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Office Automation Clerical and Assistance Series

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SERIES DEFINITION

This series includes all positions the primary duties of which are to perform office automation work, which includes word processing, either solely or in combination with clerical work, when such work is performed in the context of general office clerical support. Also included are positions which supervise work characteristic of this series when the knowledge, skills, and abilities for general office automation support work are essential requirements of the supervisory position. Positions in this series require: (1) knowledge of general office automation software, practices, and procedures; (2) competitive level proficiency in typing; and (3) ability to apply these knowledges and skills in the performance of general office support work.

EXCLUSIONS

1. Classify in the [Secretary Series, GS-0318](#), a position which is the principal office clerical or administrative support position in an office and operates independently of any other such position in the office.
2. Classify positions involving office automation work which do not require a fully qualified typist, in the specific series appropriate for the subject matter work performed, or in the appropriate general group series, e.g., the [Financial Clerical and Assistance Series, GS-0503](#), or the [Miscellaneous Clerk and Assistant Series, GS-0303](#).
3. Classify in the [Correspondence Clerk Series, GS-0309](#), positions in which the duties are to supervise or perform the composition or review of correspondence when the work primarily requires skill in the composition of letters and memoranda.
4. Classify in the [Computer Operation Series, GS-0332](#), positions in which the paramount duties are to operate or supervise the operation of the controls of a digital computer, including the operation of peripheral equipment.
5. Classify in the [Computer Specialist Series, GS-0334](#), positions with responsibility for managing, supervising, or performing the design, implementation, maintenance, or modification of digital computer systems where the primary need is knowledge of digital computer requirements and techniques.
6. Classify in the [Computer Clerk and Assistance Series, GS-0335](#), positions in which employees perform or supervise data processing support and services for users of digital computer systems. This work requires knowledge of external data processing sequences, controls, procedures, or user and programming languages.

7. Classify in the [Data Transcriber Series, GS-0356](#), positions in which the primary purpose is to operate or supervise the operation of a keyboard to transcribe or verify data in a form that can be used in an automated data processing system.

OCCUPATIONAL INFORMATION

Positions in the Office Automation Clerical and Assistance Series have emerged with the evolution of automated systems and the spread of the use of these systems for general office support.

The technology used in office environments for producing textual documents first evolved from manual typewriters to electric typewriters. Typing on electric typewriters required less physical force, but offered few new capabilities for creating textual documents. Technology then advanced to electronic typewriters that could store and retrieve from memory (electronically stored records) limited amounts of information. The electronic typewriter, introduced in the early 1970's, was the first of the automated office systems. It provided greater flexibility in creating and editing textual documents, e.g., it provided a few automated functions such as center, bold, underline, spell check, and editable memory.

Since the advent of electronic typewriters, automated office systems have evolved along three major dimensions:

- (1) from automated systems with a limited capacity for storing information toward automated systems with an increasingly greater capacity for storing information;
- (2) from automated systems designed for single users toward automated systems designed for multiple users; and
- (3) from automated systems with the capability for producing only textual documents toward automated systems with multiple capabilities such as producing textual documents, reports, spreadsheets, and graphics; sending and receiving mail electronically; and performing mathematical computations.

In the 1970's, office automation technology consisted primarily of word processing systems in the form of text-editing electronic typewriters without screens and with limited capacity for storing information. These gave way to dedicated word processing systems with screens for viewing the text and the capacity to store unlimited information on cassettes or diskettes. These systems, however, had limited capability for the manipulation of data and were used almost exclusively as a word processing tool for preparing typewritten material, primarily by clerk-typists, secretaries, and others.

With the rapid evolution of electronic technology in the 1980's, office automation systems were developed that provided for the storage, manipulation, computation, reporting, and transmission of large amounts of information. These office automation systems were designed as a single piece of

stand-alone equipment or as a work station or terminal linked to a mainframe, mini-computer, or local area network. They provided the capability for using more than one type of software within the same system. Now, in addition to word processing, these systems could provide capability for electronic spreadsheet, database management, electronic mail, desk-top publishing, and other types of software.

In most organizations these new office automation systems were purchased in place of dedicated word processors because the older machines were no longer available. Once purchased, however, it was logical to make fuller use of the capabilities that were available to improve office productivity. In the process, general office support duties were expanded to include use of a variety of software types in addition to word processing software.

Today, in addition to word processing software, office support staff frequently use database management, electronic spreadsheet, electronic mail, electronic calendar, and other types of office automation software. These different office automation systems allow automation of much of the administrative work of the office, e.g., office budgeting, forms tracking, action item tracking, time and attendance, directories and logs, correspondence and memoranda.

Current trends in office automation technology indicate that many offices have recently obtained or are in the process of obtaining electronic systems with multiple software capabilities. Also, an increasingly greater variety of functions are being included within software packages. Word processing software packages, for example, include increasingly greater capabilities for graphics, calculations, and sorting information. At the same time, an increase in user aids such as menus and screen prompts facilitates use of the full range of functions available within software packages. These increases in the types of software available, the functions available within software packages, and various user aids generate new opportunities for automating the administrative work of the office.

As office automation technology continues to advance, the exact capability, form, speed, and combination of office automation systems may change. New systems will be covered by the Office Automation Clerical and Assistance Series, GS-0326, as long as the basic intent is use of office automation systems for general office support.

RELATIONSHIP OF THIS SERIES TO THE CLERK-TYPIST SERIES, GS-0322

The Clerk-Typist Series, GS-0322, includes those positions the primary duties of which are to perform typing work using manual or electric typewriters to produce textual documents from written material or voice recordings. The work is performed either solely or in combination with general office clerical work, except when the clerical work requires knowledge of a specialized subject matter field. Positions in the GS-0326 series, like those in the Clerk-Typist Series, require fully qualified typists to produce textual documents, either solely or in combination with general office clerical work. Unlike clerk-typist positions, however, positions in the GS-0326 series use a knowledge of office automation hardware and software systems.

RELATIONSHIP OF THIS SERIES TO OTHER SUBJECT-MATTER SERIES

In addition to specialized clerical duties, some positions may also be assigned significant office automation duties as an integral part of their responsibilities. These positions are excluded from the GS-0326 when the primary requirement is knowledge of a specialized subject matter field. They are classified in whatever series is appropriate for the specialized work, such as the [Personnel Clerical and Assistance Series, GS-0203](#); [Civilian Pay Series, GS-0544](#); [Editorial Assistance Series, GS-1087](#); [Supply Clerical and Technician Series, GS-2005](#); or the [Miscellaneous Clerk and Assistant Series, GS-0303](#).

Some positions in this series may include duties properly classified in other more specialized series. To determine whether a position with such a mixture of duties should be classified in the GS-0326 series, decide the primary purpose or focus of the position. If the primary purpose is to provide general office clerical support, if the position requires a knowledge of office automation hardware and software systems, and if the position requires the typing skills of a fully qualified typist, then the position is appropriately classified in the GS-0326 series. If the primary purpose of the position is to perform clerical work that requires knowledge of a specialized subject matter field, regardless of whether or not the position uses office automation systems, the position is classified in the appropriate specialized clerical series.

Where there is a question regarding the most appropriate series, other factors to consider in making a decision include: (a) the paramount qualification requirement; (b) the highest grade duties of the position being evaluated; (c) the series of positions that are in the line of promotion to and from the position being evaluated; and (d) recruitment sources.

TITLES

Office Automation Clerk is the title for positions at GS-4 and below.

Office Automation Assistant is the title for positions at GS-5 and above.

Lead Office Automation Clerk and *Lead Office Automation Assistant* are the titles of positions which meet the criteria in the [Work Leader Grade Evaluation Guide](#).

Supervisory Office Automation Assistant is the title for positions which meet the criteria in the [General Schedule Supervisory Guide](#) (In Department of Defense components use titling instructions for supervisory positions in other guides.)

PARENTHETICAL TITLES

The parenthetical title *Office Automation* is added to the title of positions excluded from this series when such positions require significant knowledge of office automation systems and a fully qualified typist to perform word processing duties. The abbreviation, *OA*, may be used to prevent titles from becoming unnecessarily cumbersome.

When the OA parenthetical title is used, the *Typing* designation will not be used. When appropriate, however, other parenthetical titles are combined with the OA title, e.g., Secretary (Stenography/OA). Whenever a parenthetical title is used, the position description must reflect the duties which require use of that title.

EVALUATION OF POSITIONS

Appropriate grading criteria are selected as follows:

Evaluate office automation work using the [Office Automation Grade Evaluation Guide](#).

Evaluate other aspects of the work of positions in this series not covered by the Office Automation Grade Evaluation Guide by the most appropriate standard or guide depending on the duties performed, e.g., the [Grade Level Guide for Clerical and Assistance Work](#) or standards for specialized subject matter work.

Evaluate leader positions using the [Work Leader Grade Evaluation Guide](#).

Evaluate supervisory positions using the criteria in the [General Schedule Supervisory Guide](#), (In Department of Defense, use criteria for supervisory positions in other guides.)