of urgency, by telegram, telephone, air mail, special delivery. Ordinary mail should have time allowed to await him on arrival at a given point.

Meeting the Double Test. When your employer comes back, have everything in order for him to take up without loss of time. On his return, expect extra work. Be prepared to take up new affairs because of his trip, while you carry on your daily routine as well.

If you can handle unusual situations in addition to the usual run of office work, you are passing the double test in a way that every smoothly running business expects.

CHAPTER 50

The End of the Day

Now comes the end of the office day—and a satisfactory day it has been!

The work has seemed to move swiftly because you have known just how to do it. Each half-hour has counted. There will be no hustling tomorrow to make up for slowing down today. You will not need to apologize, "Sorry, I'm just going to do that; I didn't get to it yesterday."

Everything is shipshape. Now you are ready to leave working hours—ready to enjoy the freedom of exercise, of amusement, of companionship, and of sleep. In the morning it will take no time at all to begin where you left off.

You are a successful office assistant. No wonder you are proud of belonging to a busy office!

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