

ADMINISTRATIVE PROCEDURES AND METHODS

CLERICAL SUPPORT PROCEDURES

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1. GENERAL

1.01 This section defines the role of the clerical support force in the district outside plant engineering office. Relationships with the design personnel and the recommended assignment of tasks are discussed herein. A good performance by this unit is necessary for successful operation of any district.

1.02 The attitude of the clerical group should be to serve completely the design personnel in the execution of all nonengineering tasks. These include preparation of drawings, counting of cable fills, computing and summarizing of costs, filing, print distribution, posting, and many other work items. The force should be trained in various aspects of the work and should be arranged to meet the district production needs on schedule.

Failure of the clerical force to meet these requirements causes an immediate loss in efficiency of the engineering unit and often for plant service and construction forces as well, with a resultant increase in costs for the company.

1.03 To permit the maximum use of their own effort in decision making activities, engineering design personnel have a distinct responsibility to avail themselves of the clerical force in all reasonable ways. They must further recognize the importance of making requests in time to permit adequate preparation for all items. To facilitate a smooth flow of data to meet engineering requirements, the office supervisor and the facility and study managers should develop a programmed list of the larger projects. Flexibility is needed if the numerous small work items that develop in the daily job are to be handled.

2. CLERICAL FORCE ASSIGNMENT

2.01 As discussed in Section AG11.410, the clerical force should now represent about one-half of the personnel in the engineering district. The bulk of this force should be assigned to the office supervisor. Experience indicates that assignment of clerical employees under clerical supervisors promotes efficiency and maximizes control of the work output of each individual. Training under this arrangement can be extensive and can develop a greater cross section of skills for the unit and for each individual. In addition, complex work items can continue to be produced at the desired rate. For instance, due to the press of other more urgent (?) items, cable fill counting is often put off in small groups with a few clerks. With the recommended clerical assignment under clerical supervision such a task can be given to a fixed group to ensure production. Employees in the clerical force can be shifted from time to time to

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different tasks to increase skill levels and to promote job interest.

2.02 Assignment of clerks to the facility and study managers should be held to a minimum. One clerical employee is suggested to serve the needs of each facility engineering group. Typical tasks for this individual would include telephone answering, held order handling and filing, building activity monitor report maintenance, preparatory work of job documents for engineers, occasional cable fill counting, route layout sheet posting, and other related work items. Large jobs that require extensive amounts of time would necessarily be referred to the office supervisor's group, where sufficient force is available.

2.03 In the study group the clerical force will have to be adjusted to handle the requirement involved for projects under way. The basic task of clerks in this section will be to build such new study tools as Exchange Feeder Route Analysis Program (EFRAP) input forms, planning maps, cable facility charts, section terminal records, dedicated plant plans, route layout sheets, and other associated documents. Once these are established, the clerical job in the group will be confined to maintenance activity wherein the force can be reduced to a lower level. During the initial periods of high activity, however, it is anticipated that considerable assistance will be required from the office supervisor's force. The latter will also have to provide assistance in the maintenance program of posting cable fills to section terminal records and route layout sheets.

2.04 The chart shown in Fig. 1 defines group responsibilities for study tool creation and maintenance. These items are also discussed in greater detail in Sections AG11.200, AG11.412, and AG13.365.

3. PREPARATION OF ROUTINE ORDERS AND ESTIMATE WORK PRINTS

3.01 Extensive efforts should be made by the facility manager's clerk and/or the forces of the office supervisor to provide basic prints for the engineer to work with prior to the beginning of most jobs. Clerical personnel should be informed of the engineer's needs as early as practicable. There are a number of types of suitable documents

that will meet these requirements. Some of these are as follows:

(a) **Subdivision Plots:** These are available from developers, county planning boards, and others and may be procured by the engineer, the right-of-way man, or the clerical employee. The print may be too large for convenient job handling, in which case photographic reduction with the aid of an outside firm can be employed to change the document to standard size before application of plant items. In some cases a tracing will be necessary to eliminate unwanted detail. In other cases blocking or scissoring techniques can be used to preclude the need for the tracing work. These procedures include the use of paste-ups and/or cutouts and the insertion of blank sections to eliminate the undesired notations. A sensitized intermediate (sepia) print can be made that will permit production of an opaque (white) drawing for the engineer's use. The intermediate can be used later for the finished job drawing and finally for the records section to transfer mortality items to the records. It is desirable to use the same scale on the job drawing as for record work to facilitate such a transfer operation. Clerical forces working under the direction of the engineer can often draw the cable and count the line requirements on subdivision jobs in advance.

(b) **Highway Improvements Requiring Telephone Plant Changes:** Drawings for these projects are always available at the appropriate department and may be obtained by the engineer or liaison man. Often the scale on sections involving highway crossings is larger than required for records but is adequate and convenient for the job drawing. Creation of the telephone job drawing can either be by tracing or by scissoring and blocking techniques with the intermediate reproduction as appropriate.

(c) **Building Drawings:** Floor plan layouts are ordinarily obtained through the Building Industry Consultants (BIC) Service. As these people proceed with their initial negotiation for facilities, drawings will be procured on which telephone plant can be entered. The ideal situation is to get drawings without electrical outlet detail and with a scale that does not require reduction. When reduction is needed, it is usually cheaper to do so by photographic

ITEM	ENGINEERING MANAGER, STUDIES	ENGINEERING MANAGER, FACILITIES	OFFICE SUPERVISOR
Planning maps	Create and maintain	Reference	Assistance
EFRAP input forms	Create and maintain	—	—
Section terminal record	Design	Reference	Maintain cable fill counts by schedule and by request of study and/or facility manager
Route layout sheet	Initial design	Maintenance and utilization	Assist in initial creation and in maintenance of fills
Master route layout	Initial design and reference	Maintenance and utilization	Assistance
Dedicated Plant Plan	Initial design	Maintenance and utilization	Assist facility manager with maintenance of cable fills
Cable facility charts	Design and maintain	Reference	—
Building activity record	Reference	Create and maintain	—
Facility Control Plan Data Form E-5536	Reference	Maintenance and utilization	Assistance
CPAS forms	Design and maintain	Reference	—
Transmission charts — rural	Initial design	Alternate — Initial design	—

Fig. 1 — Group Responsibilities for Study Tool Creation and Maintenance

means than through the use of proportional dividers in the slower drafting process. After the conduit entries have been made by the BIC section and the builder has given acceptance, prints should be provided to plant service forces for installation use and to outside plant engineers for cable design.

(d) **Existing Plant Location Records:** Under many conditions, the use of an existing record to serve as a basis for job prints is quite appropriate. This would apply to all types of records, but may more often be applicable for underground cable than for other types. The propriety of employing such a process would depend upon the desirability of showing existing plant, as opposed to the clutter and nuisance effect that might be caused by its use. In some situations it would be very practicable to use a portion of a record print, deleting or blanking out other sections to clear space for new plant entries. When the plant proposals are known in advance, the record can often be used for the job and later reused as a posted record. For example, suppose an engineer says that a reinforcing cable is required between two points on an existing cable record. The clerk can enter the new line on the record between the two splices indicated. An intermediate could then be produced, along with a paper print to serve as the "rough" for the engineer. After job details are completed by the engineer, these may be placed by the clerk on the intermediate and job prints produced. This procedure would begin by placing the new plant on the permanent tracing in the regular manner, using a conventional line thickness Mars plastic (or equivalent) pen. To produce the new plant heavy line effect, a Chart-Pak (or equivalent) tape can be superimposed over the permanent finer line. These tapes are supplied in a number of widths, and an appropriate selection can be made based on space and other considerations. After the job papers have been completed, the heavy taped line can be removed from the record tracing, leaving only the permanent line. The record posting can then be completed in accordance with 4.02.

3.02 In cases where a print cannot be obtained to form the base of a new engineering job, the clerk can often draw something in advance to facilitate the designer's work. This might include the existing plant on a single street between relief points, or it could be a network of aerial plant

showing two or more branch feeders and interconnecting distributors. Whatever the example, maximum use of clerical effort should be made in the advance preparation of job drawings for engineers.

3.03 When it is not practical for clerical forces to prepare a print, a freehand sketch should be made by the engineer in the field. This drawing should be neat, but not fancy. It should be made with reasonable proportion but not drawn to scale with the exception of certain special items such as bridge details, special manholes, or other similar specifications. The engineer should endeavor to provide complete field notes; however, some data can be added in the office by the clerk. Preparation of field notes is thoroughly covered in Section AG11.414.

3.04 The clerk can assist in developing existing loop data to permit the engineer to gauge cable additions quickly. Training should be provided to show the care required in developing various loops. For example, standard loops close to a central office may be rounded off at the nearest thousand feet with a simple expression of bridged tap. On the other hand, a long loop into a rural area would require gauge itemization, loading detail, bridged tap, etc.

3.05 Cable fill data should also be prepared in advance by clerical forces, at the direction of the engineer.

3.06 After the field notes are prepared by the engineer, the clerk can develop the finished print. If an intermediate has been prepared, all of the detail can be transferred to this document for reproduction. Clerical forces should make all mortality entries as well as account codes, pair transfer counts, and similar standard notations. They should make all broad gauge costs and work unit and/or man-hour computations. When unusual construction conditions exist, the engineer should indicate the difference for the clerical person's use in making a cost estimate adjustment. Section AG11.500 describes routine order format and provides detailed instructions for all types of plant specifications.

3.07 Many small jobs can be prepared by dictating key elements to the clerk. In certain instances, this might be accomplished by a telephone call from the field. Upon the engineer's return to

the office, the job can be ready for final notations and signature.

4. RECORDS POSTING

4.01 The delegation of the location records posting job to the district outside plant engineering office is highly recommended and offers the following advantages:

- (a) Close coordination is possible between the record clerks and the engineers, and errors can be minimized.
- (b) The use of records as a base for jobs is facilitated. Employees who recognize the portrayal requirements can utilize many reproduction techniques to reduce the time-consuming job of manually creating new drawings. This in itself will pay for additional reproduction equipment.
- (c) Service to engineering, assignment, and construction forces is improved and hence provides resultant benefits to customers.

The possibility of deviations from System and company standards that is inherent due to the tendency of individuals to create their own formats, symbols, etc., can be controlled by a simple audit arrangement performed periodically by the area headquarters staff.

4.02 For posting all cable location records, a method to be called "Initial Permanent Posting with Final Completion Verification" is recommended as the System standard. This method calls for an initial posting of the job condition as plant will exist at the issue of any routine order or specific estimate work print. This means that count changes, including interim splicing conditions, will never appear on the record print. When the job is posted, the final plant condition should be portrayed. The only exceptions to this rule will be as described in this paragraph. When major sections of cable are removed, an intermediate transparency showing the plant condition before engineering started should be made and filed with the original tracing. In the event of an accounting reconciliation between the continuing property record and the plant location record, a print of the intermediate can be made and forwarded in place of the original. These intermediates should be made for any substantial pieces of cable being removed. When cable stubs are removed, these

can be crossed out on the original tracing and marked in lightly with a pencil. Other jobs (such as small routine orders that make cable count changes or provide terminal replacement, etc.) may be posted in pencil on the original tracing. These are examples of the exceptions mentioned previously. The permanent record tracing file will be increased by about 15 to 20 percent to accommodate the intermediates provided for removal operations. This is considered reasonable in view of the savings obtained through the elimination of duplicate postings required in other methods. When the job is completed, minor changes in plan, length adjustments, etc., can be introduced on the original record. The year placed can also be posted. The verification column can then be dated, completing work for this order. If an intermediate has been required, it may be discarded at this time. Under the initial permanent posting plan, paper copies should be dispatched to the field immediately. This is intended to preclude the need for most posting commonly found on the engineer's and the plant service prints. These postings should be confined to brief job number notations and made only when delay is expected in the initial permanently posted prints. It is important that field personnel develop confidence and know that they may anticipate prompt delivery of record prints. When confidence breaks down, they begin to post more and more information on office prints. They become reluctant to discard the old copy and often retain it, disposing of the new print instead. The record group should therefore provide prompt issuance of updated record prints to obviate field posting. Posting of large estimates should be under way by the beginning of work operations and delivered to the field before 25 percent of the work is completed. When subsequent related routine orders are prepared, the records group should endeavor to include these postings with the new estimate entries. However, the clerk should be trained to recognize the final cable count planned for any cable under the combined group of jobs. If this is not done, the first job (the estimate) may be posted last, thereby offering the potential of posting an interim count instead of the final condition. High cost routine orders that require upper management approval, certain jobs requiring right-of-way, and any others that are withheld from release to construction forces, are types for which initial permanent posting should be deferred until clear. These and the estimate posting group described previously are types that warrant job notation postings on the plant engineer's paper prints. When specific estimates and related

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subsequent routine orders are being completed, the latter are often closed out first. The initial permanent posting plan offers an opportunity to make the verification on an extended section provided by the routine order since the estimate cable is already in place on the tracing. Most job revisions will not require record posting prior to final verification. Such revisions include numerous material substitutions and other similar approved changes in plan. However, when a major change is made which affects current and future facility provision considerations, the revision should be made promptly. As stated, initial permanently posted record prints should be dispatched to the field immediately. Verification issues of separate routine order record postings should also be released at once. However, verification issues of estimates and related routine order record postings may be withheld until all jobs are complete and posted. The clerk, advisedly, on the same premise with the engineer, should enter new paper prints in the appropriate file. Old prints should be discarded at this time. However, care should be used before destroying current cable fill information posted on the old copy. Pole records should be posted initially in pencil, with no further entries required until the job is completed. This applies to companies using either the manual or the mechanized system. A simple job notation should suffice for the initial entry.

5. RECORD AND JOB DRAFTING MATERIALS

5.01 The three standard size cable records recommended for use in the System are 11 by 17 inches, 17 by 22 inches, and 22 by 34 inches. The 17- by 22-inch size is suggested as the most suitable record to serve the largest number of objectives for location record work. This size will permit the display of an adequate amount of plant and yet not be too large when used as the basis of a construction print. The width of 17 inches can also be accommodated in some of the smaller reproduction machines appropriate for use in the more remote districts. These machines will be more fully discussed in Section AG11.415, which describes office layouts and equipment.

5.02 Drafting vellums, cloths, and films should be purchased as ready-made forms that have the preprinted data entered on the reverse sides to facilitate erasing processes. A new form arrangement is provided to accommodate the "Initial Permanent Posting with Final Completion Verification"

procedure and the increased use of record drawings as a basis for job prints. The new posting procedure requires the use of an adjacent column on the record form for verification data entry. A double title block is recommended to accommodate the combined use record and job form. An example of this is shown in Section AG11.500.

5.03 To handle economically the large volume of paper reproduction required for outside plant engineering records, a procedure that provides for the production of paper prints from transparent (or translucent) originals has been in use for a number of years in the operating companies. This system employs a process called Diazo and is commonly done on Bruning or similar types of reproduction machines. These translucent originals that have been the major component of outside plant location records have been created from a variety of different materials. The linen cloth record has been the "old standby" for many years and continues to offer a number of advantages for further use. It has excellent aging qualities, provides good quality reproduction, has good erasing qualities, and has sufficient strength for normal office use. The chief disadvantage is a poor stability or "raglike" characteristic that allows the record to collapse during handling. The newer permanent record material is a polyester film often called by the trade name Mylar. The latter has superior qualities in all of the basic areas mentioned previously. It does present some handling problems, however, due to an excessive amount of adhesion when stored in typical flat file units. Mylar is about 25 percent higher in cost than equivalent linen material. Both cloth and polyester film are recommended for permanent record use. Vellum transparentized papers have been used by some companies but are not recommended for the long-term record use conditions. Their erasability and strength characteristics are only fair, and they do not offer the life span of other materials. They can be used under short-term conditions, however, such as for hand-drawn job tracings. With a sufficient amount of the latter, their cost (which is only about one-quarter of the cloth and polyester film materials) is very attractive for this purpose. There are a number of sensitized surface papers that can be used for the intermediate (or sepia) function. For the "special removal print" intermediate where only a few copies are anticipated (see 4.02), an inexpensive translucent paper would serve adequately. An intermediate made of a record from which to produce a job would require a better

quality, however, and a sensitized polyester film of a light grade is recommended.

5.04 Drafting forces should take advantage of recent improvements in pens, pencils, erasers, and line tapes to achieve maximum production performance and quality in the handling of records and job papers. New plastic pens provide a good, stable line or letter that can be quickly removed by proper erasing equipment, with minimum damage to the record surface. This technique is so improved that it cancels earlier recommendations for maximum use of pencil drawings. Penned lines and letters provide superior reproduction clarity and are suggested as the primary media for records work. Electric erasers should be standard equipment in all record units. One use of drafting tapes is described in 3.01(d). Other applications include the use of ready-made dotted- and dashed-line tapes to symbolize exchange boundaries, division of feed, and similar coded lines. These are most appropriate in estimate presentations. The use of colored line tapes is desirable for some special presentations with single copy use. Usage for multicopy work is discouraged since standard reproduction equipment will not accommodate the color feature.

5.05 The use of typewriter drafting is an acceptable method for some types of job preparation and records work. However, this system has a limited flexibility and requires the purchase of long-carriage machines, thus reducing the attractiveness of the procedure for many applications.

6. RECORDS QUALITY CONTROL

6.01 With district operation of plant location records, quality reviews should be made quarterly to ensure consistency with System and company standards. The responsible supervisor on the area outside plant engineer's staff should visit each district and review 100 records on which activity has occurred in the previous quarter. This activity may be initial permanent posting or final completion verification. The chart shown in Fig. 2 is the type recommended for such a control. Suggested percentages are shown for the various groups of records; however, these may be varied at the discretion of the reviewer when operation activity differs appreciably from proposed amounts. Columns are provided to separate symbol and format deviations from clarity deviations and other types. Space is provided to permit the reviewer to enter

specific comments about items requiring correction, or if appropriate, on procedures that warrant complimentary notes. These comments should be discussed with local supervision before the report is submitted to the area outside plant engineer. A formal sampling plan is not suggested for the plant location records quality review. Instead, the choice of records reviewed at each visit is to be based on the judgment of the observing supervisor. He may, for example, concentrate on a subject of earlier deficiency or look for problems noted at other locations. District and/or division comparison reports are not suggested for use in this program. It is intended that the information provided in the space for specific comments serve as the corrective action material for the area outside plant engineer. The quality review procedure for outside plant location records complements other plans such as the Management Quality Control Plan for Outside Plant Engineering and the Construction Quality Control Plan. Observations made in the records review should not duplicate types done under other plans. Standards provided in the AG13.300 series should be the primary guide for the records reviewer.

7. CLERICAL FORCE LOAD PLANNING

7.01 The clerical work load must be analyzed monthly to maintain necessary services for engineers and to provide proper force control. It is imperative that the efforts of the design force and the clerical support force be kept in balance. To sustain the necessary clerical group, good factual data should be provided to obtain management concurrence in proposed force levels. Figure 3 depicts a suggested force load chart.

7.02 The office supervisor is responsible for compiling the load estimates for the various functions of the clerical support job. This supervisor must coordinate efforts with study and facility managers. Since the clerical unit provides backup for the others, the office supervisor must be aware of the activities within those sections and must recognize and accept overflow work volumes. In the development of the force load chart, it is suggested that the lump hour assignments be included in the study and facility manager categories, with overflows recorded in other appropriate columns. The office supervisor should assume that all service order handling, building activity recording, and most advanced job preparatory work for engineers will be done by the clerk in the respective facility

RECORDS QUALITY REVIEW				CO
Area _____		Division _____		District _____
				Quarter Ending _____
Type of Record		Number Reviewed	Number of Deviations Symbols & Format	Number of Deviations Clarity & Other
UG Cable	* (20%)			
Aerial & Buried Cable (Facility)	(40%)			
UG Conduit & Buried Cable (Location)	(20%)			
Block and Building Cable	(10%)			
Outside Plant Maps, Pole Records Toll & Trunk Cable Records	(10%)			
Total		100		

Explanation of Deviations Summary (use reverse side if additional space is necessary)

* Suggested percentage of total

Fig. 2—Sample Records Quality Review Form

CLERICAL SUPPORT FORCE LOAD CHART

Date of Report 9/1/68

Function	A. Factor Hrs/Item	Area _____ Division _____ District _____																							
		January		February		March		April		May		June		July		August		September		October		November		December	
		Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs	Items	Hrs
Job Preparation																									
Routine Orders	2.0	150	300	150	300																				
Estimate Prints	10.0	30	300	10	100																				
Records Posting																									
Initial Permanent Posting																									
Routine Orders	1.5	200	300	100	150																				
Estimate Drawings	7.0	20	140	35	245																				
Verification																									
Routine Orders	0.2	50	10	200	40																				
Estimate Drawings	1.0	50	50	15	15																				
Cable Fill Counting Per Route																									
Post Section Term Record	20.0	15	300	25	500																				
Post Route Layout	6.0	15	90	25	150																				
Misc																									
Reproduction, Distribution, Etc.	-	-	150	-	150																				
Joint Utility Forms, R/W, Etc.	-	-	150	-	150																				
Secretarial	-	-	150	-	150																				
Etc.																									
Special One-Time Jobs																									
Make New Route Layouts	-	-	-	-	300																				
Make DOP Plant Plans	-	-	-	-	-																				
Make CATV Layouts	-	-	-	-	-																				
Make Section Terminal Records	-	-	-	-	300																				
Make Separation Study	-	-	-	-	-																				
Etc.																									
Records Rehabilitation	-	-	-	-	-																				
Study Group Clerical (Planning Maps, EFRAP, Etc.)	-	-	300	-	300																				
Area Group Clerical (Building Activity Reports, Etc.)	-	-	450	-	450																				
Other																									
Training	-	-	-	-	-																				
Disability	-	-	-	-	-																				
Etc.	-	-	-	-	-																				
Total Hour Requirement			2690		3300																				
Total Hours Available			2700		2700																				
Deficit or Overage			-		600 B																				

Notes:
 A. The hours per item must be developed in the operating area. Factors shown are for example only.
 B. A typical deficit note might be: "Four employees borrowed from traffic in an off-season period."
General - Only 2 months are shown in this sample chart. The office supervisor should plan his force requirements several months ahead.

Fig. 3—Sample Clerical Support Force Load Chart

manager's group. Similarly, assigned clerks in the study section should be expected to prepare planning maps, EFRAP input forms, and cable facility charts and to participate in section terminal record preparation as well. As experience increases, load adjustments can be made as appropriate.

7.03 In the administration of the district clerical support group it is recommended that a nucleus of personnel be assigned to each of the major functions, to promote continuity of work flow. Flexibility should permit the individual to participate in certain job preparation work and related record work where efficiencies can be achieved. Job assignment changes should be made periodically to develop a cross section of skills throughout members of the support force.

7.04 Although a number of job operations are integrated between functions, the office supervisor should make a unit analysis for each function in developing the force load chart. The routine order preparation and related records posting work items can be developed by trending historical data, and the hours per item can be computed by analyzing present performance. This factor should be updated as technology improves. Through consultation with facility and study managers, estimate work print preparation and related records posting work volumes can be obtained. Although these may be averaged in projecting long-term trends, detailed volume analysis is suggested as project plans are formulated. This is particularly important when project schedules coincide.

7.05 The cable route is suggested as the unit for estimating cable fill counting clerical work loads. Although it is recognized that many requests will be made for portions of routes or for a total wire center, the route is probably the best average for estimating purposes. The unit is divided into the entering of counts on the section terminal record and the subsequent posting on route layout sheets. The former is generally associated with submission of estimate authorizations, whereas the latter is most often connected with preparation of detail plans. Each district should develop its own hourly factor for fill counting and related posting clerical work operations.

7.06 The introduction of new programs that develop large clerical loads on a one-time basis should be entered on the chart as a separate item. Since production of current work items

must be maintained, the company may wish to handle one-time projects with employees hired temporarily, with personnel borrowed from other departments, or through contract. Work done by any of these methods should be carefully supervised to ensure that adherence to System and company standards and quality is obtained.

7.07 Allowances must be made for regular miscellaneous tasks performed by clerical forces. Some of these include print reproduction, assembly, and distribution; preparation of paper work for right-of-way transactions; completing forms for joint utility negotiations; computing loops for special circuit lines, etc. In addition, time must be afforded for secretarial work and for preparation of certain administrative reports.

7.08 Office supervision should make use of "load levelers" in the administration of the clerical force load control operation. The main item in this category is the rehabilitation of worn records. Records that are still legible should be replaced, using a sensitized polyester film. Others, including those that require respacing, will need to be redrawn.

8. RECORDS STATUS REPORTS

8.01 The System recommends that each operating area minimize the amount of unposted and/or unverified records at all times. To control this item, a report should be prepared and submitted monthly to the outside plant engineer at the area level. Copies should be sent to the auditor of disbursements and to the construction superintendent. The suggested report shown in Fig. 4 provides for entries on a monthly basis, and managers should view trends to determine problem areas. They should also be aware of the backlog of a day's work for the appropriate force involved. As described in 4.02, the initial permanent posting of routine orders should be done immediately (within one or two days) after the job is released. The entry for this item should therefore be small. An age breakdown is provided for routine orders and estimates not completed by construction forces. This is included to permit analysis of unverified records due to all causes. Job scheduling and completion reports and coordination efforts with construction forces are discussed in greater detail in Section AG11.440.

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8.02 The office supervisor is responsible for keeping plant location records as current as practical. This requires constant surveillance of his own posting work and also includes aggressive negotiations with other departments to complete old work items. A detail job list report is recommended monthly to administer this function. Figures 5 and 6 are examples of reports for routine orders and estimates, respectively. Suggested notes for corrective action are made on the form.

9. SUMMARY

9.01 The clerical support procedures defined in this section are provided to improve operations in System outside plant engineering offices. They are directly related to force arrangements prescribed in Section AG11.410 and to functional production procedures described in Section AG11.412. System companies are urged to adopt the recommendations.

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RECORD STATUS REPORT

Type of Operation	Area _____ Division _____ District _____											
	January	February	March	April	May	June	July	August	September	October	November	December
Routine Orders												
Initial Permanent Posting not Complete	25 (5) A.	50 (7)	75 (7) B.									
Not Completed by Construction Forces												
Less than 90 Days Old	200	150	160									
90 Days to 1 Year Old	70	65	75									
Over 1 Year Old	10	15	12									
Completed by Construction Forces but Held in Accounting	30	100 C.	120									
Cleared by Accounting but not Verified by Location Records	30	25	35									
Estimates												
Initial Permanent Posting not Complete	3 (1) A.	2	2									
Not Completed by Construction Forces												
Less than 6 Months Old	4	3	2									
Over 6 Months Old	2	2	3									
Completed by Construction Forces but Held in Accounting	2	2	2									
Cleared by Accounting but not Verified by Location Records	1	1	1									
<p>Notes:</p> <p>A. The bracketed figures (5) and (1) represent the number of routine orders and/or estimates that cannot be posted for some reason.</p> <p>B. Negative trend should be reviewed by engineering managers and problem solving steps taken.</p> <p>C. Large increase in other department backlog should be discussed with disbursement accounting managers to obtain corrective action.</p> <p><u>General</u> - Figures are demonstrative only. They are not to be taken as typical for any particular district.</p>												

Fig. 4—Sample Record Status Report

Date of Report 9/1/68

_____ District

UNCOMPLETED AND/OR UNVERIFIED ROUTINE ORDER LIST

Routine Order Number	Date Released to Const	Date Initial Permanent Posting	Age Category - Date of Release to Date of Report			Date Completed by Const	Date Cleared by Acct	Date Verified in Location Records
			0-90 Days	90 Days to 1 Year	Over 1 Year			
71234	5/15/67	5/16/67			✓ A.	-	-	-
74000	1/15/68	1/17/68	-	- B.	-	7/15/68	-	-
74100	4/30/68	5/ 3/68	-	-	-	5/15/68	- C.	-
74150	5/ 6/68	5/ 9/68	-	-	-	5/20/68	5/31/68	- D.
74200	5/20/68	5/22/68	-	-	-	7/15/68	8/ 5/68	8/20/68 E.

Notes:

- A. Requires discussion with construction forces to determine plans for completion.
 - B. Construction Age Category not checked when job is completed.
 - C. When extended time has elapsed since construction completion without accounting clearance, inquiry should be made to the latter to determine plans for release.
 - D. Investigate reason for delay in not completing verification in location records.
 - E. To show all concerned parties that a job is fully completed and verified in the records the date may be entered in the report month. This job entry would be deleted in subsequent months.
- General - Data entered on this form is demonstrative only. Time intervals are not necessarily typical for those found in any specific district.

Fig. 5—Sample Report for Routine Orders

Date of Report 9/1/68

_____ District

UNCOMPLETED AND/OR UNVERIFIED ESTIMATE LIST

Estimate Number	Date Released to Const	Date Initial Permanent Posting	Age Category - Date of Release to Date of Report		Date Completed by Const	Date Cleared by Acct	Date Verified in Records
			Less than 6 Months	Over 6 Months			
12000	3/ 1/68	4/10/68	-	-	6/25/68	- A.	-
12100	3/15/68	4/ 5/68	-	-	6/20/68	7/10/68	- B.
12200	6/ 1/68	6/25/68	✓		-	-	-
12250	7/ 1/68	- C.			-	-	-

Notes:

- A. Determine accounting plans for clearing estimate review since elapsed time is excessive.
- B. Determine reason for location record verification delay.
- C. Determine reason for initial permanent posting delay.

General - Data entered on this form is demonstrative only. Time intervals are not necessarily typical for those found in any specific district.

Fig. 6—Sample Report for Estimates