RECOMMENDATIONS FOR TEACHING RECORD KEEPING
BASED ON JOB ANALYSIS FINDINGS (ROANOKE, VIRGINIA)

by

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MASTER OF SCIENCE
in
Business Education

APPROVED:

Director of Graduate Studies

Head of Department

Dean of Applied Science and
Business Administration

Supervisor or Major Professor

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Blacksburg, Virginia
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CHAPTER I

THE PROBLEM

Need for the Study

Teachers frequently say that "such and such" is required of office employees but few scientific studies have been made to determine the actual requirements. Guesses and mere speculation are not sound bases for determining what is done by record keepers or by any other type of office worker. The most reliable method of determining the duties of record keepers is through job analysis. It was to meet this need for valid occupational information on the duties and responsibilities of clerical record keepers that this study was conducted. Since job analyses are needed in all phases of clerical office work, it is hoped that similar studies will be made in other areas.

Purposes of the Study

There were two primary purposes for which this study was made. They were:

1. To determine the duties and responsibilities of office workers who participate in record keeping activities.

2. To develop a series of recommendations showing what should be done by high schools in order to properly prepare young people for record keeping positions.
The research represented in this thesis was concerned first with finding out exactly what was done on the job by clerical workers primarily engaged in record keeping activities. The second purpose was to present a series of recommendations based upon job analysis findings. Such recommendations would be designed to give the classroom teacher some ideas which might prove helpful in making revisions to bring the teaching of record keeping into line with actual business practice in the Roanoke area.

Review of Literature

Literature in the fields of business education and office management was searched in an effort to find information relating to (a) duties and responsibilities of clerical record keeping office workers and (b) procedures in job analysis. The results of this search are given here.

Literature on Record Keeping. Parker Liles in his research discusses several points relating to this study. He briefly describes some of the duties of the "non-specialized" clerical worker, such as recording, sorting, clerical bookkeeping, and miscellaneous clerical duties. However, the discussion is so brief and general in nature as to be of little value in supplying the data needed for this study.

Some of the duties of the recording clerk, as listed in an abstract of a doctoral dissertation by Ruggles are the following:

Copies selected items from list into record book under appropriate headings.

Prepares mailing lists, lists for publication, etc.

Summarizes items appearing under common headings and transfers result to appropriate place in record book or other set form.

Accumulates items from a complexity of data, summarizes same under two or more headings and transfers to regular form. 2

This, too, is not specific enough to be of much help in determining the various duties and responsibilities of record keepers.

Kahn 3 lists only a few of the activities of record keepers. Two of these are specific enough to mention here: (a) posting sales and (b) auditing invoices.

Information in Potter's study which came nearest to having application to this particular research problem consisted of an enumeration of some of the activities of workers involved in general clerical duties. These duties included:


checking (proving or checking for inaccuracy)
classifying and sorting
collating and stapling
filling in forms by hand
folding machine
ordering supplies
sealing envelopes
secretarial relief
stuffing envelopes

However, nothing more was done than to list the above activities
with no mention of their relative importance.

Nichols⁵, as long ago as 1927, realized that there was a dis-
tinct need for making job analyses in the various clerical fields
of office work. Much that he said at that time is still true today.
For example, he pointed out that there were many types of specialized
office work in existence but that schools were doing very little to
train students for any type of office work except in the stenographic
and bookkeeping fields. For this reason, businessmen preferred to
take students with little specialized business training and to train
them themselves. This condition still exists today to a large ex-
tent, and it was for this reason that this study was conducted.
Nichols effectively points out some of the crucial needs for more
training in the many clerical fields, including record keeping.
His discussion indicates that research is needed.

⁴. Potter, Thelma M., An Analysis of the Work of General
Clerical Employees. The National Association of Business Teacher-

⁵. Nichols, Frederick G., A New Conception of Office Practice,
Literature on Job Analysis. Maze⁶ presents a wealth of information which proved valuable in studying procedures in job analysis. This information included definitions of terms used in job analysis, forms to use in making analyses, and detailed steps to be followed in collecting the data. Much valuable help was obtained from this source.

Herrmann⁷ makes slight reference to what is called employee work analysis. Basically, this is the same as job analysis. A substantial amount of help was presented on what information to include when conducting analyses—such as job title, supervisor, supervision performed, and brief description of daily tasks in order of performance.

Greatest aid in conducting job analyses was given in Training and Reference Manual for Job Analysis.⁸ This book was designed as a manual for training specialists in job analysis and contained helpful aids to home study. Many terms, such as job analysis, job, activities, and others were defined so as to give a clear...


understanding of their meanings. Very detailed instruction in exactly what to include in analyses and how to collect data was presented.

Delimitations

The major delimitation to this study was in the number of office workers employed by the businesses in which analyses were made. Analyses were made in businesses employing twenty-five or more office workers. The reason for this delimitation was that, in business offices of a smaller size, the work performed by office workers is more of a diversified rather than specialized nature. Since the purpose of this problem was to study employees whose work consisted primarily of record keeping, it was considered wise to conduct the investigation in large offices.

Definitions

The following are given as definitions of terms as used throughout the study.

The term record keeping may be defined as the preparation of written accounts of business operations. These business operations may involve either financial transactions or other events in the business not of a financial nature.
Job analysis may be defined as follows:

... the process of determining, by observation and study, and reporting pertinent information relating to the nature of a specific job. It is the determination of the tasks which comprise the job and of the skills, knowledges, abilities, and responsibilities required of the worker for successful performance. ... 9

Job is defined by Good as "a unit of a trade or task done by a worker in return for pay; an employment classification." 10

Record keeping activities may be defined merely as the various tasks which combine to form a complete record keeping job.

In analyzing the data collected in this study, three closely allied terms are used—mental skills, manual skills, and social skills. These terms were used by Lauderdale 11 in a study of all types of clerical workers in the petroleum industry. These skills may exist at any range or level, from the very lowest to the very highest. Mental skills may be defined as all the knowledges which are needed for the successful performance of a job. Mental skills are all-inclusive. Every manual skill must have its corresponding mental skill. For example, filing alphabetically requires a knowledge of alphabetic filing rules; making and receiving telephone

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calls requires a knowledge of the principles of correct telephone usage. Of course, some mental skills may exist independently. For example, proofreading is normally neither manual nor social in nature. Manual skills may be defined as the efficiencies needed in order to complete tasks done with the hands. Social skills are those traits that function when coming in contact with other persons, face-to-face, or by means of some communication device.
CHAPTER II
PROCEDURES FOR COLLECTING DATA

Preparation of an Outline

The first step in conducting the job analysis was to prepare an outline to be followed in collecting the data. No check lists or forms were used for the purposes of this study. Instead, information was taken in rough pencil form by following this outline:

1. TITLE OF JOB
2. WHERE WORKING
3. TRAINING REQUIRED
   a. On the job
   b. Vocational
4. RELATION TO OTHER JOBS
   a. Promotion to
   b. Promotion from
   c. Supervise over
   d. Supervised by
5. SOURCE OF DATA HANDLED
6. WHAT IS DONE WITH THE DATA

(included here was an introductory sentence to orient the reader with the scope of the job, followed by a detailed description of the record keeping activities listed in one, two, three order.)
The outline followed is an adaptation of the one described in *Training and Reference Manual for Job Analysis*. 12

Selection of Firms in Which to Conduct Analyses

As explained in Chapter I, this job analysis is limited to a study of record keepers in business firms employing twenty-five or more office workers. Hence, the next step in collecting data was to secure a list of such businesses from the Roanoke Chamber of Commerce. 13 Because of the limited number of such firms in the Roanoke area, it was deemed unnecessary to use a method of statistical sampling in selecting those in which analyses would be made. Instead, analyses would be made in all firms consenting thereto.

Conducting the Job Analyses

After securing a list of Roanoke business firms employing twenty-five or more office workers, the next step was to visit firms, obtain permission to collect data, and conduct job analyses. The procedure was to make an appointment and talk to the office manager or chief supervisor so as to explain the purpose and scope of the study and to make arrangements for interviewing individual


13. No references are made in this thesis as to the identity of businesses in which analyses were made. This was the understanding reached with such firms.
record keepers and their immediate supervisors. The number of record keepers whose jobs were analyzed in each firm depended upon the understanding reached with the office manager. By interviewing the individual record keepers and their supervisors, data were collected in rough pencil form on paper by following the previously chosen outline.

Revision of the Data

At the end of each day after making job analyses, these data were expanded and transcribed into the first typewritten draft. This was done immediately while the experience was still fresh so that the data could be as accurate as possible. Before being typed into final form for insertion in Appendix A, the analyses were revised two more times to improve clearness and completeness.

Conclusion of the Analyses

As formerly mentioned, it was originally intended that analyses would be made in all of the firms employing twenty-five or more office workers, providing the firms consented. However, after making twenty-two analyses in over two-thirds of the firms, data were so similar in content as to make further collection of questionable value to the study. Information presented in Tables 1, 2, and 3, is given to support this statement. These three tables picture the breakdown of data collected in such a way as to compare the results
<table>
<thead>
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<th>Knowledge</th>
<th>First Half</th>
<th>Second Half</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to locate information on records or reports</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Where to send records or reports</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>How to cooperate with fellow workers</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>How to cooperate with supervisors</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>How to post to records or reports</td>
<td>9</td>
<td>11</td>
</tr>
<tr>
<td>How to proofread records or reports</td>
<td>6</td>
<td>11</td>
</tr>
<tr>
<td>How to write by hand on records or reports</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>How to file alphabetically</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>How to type on records or reports</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>How to manifold records or reports</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>How to make and receive telephone calls</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>How to use an adding-listing machine</td>
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<td>3</td>
</tr>
<tr>
<td>When to transfer records or reports to other files</td>
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<td>4</td>
</tr>
<tr>
<td>How to insert records into and seal envelopes</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>How to file numerically</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>How to operate an automatic rotary calculator</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>How to make personal contacts with customers</td>
<td>3</td>
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TABLE 1 (continued)
COMPARISON OF RESULTS (MENTAL SKILLS)

<table>
<thead>
<tr>
<th>Knowledges</th>
<th>First Half</th>
<th>Second Half</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to decide on the number and kind of records to use</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>How to stamp information on records and reports</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>How to operate an accounting-posting machine</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td>Name of Skill</td>
<td>First Half</td>
<td>Second Half</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Posts information to records or reports</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Writes information on records or reports</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Types information on records or reports</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>Files records alphabetically</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Types multiple carbon copies of records</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Operates adding-listing machine</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Files records numerically</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Inserts records into and seals envelopes</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Operates accounting-posting machine</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Operates automatic rotary calculator</td>
<td>0</td>
<td>3</td>
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<tr>
<td>Stamps information on records or reports</td>
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<td>1</td>
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<tr>
<td>Miscellaneous</td>
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</table>
**TABLE 3**

**COMPARISON OF RESULTS (SOCIAL SKILLS)**

<table>
<thead>
<tr>
<th>Name of Skill</th>
<th>First Half</th>
<th>Second Half</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has contact with fellow workers</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Has contact with supervisors</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Makes and receives telephone calls</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Has personal contacts with customers</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Supervises subordinates</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Has personal contacts with job applicants</td>
<td>0</td>
<td>1</td>
</tr>
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</table>
of the first eleven analyses made with the last eleven analyses made. It can readily be seen from these tables that the results of the first eleven analyses bear a strong resemblance to the results of the second eleven analyses. It is for this reason that further analyses were not made.

Proof of the Comprehensiveness of Analyses Made

Table 4 is presented as proof of the comprehensiveness of analyses made in terms of the types of records kept by workers whose jobs were analyzed. It will be noted that representation of at least two or more workers is present in eight different types of records. These are: (a) shipping and billing, (b) personnel, (c) accounts receivable, (d) costs, (e) purchases, (f) service, (g) credit, and (h) inventory. In addition, seven other workers kept records of some other type, as listed under the heading, "miscellaneous."

Summarization of the Data

In order properly to analyze the data collected as a result of interviewing record keepers and their supervisors, it was first necessary to summarize the data. This was done by preparing tally sheets on which to record results. Four sheets were used for this purpose. The first three were designed to summarize the duties and responsibilities of record keepers in terms of skills involved in performing their jobs. As previously explained in Chapter I, these
**Table 4**

KINDS OF RECORDS KEPT ON JOBS ANALYZED

<table>
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<th>Kind of Records</th>
<th>Frequency</th>
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<td>Shipping and Billing</td>
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<tr>
<td>Personnel</td>
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</tr>
<tr>
<td>Accounts Receivable</td>
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<tr>
<td>Costs</td>
<td>2</td>
</tr>
<tr>
<td>Purchases</td>
<td>3</td>
</tr>
<tr>
<td>Service</td>
<td>2</td>
</tr>
<tr>
<td>Credit</td>
<td>2</td>
</tr>
<tr>
<td>Inventory</td>
<td>2</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>7</td>
</tr>
</tbody>
</table>

a. Although only twenty-two record keeping jobs were analyzed, it may be noted that the total of all items in this table is twenty-seven. The reason is that some workers were engaged in more than one type of record keeping.
three types of skills were classified as mental, manual, and social. The fourth sheet was used to summarize information on the number and kinds of machines used.

Next, the job analysis forms shown in Appendix A were carefully examined individually so as to note and record information relating to skills and machines on the four tally sheets. It was made positive that all manual and social skills represented were supported by the necessary mental skills involved in their performance. This process was repeated several times to make sure that nothing was omitted.

Finally, totals were drawn for each of the items listed in the tally sheets and, from these results, were constructed the tables presented in the following chapter.
CHAPTER III
ANALYSIS OF THE DATA

Introduction

The next step in this problem was to make a summary of the data collected so as to determine the duties and responsibilities of clerical record keepers. Four tables were used as a means of presentation. Three of these summarized the duties and responsibilities of record keepers in terms of skills involved in performing their work. These skills were classified into three kinds—mental, manual, and social. The fourth table was one showing the distribution of the types of office machines used by record keepers observed in this study.

Mental Skills

Mental skills involve the various knowledges which are essential for the record keeper to be successful at his job. Thirty-seven major mental skills were involved in work performed by record keepers whose work was analyzed for use in this study. Eighteen of these were limited to only one or two workers and so are tallied together under the heading of "miscellaneous" instead of being listed separately on Table 5. They include knowledge such as (a) how to file according to street addresses and (b) how to administer aptitude tests to job applicants.
<table>
<thead>
<tr>
<th>Knowledges</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to locate information on records or reports</td>
<td>22</td>
</tr>
<tr>
<td>Where to send records or reports</td>
<td>22</td>
</tr>
<tr>
<td>How to cooperate with fellow workers</td>
<td>22</td>
</tr>
<tr>
<td>How to cooperate with supervisors</td>
<td>22</td>
</tr>
<tr>
<td>How to post to records or reports</td>
<td>20</td>
</tr>
<tr>
<td>How to proofread records or reports</td>
<td>17</td>
</tr>
<tr>
<td>How to write by hand on records or reports</td>
<td>16</td>
</tr>
<tr>
<td>How to file alphabetically</td>
<td>11</td>
</tr>
<tr>
<td>How to type on records or reports</td>
<td>11</td>
</tr>
<tr>
<td>How to manifold records or reports</td>
<td>8</td>
</tr>
<tr>
<td>How to make and receive telephone calls</td>
<td>6</td>
</tr>
<tr>
<td>How to operate an adding-listing machine</td>
<td>6</td>
</tr>
<tr>
<td>When to transfer records or reports to other</td>
<td>5</td>
</tr>
<tr>
<td>files</td>
<td></td>
</tr>
<tr>
<td>How to insert records into and seal envelopes</td>
<td>4</td>
</tr>
<tr>
<td>How to file numerically</td>
<td>4</td>
</tr>
<tr>
<td>How to operate an automatic rotary calculator</td>
<td>3</td>
</tr>
<tr>
<td>How to make personal contacts with customers</td>
<td>3</td>
</tr>
<tr>
<td>How to decide on the number and kind of</td>
<td>3</td>
</tr>
<tr>
<td>records to use</td>
<td></td>
</tr>
</tbody>
</table>
TABLE 5 (continued)
MENTAL SKILLS

<table>
<thead>
<tr>
<th>Knowledges</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to stamp information on records or reports</td>
<td>3</td>
</tr>
<tr>
<td>How to use an accounting-posting machine</td>
<td>3</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>18²</td>
</tr>
</tbody>
</table>

b. See Appendix B for a complete breakdown.
By examining Table 5, it can be seen that four mental skills were used by all the workers in the twenty-two jobs analyzed. These skills included the following knowledges: (a) how to locate information on records or reports, (b) where to send records or reports, (c) how to cooperate with fellow workers, and (d) how to cooperate with supervisors. Five mental skills were used by one-half or more of the record keepers but not by all of them: (a) how to post to records or reports, (b) how to proofread records or reports, (c) how to write by hand on records or reports, (d) how to file alphabetically, and (e) how to type on records or reports.

The remaining mental skills listed were used in less than half of the jobs analyzed but in more than two and are, therefore, significant and worth noting. (See Table 5)

Manual Skills

Manual skills involve the various efficiencies needed in order to complete tasks done with the hands. Nineteen important manual skills were involved in work performed by the record keepers whose work was analyzed. Eight of these were limited to use by only one or two workers and for that reason are listed together as miscellaneous in Table 6.

No manual skills were used by all twenty-two record keepers although twenty workers did post information to records or reports. The word "posting," as used in this study, refers to the transferring of information from one place to another whether done with pen,
### TABLE 6
MANUAL SKILLS

<table>
<thead>
<tr>
<th>Name of Skill</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posts information to records or reports</td>
<td>20</td>
</tr>
<tr>
<td>Writes information on records or reports</td>
<td>16</td>
</tr>
<tr>
<td>Types information on records or reports</td>
<td>12</td>
</tr>
<tr>
<td>Files records alphabetically</td>
<td>11</td>
</tr>
<tr>
<td>Types multiple carbon copies of records</td>
<td>8</td>
</tr>
<tr>
<td>Operates adding-listing machine</td>
<td>6</td>
</tr>
<tr>
<td>Files records numerically</td>
<td>4</td>
</tr>
<tr>
<td>Inserts records into and seals envelopes</td>
<td>4</td>
</tr>
<tr>
<td>Operates accounting-posting machine</td>
<td>3</td>
</tr>
<tr>
<td>Operates automatic rotary calculator</td>
<td>3</td>
</tr>
<tr>
<td>Stamps information on records or reports</td>
<td>3</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>8&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
</tbody>
</table>

<sup>c</sup> See Appendix B. for a complete breakdown.
pencil, rubber stamp, typewriter, or accounting machine. Three other manual skills were required by one-half or more of the jobs analyzed: (a) writes information on records or reports, (b) types information on records or reports, and (c) files records alphabetically.

Seven manual skills were required on less than half and more than two of the jobs. These are also very important and worth noting: (a) types multiple carbon copies of records, (b) operates adding-listing machine, (c) files records numerically, (d) inserts records into and seals envelopes, (e) operates accounting-posting machine, (f) operates automatic rotary calculator, and (g) stamps information on records or reports.

Social Skills

Social skills include the traits that function when the worker comes in contact with other persons, either personally or by communication devices. There were six basic social skills used on the jobs analyzed in this study. (See Table 7) The most important ones involved contact with fellow workers and with supervisors. All twenty-two workers were involved in these two skills to some degree. To make the picture clearer, however, these social skills were further broken down into three parts as shown in Table 7. Nine jobs required a small degree of contact with fellow workers; four required an average degree of contact with fellow workers; and nine required a high degree of contact with
<table>
<thead>
<tr>
<th>Name of Skill</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has contact with fellow workers</td>
<td>22&lt;sup&gt;d&lt;/sup&gt;</td>
</tr>
<tr>
<td>Has contact with supervisors</td>
<td>22&lt;sup&gt;g&lt;/sup&gt;</td>
</tr>
<tr>
<td>Makes and receives telephone calls</td>
<td>6</td>
</tr>
<tr>
<td>Has personal contacts with customers</td>
<td>3</td>
</tr>
<tr>
<td>Supervises subordinates</td>
<td>2</td>
</tr>
<tr>
<td>Has personal contacts with job applicants</td>
<td>1</td>
</tr>
</tbody>
</table>

d. This item may be broken down as follows: (1) small degree of contact with fellow workers, nine; (2) average degree of contact with fellow workers, four; (3) high degree of contact with fellow workers, nine.

e. This item may be broken down as follows: (1) small degree of contact with supervisors, nine; (2) average degree of contact with supervisors, seven; (3) high degree of contact with supervisors, six.
fellow workers. Nine jobs required a small degree of contact with supervisors; seven required an average degree of contact with supervisors; and six required a high degree of contact with supervisors.

None of the remaining four social skills were needed in as many as one-half of the jobs. Six jobs required making and receiving telephone calls; three required personal contact with customers; two required supervision over subordinates; and one required personal contact with job applicants.

Machines Used

Table 3 shows how many jobs observed required the use of various office machines. The operation of machines by record keepers observed was not too widespread. Fourteen out of a total of twenty-two workers operated a typewriter; six operated an adding-listing machine; three operated an accounting-posting machine; three operated an automatic rotary calculator; one operated a key-driven calculator; and one operated a change-making machine.
<table>
<thead>
<tr>
<th>Name of Machine</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Typewriter</td>
<td>14</td>
</tr>
<tr>
<td>Adding-listing machine</td>
<td>6</td>
</tr>
<tr>
<td>Accounting-posting machine</td>
<td>3</td>
</tr>
<tr>
<td>Automatic rotary calculator</td>
<td>3</td>
</tr>
<tr>
<td>Key-driven calculator</td>
<td>1</td>
</tr>
<tr>
<td>Change-making machine</td>
<td>1</td>
</tr>
</tbody>
</table>
CHAPTER IV
CONCLUSIONS AND RECOMMENDATIONS

Introduction

The analysis of data made in the foregoing chapter indicates that there are definite duties and responsibilities typical of clerical record keepers in offices of large businesses in the Roanoke area. If the secondary schools are to prepare students properly to occupy these positions upon graduation, students must have sufficient training and experience in these most prominent activities while still in school.

It may be said by some that students do not need to have training in record keeping because businessmen train workers in this type of work while they are on the job. However, it is no more logical to say that this situation should be continued than it would be to say that businessmen should have to train their own secretaries, typists, and bookkeepers. Since more high school graduates are employed in the clerical types of office work (including record keeping) than in secretarial and bookkeeping work, businessmen should expect and students should receive training in this former type of work.

Training in the activities common to record keepers can be effected in the three following manners: (a) by reorganizing the

existing training in business education, (b) by establishing courses in vocational office training in which students receive integrated instruction during their final year of study, and (c) by establishing cooperative part-time training programs in which students receive office training through the joint efforts of the business community and the public schools.

Following are some conclusions together with some recommendations designed to show specific ways in which the training can be put into effect. Training should be given as much as possible throughout the existing business courses as shown in these recommendations. The vocational office training course and the cooperative part-time training program are both essential to the carrying out of all of the recommendations listed, even though these programs are not mentioned specifically each time.

Conclusion No. 1

Prospective record keepers need training in locating information on records and reports.

Recommendation. Training in locating information on records should be afforded to a degree sufficient to assure that the students know how to scan records and quickly locate the needed information without having to read every word. Practice along this line can be supplied especially well in a vocational office training course in which students are given adequate experience in office-like situations.
Conclusion No. 2

Prospective record keepers need training in proofreading records and reports quickly and accurately.

Recommendation. Any teacher of typewriting, will testify to the need for special instruction in how to locate errors. Training in this skill can be afforded by insisting that students locate their own errors in typewriting, bookkeeping, and business mathematics courses.

Conclusion No. 3

Prospective record keepers need training in the posting of information from one place to another.

Recommendation. Skill in posting is something that cannot be learned without specific training. Practice is required in order to be able to acquire and mentally retain information until it is transferred to another record. This training can be afforded in the general business, bookkeeping, and vocational office training courses.

Conclusion No. 4

Prospective record keepers need training in writing information by hand on records and reports.

Recommendation. Even persons already possessing good handwriting skill need further training in order to write information
on forms and blanks. Training in this skill can be offered especially well in general business and bookkeeping classes.

Conclusion No. 5

Prospective record keepers need training in the skill of typewriting information on records and reports.

Recommendation. This includes skill in crowding typewritten information into small spaces on forms and typewriting information on printed lines. Training of this type is best given in the advanced typewriting class, and the vocational office training class.

Conclusion No. 6

Prospective record keepers need training and practice in the principles and procedures of alphabetic filing.

Recommendation. Record keepers are frequently called upon to keep alphabetic files of records and reports. This training is best offered in the vocational office training class and in the cooperative part-time training program. However, an acquaintance-ship knowledge of the principles can be learned from the general business course.

Conclusion No. 7

Prospective record keepers need training in manifolding multiple copies of records.
Recommendation. There are frequent occasions when record keepers must prepare several copies of records. Training in manifolding may be included in the typewriting class and the vocational office training class.

Conclusion No. 8

Prospective record keepers need training in making and receiving telephone calls with reference to the records they keep.

Recommendation. This training can be given primarily in the vocational office training class, and should include such points as telephone etiquette, telephone technique, representing the firm, and so on. Some of this training fits into the scope of the general business class.

Conclusion No. 9

Prospective record keepers need training in where to send records and reports after they are finished with them.

Recommendation. Training for this skill logically fits into the content of any of the business classes. All classes in business should be conducted in an office-like manner and students should become familiar with the organizational set-up just as they would have to do in actual offices.

Conclusion No. 10

Prospective record keepers need training in knowing when to transfer records and reports to other files.
**Recommendation.** When students receive training in filing in the office training class, they should be confronted with situations in which they must decide when records need to be transferred from one file to another.

**Conclusion No. 11**

Prospective record keepers need training in operating the adding-listing machine.

**Recommendation.** Record keepers frequently have occasion to operate the adding-listing machine. Training in its use can especially be offered in the bookkeeping class, the office machines class, and the vocational office training class.

**Conclusion No. 12**

Prospective record keepers need training in stuffing records into and sealing envelopes.

**Recommendation.** It is not uncommon for record keepers to be called upon to stuff and seal envelopes. This training is best supplied in the vocational office training class.

**Conclusion No. 13**

Prospective record keepers need training in the principles and procedures of numeric filing.

**Recommendation.** Training in this skill is most profitably offered in the vocational office training course. However, an
acquaintanceship with numeric filing can be afforded in the general business course.

Conclusion No. 14

Prospective record keepers need training in cooperating with fellow workers.

Recommendation. Training in this important social skill can profitably be offered in nearly all of the various business courses. Although the degree of contact and cooperation with fellow workers on each job varies somewhat, frequent opportunity should be afforded for students to work cooperatively on projects and assignments so as to effect office-like practice.

Conclusion No. 15

Prospective record keepers need training in cooperating with their supervisors.

Recommendation. Training in this skill can best be offered throughout the business program by conducting the classroom as a model office with the teacher acting as office manager and the students acting as employees.

Conclusion No. 16

Prospective record keepers need at least acquaintanceship training in numerous other skills in order to be prepared for
record keeping jobs. There are various other duties and responsibilities required of some of the record keepers whose jobs were analyzed. However, since the number of workers performing such activities was very small in relation to the total number analyzed, it is not recommended that students receive extensive training in these as far as record keeping training is concerned. This statement is not to be construed as recommending that training in these skills not be given to prepare students for other types of clerical work if they are so needed. It is very probable that these skills are used to a higher degree in some of the other clerical fields.

Recommendation. In order for students to be trained to assume record keeping positions upon graduation from high school, it is recommended that they have at least an acquaintance with the following skills: (a) operating the automatic rotary calculator, (b) making personal contact with customers, (c) deciding on the number and kind of records to use, (d) stamping information on records and reports, and (e) operating an accounting-posting machine. Other skills used to some degree may be noted in the two tables appearing in Appendix B.
BIBLIOGRAPHY


VITA
BIOGRAPHICAL SKETCH

I was born in Miami, Florida in 1927, and attended the public schools there until graduation from Edison High School in 1945. Shortly, I enlisted in the United States Navy and served one year on active duty. During most of this time, I was engaged in clerical office work at the Bureau of Naval Personnel, Washington, D. C. After being honorably discharged in August, 1946, I began undergraduate work at the University of Miami. While still attending college, I was married in 1948. The degree of Bachelor of Business Administration was conferred upon me August 1, 1949. In September of the same year, I was appointed teacher of business subjects at Fairfield High School, Fairfield, Virginia. I commenced graduate study in Business Education at the Virginia Polytechnic Institute in June, 1950.
APPENDIX A
OBSERVATION ONE

1. TITLE OF JOB
   Clerk (keeping control records of applications in process)

2. WHERE WORKING
   Control Department of an agency of the Federal government

3. TRAINING REQUIRED
   a. On the job: 1 to 2 weeks to attain efficiency
   b. Vocational: high school, (typewriting training desired but not required)

4. RELATION TO OTHER JOBS
   a. Promotion to: more responsible position in department
   b. Promotion from: (initial position with the agency)
   c. Supervise over: none
   d. Supervised by: department head

5. SOURCE OF DATA HANDLED
   Applications from persons making claims

6. WHAT IS DONE WITH THE DATA
   Keeps records showing what claims are being processed and where they are in the process. These records are kept in an alphabetic section of the master files, such as "K through O."
   a. Receives application forms from people making claims.
   b. Arranges these forms in alphabetic order, locates the card for each one in the files. If one is not there, then types or writes one for the claim.
   c. Transfers information to the record cards showing the purpose of the claim, what is done to the claim, and bringing other information up-to-date. This transferring of information to the record cards may be done by hand or on the typewriter.
d. Makes a small stencil duplicate of the record card which is kept on file when a claim must be sent to national headquarters to be processed. This is used to transfer information from the record cards to various blanks used by other departments.
OBSERVATION TWO

1. TITLE OF JOB
   Clark-typist (preparing and keeping records needed in making purchases)

2. WHERE WORKING
   Purchasing Department of a manufacturing concern

3. TRAINING REQUIRED
   a. On the job: 1 to 2 months to reach efficiency
   b. Vocational: high school, typewriting

4. RELATION TO OTHER JOBS
   a. Promotion to: (little opportunity for advancement)
   b. Promotion from: (initial position with the firm)
   c. Supervise over: none
   d. Supervised by: department head

5. SOURCE OF DATA HANDLED
   Purchase requisitions originated throughout the plant

6. WHAT IS DONE WITH THE DATA
   Keeps records on purchases and handles the making of purchases from the firm's main plant.
   a. Receives purchase requisitions from all parts of the plant.
   b. Types purchase orders for goods ordered. This consists of transferring information from the records mentioned above in "a" to purchase order blanks.
   c. Inserts one copy of each purchase order in a window envelope which is then mailed. Another copy of each order is sent to the accounting department while the third is kept on record in the alphabetic files.
d. Receives records of the receipt of purchased goods from the receiving department when goods ordered arrive.

e. Records in handwriting information on the purchase order (located in the alphabetic files) corresponding with the receipt of purchased goods. The information recorded includes date, count, etc.

f. Checks invoices against receipts for purchased goods when the invoices arrive.

g. Prepares a record on the typewriter consisting of a list of the above, which is sent to the receiving department.

h. Keeps a complete record on cards filed in alphabetic order showing the costs of various goods ordered in the past.

i. Prepares records on the typewriter to accompany merchandise which must be returned to vendors.

j. Prepares a report on the typewriter each month showing a list of all goods received for which invoices have not yet been received.

k. Prepares reports, based upon records in the files, as required by the National Production Authority.
Observation Three

1. **Title of Job**

   Clerk-typist (preparing and keeping records needed in making purchases)

2. **Where working**

   Purchasing Department of a manufacturing concern

3. **Training Required**

   a. On the job: 2 to 3 months to reach efficiency
   
   b. Vocational: high school, typewriting, (limited knowledge of shorthand necessary)

4. **Relation to Other Jobs**

   a. Promotion to: (little opportunity for advancement)
   
   b. Promotion from: Clerk-typist in department
   
   c. Supervise over: none
   
   d. Supervised by: department head

5. **Source of Data Handled**

   Purchase requisitions originated throughout the plant

6. **What Is Done with the Data**

   Keeps records on purchases and handles the making of purchases from companies other than the firm's main plant.

   a. Receives purchase requisitions from all parts of the plant.
   
   b. Types purchase orders for materials ordered. This consists of transferring information from the records mentioned above in "a."
   
   c. Inserts one copy of each purchase order in a window envelope which is mailed. Another copy of each order is sent to the accounting department while the third is kept on record in the alphabetic files.
d. Receives records of the receipt of purchased goods from the receiving department when goods ordered arrive.

e. Records in handwriting information on the purchase order (located in the alphabetic files) corresponding with the receipt of purchased goods. The information includes date, count, etc.

f. Checks invoices against receipts for purchased goods when the invoices arrive.

g. Prepares a record on the typewriter, consisting of a list of the above, which is sent to the receiving department.

h. Keeps a complete record on cards filed in alphabetic order showing the costs of various goods ordered in the past.

i. Prepares records (shipping orders) on the typewriter, to accompany merchandise which must be returned to vendors.

j. Prepares a report on the typewriter each month showing a list of all goods received for which invoices have not yet been received.

k. Prepares reports, based upon records in the files, as required by the National Production Authority.

l. Takes care of department correspondence.
OBSERVATION FOUR

1. TITLE OF JOB

   Service Representative (keeping records of accounts receivable, credit, and service)

2. WHERE WORKING

   Office of a telephone company

3. TRAINING REQUIRED

   a. On the job: 6 weeks initial training course before assuming job
   b. Vocational: high school, (knowledge of numeric filing desirable)

4. RELATION TO OTHER JOBS

   a. Promotion to: Supervisor of Service Representatives
   b. Promotion from: operator
   c. Supervise over: none
   d. Supervised by: Supervisor of Service Representatives

5. SOURCE OF DATA HANDLED

   Toll tickets, service forms from service men, and stubs from customers' bills.

6. WHAT IS DONE WITH THE DATA

   Keeps records of accounts receivable, credit, and service for approximately 2100 customers. These records are all arranged in files of numerical order according to the customer's telephone number. All calls regarding service, complaints, etc., from any of these 2100 customers are referred to this worker for satisfaction.

   a. Receives stubs from customers' bills which are prepared and retained by the accounting department when they send out notices.
b. Files these numerically in the accounts receivable file to form the individual accounts receivable.

c. Stamps stubs paid with a date stamp when payment is received and transfers them to a paid file.

d. Receives requests from customers for service, either by mail or telephone.

e. Makes pencil notations of requests for service under the customers' account numbers in the record of service file and fills out written orders for service which are forwarded to the proper department for action. These forms are filled out in duplicate.

f. Receives one of the forms from the service man when the service has been completed.

g. Writes in date completed and files it numerically in the record of service file.

h. Files toll tickets representing long-distance calls in the accounts receivable file when they are received from the operators.

i. Decides upon credit ratings for each customer which are revised from time to time as the need arises. All this

j. Keeps credit rating records for each customer.
OBSERVATION FIVE

1. TITLE OF JOB

Liability-ledger Clerk

2. WHERE WORKING

Banking institution

3. TRAINING REQUIRED

a. On the job: 3 months as understudy

b. Vocational: high school, typewriting, (preferably having experience on an accounting machine and adding-listing machine)

4. RELATION TO OTHER JOBS

a. Promotion to: (little opportunity for advancement)

b. Promotion from: (initial position with firm)

c. Supervise over: none

d. Supervised by: head clerk

5. SOURCE OF DATA HANDLED

Single-payment promissory notes received from teller.

6. WHAT IS DONE WITH THE DATA

Keeps records of single-payment promissory note transactions by means of an accounting machine.

a. Receives new and renewed single-payment notes from the note tellers each morning which were handled during the previous day's business.

b. Runs a list of the amounts of all the notes on an adding-listing machine to obtain a total.

c. Runs a list of all the credit tickets (representing payments on notes) and deducts from the total of new and renewed notes to determine the net increase or decrease to be applied to the note discount ledger.
d. Posts the amounts of all new and renewed notes on the accounting machine. As each note is taken up to be recorded on the machine, three copies of notices to be used at the time of maturity are inserted into the machine. This information is also posted at the same time to the individual's ledger sheet and the results of all entries are recorded on a large control sheet which remains in the machine while all entries are made on the notices and individual ledgers.

e. Files individual ledger sheets in alphabetical order. The notes and notices of maturity are also filed until needed for further use.

f. Makes sure that the individual subsidiary ledger sheets agree with the total of the control ledger sheet and with the total of the notes as drawn up on the adding-listing machine tape.
OBSERVATION SIX

1. TITLE OF JOB

Paying and Receiving Teller (keeping records of deposits and disbursements)

2. WHERE WORKING

Banking institution

3. TRAINING REQUIRED

a. On the job: requires several months to reach efficiency
b. Vocational: high school (desirable to know something about record keeping)

4. RELATION TO OTHER JOBS

a. Promotion to: head teller
b. Promotion from: messenger
c. Supervise over: none
d. Supervised by: head teller

5. SOURCE OF DATA HANDLED

Result of transactions with bank customers

6. WHAT IS DONE WITH THE DATA

Keeps complete records of deposits and payments as a result of dealings with customers.

a. Receives deposits and makes payments to customers.
b. Verifies the record of deposit (deposit slip) against the cash received from the customer. In some cases makes out the deposit slip for the customer. In any event, always keeps one record.
c. Uses teller's machine while not working with customers. This machine keeps a record of cash received and cash paid out. Teller charges himself with cash received and credits himself with cash paid out.
d. Forwards cash and checks received together with deposit slips and other minor records handled to the proof department where everything is checked for accuracy.

e. Duties incidental with this work include disposing of mutilated currency, making drawings of cash from head teller, reporting excesses of cash, identifying customers, and guarding against counterfeits and forgeries.
1. **TITLE OF JOB**

   Clerk (keeping accounts receivable records)

2. **WHERE WORKING**

   Credit Department of a retail store

3. **TRAINING REQUIRED**

   a. On the job: 1 to 2 months to reach efficiency
   
   b. Vocational: high school, typewriting, (record keeping training advisable)

4. **RELATION TO OTHER JOBS**

   a. Promotion to: higher position in department
   
   b. Promotion from: another department in firm
   
   c. Supervise over: none
   
   d. Supervised by: Manager of Credit Department

5. **SOURCE OF DATA HANDLED**

   Records of customers' purchases or payments, and calls requesting credit information

6. **WHAT IS DONE WITH THE DATA**

   Keeps credit records on customers and prepares and mails records or statements of monthly bills to customers.

   a. Receives receipts of customers' purchases and payments which have been prepared by other clerks.

   b. Files these records in alphabetical order under the names of the customers who have charge accounts.

   c. Prepares several copies of customers' monthly statements and a control record all in one operation on an accounting machine. These are based on information from the files.
d. Inserts customer's copy of statement in window envelope which is mailed. Distributes other records prepared to proper destinations.

e. Refers certain of the record statements to the department head before mailing out so that special letters can be prepared to accompany them.

f. Locates information in the accounts receivable record files in answer to telephone inquiries from other businesses or the merchant's association regarding the credit standings of customers. The calls are received by another person who merely requests that this worker locate it for her.
1. TITLE OF JOB
   Head Meter Reader (keeping records on meter readings)

2. WHERE WORKING
   Meter Reading Department of public utility company

3. TRAINING REQUIRED
   a. On the job: must advance up from job of meter reader
   b. Vocational: high school, typewriting

4. RELATION TO OTHER JOBS
   a. Promotion to: not much opportunity for advancement
   b. Promotion from: meter reader
   c. Supervise over: 10 meter readers
   d. Supervised by: office manager

5. SOURCE OF DATA HANDLED
   Meter reading cards from rural customers and meter reading books from other readers

6. WHAT IS DONE WITH THE DATA
   Keeps records on meter readings of all customers and answers complaints of customers regarding meter readings.
   a. Types out schedules monthly of territory for each meter reader to cover for the coming weeks. Rotates them to different areas each month.
   b. Receives cards mailed in from customers who read their own meters.
   c. Checks these cards for any noticeable errors and investigates if needed.
   d. Arranges the cards in order according to the numerical arrangement in the folio pages of the meter reading books.
e. Enters the readings from the cards to the individual pages provided for each customer in the meter reading books.

f. Checks the meter reading books of the other meter readers when they return for any possible obvious errors. Decides whether investigation is necessary.

g. Puts clips on the pages of accounts that show readings not in the same rate as previously so that the person computing charges will know that changes are necessary.

h. Turns over the meter reading books to another department after they have been properly checked.

i. Answers telephone and personal complaints from customers.
OBSERVATION NINE

1. TITLE OF JOB
   Cash Poste (keeping records of accounts receivable)

2. WHERE WORKING
   Accounting Department of public utility company

3. TRAINING REQUIRED
   a. On the job: takes about 2 weeks to reach efficiency
   b. Vocational: high school, (desirable to have training in
      record keeping and operation of full-key
      adding-listing machine)

4. RELATION TO OTHER JOBS
   a. Promotion to: higher bookkeeping job
   b. Promotion from: outside the firm
   c. Supervise over: none
   d. Supervised by: head accountant

5. SOURCE OF DATA HANDLED
   Copies of receipts given to customers by cashier

6. WHAT IS DONE WITH THE DATA
   Keeps records of accounts receivable
   a. Receives portions of receipts which are retained by the
      cashier when accepting payments.
   b. Arranges these in numerical order according to account
      numbers assigned to each customer.
   c. Takes these slips one at a time and locates the account
      corresponding with it in the numeric file. The accounts
      in the files merely consist of the half of the bill which
      is retained by the company when sending out the card bills
      to customers. They have holes punched in one end and are
so fastened to a rod which holds them in place in the files.

d. Stamps the account card paid with a date stamp and flips it over into the left-hand side of the tray indicating that it is paid. Continues this process.

e. Lists the amounts from each individual card which has been marked paid on the adding-listing machine and checks the total and individual amounts to see if they agree with the individual amounts and total on the tape which accompanied the portions of the receipts of payment when they came from the cashier.

f. Posts delayed-payment charges to the account cards of commercial users when they fail to pay their bills on time.

g. Moves the customer's card to the correct new file when a transfer slip comes in from final billing clerk.
OBSERVATION TEN

1. TITLE OF JOB

Contracts and Orders Clerk (keeping records of contracts and orders)

2. WHERE WORKING

Contracts and Orders Department of public utility company

3. TRAINING REQUIRED

a. On the job: 2 or 3 months to reach efficiency

b. Vocational: high school, typewriting

4. RELATION TO OTHER JOBS

a. Promotion to: Chief Contracts and Orders Clerk

b. Promotion from: (initial position with the firm)

c. Supervise over: none

d. Supervised by: Chief Contracts and Orders Clerk

5. SOURCE OF DATA HANDLED

Telephone or personal calls from customers

6. WHAT IS DONE WITH THE DATA

Prepares and maintains records necessary for the authorization and termination of service to customers.

a. Receives calls from persons or firms asking for the beginning of service.

b. Types three copies of the contract for the customer, retaining one as a record in own files (arranged according to street addresses) and forwarding the other two copies to other workers.

c. Types authorization notices for beginning customers which notices are sent to the meter department so that connections can be made.
d. Receives calls from persons or firms wishing to discontinue service.

e. Types records of disconnection notices which are sent to the meter department for action.

f. Posts notations on contracts which are kept on record in the files and transfers contracts of disconnected customers to another file.

g. Receives calls of customers wishing to have special work done such as installation of various appliances.

h. Types records of these which are sent to the service department and the meter reading department.

i. Posts notice of these actions to the contracts kept on record in the files.
OBSERVATION ELEVEN

1. **TITLE OF JOB**

   Clerk-typist (keeping and preparing inventory and shipping records)

2. **WHERE WORKING**

   Shipping Department of a manufacturing concern

3. **TRAINING REQUIRED**

   a. On the job: requires 2 or 3 months to reach efficiency

   b. Vocational: high school, typewriting, (adding-listing
      machine experience desirable)

4. **RELATION TO OTHER JOBS**

   a. Promotion to: higher position within department

   b. Promotion from: (initial position with firm)

   c. Supervise over: none

   d. Supervised by: head clerk in department

5. **SOURCE OF DATA HANDLED**

   Case tickets attached to goods ready for sale

6. **WHAT IS DONE WITH THE DATA**

   Keeps continuous inventory record on stock of goods on hand
   and ready to be shipped when called for. Handles other typing,
   filing, and checking duties incidental in a shipping department.

   a. Receives three copies of a case ticket which are attached
      to each case of finished product as it comes off production.

   b. Checks these for accuracy, sends one copy to converting
      department, retains other two on record.

   c. Files the two copies of each case ticket in a numeric
      file. The numbers used in the filing system represent
      types, colors, or sizes of products contained in the
      cases.
d. Accumulates total poundage of each type of product represented in the files daily with the aid of adding-listing machine.

e. Prepare a daily summary of the above results in handwriting on a special form. This is later given to another worker to be typewritten.

f. Does other incidental jobs such as operating duplicator, addressing envelopes, typing invoices, and typing special reports from time to time.
OBSERVATION TWELVE

1. TITLE OF JOB

Order Schedule Clerk (keeping records on customers' orders)

2. WHERE WORKING

Shipping Department of a manufacturing concern

3. TRAINING REQUIRED

a. On the job: 1 week to 10 days under direction of old employee

b. Vocational: high school, (desirable to have training on typewriter and 10-key adding-listing machine)

4. RELATION TO OTHER JOBS

a. Promotion to: more responsible job in department

b. Promotion from: (initial position with firm)

c. Supervise over: none

d. Supervised by: department head

5. SOURCE OF DATA HANDLED

Order blanks received from customers

6. WHAT IS DONE WITH THE DATA

Keeps records necessary for the scheduling of customers' orders against quantities of goods that are in the process of being manufactured.

a. Receives original orders from customers. If these are not already on conventional order blanks, then types or writes them up on such forms.

b. Decides on the earliest possible production order from which the customers' orders can be filled.

c. Posts from the customers' orders to a large control record sheet in handwriting which shows at all times how many customers' orders have been scheduled against the goods in production. It indicates the name of the
customer and the quantities of goods ordered.

d. Posts corrections, changes, and cancellations as called for.

e. Gives customers' order blanks to other clerks who acknowledge the orders and file them.

f. Prepares, with the aid of the adding-listing machine, a stock availability report at the end of each week showing the types and quantities of all unsold items already produced or being produced. The information is obtained from the large control record sheet. The report is either handwritten or typewritten.
1. **TITLE OF JOB**

   Order File and Shipping Schedule Clerk (keeping shipping records)

2. **WHERE WORKING**

   Shipping Department of a manufacturing concern

3. **TRAINING REQUIRED**

   a. On the job: 2 weeks to 1 month to reach efficiency
   b. Vocational: high school, typewriting

4. **RELATION TO OTHER JOBS**

   a. Promotion to: more responsible job in department
   b. Promotion from: (initial position with the firm)
   c. Supervise over: none
   d. Supervised by: department head

5. **SOURCE OF DATA HANDLED**

   Customers' order blanks (after being processed by another clerk)

6. **WHAT IS DONE WITH THE DATA**

   Keeps records which are used in making sure that orders go out as scheduled.

   a. Receives customers' order blanks after the orders have been scheduled by another clerk.
   b. Files these alphabetically to serve as a record of orders on hand.
   c. Continually checks the large control record sheet (originally prepared by another worker) and pulls customers' order blanks from the files ten days before the scheduled date of shipment.
d. Receives notification from the Billing Clerk when orders are shipped and posts the dates of shipment to the large control record sheet.

e. Checks the control record sheet to find out what orders have not been shipped to customers on the dates promised and finds out the cause of the delay.

f. Posts the reasons for delay in shipment to the large control record sheet in case of inquiries from customers.

g. Types simple form letters from time to time.
1. TITLE OF JOB

   Billing Clerk (preparing records to accompany shipments)

2. WHERE WORKING

   Shipping Department of a manufacturing concern

3. TRAINING REQUIRED

   a. On the job: 2 weeks to one month to reach efficiency
   b. Vocational: high school, typewriting (preferably with training on the electric typewriter)

4. RELATION TO OTHER JOBS

   a. Promotion to: more responsible job in department
   b. Promotion from: (initial position with the company)
   c. Supervise over: none
   d. Supervised by: department head

5. SOURCE OF DATA HANDLED

   Customers' order blanks which are first handled by another worker

6. WHAT IS DONE WITH THE DATA

   Prepares records which are to accompany shipments of merchandise to customers of the firm.

   a. Receives orders from the Order File and Shipping Schedule Clerk when they are ready to be shipped to customers.
   b. Prepares records which are to accompany the shipments. This consists of typewriting copies of the shipping order, three copies of the invoice, and varying numbers of copies of the bill of lading all in one operation. The number of copies of the bill of lading varies depending on the mode of shipment used.
   c. Transfers these records to the shipping clerk.
OBSERVATION FIFTEEN

1. TITLE OF JOB

   Clerk-typist (keeping temperature, humidity, and air-flow records)

2. WHERE WORKING

   Engineering Department of a manufacturing concern

3. TRAINING REQUIRED

   a. On the job: requires about 4 months to reach efficiency

   b. Vocational: high school, typewriting (experience on automatic calculator desirable)

4. RELATION TO OTHER JOBS

   a. Promotion to: more responsible position in department

   b. Promotion from: typist job in other department

   c. Supervise over: none

   d. Supervised by: head of department

5. SOURCE OF DATA HANDLED

   Reports of temperature, humidity, and air-flow prepared by other workers.

6. WHAT IS DONE WITH THE DATA

   Keeps records on temperature, humidity, and air-flow control for all parts of the plant and does necessary computations required in that connection.

   a. Receives charts that have been filled in by men throughout the plant who make periodic checks on the temperature, humidity, and air-flow in the various departments.

   b. Calculates the cubic feet of air-flow per minute for each department with the aid of the information contained on the above forms and an automatic calculator.
c. Types data about temperature, humidity, and air-flow on special forms used for that purpose and at the same time maintains a large log or control sheet showing the conditions throughout the plant.

d. Classifies and files in alphabetic order monthly reports originating in each department regarding the tons of refrigerant consumed and the total steam and water consumption.

e. Maintains current inventory data in alphabetic files on air-conditioning equipment on the basis of information submitted from each department by means of reports.

f. Types requisitions for supplies as needed within the department,
OBSERVATION SIXTEEN

1. TITLE OF JOB
   Records Clerk (keeping personnel records)

2. WHERE WORKING
   Personnel Office of a manufacturing concern

3. TRAINING REQUIRED
   a. On the job: requires 5 or 6 months to reach efficiency
   b. Vocational: high school, typewriting

4. RELATION TO OTHER JOBS
   a. Promotion to: stenographic position in department
   b. Promotion from: (initial position with firm)
   c. Supervise over: none
   d. Supervised by: Personnel Manager

5. SOURCE OF DATA HANDLED
   Application blanks, attendance reports, address change notifications, employee progress reports, and similar sources

6. WHAT IS DONE WITH THE DATA
   Keeps complete personnel records which contain any and all information desired about all employees.

   a. Types changes in the employees' individual folders kept in alphabetic files. The basis for making these changes is reports made out in the various departments and sent to the personnel office for that purpose, or from personal contact with the employee in the personnel office.

   b. Receives daily reports of absences from the various departments and enters the information in ink in the employees' individual folders.

   c. Types daily labor summary showing the labor force on hand for the day by departments.
d. Prepares monthly consolidation of daily labor summary reports on the typewriter.

e. Maintains an address card file on all employees. Address changes are made on the basis of employee notification or on notification from the post office.

f. Transfers employees' files to the retired employees' file when they retire.

g. Sends progress report forms to department head each month for the first six months that any new employee is with the firm.

h. Makes sure that the progress reports are completed and returned by the departments and files them in the employees' individual folders.

i. Maintains an alphabetic file of all employees on leave for one purpose or another, such as military, maternity, or illness.

j. Files annual attendance records in each employee's individual folder. These have been prepared in the various departments of the plant.
OBSERVATION SEVENTEEN

1. TITLE OF JOB

Labor Allocation Clerk (keeping records on labor costs)

2. WHERE WORKING

Accounting Department of a manufacturing concern

3. TRAINING REQUIRED

a. On the job: very little—a starting job
b. Vocational: high school, (desirable to have record keeping or bookkeeping training)

4. RELATION TO OTHER JOBS

a. Promotion to: accountant
b. Promotion from: (initial position with firm)
c. Supervise over: none
d. Supervised by: head accountant

5. SOURCE OF DATA HANDLED

Job cards prepared by laborers in the plant

6. WHAT IS DONE WITH THE DATA

Keeps records for use in allocating labor costs for jobs.

a. Receives job cards which have been filled in by the laborers on the job showing name of employee, job working on, time in, and time. A separate job card is prepared for each job worked on and the supervisors check all cards for accuracy before sending them to the accounting department.

b. Takes the job cards and computes the total labor expense for each one by means of an adding-listing machine.

c. Enters the expense in handwriting on the job cards.

d. Sorts the job cards into charge groups so that another person can compute amounts of labor expense to enter into each of the various accounts.
OBSERVATION EIGHTEEN

1. TITLE OF JOB

Calculating Machine Operator (Preparing fund allocation records and checking settlement records)

2. WHERE WORKING

Accounting Department of a transportation company

3. TRAINING REQUIRED

a. On the job: attend company training school while learning job

b. Vocational: high school, (experience on key-driven calculator and automatic calculator desirable)

4. RELATION TO OTHER JOBS

a. Promotion to: possibly to accountant (strict seniority followed)

b. Promotion from: messenger

c. Supervise over: none

d. Supervised by: head accountant

5. SOURCE OF DATA HANDLED

Abstract records prepared by the Accounting Machine Operator

6. WHAT IS DONE WITH THE DATA

Prepares records of fund allocations to other carriers. Checks settlement records.

a. Receives abstracts, forms which have been prepared on an accounting machine by another worker.

b. Takes these forms and from the information contained on them and with the aid of certain formulas, computes the allocation of funds to go to other carriers concerned. Both the key-driven calculator and the automatic calculator are used.
c. Posts calculations to abstract record in handwriting.

d. Sends the abstracts, together with the allocations, back to other workers.

e. Receives all settlements of revenue coming in from other carriers and checks the extensions on the calculators for accuracy.
OBSERVATION NINETEEN

1. TITLE OF JOB

Accounting Machine Operator (preparing records on agents)

2. WHERE WORKING

Accounting Department of a transportation company

3. TRAINING REQUIRED

a. On the job: attend company training school while learning job

b. Vocational: high school, typewriting (experience on accounting machine desirable)

4. RELATION TO OTHER JOBS

a. Promotion to: accountant

b. Promotion from: messenger

c. Supervise over: none

d. Supervised by: head accountant

5. SOURCE OF DATA HANDLED

Agents' reports

6. WHAT IS DONE WITH THE DATA

Preparing abstracts on accounting machine to be sent to other carriers and based on reports received from company's agents. Prepares control records.

a. Receives daily reports rendered by the various agents of the company.

b. Takes these reports, which have already been arranged according to points of origin, and prepares abstract forms in the accounting machine.

c. Gives these abstracts to another person who determines the allocation of funds to go to each carrier as a result of the transactions recorded on the abstracts.
d. Takes the allocation form calculations when they come back and prepares a large control or distribution report on the accounting machine.
OBSERVATION TWENTY

1. TITLE OF JOB
   Clerk-typist (preparing and keeping records on agencies)

2. WHERE WORKING
   Service and Statistical Department of the home office of an
   insurance company

3. TRAINING REQUIRED
   a. On the job: gains experience while working as assistant
   b. Vocational: high school, typewriting

4. RELATION TO OTHER JOBS
   a. Promotion to: (little opportunity for advancement)
   b. Promotion from: assistant which now supervising
   c. Supervise over: one assistant
   d. Supervised by: department head

5. SOURCE OF DATA HANDLED
   Vouchers, contracts, and licenses prepared by other workers

6. WHAT IS DONE WITH THE DATA
   Keeps contract, license, and expense records on the agencies.
   a. Receives vouchers representing expenditures made by the
      home office on the various agents.
   b. Posts the charges in handwriting from these vouchers to
      the cost records file which consists of a separate card
      for each agency.
   c. Files copies of contracts of new agents in an alphabetic
      file.
   d. Files copies of any letters from and to agents regarding
      contracts in this same record file.
e. Types in changes that need to be made in contracts from time to time

f. Types termination papers for agencies terminating relationships with the company and sends such records to the various departments concerned.

g. Transfers contracts from one record file to another when contracts are terminated. Simultaneously stamps the date on them.

h. Keeps agents' licenses in an alphabetic file.

i. Types records to serve as reminders to be sent to agents after noting in the file that their licenses will soon expire.

j. Types a stencil and duplicates copies of a statement each week showing a list of all new agents and all agency terminations. This is distributed to the various departments concerned.

k. Delegates certain portions of the work to an assistant.
OBSERVATION TWENTY-ONE

1. TITLE OF JOB
   Clerk (preparing and keeping personnel records and reports)

2. WHERE WORKING
   Personnel Office of the home office of an insurance company

3. TRAINING REQUIRED
   a. On the job: requires about 6 months to reach efficiency
   b. Vocational: high school, shorthand, typewriting

4. RELATION TO OTHER JOBS
   a. Promotion to: not much opportunity for advancement
   b. Promotion from: lower clerical positions within company
   c. Supervise over: none
   d. Supervised by: two workers supervised by personnel manager

5. SOURCE OF DATA HANDLED
   Many various records and reports coming from various offices in the business.

6. WHAT IS DONE WITH THE DATA
   Keeps numerous personnel records and performs other duties incidental to such work.
   a. Gives aptitude tests to job applicants being processed through the office.
   b. Sets up a folder containing all forms and blanks which are considered pertinent for each new employee. This would involve typing the employee's name on a tab to be pasted on the folder and then inserting forms such as application blank, graded aptitude test, signed pension plan agreement, photograph, physical examination form, etc.
c. Types three copies of a special salary raise form when an employee gets an increase in pay. Keeps one in the folder, sends one to the employee, and one to his supervisor.

d. Files records of personnel problems which occur from time to time. These are completed and supplied by the supervisors.

e. Files resignation forms which come through in folders whenever an employee decides to quit.

f. Answers telephone or mail inquiries of other businessmen who may be inquiring about various things with regard to employees or former employees.

g. Removes folders of resigned employees to separate file.

h. Sets up and keeps in order a cardex file on each employee. When employee is first hired, information such as name, dependents, who to notify in an emergency, date of birth, etc., is typed on forms which are filed in the cardex file.

i. Writes the name of the new employee in ink in a space provided on the cardex folder itself.

j. Makes a record of beginning pay and pay raises in ink on a space provided on the form whenever pay raises come through. This information is obtained from the pay raise forms in the other file.

k. Enters in ink in the space provided on the cardex folder the weekly reports of tardies and absences as supplied on forms from the supervisors.

l. Posts information in ink to various other records in the cardex file including bond deductions, pension fund contributions, group life insurance, hospitalization and surgical insurance, etc.

m. Takes dictation and handles office correspondence as directed by the personnel manager.
OBSERVATION TWENTY-TWO

1. TITLE OF JOB
   Clerk

2. WHERE WORKING
   Administrative Department of the home office of an insurance company

3. TRAINING REQUIRED
   a. On the job: requires about 6 months to reach efficiency
   b. Vocational: high school, typewriting, shorthand (adding machine and automatic calculator desirable)

4. RELATION TO OTHER JOBS
   a. Promotion to: higher, but similar job in department
   b. Promotion from: another department
   c. Supervise over: none
   d. Supervised by: head of department

5. SOURCE OF DATA HANDLED
   Purchase requisitions for supplies and requests for service

6. WHAT IS DONE WITH THE DATA
   Keeps records on purchase of supplies and service to equipment. Prepares reports on same.
   a. Receives requisitions filled out by persons in the business who wish to order supplies or equipment and takes them to the department head for his o.k.
   b. Places orders for the supplies or equipment, either by verbal or written means.
   c. Types purchase orders on special forms, inserts them in window envelopes and mails them, retaining one copy in the files.
d. Checks the two copies of each invoice when received against the original order, records, and sends one copy to the receiving department.

e. Prepares typewritten records at intervals on the costs of supplies and equipment for each of the departments. An adding-listing machine and an automatic calculator are used in this process.

f. Prepares check requisition forms on typewriter which are sent to the controller's office.

g. Sends out checks in payment of bills when they come down from the controller's office.

h. Receives inter-office phone calls requesting service on equipment.

i. Contacts repairmen or servicemen to come.

j. Makes follow-ups by phone or in person to see if the work has been done.

k. Keeps two alphabetic cardex files in order. One of these contains records on the companies with which orders for supplies, equipment, and service are placed. The other one is set up under the various kinds of equipment and machines used in the business.

l. Takes dictation and handles correspondence related to purchases and service orders.
### Enumeration of Miscellaneous Mental Skills Tallied Together in Table 5

<table>
<thead>
<tr>
<th>Knowledges</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to supervise subordinates</td>
<td>2</td>
</tr>
<tr>
<td>How to prepare stencils</td>
<td>2</td>
</tr>
<tr>
<td>How to handle outgoing correspondence</td>
<td>2</td>
</tr>
<tr>
<td>How to analyze mathematical data</td>
<td>2</td>
</tr>
<tr>
<td>How to file according to street addresses</td>
<td>1</td>
</tr>
<tr>
<td>What constitutes a legal contract</td>
<td>1</td>
</tr>
<tr>
<td>How to analyze customers' accounts and decide on credit ratings</td>
<td>1</td>
</tr>
<tr>
<td>When to send records or reports to another place</td>
<td>1</td>
</tr>
<tr>
<td>How to verify money against records</td>
<td>1</td>
</tr>
<tr>
<td>How to operate a change-making machine</td>
<td>1</td>
</tr>
<tr>
<td>How to decide whether to verify data on reports received from customers</td>
<td>1</td>
</tr>
<tr>
<td>How to do incidental typing</td>
<td>1</td>
</tr>
<tr>
<td>How to type simple form letters</td>
<td>1</td>
</tr>
<tr>
<td>How to sort records into charge groups for benefit of next worker</td>
<td>1</td>
</tr>
<tr>
<td>How to operate a key-driven calculator</td>
<td>1</td>
</tr>
<tr>
<td>How to operate a mimeograph duplicator</td>
<td>1</td>
</tr>
<tr>
<td>How to administer aptitude tests to job applicants</td>
<td>1</td>
</tr>
<tr>
<td>How to make personal contacts with job applicants</td>
<td>1</td>
</tr>
<tr>
<td>Name of Skill</td>
<td>Frequency</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Handles small amount of correspondence</td>
<td>2</td>
</tr>
<tr>
<td>Does incidental typing</td>
<td>2</td>
</tr>
<tr>
<td>Operates key-driven calculator</td>
<td>1</td>
</tr>
<tr>
<td>Counts money</td>
<td>1</td>
</tr>
<tr>
<td>Operates change-making machine</td>
<td>1</td>
</tr>
<tr>
<td>Files according to street addresses</td>
<td>1</td>
</tr>
<tr>
<td>Sorts records into charge groups for benefit of next worker</td>
<td>1</td>
</tr>
<tr>
<td>Operates mimeograph duplicator</td>
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</tr>
</tbody>
</table>
ABSTRACT

RECOMMENDATIONS FOR TEACHING RECORD KEEPING
BASED ON JOB ANALYSIS FINDINGS (ROANOKE, VIRGINIA)

by

Sylvan W. Law

In this study, job analyses were made of twenty-two individual record keepers working in over two-thirds of the Roanoke businesses employing twenty-five or more office employees.

The purposes of this research were (a) to determine the duties and responsibilities of clerical record keepers and (b) to prepare a series of recommendations designed to bring the teaching of record keeping into line with actual business practice.

It was found that in the jobs analyzed there were many definite duties and responsibilities typical of clerical record keepers. Some of these were: (a) locating information on records and reports, (b) proofreading records and reports, (c) posting information from one place to another, (d) writing information on records and reports, (e) typing information on records and reports, (f) filing alphabetically, (g) manifolding multiple copies of records, (h) making and receiving telephone calls about records, (i) knowing where to send records and reports, (j) knowing when to transfer records to other files, (k) operating the adding-listing machine, (l) stuffing and sealing envelopes, (m) filing numerically, (n) cooperating with fellow workers, and (o) cooperating with supervisors.
Specific recommendations were made pointing out how to put training for record keeping into effect. In general, they consisted of: (a) reorganization of existing training in business education, (b) establishment of vocational office training courses, and (c) establishment of cooperative part-time training programs.