



Infor Distribution FACTS Office Automation Users Guide

Release level 9.2.0

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Contents

- About this guide..... 5**
 - Intended audience 5
 - Organization..... 5
 - Related documents 6
 - Contacting Infor..... 6

- Using Office Automation..... 7**
 - Overview 7
 - Major features of Office Administration 7
 - Program Concepts..... 8
 - OA Messages 9
 - Work flow 9
 - OA Calendar 9
 - Program Concepts 9
 - Inquiries 10
 - OA Reports & Prints 10
 - Program concepts 10
 - OA File and Infrequent File maintenances 11
 - Program concepts 11

- Office Automation Procedures..... 13
 - Signing in to OA 13
 - Managing phone messages 13
 - Managing general messages..... 14
 - Managing messages (general and phone) 14
 - Managing scheduled events and daily memos..... 15
 - Displaying phone number information 17
 - Displaying signed-out employees 17
 - Displaying employee information 17

About this guide

This guide describes workflow, concepts and procedures for using the Infor Distribution FACTS Office Automation module.

Intended audience

This guide is for FACTS end users, managers, in-house analysts, and trainers who require an understanding of the product and how to use it.

Organization

This table shows the chapters of the guide:

| Section | Description |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| About this guide | Lists the intended audience as all users. Describe the purpose and the related documentation. |
| Overview | The overview section described the purpose of the application in terms of the business solutions that it provides, program listings, and menu trees, as applicable to the application. |
| Work Flows & Program Concepts | This section includes process flows for each module, program descriptions and concepts that are key to using this FACTS module. |
| Transaction Procedures | This section contains daily, weekly and end of year procedures as well as step-by-step processing information for OA entry, inquiry and transaction programs. |

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in "Contacting Infor" on page 6.

Refer to the contents of the FACTS Version 9.2 & Incrementals folder located at www.inforxtreme.com. Click Search>Browse Documentation>FACTS> Version 9.2 & Incrementals to view a document tree similar to this.

- *FACTS Version 9.2 & Incrementals*
 - *Installation and Administration Guides*
 - *Installation Guide*
 - *Product Compatibility Matrix*
 - *Hardware Guide*
 - *Release Notes*
 - *9.2.0 Release Overview*
 - *Incremental Release Notes*
 - *Integrations*
 - *Infor Solutions*
 - *Infor Distribution Storefront*
 - *eCommerce*
 - *Credit Card*
 - *CenPOS*
 - *WMS*
 - *Accellos*
 - *Document Management*
 - *Uniform*
 - *Users Guides*
 - *Implementation Guides*
 - *Standard modules User Guides*

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Using Office Automation

Overview

The Office Automation system helps you run your office internally. Use it to enter phone directories, record phone messages, send general messages, view phone and general messages, use a sign-out board, enter schedules and maintain and print mailing labels. All employees should have access to the Office Automation module.

Use the Office Automation menu to access these menus.

Sign In/Out

Messages

Calendar/Scheduler

Inquiries

Reports & Prints

File Maintenances

Major features of Office Administration

Use the Employee F/M program to set employees up in the system (click **Office Automation>File Maintenances>Infrequent File Maintenances>Employee F/M**). As employees are set up, they are assigned to a user code so that whenever employees sign in to Infor Distribution FACTS with their user codes, the Office Automation system recognizes the codes and validates them with the employee code.

Print an Employee Listing (click **Office Automation>Reports & Prints>Employee Listing**) to verify which employees are in the OA system. Once employees are set up, you can enter group codes.

Group codes (click **Office Automation>File Maintenances>Infrequent File Maintenances>Group Code F/M**) enable you to set up distribution lists that you can send a message to a particular group code rather than an individual message to every employee. For example, there might be 10 employees in the Sales & Marketing Department. You could set up a group code called SALES with each Sales & Marketing employee assigned to that group code. When the Director of Sales & Marketing needs to announce a meeting for the entire department, he can send one message using the group code. Each employee included in the SALES group code gets the message.

Office and personal phone directories are another feature of Office Automation. Employees may set up general phone directories for all employees to access. Employees may also set up personal directories that are only accessible by the employee (user code) who entered the record initially. General and personal phone directories may be printed by running the Telephone Directory print program.

The Office Automation system also helps you keep track of an employee's whereabouts through the use of a sign out board. When employees are leaving the office the Sign In/Out program is used. Employees enter the time, where they are going, the expected return time and where they can be reached. The Sign Out Board Inquiry program may be used to locate an employee's whereabouts at any time. When employees return to the office the Sign In/Out program is used again to sign back into the office. At the time when an employee signs in the system displays a welcome communication, and if the employee has any messages on file, a communication is displayed indicating that there are messages.

General and phone messages may be entered for employees. There is a Phone Message Entry program where you can enter phone messages including message options (example, please call back, etc.). There is also a General Message Entry program where users enter general messages to be sent to an individual employee or a group code (group of employees).

If an employee has any new phone or general messages that have not been read, a message to that effect will display on any menu screen the employee accesses. Messages may then be retrieved through the Message Viewing/Disposition program. Once a message has been viewed, employees may indicate the message has been read, delete the message or send the message to another employee.

Employees can maintain their schedules through the Calendar/Scheduler program. The calendar is available to display one day at a time (where scheduled activities may be entered for each half hour), one week at a time (display only) and one month at a time (display only). Company calendar notes may be entered on the daily calendar through the Company Calendar Notes F/M. Employees' schedules are then available for printing through the Schedule Print program including unscheduled time.

The Office Automation System includes a Mailing Label System. Each mailing label must be entered into the system through the Mailing Label F/M program. Each label entered may be assigned up to 5 mail codes. Mail codes must be previously set up through the Mail Code F/M program. An example of mail codes might be PRO - prospects or GEN - general company mail-out. Mail codes are used to select and sort mailing labels to print. The Mailing Label Report lists mailing labels by mail code along with selected file information. Mailing labels may be printed for specific mail codes through the Mailing Label Print F/M program.

Program Concepts

Sign In/Out (OAE110)

The Sign In/Out (OAE110) program is an electronic sign in/out board. Users can sign in and out of the OA system to let others know whether they are out and what time they anticipate being back in the office. Users must be set up for OA in the Employee F/M program to use the Sign In/Out feature. If the employee is previously signed in, the program knows the employee is signing out. If the

employee is previously signed out, the program knows the employee is signing in. The program prompts users to enter their employee code at the bottom of the menu screen. When this employee is signed in, the sign-in message is displayed. If this employee has any messages, YOU HAVE MESSAGES is displayed along with the sign-in message. Employees that are signed out are displayed in the Sign-Out Board program. Sign-out information is stored in the employee file.

OA Messages

The Office Automation Messages subsystem allows users to send phone and/or general messages to employees set up in the OA system. It also lets users view messages they sent to another employee and either update or delete these messages.

Work flow

Use the programs in this order.

1. The Phone Message Entry program allows you to enter, update, send or delete phone messages for employees. Once you enter phone messages, you can view them in the Message Viewing/Disposition program.
2. The General Message Entry program allows you to enter, update, send or delete general messages for employees. To run this program, you must be set up in the Employee F/M program. You can view general messages in the Message Viewing/Disposition program.

The General Message Entry screen consists of two sections. The upper portion of the screen is called the header. This is where you enter the message number and employee, etc. The lower portion is called the line-item entry, where you can enter each line of the message.

3. The Message Viewing/Disposition program allows you to read, send or delete phone and/or general messages for employees

OA Calendar

Program Concepts

Use the Calendar/Scheduler (OAE310) program to enter, change or delete an employee's scheduled events and daily memos. Company notes can also be viewed. This program consists of three screens: daily, weekly and monthly. All entries are entered on the daily screen, except company notes. Enter this information in the Company Calendar Notes F/M program.

Inquiries

The Office Automation inquiries allow you to perform office and personal phone-number alpha searches, view information about employees and see who is signed out.

1. The Phone Directory Search allows you to display office and personal phone number information in alphabetical order. After choosing the office or personal phone directory, enter the beginning alphabetical sort key or page through the phone number and information file in alphabetical order. For each record, the program displays alpha sort key, name, phone number and memo. To display more information about a phone number, enter its line number. This displays information such as contacts, phone numbers, memos, address, city, state and zip.
2. The Sign Out Board allows you to display information on employees who have (or have been) signed out in employee order.
3. The Employee Inquiry allows you to display employee information in employee order. To look up employee information, press Enter. Use the arrow and Page Up and Down keys to scroll through the list. The Employee Inquiry displays every user set up in the OA system, as well as their employee code, department, location, and work phone number. You can look up additional information, if provided, on each user by entering the line number. Title, home phone number, address and memo will appear across the bottom of the screen.

OA Reports & Prints

Excluding the Office Automation phone directory, the OA report programs have the option of printing in different orders (depending on the user's desired information on the report). The OA report programs allow the user to choose the range of information to print. For example, the Employee Listing allows you to print the listing in employee or department order. If the user chooses to print in employee order, the user would then need to choose the beginning and ending employee. Except for the Mailing Label Print, these reports also allow the user to determine what standard information is to be included.

Program concepts

The Telephone Directory allows you to print either an office or a personal directory, both in alpha order. The personal directory only prints if the user is set up for OA (must be a valid employee). Report information includes the following: alpha, name, address, phone(s), memo(s), contact(s) and ID. The total number of phone listings printed is also included.

The Employee Listing allows you to print employee information in employee or department order. Report information includes: employee code, name, address, title, department, location, work phone number and home phone number. The total number of employees printed is also included.

The Calendar/Scheduler Print allows you to print an employee's schedule of appointments, memos, events, etc., for any period of time set up through the Calendar/Scheduler program. The user may also include unscheduled time. Report information includes: employee code and name.

- Scheduled time: day, date, time (and AM or PM) and scheduled event. Daily memos are also included.
- Unscheduled time: day, date, time (and AM or PM) and a blank line indicating that the time slot is empty.

The Mailing Label Report allows you to print the report in mailing label or mail code order. The user may also determine which mailing labels are to print by selecting their corresponding mail codes. For each mailing label, the report gives you the mailing label code; the company name, address, city, state and zip code; contact name (attention: xxx); memo; and mail codes.

The Mailing Label Print allows you to print in mailing label, mail code and/or zip code order. The user may also determine which mailing labels are to print by selecting their corresponding mail codes. Mailing label information includes company name, address, city, state, zip code and contact (Attention: xxx). This program outputs to 11-1/2 by 15-inch paper and prints four (4) labels across.

OA File and Infrequent File maintenances

OA file maintenance programs enable you to set up and maintain phone directories, calendar notes and mailing labels. The OA Infrequent File Maintenances menu is comprised of programs that enable you to set up OA users (employees); create group codes so that employees can take advantage of distribution lists in the OA messaging system; and establish mail codes need to create mailing labels in the Mailing Label system.

Program concepts

Office Phone Directory F/M --Use this program to create and maintain office phone number records in the phone number and information file. Each record contains an ID number along with general information. These records may be displayed through the Phone Directory Search program or may be used to print the Telephone Directory. The program automatically assigns ID numbers. Any OA user may access these records because they are part of the office phone number directory.

Personal Phone Directory F/M --OA users can set up and view a directory of their own personal phone numbers through this program. To preserve privacy and maintain security, they cannot access other employees' personal phone directories. Each entry, or record, gets an ID number along with the general information you field. The program automatically assigns ID numbers. You can view your personal directory in the Phone Directory Search program located on the OA Inquiries menu, or you can print it from the Telephone Directory program located on the OA Reports menu.

Company Calendar Notes F/M --Use this program to create and maintain company calendar notes, which appear on specific dates in the Calendar/Scheduler.

Mailing Label F/M --Use this program to create and maintain information that can be used to create mailing labels. Each record contains a mailing label code and general information relevant to the mailing label. Before you enter mailing labels, set up at least one mail code in the Mail Code F/M program. After you create mailing label entries, print the labels themselves from the Mailing Label Print program. However, before you print the labels you may want to print a proofing copy from

Mailing Label Report. This document allows you to review all label entries in report format so that you don't waste labels on old addresses, out-of-date contacts or other incorrect information.

Calendar/Schedule Note Removal -- Use this program to remove daily memos and scheduled events through a specified cutoff date.

The Static and Nonstatic Control F/Ms each contain controls that are set up during installation and are maintained by the system during live processing. Do not change any of the fields in these fields. If you think any of the settings should be changed, contact your local Infor10 Distribution Express Affiliate.

CAUTION! It is strongly advised that System Administrators establish password level security on these programs. Changes should be made only with extreme caution and under the supervision of an Affiliate.

Use Static Control F/M (OA980) during installation to set OA controls, which establishes how the system handles the Sign-In/Out program and the Calendar/Scheduler program.

Use NonStatic Control F/M (OAF990) during installation to set up initial values for the OA system. This program is critical to the OA system because it contains information that the OA system references while performing various functions.

Use Employee F/M (OAF950) this program to create and maintain employees in the OA system. Each record contains an employee code and general information relevant to the employee. This file is the backbone of the office automation system and is referenced by virtually all programs in the OA system. You need to have at least one user code set up in User Code F/M (System Management>Security System>User Code F/M). An employee record cannot be deleted in this program if the employee code is also defined in the Technical Support Employee File.

Use Group Code F/M (OAF960) to create and maintain the group codes file. Group codes can be used to group employees by departments or by employee classifications (such as: sales & marketing or clerks). The codes allow the user flexibility in the general message entry program. This program can send messages to employees based on group codes or to an individual employee. Using group codes would relieve the burden of sending messages to every single employee within a department or classification. The user establishes his/her own set of valid group codes and their descriptions. The user should assign codes that are easy to remember; for example, sales department (SALE). Each valid group code may represent up to 40 employees.

Use Mail Code F/M (OAF970) to create and maintain the mail codes file. Mail codes can be used to group classifications of customers for mailing purposes (such as: industrial or office supply customers). The codes allow the user flexibility in the Mailing Label F/M, Mailing Label Report and Print programs. The Mailing Label Report and Print programs list and print mail labels based on the mail code. Using these codes would relieve the burden of unwanted labels being printed. The user establishes his/her own set of valid mail codes and their descriptions. The user should assign codes that are easy to remember; for example, industrial (IND).

Do not use the Rebuild OA Sort Files program (OAU990) unless you are a System Admin level user. This program helps technical level users rebuild sort files that may not be up to date with the rest of the system. The Infor10 Distribution Express system makes extensive use of sort files so users can report and retrieve information in an order other than the order in which the main file is stored. For example, the records of the employee file are stored in employee code order. To access this file in

department order requires a sort file that is stored in department by employee code order. The corresponding record in the main file may then be accessed for the needed information.

Office Automation Procedures

Signing in to OA

- 1 Click **Office Automation>Sign In/Out**.
- 2 Specify your **employee code** (up to 8 characters).
- 3 If you have not signed in, the system displays the message: *Are you in?*
- 4 Specify **Y-yes** to indicate that you are in the building. You are notified if you have messages, press **Enter** to continue, and the system removes your employee sign-out information from your employee file, and the program ends.
- 5 Press **Enter**.

Managing phone messages

- 1 Click **Office Automation>Message>Phone Message Entry**.
- 2 In the **For Employee** field, enter the code for the employee for whom the message belongs. Press **F2** to search for employees. Press **F3** to search for messages.
- 3 In the **Msg #** field the system automatically assigns the message number based on information provided by the OA Nonstatic Control F/M. The message number displays in the top right-hand corner of the screen. Press **F4** to back into this field and change the message number. Message numbers range from 1 to 9999. This allows you to change or delete an existing phone message.
- 4 In the **Name** field, enter the name of person who left the message. This field accepts up to 25 characters.
- 5 In the **Company** field, enter the company this person is with. This field accepts up to 25 characters.
- 6 In the **Phone** field, enter the phone number at which this person can be reached. Include dashes, area code and extension. This field accepts up to 17 characters.
- 7 In the **Message Details** section, select all of the applicable message check boxes in any order. You can select from: **Telephoned**, **Returned your call**, **Will call again** and/or **Came to see you**. Press **Enter** to initially default to **Telephoned**.
- 8 In the **Requests** section, select all applicable request check boxes in any order. You can select from: **Please call**, **Please stop by**, **Urgent**. Press **Enter** to leave all **Request** check boxes blank.

- 9 (Optional) In the **Message** field, enter up to three message lines — up to 70 characters per line. Press **Enter** to skip over the Message section.
- 10 Click **Save** to send the message or **Cancel** to delete the message and exit the program.
- 11 After you send the message, the screen clears and the prompt returns to the first field so you can enter additional messages. Press **F4** to return to the menu system.

Managing general messages

- 1 Click **Office Automation> Messages>General Message Entry**.
- 2 In the **From Employee** field, the program automatically uses the employee code that belongs to the person entering the message. If the message you are entering a message for another employee, specify that person's employee code.
- 3 In the **Regarding** field, specify the message's general subject. This entry can be up to 30 characters long. Specify at least one character.
- 4 Check the **Reply** check box to designate that a reply is required. Press **Enter** to default to not selected.
- 5 Specify your **Message**. Each line can be up to 70 characters long.
- 6 Specify whether to send the message to an **Employee** or **Group** of employees.
- 7 Specify **employee code** for individual or the group code for the employee group receiving the message.
- 8 In the browser in the lower portion of the screen, FACTS displays all of the Employee codes and names that have been selected to receive the message.
- 9 When you have added all employees or groups, click **Cancel**.
- 10 You can select:
 - F4** to back up to the line number field, where you enter the beginning line number.
 - F2** to set line number increments (1-10). If the increment is set to one, a maximum of 99 lines may be entered.
 - F4** from the line number field if you want to back up and delete the previous line.
- 11 Click **Done** to end the General Message Entry program and **Done** again to exit.

Managing messages (general and phone)

- 1 Click **Office Automation>Messages>Message Viewing/Disposition**.
- 2 Specify the **Employee**.
- 3 Indicate the type of messages to view: **Phone** or **General**.
- 4 Specify which messages to display to display: **All-All messages**, **U-Unread**, **R-Read**.

- 5 If you are displaying phone messages, in the browser in the lower portion of the screen the system displays the date and time the message was entered, who left it, that person's phone number and any selected message and request options, and whether the message has been read.

--OR--

If you are displaying general messages, the displays the date and time the message was entered, who sent the message, the message's subject and whether a reply is required, and whether the message has been read.

- 6 You have these options.
 - **Read** to mark the highlighted message as read. Yes will display at the Read field in the browser in the lower portion of the screen.
 - **Forward** to display General Message Entry (OAE220) so that you can forward the message to another employee or group.
 - **Reply** to display General Message Entry (OAE220) so that you can reply to the employee who sent the message to another employee or group.
 - **Delete** the highlighted message. To exit the program, press F4 again.
- 8 Click **Done** to end the viewing messages for the selected employee and **Done** again to exit.

Managing scheduled events and daily memos

- 1 Click **Office Automation>Calendar>Calendar/Scheduler**.
- 2 Specify the **Employee**.
- 3 Specify the **Date** for scheduling and/or viewing events and daily memos. Press **Enter** to initially default to the system date.
- 4 In the **View** field, specify:
 - D**-to view the daily screen. The daily screen is where you enter appointments, memos and events, which will also appear on the weekly and monthly screens. Weekly and monthly screens are read-only views.
 - W**-to view the weekly screen.
 - M**-to view the monthly screen. Press **Enter** to default to M initially or to whichever screen is presently displayed.
- 5 (Optional) To schedule events:
 - Specify an **employee** and enter the **date** of the event. Select the **Daily** screen.
 - Specify the **time** to schedule, or the time the event begins, for example 3.5, 3.50, 3:30 and 3:3. (The daily planner is set up on half-hour increments. It will not let you enter times such as 3:15 or 4:45.)
 - Specify the **name** of the scheduled event, up to 70 characters.

When the program asks UNTIL WHAT TIME? enter the time the event is expected to end. Asterisks appear on the planner to show the event's duration.

6 (Optional) To delete a scheduled event, select the beginning time and press the space bar.

7 (Optional) You have the following options while scheduling events:

M-Memo. Use the memo field to add information about the event or provide reminders. For example, an employee may have been asked to present information at a meeting. It may be helpful to enter a memo reminding them to bring handouts. Memos can be up to 70 characters long. The first nine characters appear on the Weekly and Monthly screens.

To delete a memo, select the memo field and press the space bar.

F1-Back and **F2-Forward.** Use these two keys to scroll "up" and "down" through the daily planner. Events can be scheduled as early as 12:00 a.m. and as late as 11:30 p.m.

F3-Next day. Use the F3 key to jump to the next day on the calendar. To return to a previous day, press F4 until you get to the Date prompt and select a previous day.

8 (Optional) To view Weekly calendars:

Select **W** after you enter the date in the second prompt. Use this screen to view appointments and events a week at a time. The first nine characters of any events, memos or company notes appear on screen. Asterisks show the duration of each event.

9 (Optional) You have the following options while viewing weekly calendars:

Day-Day to display. To return to the Daily screen, enter just the number corresponding to the day you want to view. The day must appear on screen to be valid. Use this option to edit scheduled events or memos.

F1-Back and **F2-Forward.** Use these two keys to scroll "up" and "down" through the times. Events can be scheduled as early as 12:00 a.m. and as late as 11:30 p.m.

F3- Next week. Use this key to skip to the next week.

10 (Optional) To view Monthly calendars:

Select **M** after you enter the date in the second prompt. The monthly screen gives you 28 days at a time in a format similar to a calendar, with each numbered square representing a specific date. This is a read-only view. To make changes, return to the Daily screen.

If an *(asterisk) appears in the right-hand corner a square, it indicates the employee has an appointment on that date. If a daily memo was entered, the second line in the square displays the first 10 characters. If there is a corresponding company calendar note, the first 10 characters appear on the third line.

11 (Optional) You have the following options while viewing monthly calendars:

Day-Day to display. To return to the Daily screen, enter just the number corresponding to the day you want to view. The day must appear on screen to be valid. Use this option to edit scheduled events or memos.

Week- Week to display. Use this option to switch to the Weekly screen. Specify the week you want to view — W1/W2/W3/W4.

F1-Back and **F2-Forward**. Use these keys to scroll backward or forward through the calendar, one week at a time.

- 12 Press **F4** to exit the program.

Displaying phone number information

- 1 Click **Office Automation>Inquiries>Phone Directory Search**.
- 2 In the **Office** or **Personal** field, select a directory: **O** for office or **P** for personal. Press **Enter** to default to the office directory.
- 3 At the **Enter Beginning Alpha To Search, Line # To Display** field, specify the alphabetical sort key to begin the search (up to 10 characters).
- 4 Once records are displayed, specify the line number or highlight the line and press **Enter** to display detail information at the bottom of the screen.
- 5 Press **F4** to exit the program.

Displaying signed-out employees

- 1 Click **Office Automation>Inquiries>Sign Out Board**.
- 2 Press **Enter** to display the employee list. If necessary, use the arrow keys and Page Up and Down keys to scroll through the list.
- 3 For each employee listed, the Sign Out Board displays the employee's code, name, sign-out time, sign-out date, expected sign-in time and sign-in date (if it's different than the sign-out date). If the sign-out date field is blank, it indicates system date.
- 4 To see if a signed-out employee left a phone number or a memo, specify the line number at the prompt. Any information entered will appear at the bottom of the screen.
- 5 Press **F4** to exit the program.

Displaying employee information

- 1 Click **Office Automation>Inquiries>Employee Inquiry**.
- 2 To look up employee information, press **Enter**. Use the arrow and Page Up and Down keys to scroll through the list.
- 3 The Employee Inquiry displays every user set up in the OA system, as well as their employee code, department, location, and work phone number. You can look up additional information, if provided, on each user by entering the line number or highlighting the line and pressing Enter. Title, home phone number, address and memo will appear across the bottom of the screen.
- 4 Press **F4** to exit the program.