

UNISYS

A Series/V Series
OFIS[®] Link
Operations
Training Guide

Relative to Release
Level 1.0

Priced Item

October 1987
Distribution Code SI
Printed in U S America
5026123

UNISYS

**A Series/V Series
OFIS[®] Link
Operations
Training Guide**

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About This Guide

This guide contains training exercises for self-paced training on the A Series/V Series OFIS® Link program. You will find OFIS Link operations easy to perform if you are somewhat familiar with computer terms and menu-driven software; however, even if you are a novice, you can learn how to use OFIS Link by completing the step-by-step exercises in this guide.

OFIS Link On-line Training

To do the exercises in this guide, you use a training database, not the main OFIS Link database. (A database contains information stored in files that users create and the information the system needs to retrieve those files.)

The training database works the same way as the OFIS Link main database, but does not share files with it. To simulate a typical OFIS Link environment, the training database contains files and lists you can process to practice OFIS Link procedures. You can also create your own files and lists to process while doing the exercises.

The exercises in this guide are based upon the information in the training database. All of your entries affect only the training database, not the OFIS Link main database.

How to Use This Guide

There are two types of exercises in each section of this book: guided and unguided. The guided exercises take you through a procedure one step at a time, with explanations of new concepts as you use them. To practice what you learned in the guided exercises, you can perform the unguided exercises.

The sections and their exercises are self-contained. If you know how to use menu-driven software or office automation products, you can take the sections in any order you prefer, as long as you complete the exercises within each section in the order presented.

If you are using OFIS Link for the first time, you should:

- read sections 1 and 2
- begin with the exercises in section 3 and proceed through each section in the order presented

How This Guide Is Arranged

Section 1 contains basic information you must know to use the OFIS Link displays. Section 2 contains information about signing on to OFIS Link, using the training database, and other basic OFIS Link procedures, such as accessing Help screens.

The rest of the sections present information and exercises on OFIS Link activities, beginning with the least complex tasks. This guide includes one or more sections for each OFIS Link module. (A module is a main activity, such as Electronic Mail, listed on the Main Activity Selection menu, the first menu that appears when you sign on to OFIS Link.) You can complete any section in approximately an hour.

Note: The Calendar, Scheduler, Form Letters, and Archiving modules are purchased separately and may not be available on your system. (Scheduler options are accessed through Calendar menus, but it is purchased separately from Calendar. You can have Calendar without Scheduler, but not vice versa.)

Conventions

The following conventions apply to the exercises:

- Words and numbers that you enter into the displays are printed in boldface, except where the text you enter is more than one line long. Longer text examples appear in italics instead of boldface.
- Keys you press appear in boldface. This book refers to keys by functions. For example, the **TRANSMIT** key transmits information to OFIS Link. The labels on the keys used for these functions can vary, depending on the keyboard you are using.
- Abbreviations for menus appear in boldface.
- The term *character* means a space (blank) you enter by pressing the **Spacebar** as well as letters, numbers, or special characters.
- A reference to a heading without a section number means that the heading is within the section where the reference appears.

Artwork

The figures in this guide present examples, not exact replicas, of OFIS Link displays. Your displays may differ from them in minor details.

Reference Material

This guide contains appendixes with reference information, a glossary, and an index.

For information about the types of workstations and printers you can use with OFIS Link, refer to appendix A.

For procedures you use to sign on to OFIS Link, refer to appendix B. Your System Administrator can help you identify the specific procedure that is correct for the equipment and programs you are using.

For a list of commands you use in OFIS Link, with an explanation of each command, refer to appendix C.

For a list of OFIS Link menu identifiers, with the full menu title next to each identifier, refer to appendix D.

To find the definition of a word or acronym that is unfamiliar to you, check the Glossary.

To locate specific information, turn to the index for an alphabetic list of topics.

Related Product Information

For a list of menus, refer to your *A Series/V Series OFIS Link Operations Reference Card*.

For an explanation of all options on OFIS Link menus, refer to the *A Series/V Series OFIS Link Operations Guide*.

For document transfer information, refer to:

- *BTOS Document Translator Operations Guide*
- *BTOS File Transfer Operations Guide*

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Using OFIS Link Menu

This section gives an overview of OFIS Link activities, describes the OFIS Link menu format (program displays) you see on your terminal or workstation, and explains how to send menu information to OFIS Link for processing.

Note: When explaining which keys you press to carry out certain actions, this book refers to the keys by function. For example, the key used to transmit information is called the **TRANSMIT** key. The labels on the keys used for these functions can vary, depending on the keyboard you are using.

OFIS Link Modules

The first menu that appears after you sign on to OFIS Link is the Main Activity Selection menu. It lists the eight main OFIS Link activities, known as modules.

To begin OFIS Link processing, you select a module from the list. A menu then appears listing tasks you can perform within that module. For example, if you select the Electronic Mail module, the next menu lists such tasks as sending mail and viewing your mailbox.

Table 1-1 lists the modules and some of the main tasks you can perform within each.

Table 1-1 OFIS Link Modules

Module	Examples of Tasks
Document Management	Create, file, edit, print, delete, and transfer documents; set up and maintain files you share with other users.
Electronic Mail	Create and send mail; view your mailbox and process incoming mail.
Calendar	View and print calendars; add and change events; check availability of meeting locations; maintain To Do lists. With scheduler option, check availability of meeting participants; view participant responses; respond to meeting invitations you receive.

Table 1-1 OFIS Link Modules (continued)

Module	Examples of Tasks
Form Letters	Create a series of records containing variable information. (OFIS Link merges the information with a skeleton letter to create customized form letters.)
Systems and Users	View and print user identifiers; view user information, such as office location and phone number; set up alternate users (others who can use OFIS Link on your behalf).
Distribution Lists	Create and maintain lists of other users. (You can use such lists with Electronic Mail to distribute mail or with Calendar to send event notifications.)
Printer Selection	Select a printer; select print formats (such as line spacing) for documents created in OFIS Link; select other print options, such as number of copies.
Archiving	Send documents to long-term storage outside of OFIS Link; retrieve such documents.

Understanding OFIS Link Menu Format

OFIS Link is a menu-driven program, which means that you perform most tasks by viewing a menu, making selections from it, and entering information on it.

OFIS Link menus share certain basic features. Most are either a list of options from which you make a selection, or a form where you enter information. Table 1-2 shows the four general types of OFIS Link menus.

Note: This guide refers to all OFIS Link displays as menus, with the following exceptions referred to as screens:

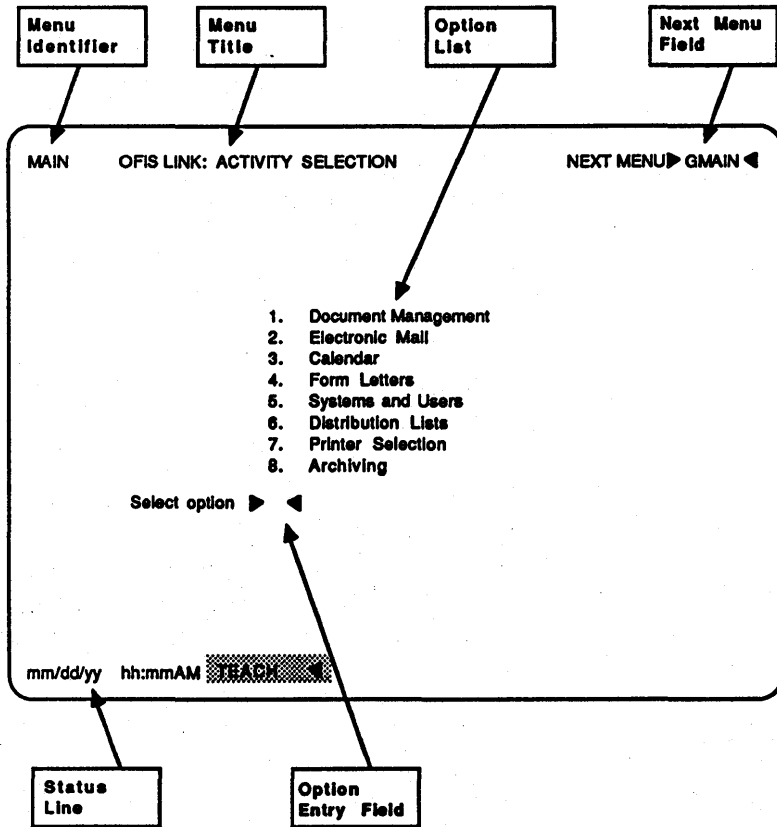
- Sign-on screen (used to sign on to OFIS Link)
- Command screen (used to enter certain commands when viewing or entering text)
- Text Entry screen (used to enter text)
- Help screens (used to view information about the currently displayed menu)
- Status screens (used from any module to view status information on tasks OFIS Link performs as a background process, such as print requests)

The exercises in this manual assume you understand certain terms that apply to all OFIS Link menus. An explanation of these terms follows. Figure 1-1 shows the parts of the menu identified by them.

Table 1-2 OFIS Link Menu Types

Type of Menu	Purpose/Description
Main Activity Selection	This menu displays a numbered list of OFIS Link modules. To select the module that contains the task you want to perform, you enter its number.
Module Activity Selection	This menu is the primary menu for a selected module. It lists activities within that module. To select one, you enter its number.
Activity	This menu varies according to the information OFIS Link needs. It can contain fields (areas on the screen where you enter information) that call for entries such as the name of a document or the number of copies you want. The starting and ending positions in a field are defined by delimiters (► and ◀).
Help and Status	You access these screens from any module to view help or status information. You need not make a selection or enter additional information. When you finish viewing, you return immediately to the same menu from which you accessed the Help or Status screen.

Figure 1-1 OFIS Link Menu Features



Menu Title

The full menu title appears in the center of the top line of the display and identifies the menu displayed. The title describes the OFIS Link feature that you are using.

Menu Identifier

Menu identifiers are the four letters that appear in the upper left-hand corner of each menu. The menu identifiers are an abbreviated form of the menu title. The exercises in this guide refer to menus by their identifiers alone; for a list of the menu identifiers and the full menu titles, refer to appendix D.

Next Menu Field

During an OFIS Link work session, the **Next Menu** field displays the menu identifier of the current menu or the menu that normally appears next in your current activity.

You use the **Next Menu** field in the upper right-hand corner to:

- enter an OFIS Link command (refer to appendix C for more about commands)
- select a new activity within OFIS Link through menu jumping (refer to section 2 for more about menu jumping)

Error Messages

Error messages display on the twenty-fourth line of the screen. OFIS Link highlights the field containing the error and positions the cursor in that field so that you can correct the error.

Status Line

The twenty-fifth line of the screen (the status line) shows the following status information:

- current date and time
- indicators for special processing modes, such as **TEACH** for training
- mail indicators
 - regular mail (**Mail**)
 - urgent mail (**Urgt**)
 - undeliverable (dead letter) mail (**Dltr**)

- reminders of scheduled events (**Evts**)
- indicators for background tasks (tasks OFIS Link can carry out in the background while you continue with other OFIS Link activities):
 - printing (**Prt**)
 - background file transfer (**Bft**)
 - retrieval of archived documents (**Retr**)

An indicator for a background task appears in normal video when the task has completed successfully. Reverse video (dark letters against a highlighted field) indicates the background task has not completed successfully.

Entering Information on a Menu

On most keyboards, you press the **RETURN** or **TAB** key to move the cursor from one field to the next. You use the backspace or arrow keys to move the cursor within a field. When entering information on a menu, you overtype to correct any errors.

Sending Information to OFIS Link for Processing

Since OFIS Link runs on mainframe computers, not on your local terminal or workstation, you must transmit any data you enter to the mainframe computer for OFIS Link processing. Table 1-3 lists the cursor positions from which you can transmit and the purposes for transmitting from each position. (You can always transmit from **HOME** position—the position the cursor moves to when you press the **HOME** key.)

To transmit, you press the **TRANSMIT** key. OFIS Link sends your input to the mainframe computer. When processing is complete, OFIS Link sends the result back to your terminal or workstation, and displays the message **Receiving** briefly in the lower left corner of the screen.

Note: Because system demands vary, time required to complete the processing loop from terminal to host and back can vary widely. You need not transmit a second time.

Table 1-3 Cursor Positions for Transmitting

Purpose	Cursor Position
to transmit a Text Entry screen	the first character space in the upper left corner of the display
to transmit the displayed menu	any position in a display other than a Text Entry screen
to execute a command you enter in the Next Menu field	any position in a menu

Cancelling Menu Entries

If you have entered information on a menu but have not yet transmitted it, you can clear any entries you made and redisplay the menu as it originally appeared. To do this, you enter **R (Refresh)** in the **Next Menu** field and transmit. To exit a menu and cancel the activity in progress, you enter **C (Cancel)** in the **Next Menu** field and transmit. OFIS Link discards any information you entered on the menu before transmitting.

Getting Started

This section covers OFIS Link procedures you must use to begin the training exercises. It also includes procedures for accessing the Help screens, exiting training, and exiting OFIS Link.

Ask Your System Administrator

Verify the following information with your System Administrator before you begin the procedures.

Personal Sign-on Information

Your System Administrator determines your OFIS Link identifier and password, which you need in order to sign on. Write this information in your Personal Sign-on Information Form.

Personal Sign-on Information Form

My OFIS Link identifier is: _____

My OFIS Link password is: _____

Your Sign-on Procedure

Since you can use many kinds of equipment with OFIS Link, procedures for signing on to OFIS Link vary. Ask your System Administrator to give you the sign-on procedure for your system or direct you to the appropriate procedure in appendix B. For more about the different procedures, refer to appendix B. Write the procedure in your Sign-on Procedure Form.

Sign-on Procedure Form

Location of Your Default Printer

Since several exercises in this guide require you to print on your default printer, you should ask your System Administrator its location so that you can pick up the printouts.

Date and Time Formats

In several exercises you enter date and time information. The System Administrator determines the form in which you enter this information. The date and time displayed on the status line appear in this format. You can verify with your System Administrator the format you should follow when entering dates or times.

Signing on to OFIS LINK

You need the information in both the Personal Sign-on Information Form and the Sign-on Procedure Form to complete this procedure.

Note: You cannot sign on to OFIS Link at more than one location at a time. If you sign on at a second location, OFIS Link automatically signs you off the first location.

Sign on to OFIS Link using the following procedure:

- 1 Follow the steps in the sign-on procedure you entered in the Sign-on Procedure Form.

The OFIS Link Sign-on screen appears (refer to figure 2-1).

- 2 Enter your identifier in the **OFIS Link Identifier** field.
- 3 Press the **TAB** key to move the cursor to the **Password** field.
- 4 Enter your password in the **Password** field.
- 5 Press the **TRANSMIT** key.

The OFIS Link Activity Selection menu appears on the screen (refer to figure 2-2).

Figure 2-1 **Sign-on Screen**

```
HELO          OFIS LINK: SIGN-ON          NEXT MENU > GHELO <

Welcome to OFIS Link
Friday mm dd, yy          hh:mm PM

Please enter:
Your OFIS Link Identifier. ....>
Your OFIS Link password .....>
```

Figure 2-2 OFIS Link Main Activity Selection Menu (MAIN)

```
MAIN          OFIS LINK: ACTIVITY SELECTION          NEXT MENU ► GMAIN ◀

1.  Document Management
2.  Electronic Mail
3.  Calendar
4.  Form Letters
5.  System and Users
6.  Distribution Lists
7.  Printer Selection
8.  Archiving

Select option ► ◀

mm/dd/yy  hh:mmAM
```

Correcting a Sign-on Mistake

If you make a mistake when you enter your identifier or password, you can direct OFIS Link to remove the incorrect entries and redisplay the blank Sign-on screen. To do this, you use the following procedure:

- 1 Enter **R** in the first character space of the **Next Menu** field.
- 2 Press the **TRANSMIT** key.

The system removes all entries and redispays the Sign-on screen in its original form.

Accessing the Help Screens

You can get on-line help with information about the displayed menu. View the Help screen for the current menu (in this case, the **MAIN** menu) using the following procedure:

- 1 Press the **HOME** key.
- 2 Enter **H** in the first character space of the **Next Menu** field.
- 3 Transmit.

The Help screen for the **OFIS Link Main Activity Selection** menu displays. A **Transmit To Continue** field appears in the upper right corner of the screen. An **H** appears in this field, denoting that additional Help screens follow.

- 4 Choose one of the following:
 - Transmit again to view the next Help screen in the series.
 - Press the spacebar to blank out the **H** in the **Transmit To Continue** field.

When you transmit the screen with this field blank, you return immediately to the menu from which you requested help.

- 5 Transmit to return to the **MAIN** menu.

The **MAIN** menu reappears. **OFIS Link** does not change or delete entries you make on a menu before you access Help.

Initializing the Training Database (TEACH)

Before you can begin doing the **TEACH** exercises for the first time, you must initialize the training database, using the following procedure:

- 1 Enter **TEACH** in the **Next Menu** field.
- 2 Transmit.

The **TEACH Activity Selection** menu appears.

- 3 Select option 1.
- 4 Transmit.

The message **Current State of Database: Initializing** appears in the middle of your screen while **OFIS Link** enters your user ID and password into the training database, and sets the starting values within the database.

- 5 Wait a minute, then enter **R** in the **Next Menu** field.
- 6 Transmit.

While OFIS Link is still initializing the training database, the message **Current State of Database: Initializing** continues to appear. Repeat steps 5 and 6 until the message **Current State of Database: Available** appears.

OFIS Link has initialized the training database; once initialized, it remains initialized for your user ID. **TEACH** appears on your status line to indicate you are in the **TEACH** mode.

Note: The **Urgt Mail** indicator appears on your status line when you initialize the training database. In section 6, you will learn how to open your mailbox and view the training mail items. Until then, you can ignore this indicator.

Accessing the Main Activity Selection Menu (MAIN)

Once in **TEACH** mode, you display the Main Activity Selection menu (**MAIN**) with the following procedure:

- 1 Enter **2** in the **Select option** field of the **TEACH** menu.
- 2 Transmit.

The **MAIN** menu appears, with **TEACH** highlighted on your status line at the bottom of the screen.

You can go to the following sections of this guide to practice the training exercises for a particular module, or you can continue with this section to get more familiar with basic OFIS Link procedures.

Choosing an Activity Module

Once you are signed on to OFIS Link and in **TEACH** mode, you can choose to work with any of the program modules.

Select a module from the **MAIN** menu with the following procedure:

- 1 Enter the number that corresponds to the module you choose in the **Select Option** field of the **MAIN** menu.
- 2 Transmit.

The Activity Selection menu for that module displays.

Menu Jumping

You can interrupt the automatic menu sequence by choosing the menu you want to display next. For example, you can return to the **MAIN** menu or jump to another module. Practice menu jumping with the following procedure:

- 1 Enter **GMAIN** in the **Next Menu** field of the displayed menu.
- 2 Transmit.
The **MAIN** menu appears.
- 3 In appendix D, find the menu identifier for the activity selection menu of the module with which you want to practice.
- 4 Enter **G** plus the menu identifier in the **Next Menu** field.
- 5 Transmit.
The Activity Selection menu for the module you chose displays.

You can turn to the section in this guide that contains exercises on the module you selected and proceed with the exercises, or you can exit training with the next procedure.

Exiting the Training Database

You can end your training session with the following procedure:

- 1 Press the **Home** key to move the cursor to the **Next Menu** field.
- 2 Enter **TEACH** in the **Next Menu** field.
- 3 Transmit.
The **TEACH** Activity Selection menu appears.
- 4 Enter **3** in the **Select option** field.
- 5 Transmit.
The **MAIN** menu appears. **TEACH** is no longer highlighted on your screen.

Exiting OFIS Link

If you do not wish to continue with OFIS Link processing, you can exit OFIS Link with the following procedure:

- 1 Press the **Home** key to move the cursor to the **Next Menu** field.
- 2 Enter **BYE** or **QUIT** in the **Next Menu** field.
- 3 Transmit.

The screen from which you entered OFIS Link displays.

Identifying Users

Through the Systems and Users module, you can view a list of OFIS Link users and their user identifiers (IDs). You enter user IDs in other OFIS Link activities, such as sending mail and scheduling group events.

The Systems and Users module also allows you to:

- set up or change your user profile (specific information about yourself)
- view nonconfidential information from another user's profile
- set up or change your alternate users (other users you authorize to act in your behalf when using OFIS Link)
- find out who has designated you as an alternate user and what authority you have as an alternate user
- specify how long OFIS Link retains old copies of your mail and documents (providing it is no longer than the time set up by the System Administrator)

With optional OFIS Link modules, you can communicate with users on external (remote) systems, such as external mail systems and OFIS Link programs on remote hosts. Systems and Users directories include external system users whose user information has been shared with OFIS Link.

To send information to external users, you enter a network identifier for their system. Through Systems and Users, you can view or print a directory listing network identifiers and showing the system location and the system type (for example, OLINK, BMAIL, TELEX). Workstations used for background file transfer (refer to section 10, Transferring Documents) are also assigned network identifiers and listed on this directory (as type BFT). For more about network identifiers, refer to the *A Series/V Series OFIS Link Operations Guide*.

By doing the exercises in this section, you can practice the following Systems and Users activities:

- viewing a directory of users
- printing a directory of users
- building your user profile
- designating an alternate user
- viewing alternate user privileges of another user

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Systems and Users Module to perform the exercises in this section.

Accessing the Systems and Users Module

All exercises in this section begin with a choice you make from the options on the Systems and Users Activity Selection menu (**USER**). This is the first menu that appears when you access the Systems and Users module. You can access this module in two ways:

- From the **MAIN** menu, enter **5** in the **Select Option** field and transmit
- From any other menu, enter **GUSER** in the **Next Menu** field and transmit.

The **USER** menu appears (refer to figure 3-1). You can proceed with the exercises for this module.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Figure 3-1 Systems and Users Activity Selection Menu (USER)

USER	SYSTEMS AND USERS: ACTIVITY SELECTION MENU	NEXT MENU ► GUSER ◀
<ol style="list-style-type: none"> 1. View directory of users 2. Print directory of users 3. View directory of remote systems 4. Print directory of remote systems 5. User Profile 6. Record retention parameters 7. Alternate users 		
Select option	► ◀	
Selected user	►	◀
mm/dd/yy	hh:mmAM	TEACH ◀

Guided Exercises

Exercise 1: Viewing a Directory of Users

View a directory (list) of all users on your local OFIS Link system with the following procedure:

- 1 Enter **1** in the **Select Option** field of the **USER** menu.
- 2 Transmit.

The User List Selection menu (USLS) displays.

- 3 Transmit.

The Systems and Users User List (USVU) menu appears, with a list of user IDs (refer to figure 3-2).

Press the **TRANSMIT** key until the **USER** menu reappears. You can proceed to the next exercise.

Figure 3-2 User List (USVU) (Example)

USVU	SYSTEMS AND USERS: USER LIST		NEXT MENU ► GUSVU ◀
User ID / Network ID	Name / Comment	Office Phone	
INSTRUCTOR1	Green Instructor	Bob	
INSTRUCTOR2	Johnson Instructor	Robert	
STUDENT1	Allen Student	Greg	
STUDENT2	Grey Student	Bob	
STUDENT3	Peters Student	Jeff	
STUDENT4	Stevens Student	Joan	
STUDENT5	Johnson Student	Larry	
STUDENT6	Jones Student	Harry	

mm/dd/yy hh:mmAM **TEACH**

Exercise 2: Printing a Directory of Users

Print a directory of all the users who are authorized to use your local OFIS Link system with the following procedure:

- 1 Enter **2** in the **Select Option** field.
- 2 Transmit.

A message to confirm that you are printing a directory of users displays at the bottom (line 24) of your screen. The system prints the directory on your default printer and redisplay the Activity Selection menu.

To check the progress of your request, enter **P** in the **Next Menu** field and transmit. The **Printing Status menu (PSTA)** displays a description of the job, the priority rating, the printer identifier, the date and time of the request, and the current status.

After you view the **Printing Status menu**, transmit to redisplay the **Activity Selection menu**. You can proceed to the next exercise.

Exercise 3: Building a User Profile

A user profile contains information about you and allows you to keep the information in that profile current. Create a user profile with the following procedure:

1 Enter **5** in the **Select Option** field of the **USER** menu.

2 Transmit.

The Systems and Users User Profile (**UPRO**) menu displays. To change any entry appearing on the screen, type over the existing entry.

You cannot blank out the **Last name**, **First name**, **First menu**, **Language version**, or **Time line begin** fields. These are required fields.

3 Complete the **UPRO** menu by entering personal information describing yourself, using the following guidelines:

- If the field does not apply to you (for example, room number), you can leave it blank.
- If you want your sign-on procedures to begin with the Main Activity Selection menu (**MAIN**), in English, and at 8:00 a.m., you can leave the last three entries of this display as they appear on your screen. If you need other options, consult the *A Series/V Series OFIS Link Operations Guide* for the appropriate entries.

4 Transmit.

The **USER** menu reappears.

To check your entries on the **UPRO** menu, you can return to step 1 and perform this procedure again. To change any entry, you type over the existing entry.

After you check your entries and transmit the **UPRO** menu, the **USER** menu displays. You can proceed to the next exercise.

Exercise 4: Designating an Alternate User

Authorize another user to process on your behalf with the following procedure:

- 1 Enter 7 in the **Select option** field of the **USER** menu.
- 2 Transmit.

The Alternate Users Activity Selection menu (**UALT**) appears (refer to figure 3-3).

- 3 Enter 2 in the **Select option** field.
- 4 Transmit.

The Add Alternate User menu (**UAAD**) appears (refer to figure 3-4).

- 5 Enter **STUDENT7** in the **User ID** field.

This is the ID for Linda Thompson, a user entered in the training database.

Figure 3-3 Alternate Users Activity Selection Menu (UALT)

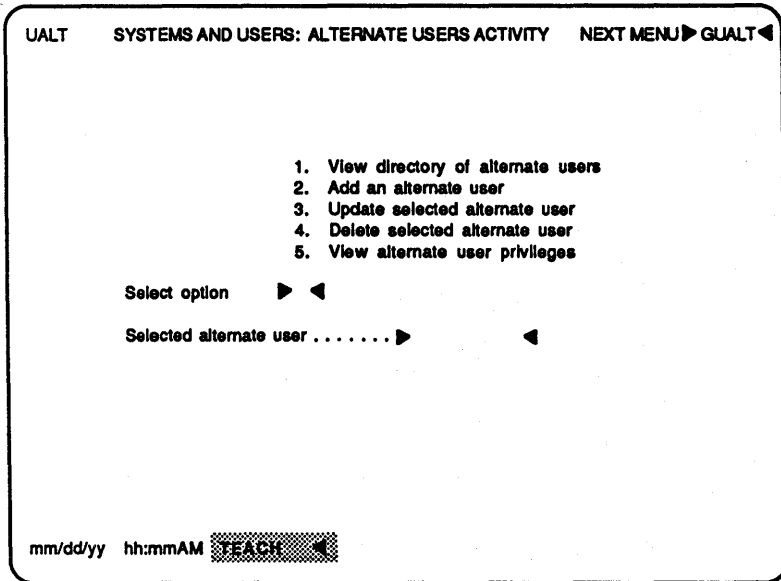


Figure 3-4 Add Alternate User Menu (UAAD)

UAAD	SYSTEMS AND USERS: ADD ALTERNATE USER	NEXT MENU	►QUAL◀
User ID	► STUDENT7 ◀		
Comment	►		◀
Process confidential information	► N ◀		
Documents: Read / print	► N ◀	Create / assemble ..	► N ◀
Remove / refill ...	► N ◀	Edit	► N ◀
Archive	► N ◀	Retrieve	► N ◀
Mail: Read / print	► N ◀	Send	► N ◀
Forward / respond ..	► N ◀	File	► N ◀
Remove	► N ◀		
Calendars: View	► N ◀	Maintain events ..	► N ◀
Retrieve	► N ◀		
Lists: Create / maintain ..	► N ◀		
Printing: Printer selection ..	► N ◀	Attributes	► N ◀

mm/dd/yy hh:mmAM **TEACH** ◀

6 Enter **Y** in the following fields:

- Mail: Read/print**
- Mail: Send**
- Mail: Forward/Respond**
- Calendars: View**
- Calendars: Maintain events**

Entering a **Y** in these fields means that you are authorizing Linda Thompson to perform these activities for you using OFIS Link.

7 Transmit.

OFIS Link grants these privileges to Linda Thompson and returns to the **UALT** menu.

Press **TRANSMIT** until the **USER** menu reappears. You can proceed to the next exercise.

Exercise 5: Viewing Alternate User Privileges

To find out what access privileges another OFIS Link user has as your alternate user, use the following procedure:

- 1 Enter **7** in the **Select Option** field of the **USER** menu.
- 2 Transmit.

The **UALT** menu appears (refer to figure 3-3).

- 3 Enter **5** in the **Select Option** field.
- 4 Enter **STUDENT7** in the **Selected alternate user** field.
- 5 Transmit.

The Systems and Users Alternate Users Activity (**UAVU**) menu displays the alternate user privileges for Linda Thompson, whose user ID is **STUDENT7**. A **Y** follows the activities she is authorized to perform as your alternate user.

- 6 Transmit to return to the **UALT** menu.

You can proceed to the Unguided Exercises.

Unguided Exercises

To practice what you have learned about the Systems and Users module, you can do the following exercises.

Exercise 1: Checking User Identifiers

Access the **USVU** menu and verify which users the following training identifiers belong to:

- STUDENT1**
- STUDENT2**

Exercise 2: Designating an Alternate User

Designate one of the training identifiers you just viewed on the **USVU** menu as your alternate user.

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Using Distribution Lists

Distribution lists are shortcuts for sending documents or memos to OFIS Link users. Each time you request distribution through a distribution list identifier, OFIS Link sends information to each of the users listed on that list.

Distribution lists can be:

- private (available only to the user who creates the list)
- public (available to all users)

You can construct private distribution lists from the identifiers of any OFIS Link users. You can also add identifiers of any users on external systems with which your local OFIS Link system communicates. (For more information on external systems, refer to section 3). Only you or your authorized alternate user can use, update, or remove a distribution list you create.

The System Administrator creates and maintains public distribution lists, but any user can use them. A virgule (/) precedes the identifier for a public distribution list. You can enter the identifier for a public distribution list in your private lists to include all the members of the public list in your private list.

The exercises in this section give you practice in the following Distribution List activities:

- creating a list
- viewing a list directory and selecting a list
- viewing a list
- modifying a list
- resolving a duplicate identifier
- printing a list
- printing a list directory

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Distribution Lists module to perform the exercises in this section.

Accessing the Distribution Lists Module

All exercises in this section begin with a choice you make from the options on the Distribution Lists Activity menu (**DIST**). This is the first menu that appears when you access the Distribution Lists module. You can access this module in two ways:

- From the **MAIN** menu, enter **6** in the **Select option** field and transmit.
- From any other menu, enter **GDIST** in the **Next Menu** field and transmit.

The **DIST** menu appears (refer to figure 4-1). You can proceed with the exercises for this module.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Figure 4-1 Distribution Lists Activity Selection Menu (DIST) (Example)

```

DIST      DISTRIBUTION LISTS: ACTIVITY SELECTION MENU      NEXT MENU ► GDIST ◀

Current distribution list . . . . TRNSTAFF

1. View directory and select list
2. Print directory of lists
3. Create selected list
4. Maintain selected list
5. View selected list
6. Print selected list
7. Remove selected list

Select option ► ◀

Selected distribution list . . ► ◀

mm/dd/yy  hh:mmAM ████ ████
  
```

Guided Exercises

Exercise 1: Creating a Distribution List

Only you or your authorized alternate users can use or modify a private distribution list you create. To create a private distribution list named **CLASS**, use the following procedure:

- 1 Enter **3** in the **Select Option** field of the **DIST** menu.
- 2 Enter **CLASS** in the **Selected Distribution List** field.
- 3 Transmit.

The User Entry menu (**OMUE**) appears.

- 4 Enter **STUDENT1**, the first identifier on the list in table 4-1, in the first field.

To correct typing errors, overtype.

5 Press TAB.

The cursor moves to the next field.

To return to the previous field, use the **BACKTAB** key.

To move within fields, use the arrow keys.

6 Continue to enter identifiers of the students in table 4-1, repeating steps 4 and 5.**7 Transmit.**

The **DIST** menu reappears

General Rules for Creating Distribution Lists

When you complete the **OMUE** menu on your own, use the following conventions:

- You can change any entry by overtyping it. If the entry you overtype contains more characters than the new entry, you press **Spacebar** to blank the extra characters.
- You can delete any entry by overtyping it using **Spacebar** (blanking the entry).
- You can add an unlimited number of identifiers to any distribution list by entering **Y** in the **More entries** field and transmitting to display a new screen.
- If you include a public distribution list in your private list, you must enter the virgule that precedes the name of the list (for example, **/MARKETING**).

Table 4-1 User Names and Identifiers for Training

Identifier	Last Name	First Name	Description
STUDENT1	Allen	Greg	Student
INSTRUCTOR1	Green	Bob	Instructor
STUDENT2	Grey	Bob	Student
STUDENT3	Peters	Jeff	Student
STUDENT4	Stevens	Joan	Student
STUDENT5	Johnson	Larry	Student
INSTRUCTOR2	Johnson	Robert	Instructor
STUDENT6	Jones	Harry	Shipping
STUDENT7	Thompson	Linda	Marketing
STUDENT8	Williams	Jane	Marketing

Exercise 2: Viewing a Directory of Distribution Lists and Selecting a List

View a directory, or listing, of all the distribution lists available on your system, and make a selection from this list with the following procedure:

1 Enter **1** in the **Select Option** field of the **DIST** menu.

2 Transmit.

The Select List Directory (**DLSD**) menu appears (refer to figure 4-2).

3 Enter **5** to select the **/MARKETING** public distribution list.

Note: Public distribution list identifiers include a virgule before the name of the list.

4 Transmit.

The **DIST** menu reappears, with the distribution list you selected as the current list.

You can proceed to the next exercise.

Figure 4-2 Select List Directory (DLSD) (Example)

DLSD	DISTRIBUTION LISTS: SELECT LIST DIRECTORY	NEXT MENU ► GDIST ◀																														
	<table border="0"> <thead> <tr> <th></th> <th>List Name</th> <th>Entries</th> </tr> <tr> <th></th> <th>-----</th> <th>-----</th> </tr> </thead> <tbody> <tr> <td></td> <td>Private Lists</td> <td></td> </tr> <tr> <td>1.</td> <td>CLASS</td> <td>10</td> </tr> <tr> <td>2.</td> <td>STUDENTS</td> <td>8</td> </tr> <tr> <td>3.</td> <td>TRNSTAFF</td> <td>3</td> </tr> <tr> <td></td> <td>Public Lists</td> <td></td> </tr> <tr> <td>4.</td> <td>/ADMINMEM</td> <td>3</td> </tr> <tr> <td>5.</td> <td>/MARKETING</td> <td>3</td> </tr> <tr> <td></td> <td>**END**</td> <td></td> </tr> </tbody> </table>		List Name	Entries		-----	-----		Private Lists		1.	CLASS	10	2.	STUDENTS	8	3.	TRNSTAFF	3		Public Lists		4.	/ADMINMEM	3	5.	/MARKETING	3		**END**		
	List Name	Entries																														
	-----	-----																														
	Private Lists																															
1.	CLASS	10																														
2.	STUDENTS	8																														
3.	TRNSTAFF	3																														
	Public Lists																															
4.	/ADMINMEM	3																														
5.	/MARKETING	3																														
	END																															
	► ◀ Select distribution list number																															
mm/dd/yy hh:mmAM	TEACH																															

Exercise 3: Viewing a Selected Distribution List

View a list of the identifiers in the current distribution list with the following procedure:

1 Enter **5** in the **Select Option** field of the **DIST** menu.

2 Transmit.

The **DLVU** menu displaying the **/MARKETING** distribution list appears, so that you can view the identifiers in the list.

3 Transmit.

The **DIST** menu reappears.

You can proceed to the next exercise.

Exercise 4: Modifying a Distribution List

You can add, delete, or change the identifiers in a private distribution list. If you want to view a list of the users (and their identifiers) on your system, refer to Viewing a Directory of Users (exercise 1) in section 3.

Caution: After you change or remove a name on a distribution list, you must continue to transmit each User Entry menu until an **N** defaults in the **More entries** field. Otherwise, you will lose the rest of the names on the list.

Modify a private distribution list with the following procedure:

1 Enter **4** in the **Select option** field of the **DIST** menu

2 Enter **STUDENTS** in the **Selected Distribution list** field.

3 Transmit.

The User Entry menu (**OMUE**) appears showing members of the **STUDENTS** distribution list.

4 Add your identifier to the list.

5 Transmit.

OFIS Link adds your identifier to the **STUDENTS** distribution list and redisplay the **Activity Selection** menu. You can proceed to the next exercise.

Exercise 5: Resolving a Duplicate Identifier

Each OFIS Link user has a unique identifier. When you enter a user identifier or name, OFIS Link searches for an exact match.

If you enter only a portion of a user identifier or last name and there is no exact match, OFIS Link finds all the users with initial letters that match what you enter. For example, if you enter **JOH** and there is no identifier or name that matches exactly, OFIS Link would display users like *JOHNSON*, *JOHNS*, or *JOHANS* as possible matches.

Practice using the Duplicate ID Resolution menu with the following procedure:

- 1 Enter **4** in the **Select option** field of the **DIST** menu.
- 2 Enter **STUDENTS** in the **Selected Distribution list** field.
- 3 Transmit.
The User Entry menu (**OMUE**) appears.
- 4 Add the identifier **INSTRUCTOR** to the displayed list.
- 5 Transmit.

If there is no exact match for **INSTRUCTOR**, the Duplicate ID Resolution menu appears (**IDDP**). The training identifiers **INSTRUCTOR1**, **INSTRUCTOR2**, and **INSTRUCTOR3** contain the partial identifier (**INSTRUCTOR**) you entered.

- 6 Enter **2** in the **Select correct identifier** field to select the identifier for Robert Johnson, **INSTRUCTOR2**.
- 7 Transmit.

OFIS Link adds **INSTRUCTOR2** (for Robert Johnson) to the **STUDENTS** distribution list, and the **DIST** menu reappears.

You can proceed to the next exercise.

Exercise 6: Printing a Distribution List

Print a distribution list you select with the following procedure:

- 1 Enter **6** in the **Select option** field of the **DIST** menu.
- 2 Enter **STUDENTS** in the **Select distribution list** field.
- 3 Transmit.

The system prints the distribution list **STUDENTS** on your default printer, and redisplay the **DIST** menu.

You can proceed to the next exercise.

Exercise 7: Printing a Directory of Distribution Lists

Print a directory of all distribution lists which you can access with the following procedure:

- 1 Enter **2** in the **Select option** field of the **DIST** menu.
- 2 Transmit.

The message **Print request queued** appears above your status line.

OFIS Link prints a directory of distribution lists on the default printer, and redisplay the **DIST** menu.

You can proceed to the Unguided Exercises.

Unguided Exercises

To practice what you have learned about Distribution Lists, you can do the following exercises.

Exercise 1: Adding IDs to Your Private Lists

Using the identifiers in the list you printed, experiment with adding identifiers to your private distribution lists, **CLASS**, **STUDENTS**, and **TRNSTAFF**.

Exercise 2: Creating a Distribution List

Create a distribution list, and enter the identifier of a public distribution list, as well as the identifiers of other students, in the list of users and identifiers.

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Mailing Messages and Attachments

You can exchange messages and attachments (documents and other files) with other users through the Electronic Mail module. In this section, the exercises familiarize you with tasks related to creating and sending mail to other users. In section 6, you practice tasks related to viewing and processing mail you receive.

The exercises in this section cover the following Electronic Mail activities:

- creating and sending a short message
- creating and sending a longer message
- filing mail you send
- sending an attachment
- viewing the follow-up directory
- checking on certified mail receipts

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the Next Menu field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Electronic Mail module to perform the exercises in this section.

Accessing the Electronic Mail Module

The first exercise in this section begins with a selection you make from the Electronic Mail Activity Selection menu (**MAIL**). This is the first menu that appears when you access the Electronic Mail module. You can access this module in two ways:

- From the **MAIN** menu, enter **2** in the **Select Option** field and transmit.
- From any other menu, enter **GMAIL** in the **Next Menu** field and transmit.

The **MAIL** menu appears (refer to figure 5-1). You are ready to begin exercise 1.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help Screens, refer to appendix C.

Figure 5-1 Electronic Mail Activity Selection Menu (**MAIL**)

The screenshot displays a terminal window titled "ELECTRONIC MAIL: ACTIVITY SELECTION". The top bar contains "MAIL" on the left, "ELECTRONIC MAIL: ACTIVITY SELECTION" in the center, and "NEXT MENU ► GMAIL ◀" on the right. The main area lists six numbered options:

1. View mailbox
2. Send mail
3. Create mail
4. View follow-up directory
5. View mail receipt directory
6. View dead letter directory

Below the list is a "Select option" prompt with right and left arrow keys. At the bottom left, the date and time are shown as "mm/dd/yy hh:mmAM". At the bottom center, there is a shaded box containing the word "TEACH" with a right arrow key.

Guided Exercises

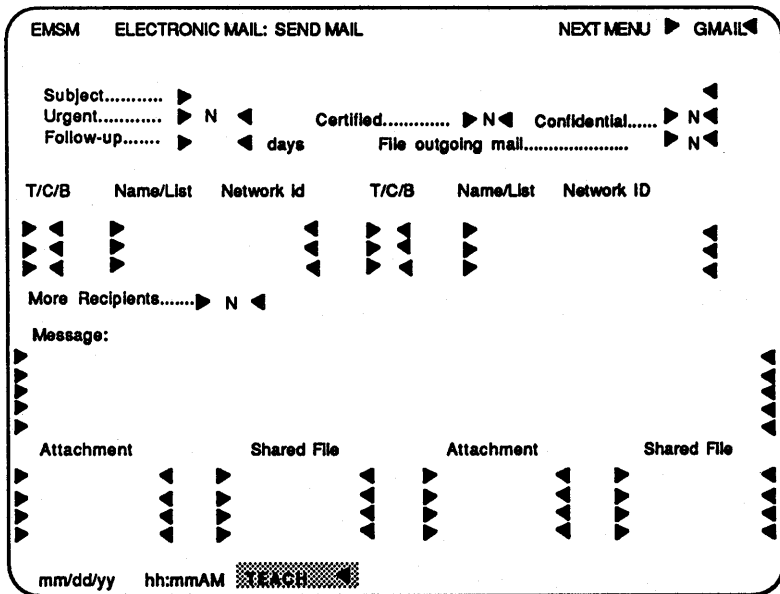
Exercise 1: Creating and Sending a Short Message

You can create and send a message up to five lines long using the Send Mail menu (**EMSM**). You fill out the mailing information and then enter the message in the message area.

Create and send a short message with the following procedure:

- 1 Enter **2** in the **Select option** field of the **MAIL** menu.
- 2 Transmit.
The **EMSM** menu appears (refer to figure 5-2).
- 3 Enter **practice** in the **Subject** field.
- 4 Enter **Y** in the **Urgent, Certified, and Confidential** fields.
Entering **Y** in these fields changes the mail priority to Urgent, requests a certified mail receipt, and limits alternate user access to those allowed to view confidential information.
- 5 Enter **3** in the **Follow-up** field.
When you complete and transmit this menu, OFIS Link files a copy of the outgoing mail item in the follow-up file. After three days, it sends the mail item, flagged as Follow-up, to your mailbox.
- 6 Leave the default **N** in the **File outgoing mail** field.
- 7 Enter **T** in the first **T/C/B** field.
T (To) and **C** (Carbon copy) recipients are listed on the mail item header; **B** (Blind copy) recipients are not listed.
- 8 Enter the user ID **STUDENT4** in the first **Name / List Network id** field. Do not enter any network ID.
Your OFIS Link system may contain optional modules that allow you to exchange mail with external users. To send mail to such users, you enter their network ID as well as their user ID. Refer to section 3, Identifying Users, for information on viewing user and network IDs.

Figure 5-2 Electronic Mail Send Mail Menu (EMSM)



9 Enter the following paragraph (or make up your own) in the **Message** field. Overtyping to correct any errors.

You can use the message area on the Send Mail menu to send brief messages to other users. This allows you to create and send a message on the same menu.

10 Transmit.

The **MAIL** menu reappears. The message **Mail has been posted** displays on line 24.

You can proceed to the next exercise.

Exercise 2: Creating and Sending a Longer Message

You can create a message longer than five lines using the Create Mail option. When you select Create Mail, you enter the message text on a Text Entry screen.

This exercise has two parts: creating the message and sending the message. You enter information required for exercise 3 in the second part of this exercise, so you should plan to complete both exercise 2 and 3 in the same training session.

Part 1: Creating a Longer Message

Create a message longer than five lines with the following procedure:

- 1 Enter **3** in the **Select option** field of the **MAIL** menu.
- 2 Transmit.
A Command screen appears with **I (INSERT)** defaulted in the **Command** field.
- 3 Transmit.
A Text Entry screen appears.
- 4 Enter the following message (or make up your own). If you fill the screen, press the **Home** key and transmit to display a new screen. If you want to cancel your message or start over, you do steps 5 through 8 and then enter **QUIT** in the **Command** field. OFIS Link will discard your message and return you to the **MAIL** menu.
You can enter a message of unlimited length on the Command screen. You can edit the message with the same document editing and positioning commands as those you use when editing a document in the Document Management activity. (You can also make corrections by overtyping existing text.)
*When you finish your message, you enter **END** or **SAVE** in the Command field. The EMSM menu displays. You fill out the options on this menu to send your message to the recipient.*
- 5 Press the **Return** key.
The cursor moves to the left margin of the line following the last line of text you entered.

- 6 With the cursor at the left margin, enter two virgules (/).
- 7 Press the **Home** key.
- 8 Transmit.
The Command screen displays.
- 9 Enter **END** or **SAVE** in the **Command** field.
- 10 Transmit.
The **EMSM** menu displays with the word **ENCLOSURE** above the **Message** field.

Note: To edit long messages, you can use the same document editing and positioning commands you use in the Document Management activity (refer to appendix C for a list of these commands). Refer to section 9, Processing Documents, for practice in using editing and positioning commands.

You can proceed to part 2 of this exercise.

Part 2: Sending a Longer Message

To send a longer message, you fill out the **EMSM** menu, just as when sending a short message.

Send the longer message you just created, using the following procedure:

- 1 Enter **practice** in the **Subject** field.
- 2 Leave the default **N** in the **Urgent, Certified, and Confidential** fields.
- 3 Enter **5** in the **Follow-up** field.
- 4 Enter **Y** in the **File outgoing mail** field.
- 5 Enter **T** in the first **T/C/B** field.
- 6 Enter the user ID **STUDENT4** in the first **Name / List Network id** field. Do not enter any network ID.
- 7 Transmit.

OFIS Link sends the mail message. Since you entered **Y** in the **File outgoing mail** field, the Electronic Mail Filing Information menu (**EMFM**) displays so that you can enter filing information.

You can proceed to the next exercise to enter filing information.

Exercise 3: Filing Mail You Send

To do this exercise, you must have completed exercise 2. The **EMFM** menu will be displayed.

Enter the appropriate filing information on the **EMFM** with the following procedure:

- 1 Enter a name in the **Document name** field of the **EMFM** menu (refer to figure 5-3).
 You must name the new document you are creating from this mail item. In OFIS Link, names must begin with a letter, and they can contain numbers, spaces, slashes, hyphens and periods.
- 2 Leave the **Shared file name** field blank and leave **N** in the **Confidential** field.
- 3 Enter **practice** in the **Subject** field.

Figure 5-3 Filing Information Menu (EMFM) (Example)

EMFM ELECTRONIC MAIL: FILING INFORMATION NEXT MENU ► GMAIL ◀

From: T. TRAIN
 By:
 Subject: Practice
 Order:

Indicate how this mail item is to be filed:

Document name . ► N ◀ ◀ Shared file name ... ► ◀
 Confidential ... ► N ◀

Subject ► ◀
 Author ► ◀

Keyword:
 1.... ► ◀ 2.... ► ◀
 3.... ► ◀ 4.... ► ◀

Remove after 5.... ► ◀

 ◀ days (leave blank for permanent save)

Overwrite existing document..... ► N ◀

mm/dd/yy hh:mmAM **TEACH** ◀

- 4 Enter your last name in the **Author** field.
- 5 Enter the following in **Keyword** fields one to three:
mail
create
edit

Keyword entries can help you locate a filed document later. For additional information on keywords, you can refer to the exercises in section 9, Document Processing.

- 6 Enter 5 in the **Remove after** field.
This directs OFIS Link to place the document on the list for removal if more than five days pass when no user accesses it.
- 7 Transmit.
The **MAIL** menu displays. You have filed the mail item as a document in your Document Management file directory. For more about Document Management, refer to section 9.

You can proceed to the next exercise.

Exercise 4: Sending an Attachment

You can send a document or other file attachment with or without an accompanying message. Send an attachment with the following procedure:

- 1 Enter 2 in the **Select option** field of the **MAIL** menu.
- 2 Transmit.
The **EMSM** menu appears (refer to figure 5-2).
- 3 Enter **attachment** in the **Subject** field.
- 4 Enter **Y** in the **Urgent, Certified, and Confidential** fields.
- 5 Leave the **Follow-up** field blank.
- 6 Leave the default **N** in the **File outgoing mail** field.
- 7 Enter **T** in the **T/C/B** field.
- 8 Enter the user ID **STUDENT1** in the **Name / List Network id** field. Do not enter any network ID.
- 9 Enter the following message in the **Message** field:
I've attached a document with information about editing commands.

- 10 In the first **Attachment** field, enter the document name **EDITCOMMANDS**.

This is a document existing in your Document Management filing directory (refer to section 9).

- 11 Leave the **Shared File** field blank.

- 12 Transmit.

The **MAIL** menu displays. OFIS Link sends the message with a copy of the document **EDITCOMMANDS** attached.

If you file a copy of this mail item with a **Y** in step 6, the filed document includes the name of the recipient, the message, and the name of the attachment, but not the attachment itself.

You can proceed to the next exercise

Exercise 5: Viewing a Follow-up Directory

When you mark mail items for follow-up, they automatically appear in your mailbox after the number of days you indicate. If you need to access a mail item before that date, do so by displaying the follow-up directory and selecting the **Activate** option for that mail item. Activating a mail item sends it to your mailbox.

View the follow-up directory and select a mail item to activate with the following procedure:

- 1 Enter **4** in the **Select option** field of the **MAIL** menu.
- 2 Transmit.

The **Electronic Mail Follow-up Directory** menu (**EMFD**) appears (refer to figure 5-4). For each mail item you marked for follow-up in the earlier exercises, it lists the follow-up date, subject, mail type (received or sent), sender, and date and time sent.

- 3 Enter **1** in the **Select option** field.

Figure 5-4 Follow Up Directory Menu (EMFD) (Example)

```

EMFD  ELECTRONIC MAIL: FOLLOW UP DIRECTORY  NEXT MENU ►GMAIL◀

      1. Activate
      2. Remove

  Select option ► ◀      Item number ► ◀

Follow-up date  Type  Sender :Network ID  Date and Time Sent
-----
1.  mm/dd/yy    Sent   USERID                mm/dd/yy  hh:mmAM
   Subject: practice

2.  mm/dd/yy    Sent   USERID
   Subject: practice

      ....END....

mm/dd/yy  hh:mmAM  [TEACH] ◀
  
```

4 Enter 1 in the **Item number** field.

5 Transmit.

The **EMFD** menu redisplay with that item removed. A message appears on line 24 stating that the mail item is active (in your mailbox).

6 Transmit. The **MAIL** menu displays.

You can proceed to the next exercise.

Exercise 6: Checking on Certified Mail Receipts

To determine whether or not recipients have viewed the certified mail you send, you can view a directory of certified mail items and select a mail receipt to view.

View the status of certified mail items you send with the following procedure:

1 Enter 5 in the **Select option** field of the **MAIL** menu.

2 Transmit.

The Mail Receipts Directory menu (**EMRD**) appears (refer to figure 5-5) with a list of all certified mail items in the **Date and Time Sent** and **Subject** fields.

3 Enter **1** in the **Select Option** field.

4 Enter **1** in the **Item number** field.

5 Transmit.

The **View Mail Receipt** menu (**EMVR**) displays with the status of the selected mail item.

6 Transmit.

The **EMRD** menu displays.

7 Transmit.

The **MAIL** menu displays.

You can proceed to the Unguided Exercises.

Figure 5-5 Mail Receipts Directory Menu (EMRD) (Example)

EMRD ELECTRONIC MAIL: MAIL RECEIPTS DIRECTORY		NEXT MENU ►GMAIL◀	
1. View 2. Remove			
Select option ► ◀		Item number ► ◀	
Date and Time Sent		Subject	

1.	mm/dd/yy hh:mmAM	practice	
2.	mm/dd/yy hh:mmAM	attachment	
END			
mm/dd/yy	hh:mmAM	TEACH ◀	

Unguided Exercises

To practice what you have learned about Electronic Mail, you can do the following exercises.

Exercise 1: Creating and Sending a Short Message

Send a message to the STUDENTS distribution list notifying them of a change in class time, and mark the mail item for follow-up. Refer to exercise 1 if you need help.

Exercise 2: Removing a Mail Item from the Follow-up Directory

View your follow-up directory and remove the message you just marked for follow-up, using what you know from exercise 5 and help from the Help screens.

You can proceed to another section of this guide, or you can exit the TEACH mode by entering **QUIT** in the **Next Menu** field and transmitting.

Handling Mail You Receive

The Electronic Mail module makes your terminal or workstation an interoffice mailbox for exchange of mail with other users. The preceding section introduced you to Electronic Mail activities with exercises on creating and sending mail. This section gives you practice in handling the mail you receive. (You may find the exercises in this section easier to do if you have completed section 5 first.)

When mail arrives in your mailbox, OFIS Link notifies you on the status line with two indicators: **Mail** and **Urgt**. (**Mail** means regular mail and **Urgt** means Urgent mail.) These indicators remain until you open your mailbox.

You open your mailbox by selecting the View Mailbox activity from the Electronic Mail Activity Selection menu. This activity enables you to view and act upon mail items sent to you. You can view, print, respond to, forward, file, follow up on, view details of, and remove mail items you receive. The exercises in this section give you practice in these tasks.

If you have just completed section 5 and are still in TEACH mode, you can go directly to exercise 1 to begin practice. Otherwise you should read the information under the following heading.

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Electronic Mail module to perform the exercises in this section.

Accessing the Electronic Mail Module

The first exercise in this section begins with a selection you make from the Electronic Mail Activity Selection menu (**MAIL**). This is the first menu that appears when you access the Electronic Mail module. You can access this module in two ways:

- From the **MAIN** menu, enter **2** in the **Select Option** field and transmit.
- From any other menu, enter **GMAIL** in the **Next Menu** field and transmit.

The **MAIL** menu appears. You are ready to begin exercise 1.

Note: If you need additional information about the menu or screen you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Guided Exercises

Exercise 1: Viewing Your Mailbox

When you open your mailbox, you view a directory that lists mail items in the order received, with Urgent mail before regular mail, and regular mail before follow-up mail (mail you have earlier marked for follow-up).

To view your mailbox directory, use the following procedure:

- 1 Enter **1** in the **Select option** field of the **MAIL** menu.
- 2 Transmit.

The Mailbox menu (**EMVB**) displays (refer to figure 6-1).

You can proceed to the next exercise.

Figure 6-1 Mailbox Menu (EMVB) (Example)

```

EMVB  ELECTRONIC MAIL: MAILBOX                                NEXT MENU ► Gmail ◀
1. View      2. Print      3. File      4. Remove      5. Follow-up
6. Forward   7. Create Forward 8. Respond   9. Create Response 10. Mail Item
      Select option ► ◀   Mail Item ► ◀   Follow up in ► ◀   days

Type                                     Sender :Network ID      Date and Time Sent
-----
1. Urgt   Drct                               INSTRUCTOR2             mm/dd/yy  hh:mmAM
   Subject: Electronic Mail

2. Urgt   Drct                               INSTRUCTOR2             mm/dd/yy  hh:mmAM
   Subject: Mail Attachments

3. Drct   Drct                               INSTRUCTOR2             mm/dd/yy  hh:mmAM
   Subject: Creating Mail

4. Drct   Drct                               INSTRUCTOR2             mm/dd/yy  hh:mmAM
   Subject: Menu-Jumping

      *****END*****

mm/dd/yy  hh:mmAM  TEACH ◀

```

Exercise 2: Viewing a Mail Item

When you view a mail item, it displays on a Command screen (refer to figure 6-2). The display consists of a TO/CC list (indicating sender, date and time sent, subject, and recipients) and one or more of the following:

- a brief message created on the Send Mail menu (EMSM)
- a longer message (called an enclosure) created on a Text Entry screen
- a response you sent (identified as History)
- one or more document attachments

Figure 6-2 Command Screen with Sample Text (Example)

```

COMMAND: ► ◀ DOCUMENT: "ENCLOSURE" SHARED FILE:
----- TO/CC LIST -----
From: R. Johnson
Date/Time: Day mm/dd/yy hh:mm AM
Subject: Electronic Mail

To: T. TRAIN
----- "MESSAGE" -----
See the enclosed message for some information about OFIS Link Electronic Mail.
----- "ENCLOSURE" -----
The OFIS Link Electronic Mail module makes your terminal or workstation an interoffice
mailbox. You can easily deliver accurate, complete messages of any length and distribute
documents or other files.

When you receive mail, OFIS Link notifies you on the Status Line at the bottom of your
screen. The Status Line also tells you when mail you send is undeliverable.

To confirm that the recipient you designated actually receives the mail you send, you can
request a return receipt. OFIS Link keeps a list of your return receipts and informs you

mm/dd/yy hh:mmAM TEACH ◀

```

For mail items longer than one screen, you can view the entire item in sequence by transmitting each screen until you reach the end.

To view a mail item, use the following procedure:

- 1 Enter 1 in the **Select option** field of the **EMVB** menu.
- 2 Enter 1 in the **Mail item** field.
- 3 Transmit.

A Command screen with the first 20 lines of mail item 1 displays.

- 4 Transmit to view the remainder of a mail item longer than 20 lines.
- 4 When you are finished viewing the mail item, enter **END**, **SAVE** or **QUIT** in the **Command** field.
- 5 Transmit.

The **EMVB** menu reappears.

You can jump to different parts of the mail item by entering positioning commands in the **Command** field. These are the same positioning commands you use when viewing or editing documents in the Document Management activity. For a list of these commands, refer to appendix C. To practice using them, refer to section 9, Processing Documents.

You can also enter commands in the **Command** field that allow you to print, file, forward, respond to, and mark for follow-up the mail item you are viewing. Like the menu-jumping feature, the mail commands allow experienced users to take a short cut to accomplish a task. For an explanation of how to use these commands, refer to the *A Series/V Series OFIS Link Operations Guide*. The following exercises show you how to accomplish these tasks by selecting options from the **EMVB** menu.

You can proceed to the next exercise.

Exercise 3: Printing a Mail Item

You select the Print option on the **EMVB** menu to print an entire mail item (including any attachments). To print portions of a mail item, you must use the Mail Item Detail menu (**EMMI**) (refer to exercise 9).

To print a mail item, use the following procedure:

- 1 Enter **2** in the **Select option** field of the **EMVB** menu.
- 2 Enter **1** in the **Mail item** field.
- 3 Transmit.

The **EMVB** menu reappears with the message **Print request queued**. Mail item 1 will print on your default printer.

You can proceed to the next exercise.

Exercise 4: Responding to Mail

The procedure for responding to mail is the same as for originating a mail item (refer to section 5, Mailing Messages and Attachments), except that you need not fill in the recipient information. You can enter a brief message on the **EMSM** menu, enter a message of unrestricted length on the Text Entry screen, and attach documents or other files.

This exercise has two parts: creating a response message of unrestricted length and sending the response.

Part 1: Creating a Response Message

To create a response message of unrestricted length, use the following procedure:

- 1 Enter **9** in the **Select option** field of the **EMVB** menu.
- 2 Enter **1** in the **Mail item** field.
- 3 Transmit.

A Command screen displays with **I (INSERT)** defaulted in the **Command** field.

- 4 Transmit.

A Text Entry screen appears.

- 5 Enter the following paragraph (or one of your choice):

Thanks for the information on OFIS Link Electronic Mail. Now that I've practiced some of the Electronic Mail training exercises, I see how Electronic Mail can speed up business communications. We can send short messages, avoiding "telephone tag." We can attach documents, avoiding time-consuming reproduction on paper. We can easily select mail items to view and quickly respond to Urgent messages.

- 6 Press the **Return** key.

The cursor moves to the left margin of the line following the last line of text you entered.

- 7 With the cursor at the left margin, enter two virgules (//).
- 8 Press the **Home** key.
- 9 Transmit.

The Command screen displays.

- 10 Enter **END** or **SAVE**.
- 11 Transmit.

The **EMSM** menu appears with the word **RESPOND** displayed at the top. The word **ENCLOSURE** displays above the **Message** field, showing that you created a message separately.

Part 2: Sending a Response

To send the response you just created, use the following procedure:

- 1 Leave the **Name / List Network id** field on the **EMSM** menu blank. The sender of the mail item will automatically receive your response.
- 2 Leave the defaults in the **Urgent**, **Certified**, and **Confidential** fields.

When you respond to a mail item, the default in the **Urgent** field matches the original mail item.

- 3 Leave the **Follow-up** field blank.
- 4 Leave the default **N** in the **File outgoing mail** field.
- 5 Transmit.

OFIS Link sends your response. The **EMVB** menu reappears with the message **Response sent** displayed on line 24.

You can proceed to the next exercise.

Exercise 5: Forwarding Mail

You can forward mail you receive to another user. You can add a message or attachments or forward it with nothing added.

To forward a mail item with a brief message, use the following procedure:

- 1 Enter **6** in the **Select option** field of the **EMVB** menu.
- 2 Enter **1** in the **Mail Item** field.
- 3 Transmit.

The **EMSM** menu appears with the word **FORWARD** displayed at the top.

- 4 Leave the default in the **Urgent, Certified, and Confidential** fields.
- 5 Leave the **Follow-up** field blank.
- 6 Leave the default N in the **File outgoing mail** field.
- 7 Enter T in the **T/C/B** field.
- 8 Enter **STUDENTS** in the **Name / List Network id** field.
This addresses the mail item to all the users listed in the STUDENTS distribution list.
- 9 Enter the following message in the **Message** field:
See the forwarded message for information on Electronic Mail.
- 10 Transmit.
OFIS Link forwards the mail item with your message to the users listed on the STUDENTS distribution list. The **EMVB** menu reappears with the message **Mail item forwarded** displayed on line 24.

You can proceed to the next exercise.

Exercise 6: Filing a Mailbox Item

To store a mailbox item as a document in your Document Management directory, you select the File option on the **EMVB** menu. If the mail item does not have attachments, the entire mail item is filed; otherwise the Mail Item Detail menu displays first, so that you can file attachments separately.

To file a mailbox item, use the following procedure:

- 1 Enter 3 in the **Select option** field of the **EMVB** menu.
- 2 Enter 1 in the **Mail item** field.
- 3 Transmit.
- 4 The Filing Information menu (**EMFM**) displays (refer to figure 6-3). The top of the menu shows the sender, the subject, and the order in which portions of a mail item will be filed.
- 5 Enter a name in the **Document name** field of the **EMFM** menu.

You must name the new document you are creating from this mail item. In OFIS Link, names must begin with a letter, and they can contain numbers, spaces, slashes, hyphens and periods.

6 Leave the **Shared file name** field blank and leave **N** in the **Confidential** field.

7 Enter **Electronic Mail** in the **Subject** field.

8 Enter your last name in the **Author** field.

9 Enter the following in **Keyword** fields one and two:
statusline
receipts

For an explanation of keywords, refer to the exercises in section 9, Document Processing.

10 Enter **5** in the **Remove after** field.

This directs OFIS Link to place the document on the list for removal if more than five days pass when no user accesses it.

11 Transmit.

OFIS Link files the mail item as a document. The **EMVB** menu reappears. The mail item you just filed is no longer listed.

You can proceed to the next exercise.

Figure 6-3 Filing Information Menu (EMFM) (Example)

```

EMFM      ELECTRONIC MAIL: FILING INFORMATION      NEXT MENU ►GMAIL◀

From: R. Johnson
Subject: Electronic Mail
Order: 01,02,03

Indicate how this mail item is to be filed:

Document name . ►          ◀ Shared file name ... ►          ◀
Confidential ... ►N◀

Subject ..... ►          ◀
Author .... ►          ◀

Keyword:  1.... ►          ◀          2.... ►          ◀
          3.... ►          ◀          4.... ►          ◀
          5.... ►          ◀

Remove after ►          ◀ days (leave blank for permanent save)

Overwrite existing document.....►N◀

mm/dd/yy hh:mmAM  [TEACH]

```

Exercise 7: Viewing Details of a Mail Item

The Mail Item Detail menu (**EMMI**) allows you to view details about a mail item's contents. You can view, print, forward, respond to, file, follow up on, or remove a mail item from the **EMMI** menu just as you can from the **EMVB** menu. However, from the **EMMI** menu, you also can:

- determine the order in which you process the contents of a mail item
- select portions of the contents to process separately

Exercise 8 gives you practice in the latter two activities. First, though, to access the **EMMI** menu, use the following procedure:

- 1 Enter **10** in the **Select option** field of the **EMVB** menu.
- 2 Enter a number in the **Mail item** field to select the mail item with the subject **Mail Attachments**. (If you've completed exercise 6, this should be mail item 1.)
- 3 Transmit.

The **EMMI** menu appears, listing the contents of the mail item you selected (refer to figure 6-4).

You can proceed to the next exercise.

Exercise 8: Processing a Mail Item with Attachments

You can process any mail item from the **EMMI** screen, but you will normally process an item with attachments from this screen in order to view, print, or file the attachments separately.

On the **EMMI** menu, the different components of the mail item display as a numbered list. You enter numbers in the **Order** field to identify which components you would like to process. You can enter numbers in any order, separated by a space or a comma. If you leave the **Order** field blank, OFIS Link processes the entire item.

Figure 6-4 Mail Item Detail Menu (EMMI) (Example)

EMMI ELECTRONIC MAIL: MAIL ITEM DETAIL				NEXT MENU ►GEMVB◀	
1. View	2. Print	3. File	4. Remove	5. Follow-up	
6. Forward	7. Create Forward	8. Respond	9. Create Respond		
Select option ► ◀		Follow up ► ◀ days			
Order ►					

From: INSTRUCTOR2					
Subject: Mail Attachments					
	Mail	Attachments	Filed	Viewable	

1.	To/CC list	4.	Alternate Users	Y	
2.	Message	5.	Shared Files	Y	
3.	Enclosure				
mm/dd/yy hh:mmAM TEACH ◀					

So that you can practice several ways of using the EMMI menu to process a mail item with attachments, this exercise contains three parts: viewing, printing, and forwarding selected components of a mail item.

Part 1: Viewing Selected Components of a Mail Item

To specify the components you wish to view and the sequence for viewing, use the following procedure:

- 1 Enter 1 in the **Select option** field of the EMMI menu.
- 2 Leave the **Follow up** field blank.
- 3 Enter 2 in the **Order** field.
- 4 Enter a space in the **Order** field.
- 5 Enter the number of one of the attachments in the **Order** field.
- 6 Transmit.

The mail item message and one of the attachments display on a Command screen.

7 When you finish viewing the mail item components, enter **END**, **SAVE**, or **QUIT** in the **Command** field.

8 Transmit.

The **EMMI** menu reappears.

You can proceed to the next exercise.

Part 2: Printing Selected Components of a Mail Item

To print selected components of a mail item, use the following procedure:

1 Enter **2** in the **Select option** field of the **EMMI** menu.

2 Enter in the **Order** field the numbers of the two attachments, separated by a space, then another space and the number of the enclosure.

3 Transmit.

The **EMMI** menu reappears with the message **Print request queued**. The attachments and the enclosure will print on your default printer in the order you specified.

You can proceed to the next exercise.

Part 3: Forwarding Selected Components of a Mail Item

To forward selected components of a mail item, adding a brief message, use the following procedure:

1 Enter **6** in the **Select option** field of the **EMMI** menu.

2 Enter in the **Order** field the numbers of the two attachments, separated by a space.

3 Transmit.

The **EMSM** menu appears. The word **FORWARD** appears at the top. The attachment names are listed in the **Attachment** fields with an attachment number in the **Shared File** fields.

4 Leave **N** in the **File outgoing mail** field.

5 Enter **T** in the **T/C/B** field.

6 Enter **STUDENTS** in the **Name / List** field.

This notifies OFIS Link to forward the item to all users on the public distribution list **STUDENTS**.

7 Enter the following message in the **Message** field:

See the attachments for information on Alternate Users and Shared Files.

8 Transmit.

OFIS Link forwards your message and the attachments to members of the STUDENTS distribution list. The **EMMI** menu reappears with the message **Mail item forwarded** displayed on line 24.

9 Transmit.

The **EMVB** menu reappears.

For a summary of options on the **EMMI** menu and the screen that displays next when you select each option, refer to table 6-1.

Exercise 9: Marking Mailbox Items for Follow-up

You can defer action on a mailbox item until later by selecting the Follow-up option on the **EMVB** menu. OFIS Link places the item in the follow-up directory for the time period you specify, then returns it to your mailbox flagged as Follow-up.

Table 6-1 Mail Item Detail Menu (EMMI) Options

Option	Next Screen
View	Command screen
Print	Mail Item Detail menu (EMMI)
File	Filing Information menu (EMFM)
Remove	Mailbox menu (EMVB)
Forward	Send Mail menu (EMSM)
Create Forward	Command screen
Respond	Send Mail menu (EMSM)
Create Response	Command screen
Follow-up	Mailbox menu (EMVB)

To file a mailbox item in the follow-up directory, use the following procedure:

- 1 Enter **5** in the **Select option** field of the **EMVB** menu.
- 2 Enter **3** in the **Mail item** field to select the mail item with the subject "Menu-Jumping."
- 3 Enter **3** in the **Follow-up in [] days** field.

The item will remain in the follow-up directory three days before OFIS Link returns it to your mailbox.

- 4 Transmit.

OFIS Link places a copy of mail item 1 in the follow-up directory. The **EMVB** menu reappears with the message **Mail item placed in Follow-up directory** displayed on line 24. The mail item you just processed is no longer listed on the **EMVB** menu.

To access a follow-up item before the date specified, you can view the follow-up directory. For more about viewing the follow-up directory, refer to section 5, Mailing Messages and Attachments.

You can proceed to the next exercise.

Exercise 10: Removing Mail

If you don't remove a mail item from your mailbox by choosing the file or follow-up options, OFIS Link will automatically remove a viewed or printed mail item after a certain number of days (determined by your System Administrator). However, you can manually remove it before then.

To manually remove a mail item, use the following procedure:

- 1 Enter **4** in the **Select option** field of the **EMVB** menu.
- 2 Enter **1** in the **Mail item** field.
- 3 Transmit.

Since mail item 1 has attachments, OFIS Link displays the **EMMI** menu.

- 4 Enter **4** in the **Select option** field of the **EMMI** menu.
- 5 Transmit.

OFIS Link removes the item from your mailbox. The **EMVB** menu reappears with a new item 1 and the message **Mail item removed** displays on line 24.

You can proceed to the Unguided Exercises.

Unguided Exercises

To practice what you have learned about Electronic Mail, you can do the following exercises.

Exercise 1: Viewing a Mail Item

View the remaining mail item (refer to exercise 1 if you need help) and return to the **EMVB** menu.

Exercise 2: Printing a Component of a Mail Item

Access the **EMMI** menu and print a component of the mail item you just viewed.

Exercise 3: Responding to a Mail Item

Enter a short message in response to the mail item you just viewed and printed. Enter **Y** in the **File outgoing mail** field on the **EMSM** menu to file your response. Refer to exercises 4 and 6 if you need help.

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Using Your Personal Calendar

The OFIS Link Calendar module transfers the functions of your desktop calendar to the electronic database. When you enter events and notes in your daily calendar, OFIS Link automatically includes each entry on your monthly and weekly calendar as well.

The scheduler, an optional OFIS Link feature, works within the Calendar module as a meeting organizer. Several options on the Calendar menus work only if the scheduler feature is installed on your system. If you choose one of those options on a system without this feature, an error message displays.

Sections 7 and 8 introduce you to tasks that you can accomplish with Calendar. Section 7 focuses on how to record and access information on your own calendar. The exercises in this section give you practice in the following Calendar activities:

- adding a personal timed event to your calendar
- viewing your weekly calendar
- adding a note
- searching for events
- adding a TO DO item
- printing a calendar

No exercises in Section 7 require the scheduler feature.

The exercises in Section 8 focus on tasks involved in organizing meetings, including some that use scheduler options. Any steps that require the scheduler feature are identified.

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Calendar module to perform the exercises in this section.

Accessing the Calendar Module

The first exercise begins with a selection you make from the Calendar Activity Selection menu (**CAAS**). This is the first menu that appears when you access the Calendar module. You can access this module in two ways:

- From the **MAIN** menu, enter **3** in the **Select option** field and transmit.
- From any other menu, enter **GCAAS** in the **Next Menu** field and transmit.

The **CAAS** menu appears (refer to figure 7-1). You are ready to begin exercise 1.

Note: If you need additional information about the menu with which you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help Screens, refer to appendix C.

Figure 7-1 Calendar Activity Selection Menu (CAAS)

CAAS	CALENDAR: ACTIVITY SELECTION MENU	NEXT MENU ► GCAAS ◀
day, date		
<ol style="list-style-type: none"> 1. Daily calendar 2. Weekly calendar 3. Monthly calendar 4. Search calendar 5. Print calendar 6. Location calendar 7. TO DO list 8. Unscheduled recurring events 9. View unacknowledged invitations 10. User availability check 		
Select option	► ◀	
Date	► ◀	
Personal events only	► N ◀	
mm/dd/yy	hh:mmAM	SEARCH

Guided Exercises

Exercise 1: Adding a Personal Timed Event to Your Daily Calendar

Add a timed event (an event with a specified starting time) to your daily calendar with the following procedure:

- 1 Enter **1** in the **Select option** field of the **CAAS** menu.
- 2 Enter next Tuesday's date in the **Date** field (if today is a Tuesday, enter the date for a week from today).
Your System Administrator sets the format you use for entering a date.
- 3 Transmit.
The Daily Calendar menu (**CADC**) for next Tuesday's date appears (refer to figure 7-2).
- 4 Enter **1** in the **Select option** field.
- 5 Transmit.
The Add/Change Event menu (**CAAE**) appears (refer to figure 7-3).

Figure 7-2 Daily Calendar Menu (CADC)

```

CADC          CALENDAR: DAILY CALENDAR          NEXT MENU ► GCAAS ◀

day, date

1. Add          5. Set reminder
2. Change       6. View daily calendar
3. Cancel       7. View participants
4. View         8. Acknowledge

Select option ► ◀
Event number ► ◀   Date ► ◀   Reminder ► ◀   Attend (Y/N) ► ◀

Time           Rmd   Location           Description
-----
                                     **END**

6  7  8  9  10  11  12  1  2  3  4  5  6
-----
mm/dd/yy  hh:mmAM  TEACH
    
```

Figure 7-3 The Add/Change Event Menu (CAAE)

```

CAAE          CALENDAR: ADD/CHANGE EVENT          NEXT MENU ► GCADC ◀

day, date

Date... ►mm/dd/yy◀   Start time ► ◀
Duration... ►◀◀◀◀   Reminder ► ◀
Confidential... ►N◀   Recurring ►N◀

Designated chairperson...► ◀
Location.....► ◀
Description.....► ◀

Enter users or distribution lists:

► ◀ ◀ ◀ ◀ ◀
► ◀ ◀ ◀ ◀ ◀
► ◀ ◀ ◀ ◀ ◀
► ◀ ◀ ◀ ◀ ◀

More attendees: ► N ◀

mm/dd/yy  hh:mmAM  TEACH
    
```

- 6 Enter a starting time of 8:30 A.M. in the **Start time** field, using the time format your System Administrator selected for your site.
- 7 Enter **01** in the first **Duration** field and **30** in the second **Duration** field.
This means the event will last 1 hour and 30 minutes.
- 8 Enter **15** in the **Reminder** field.
OFIS Link will display a reminder on your status line approximately 15 minutes before 8:30 A.M. next Tuesday morning (8:15 A.M.).
- 9 Enter **CONFROOM** in the **Location** field.
The identifier for the small conference room is CONFROOM. Entering this identifier means that the meeting will be held in the small conference room.
- 10 Enter **Meeting with class** in the **Description** field.
- 11 Transmit.
OFIS Link enters an event with the description **Meeting with class** at 8:30 next Tuesday morning. The reminder **EVT** will appear on your status line at 8:15 next Tuesday morning.
The **CADC** menu for next Tuesday reappears with the scheduled meeting listed. The length of the meeting shows on the time line.

Transmit to return to the **CAAS** menu. You can proceed to the next exercise.

Exercise 2: Viewing Your Weekly Calendar

When you enter events in your daily calendar, OFIS Link automatically enters them in your weekly and monthly calendars as well. View your weekly calendar for next week (when the events you entered occur) with the following procedure:

- 1 Enter **2** in the **Select option** field of the **CAAS** menu.
- 2 Enter next Tuesday's date.

Note: You can enter any date that falls within a week to view the calendar for that week.

3 Transmit.

The Weekly Calendar (CAWC) menu appears. The slashes in the date box for Tuesday indicate the timed events that are scheduled for that date. Slashes on the left side of the box indicate events scheduled in the morning; on the right they indicate events in the afternoon.

A description of each event displays. The **P** on the description line indicates a personal event, the **G** indicates a group event, and the **C** indicates a confidential meeting.

4 Enter in the **Select daily calendar field the date for Tuesday in the week of the calendar you are viewing.****5 Transmit.**

The **CADC** menu for next Tuesday's date appears.

6 Transmit.

The **CAAS** menu displays.

You can proceed to the next exercise.

Exercise 3: Adding a Note (Untimed Event)

A note is an untimed event and does not have a starting or ending time, but appears on the calendar for the date you enter it just as a timed event does. Enter a note on your calendar with the following procedure:

1 Enter 1 in the **Select option field of the CAAS menu.****2 Transmit.****3 Enter 1 in the **Select option** field of the CADC menu.****4 Enter next Tuesday's date in the **Date** field (if today is a Tuesday, enter the date for a week from today).****5 Transmit.**

The **CAAE** menu appears.

6 Enter **Assignment: Distribution lists in the **Description** field.****7 Transmit.**

The **CADC** menu for next Tuesday reappears, with **NOTE...Assignment: Distribution lists** under the **Time** and **Description** headings.

8 Transmit.

The **CAAS** menu reappears.

You can proceed to the next exercise.

Exercise 4: Searching for Events

You can direct OFIS Link to search for events within a date range you specify. Search for calendar events with the following procedure:

- 1 Select 4 on the CAAS menu.
- 2 Transmit.

The Search Criteria menu (CASC) appears (refer to figure 7-4).

- 3 Enter the dates for the first and last days of the current month in the Calendar date range from...thru field.

This directs OFIS Link to search for all events on your calendar that fall between the first and last days of the current month.

Note: With the scheduler feature, you can do separate searches for meeting invitations you have received and acknowledged and those you have received but not yet acknowledged. Figure 7-4 shows the default for these two fields as N. On a system with the scheduler feature, the default is Y.

Figure 7-4 Search Criteria Menu (CASC)

CASC
CALENDAR: SEARCH CRITERIA
NEXT MENU ► GCASC ◀

Calendar date range from ► ◀ thru ► ◀

Personal	►	Y	◀	
Group	►	Y	◀	
Search timed	►	Y	◀	
Search notes	►	Y	◀	
Search unacknowledged	►	N	◀	
Search acknowledged	►	N	◀	

Match all search words ► N ◀

Search words:

1.	►	
2.	►	◀
3.	►	◀
4.	►	◀
5.	►	◀

mm/dd/yy
hh:mmAM
TEACH ◀

4 Enter **class** in the first **search words** field.

This directs OFIS Link to search for all events entered in your calendar (within the specified date range) that have the word **class** in their descriptions.

5 Transmit.

The Search Results menu (**CASR**) appears (refer to figure 7-5), showing all the events with the word **class** in their descriptions that occur between the first and the last days of the current month. With the scheduler feature, the response status of the meeting invitation displays; without scheduler, the status does not display.

6 Transmit.

The **CAAS** menu appears.

You can proceed to the next exercise.

Figure 7-5 Search Results Menu (CASR) (Example)

CASR		CALENDAR: SEARCH RESULTS		NEXT MENU ► GCAAS ◀	
Date: mm/dd/yy - mm/dd/yy					
Search:	Personal Notes Acknowledged	Group	Search words:	CLASS	
Date	Time	Description	Status		
-----	-----	-----	-----		
1. mm/dd/yy	08:30A-10:00A	MEETING WITH CLASS	Attending		
END					
► ◀	Item number	Attend (Y/N)	► ◀	Sending delegate..	► ◀
		View participants	► ◀	► N ◀	
mmdd/yy hh:mmAM		TECH			

Exercise 5: Adding a TO DO Item

You can use the TO DO List option to remind you of things you want to do. To add a TO DO item to your calendar, you use the following procedure:

- 1 Enter 7 on the CAAS menu.
- 2 Transmit.

The TO DO List menu (CATD) appears (refer to figure 7-6).

- 3 Enter 1 in the Select Option field.
- 4 Enter a priority for the TO DO item in the Priority field: **H** (for high), **M** (for medium), or **L** (for low).
- 5 Enter the date when the item is due for completion in the Due date field.
- 6 Enter a description of the item, such as **Prepare speech for monthly sales meeting**, in the Description field.

Figure 7-6 The TO DO List Menu (CATD)

CATD CALENDAR: TO DO LIST		NEXT MENU ► GCAAS ◀		
day, date				
1. Add Item 2. Change Item 3. Delete Item 4. Print TO DO list				
Select option ►	◀ Item ►	◀ Priority ►	◀ (H/M/L)	Due date ►
	Description			
Item	Description	Priority	Date Created	Due date
---	-----	---	-----	-----
	END			
mm/dd/yy hh:mmAM		TEACH		

7 Transmit.

OFIS Link redisplayes the TO DO List menu and adds the item you just entered to the list.

8 Transmit.

The **CAAS** menu reappears.

You can proceed to the next exercise.

Exercise 6: Printing a Calendar

You can print a daily, weekly, or monthly calendar containing personal events, group events, or both on your default printer. To print a daily calendar of personal events, you use the following procedure:

1 Enter option **5** in the **Select option** field of the **CAAS** menu.

2 Transmit.

The Print Calendar Selection menu (**CAPC**) appears (refer to figure 7-7).

3 Enter **Y** in the **Print daily calendar** field.

4 Enter the first and last dates of next week in the **Date range...thru** fields.

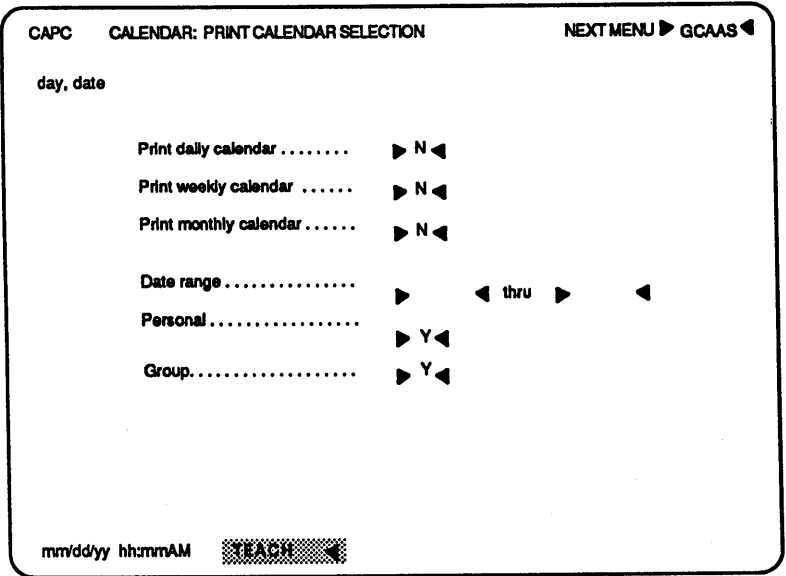
5 Enter **N** in the **Group** field.

6 Transmit.

OFIS Link prints the daily calendar of personal events for the dates you entered. The **CAAS** menu reappears.

You can proceed to the Unguided Exercises.

Figure 7-7 Print Calendar Selection (CAPC)



Unguided Exercises

While you are still in the TEACH mode, you can do the following exercises to practice what you have learned about Calendar.

Exercise 1: Adding a Note to Your Daily Calendar

Add a note to your daily calendar using what you know from exercise 3.

Exercise 2: Changing a TO DO List Item

Change a TO DO list item using what you know from exercise 5 and help from the Help screens.

You can proceed to section 8, or you can exit the TEACH mode by entering QUIT in the Next Menu field and transmitting.

Organizing Meetings

The OFIS Link Calendar module helps you organize meetings. You can schedule meetings that include other OFIS Link users and enter the event on the calendars of those who are to attend. OFIS Link maintains a calendar for locations identified by the System Administrator; you can view a directory of these locations and check the availability of a location for a meeting.

The scheduler, an optional OFIS Link feature, works within the Calendar module to give added capabilities. With this feature, you can check the availability of local meeting participants, view a directory of responses to meeting invitations you send, and view a directory of invitations you have received and not yet acknowledged. If you choose a scheduler menu option on a system without this feature, an error message displays. Any exercises or steps that require the scheduler feature are identified. You can skip them if your system does not have this feature.

You may find the exercises in this section easier if you first do the exercises in section 7. Section 7 introduces you to the Calendar module with exercises for recording and accessing information on your calendar. Section 8 focuses on tasks associated with setting up meetings.

The exercises in this section give you practice in the following tasks:

- viewing a location calendar and reserving a location
- checking availability of participants
- scheduling a meeting
- checking a directory of participants
- entering a recurring event
- resolving recurring event scheduling conflicts

If you have just completed Section 7 and are still in TEACH mode, you can go directly to exercise 1 to begin practice. Otherwise, you should read the information under the following heading.

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Calendar module to perform the exercises in this section.

Accessing the Calendar Module

The first exercise in this section begins with a selection you make from the Calendar Activity Selection menu (**CAAS**). This is the first menu that appears when you access the Calendar module. You can access this module in two ways:

- From the **MAIN** menu, enter **3** in the **Select option** field and transmit.
- From any other menu, enter **GCAAS** in the **Next Menu** field and transmit.

The **CAAS** menu appears (refer to figure 7-1). You are ready to begin exercise 1.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help Screens, refer to appendix C.

Guided Exercises

Exercise 1: Viewing a Location Calendar and Reserving a Location

You can view a list of all meeting locations in your facility that are entered on the OFIS Link system and view the calendar for a specific location to find out whether that location is available. You can reserve a location for a specific time and date.

View a list of all locations, select and view a location calendar, and then reserve the location with the following procedure:

- 1 Enter **6** in the **Select option** field of the **CAAS** menu.
- 2 Transmit.
The Location Activity Selection menu (**CALA**) appears (refer to figure 8-1).
- 3 Enter **1** in the **Select option** field of the **CALA** menu.
- 4 Transmit.
The Location List menu (**CALL**) appears (refer to figure 8-2).
- 5 Enter **1** (the number of the first location, **CONFROOM**) in the **Select location to view** field.
- 6 Enter next Tuesday's date to view the location calendar.
- 7 Transmit.
The Location Calendar menu (**CALC**) for the small conference room (**CONFROOM**) appears, showing the times that location is reserved on the date you specified.

Figure 8-1 The Location Activity Selection Menu (CALA)

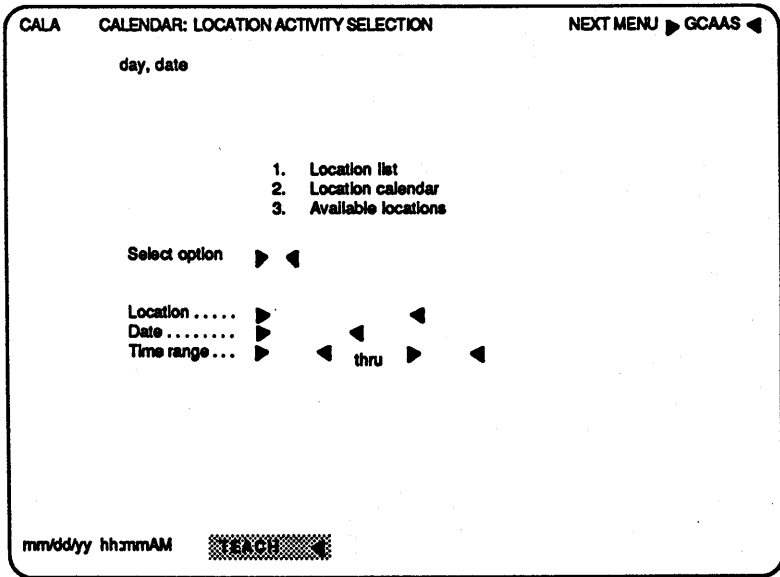
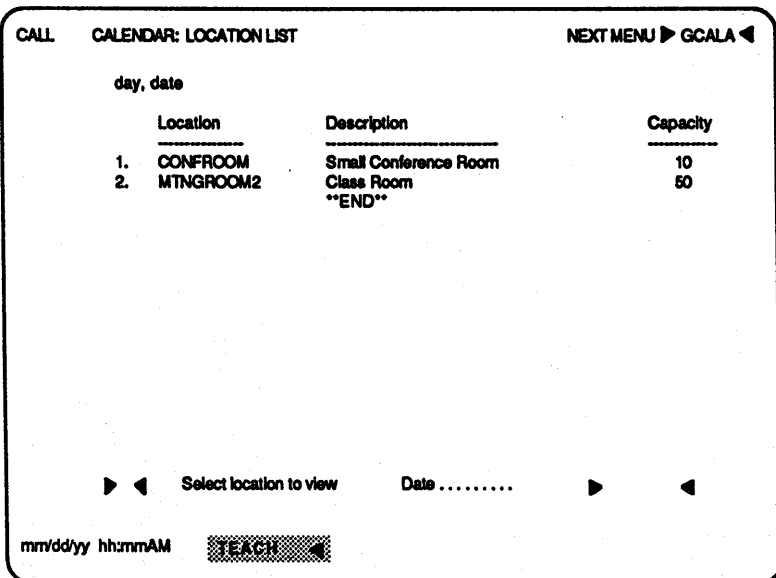


Figure 8-2 Location List Menu (CALL) (Example)



- 8 Enter **1** in the **Select option** field.
- 9 Enter 3:00 P.M. and 4:00 P.M. for the beginning and ending times in the **Time ... thru** fields, using the time format your System Administrator selected for your site.
- 10 Transmit.
OFIS Link reserves the location on the date of the calendar you viewed at the time you specified, and redisplay the **CALC** menu.
- 11 Enter **GCAAS** in the **Next Menu** field.
- 12 Transmit.
The **CAAS** menu reappears.

When you add an event using the location and times you reserved, OFIS Link schedules the location.

You can proceed to the next exercise.

Exercise 2: Checking Availability of Participants

Note: You can perform this exercise only if the scheduler feature is installed on your system.

With the scheduler feature, you can check whether local OFIS Link users are free to attend a meeting you plan. If their calendars show they have accepted another meeting invitation or have a personal event scheduled for that time period, OFIS Link notifies you of the conflict. The notification is for your information only; you can schedule the meeting anyway or you can recheck availability for a different time.

Perform an availability check on prospective meeting participants with the following procedure:

- 1 Enter **10** in the **Select option** field of the **CAAS** menu.
- 2 Transmit.

The User Availability Check menu (**CAAC**) appears (refer to figure 8-3).

Figure 8-3 User Availability Check Menu (CAAC) (Example)

CAAC CALENDAR: USER AVAILABILITY CHECK NEXT MENU ► GCAAS ◀

Date..... ► mmdyy ◀

Begin time... ► 3:00PM ◀ End time..... ► 4:00PM ◀

Recheck..... ► Y ◀ Schedule..... ► N ◀

Location..... ► CONFROOM ◀

User Id	Result	User Id	Result
► STUDENT1	◀	►	◀
► STUDENT2	◀	►	◀
► STUDENT3	◀	►	◀
►	◀	►	◀
►	◀	►	◀

mm/dd/yy hh:mmAM **TEACH**

- 3 Enter next Tuesday's date in the **Date** field.
- 4 Enter a beginning time of 3:00 P.M. in the **Begin time** field and an ending time of 4:00 P.M. in the **End time** field, using the time format your System Administrator selected for your site.
- 5 Enter **CONFROOM** in the **Location** field.
- 6 Enter the following **User Ids** in the **User id** field: **STUDENT1**, **STUDENT2**, and **STUDENT3**.
- 7 Transmit.

The screen displays the results of the participant availability check. If any of the participants listed have a schedule conflict with your proposed meeting, **CONFLICT** appears in the **RESULT** field. If that location is unavailable for the requested time, the word **CONFLICT** appears to the right of the **Location** field.

You have completed the participant availability check. In actual use, once you have completed one such check, you have three choices:

- To recheck availability, you can enter a new location, a new time, or new participants and transmit.
OFIS Link performs another availability check with the new information.
- To schedule the meeting, you can enter **N** in the **Recheck** field and **Y** in the **Schedule** field.
The **CAAE** menu appears with the date, time, location, and users you just entered displayed in the appropriate fields. You can complete the remaining options on the **CAAE** menu, as described in exercise 3.
- To return to the **CAAS** menu without scheduling the meeting, you can enter **N** in the **Recheck** field and transmit.

For training purposes (so that you can practice scheduling a meeting without doing an availability check first), the following exercise on scheduling a meeting begins at the **CAAS** menu and has you enter new information, rather than using the information you entered in this exercise. Therefore, enter **N** in the **Recheck** field and transmit. The **CAAS** menu reappears.

You can proceed to the next exercise.

Exercise 3: Scheduling a Meeting on Your Calendar and Calendars of Meeting Participants

You can use this procedure to schedule a meeting whether or not your system has the scheduler feature.

To add a meeting to the calendars of other users as well as your own calendar, you use the following procedure:

- 1 Enter **1** in the **Select option** field of the **CAAS** menu.
- 2 Enter next Tuesday's date in the **Date** field.
- 3 Transmit.

The **CADC** menu (refer to figure 7-2) for next Tuesday's date appears.

- 4 Enter **1** in the **Select option** field of the **CADC** menu.
- 5 Transmit.

The **CAAE** menu (refer to figure 7-3) for next Tuesday's date appears.

6 Enter a starting time of 10:30 A.M. in the **Start time** field, using the time format your System Administrator selected for your site.

7 Enter 01 in the first **Duration** field and 45 in the second **Duration** field.

This means that the meeting will last 1 hour and 45 minutes.

8 Enter 20 in the **Reminder** field.

This directs OFIS Link to remind you of the meeting 20 minutes prior to the meeting time, or 10:10 A.M.

9 Enter Y in the **Confidential** field.

This makes the meeting confidential, so that only users and their alternate users who have access to confidential information can view the event.

10 Leave the **Designated chairperson** field blank.

OFIS Link transmits but does not review the information you enter in this field. You can enter any name or leave it blank.

11 Enter **CONFROOM** in the **Location** field.

The identifier for the small conference room is CONFROOM. Entering this identifier means that the meeting will be held in the small conference room.

12 Enter **Planning session** in the **Description** field.

13 Enter the distribution list identifier **/MARKETING** in the first field under the message **Enter users or distribution lists**.

This directs OFIS Link to enter the meeting on the calendars of all the users listed in the **/MARKETING** distribution list.

14 Transmit.

OFIS Link enters a confidential meeting with the description **Planning session** on the calendars of all the users on the **/MARKETING** distribution list. The meeting is set for 10:30 A.M. next Tuesday in the small conference room. The **CADC** menu for next Tuesday's date reappears.

15 Transmit.

The **CAAS** menu reappears.

You can proceed to the next exercise.

Exercise 4: Checking a Directory of Participants

You can view a directory of meeting participants for both meetings to which you've been invited and meetings you scheduled.

If the scheduler feature is installed on your system, you can view additional information for meetings you scheduled. For such meetings, the **Status** field of the meeting directory displays any participant responses (Attending, Declined, or Send Delegate). If the participant has not yet responded, the **Status** field will be blank. If you were not the one who scheduled the meeting or if your system does not have scheduler, the entire column under **Status** will be blank.

To view a directory of meeting participants, you use the following procedure:

- 1 Enter **1** in the **Select option** field of the **CAAS** menu.
- 2 Enter next Tuesday's date in the **Date** field.
- 3 Transmit.

The Daily Calendar menu (**CADC**) for next Tuesday's date appears with the planning session you scheduled in the preceding exercise displayed.

- 3 Enter **7** in the **Select option** field.
- 4 Enter the item number of the planning session in the **Item number** field to view the participants.
- 5 Transmit.

The View Participant Directory menu (**CAVP**) appears with the planning session participants listed (refer to figure 8-4).


- 6 Enter **GCAAS** in the **Next Menu** field and transmit.
The **CAAS** menu reappears.

You can proceed to the next exercise.

Exercise 5: Entering a Recurring Event on Your Calendar and on the Calendars of Other OFIS Link Users

A recurring event is any timed event that occurs more than once, such as a class or committee meeting. The occurrences of the event do not have to be at the same time or on the same day of the week.

Figure 8-4 View Participant Directory Menu (CAVP) (Example)

CAVP CALENDAR: VIEW PARTICIPANT DIRECTORY		NEXT MENU ► GCAVP ◀	
Participant	Status	Participant	Status
INSTRUCTOR1			
STUDENT7			
STUDENTS			
END			
Attend (Y/N) ► ◀		Sending delegate. ► ◀	
mm/dd/yy hh:mmAM	TEACH 		

You add a recurring event in two stages: first, by adding it through the **CAAE** menu as you would any timed event, and then by setting up the repetitions through the Recurring Event Entry menu (**CARE**). To enter a recurring event, you use the following two-part procedure:

Part 1: Completing the CAAE menu

- 1 Enter **1** in the **Select option** field of the **CAAS** menu.
- 2 Transmit.
- 3 Enter **1** in the **Select option** field of the **CADC** menu.
- 4 Enter next Tuesday's date in the **Date** field (if today is a Tuesday, enter the date a week from today).
- 5 Transmit.
The **CAAE** menu for that date appears.
- 6 Enter a starting time of 1:30 P.M. in the **Start time** field, using the time format your System Administrator selected for your site.
- 7 Enter **01** in the first **Duration** field, and **30** in the second **Duration** field.

8 Enter **20** in the **Reminder** field.

9 Enter **Y** in the **Recurring** field.

This means that the event occurs more than once, and that you want to schedule all of the occurrences.

10 Enter **CONFROOM** in the **Location** field.

11 Enter **OFIS Link class** in the **Description** field.

12 Enter **STUDENTS** in the first field under the message **Enter users or distribution lists**.

13 Transmit.

The Recurring Events Entry menu (**CARE**) appears (refer to figure 8-5), with **OFIS Link class** in the **Description** field.

You are ready to proceed to Part 2 of this exercise.

Figure 8-5 Recurring Events Entry Menu (**CARE**) (Example)

```

CARE          CALENDAR: RECURRING EVENTS ENTRY          NEXT MENU ► GCADC ◀

Description..... OFIS Link CLASS
Designated chairperson.....

Start date ► mmddyy ◀      End date ► ◀
                             month year      month year

    Daily Options          S M T W T F S          S M T W T F S
    -----
1. First      5. Last      4 5 6 7 8 9 10      1 2 3 4 5 6 7
2. Second    6. Every      11 12 13 14 15 16 17      8 9 10 11 12 13 14
3. Third     7. Every other  18 19 20 21 22 23 24      15 16 17 18 19 20 21
4. Fourth                                25 26 27 28 29 30 31      22 23 24 25 26 27 28
                                                                29 30

S M T W T F S          Start time      Duration      Location      Rmd
► ◀ ◀ ◀ ◀ ◀ ◀ ◀      01:30PM      01 00      CONFROOM      020
► ◀ ◀ ◀ ◀ ◀ ◀ ◀      ► ◀ ◀ ◀ ◀ ◀ ◀ ◀      ► ◀ ◀ ◀ ◀ ◀ ◀
► ◀ ◀ ◀ ◀ ◀ ◀ ◀      ► ◀ ◀ ◀ ◀ ◀ ◀ ◀      ► ◀ ◀ ◀ ◀ ◀ ◀

MONTHLY DATES
► ◀ ◀ ◀ ◀ ◀ ◀ ◀

mm/dd/yy hh:mmAM      TEACH
    
```

Part 2: Completing the CARE Menu (Enter a Recurring Event)

You can establish the dates for a recurring event in two ways:

- You can use the **Daily Options** to specify occurrences based on day of the week (for example, every other Tuesday, the first Monday).
- You can use the **Monthly Dates** to specify occurrences based on day of the month (for example, the 15th or 20th of a month).

Note: You cannot enter information under both **Daily Options** and **Monthly Dates** on the same CARE menu.

You will set up a recurring event based on day of the week in the next part of this exercise. The examples you enter in the **CARE** menu assume you want to schedule a class meeting for 1:30 P.M. every other Tuesday of this month.

Set up the dates for a recurring event with the following procedure:

- 1 Enter in the **End date** field the last date in the month being scheduled.
- 2 Enter 7 (the number for the **Every other** option under **Daily Options**) in the field under **T** (Tuesday).

This step sets the dates for the class meeting on every other Tuesday. You established the start time (1:30 P.M.), the duration (1 hour 30 minutes), the location (small conference room) and the reminder time (20 minutes) when you completed the **CAAE** menu.

- 3 Transmit.

OFIS Link sets a class meeting at 1:30 P.M. every other Tuesday of the month.

The **CADC** menu for next Tuesday's date reappears.

- 4 Transmit.

The **CAAS** menu for today reappears.

You can proceed to the next exercise.

Exercise 6: Resolving Recurring Event Scheduling Problems

When you set up a recurring event, one of the dates you select might conflict with another date already set up for a different appointment. You can identify and resolve such conflicts using the **Unscheduled Recurring Events** directory (**CARC**) and the **Recurring Events Resolution** menu (**CARR**).

The next exercise has three parts; in the first and second, you set up a scheduled recurring event exactly as you did in exercise 5. The example given deliberately conflicts with a previously scheduled event. The third part of the exercise shows you how to identify and resolve the scheduling conflict.

Set up the recurring event with the following procedure:

Part 1: Completing the CAAE menu

- 1 Enter **1** in the **Select option** field of the **CAAS** menu.
- 2 Transmit.
- 3 Enter **1** in the **Select option** field of the **CADC** menu.
- 4 Enter next Tuesday's date in the **Date** field (if today is a Tuesday, enter the date a week from today).
- 5 Transmit.
The **CAAE** menu appears.
- 6 Enter a starting time of **1:30 P.M.** in the **Start time** field, using the time format your System Administrator selected for your site.
- 7 Enter **01** in the first **Duration** field, and **00** in the second **Duration** field.
- 8 Enter **20** in the **Reminder** field.
- 9 Enter **Y** in the **Recurring** field.
- 10 Enter **CONFROOM** in the **Location** field.
- 11 Enter **SALES MEETING** in the **Description** field.
- 12 Enter **/MARKETING** in the first field under the message **Enter users or distribution lists**.

13 Transmit.

The Recurring Events Entry menu (**CARE**) appears (refer to figure 8-5), with **sales meeting** in the **Description** field.

You can proceed with the second part of this exercise.

Part 2: Setting Up a Recurring Event

Set up the dates for a recurring event with the following procedure:

- 1 Enter in the **End date** field the last date of the month being scheduled.
- 2 Enter **3** (the number for the third option under **Daily Options**) in the field under **T (Tuesday)**.

This step sets the dates for the sales meeting on every third Tuesday. You established the start time (1:30 P.M.), the duration (1 hour 00 minutes), the location (small conference room) and the reminder time (20 minutes) when you completed the **CAAE** menu.

3 Transmit.

The **CADC** menu reappears.

4 Transmit.

The **CAAS** menu reappears.

You can proceed with the third part of this exercise.

Part 3: Resolving a Scheduling Conflict

Since OFIS Link schedules recurring events as a background process, several minutes may pass before it determines a scheduling conflict. When it does, it lists the conflicting event on the **Unscheduled Recurring Events Directory** menu (**CARC**) and the **Event Status** menu (**ESTA**) and displays the **EVTS** indicator on the status line. Wait until the **EVTS** indicator appears before continuing with this exercise.

Check for scheduling problems and resolve them with the following procedure:

- 1 Enter **8** in the **Select option** field of the **CAAS** menu.
- 2 Transmit.

The **Unscheduled Recurring Events Directory** menu (**CARC**) appears (refer to figure 8-6).

Figure 8-6 **Unscheduled Recurring Events Directory (CARC) (Example)**

CARC CALENDAR: UNSCHEDULED RECURRING EVENTS DIRECTORY NEXT MENU ▶ GCAAS ◀	
Date Range	Event description
1. mm/dd/yy - mm/dd/yy	SALES MEETING **END**
▶ ◀ Select recurring event number	
mm/dd/yy hh:mmAM	TEACH

- 3 Enter 1 to select event number 1.
- 4 Transmit.
The Recurring Events Resolution menu (**CARR**) appears (refer to figure 8-7).
- 5 Enter the number of the occurrence you want to reschedule in the **Event number** field.
- 6 Enter **S** in the **Action S/C** field to reschedule the event. (Entering a **C** in the **Action S/C** field will cancel the event.)
- 7 Change the date to a Thursday.
- 8 Transmit.
OFIS Link reschedules the event with the conflict. The **CARR** menu reappears with that event no longer listed.
- 9 Transmit twice to return to the **CAAS** menu.

You can proceed to the next exercise.

Figure 8-7 Recurring Events Resolution Menu (CARR) (Example)

CARR CALENDAR: RECURRING EVENTS RESOLUTION NEXT MENU ► GCARC ◀

Description: Sales Meeting

Event number . . . ► ◀		month year		month year
Action (S/C) . . . ► ◀		S M T W T F S		S M T W T F S
Date ►	◀		1 2 3	1 2 3 4 5 6 7
Start ►	◀	4 5 6 7 8 9 10		8 9 10 11 12 13 14
Duration ► ◀ ►	◀	11 12 13 14 15 16 17		15 16 17 18 19 20 21
Location ►	◀	18 19 20 21 22 23 24		22 23 24 25 26 27 28
		25 26 27 28 29 30 31		29 30

Date	Start	Duration	Location	Cause of Problem
-----	-----	-----	-----	-----
1. mm/dd/yy	hh:mmPM	1:00	CONFROOM	Meeting Location not available

mm/dd/yy hh:mmAM **TEACH** ◀

Unguided Exercises

To practice what you have learned about organizing meetings with Calendar, you can do the following exercises.

Exercise 1: Scheduling a Meeting

Schedule a sales meeting in the CONFROOM for next Friday from 10:00 A.M. to 11:30 A.M. Include the members of the distribution list /MARKETING. Refer to exercise 3 if you need help.

Exercise 2: Setting Up a Recurring Event

Set up an administrative meeting in MTNGROOM2 for the following dates and times. Include the members of the distribution list STUDENTS.

- Select every third Monday for the next two months at 2:00 P.M.
- Select the first working day of the month for the next two months at 8:00 A.M.

Refer to exercise 5 and the Help screens if you need help.

Exercise 3: Resolving Scheduling Conflicts

Check the Unscheduled Recurring Events Directory to see whether or not the event you scheduled in exercise 2 has caused a scheduling conflict. Refer to exercise 6, Part 3 if you need help.

You can proceed to another section of this guide, or you can exit the TEACH mode by entering QUIT in the Next Menu field and transmitting.

Processing Documents

There are 5 activities within the Document Management module:

- Document administration (where you create, file, edit, print, delete, and restore documents).
- Document transfers (where you transfer files between system components)
- Workstation local processing (where you temporarily leave OFIS Link to process at your workstation)
- OFISfile processing (where you access an OFISfile and perform most OFISfile activities)
- Shared file administration (where you create and maintain shared files for document storage and distribution)

The exercises in this section cover Document Administration and OFISfile activities. Section 10 contains exercises to practice document transfer activities. (For information on using your local workstation, refer to your workstation operations manual.)

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Document Administration activity to begin the first exercise in this section.

Accessing the Document Administration Activity

The first exercise begins with a selection you make from the Document Management Activity Selection menu (DMAS). You can access the DMAS menu two ways:

- From the MAIN menu, enter 1 in the Select option field and transmit.

The Document Management Main Selection menu (DOCM) appears.

Enter 1 in the Select option field and transmit.

- From any other menu, enter GDMAS in the Next Menu field and transmit.

The DMAS menu appears (refer to figure 9-1). You are ready to proceed with exercise 1.

Note: If you need additional information about the menu you are working with, you can enter H in the Next Menu field and transmit. For more information about Help screens, refer to appendix C.

Figure 9-1 Document Management Activity Selection Menu (DMAS)

DMAS DOCUMENT MANAGEMENT ACTIVITY SELECTION NEXT MENU ► GDMAS◀

Current document
 Shared file name

1. View directory for document selection
2. Print directory of documents
3. Create a document
4. Edit selected document
5. Assemble documents
6. View current document
7. Print selected document
8. Refile current document
9. Remove selected document
10. Restore selected document
11. View directory of keywords

Select option ► ◀

Selected current document ► ◀

Selected shared file ► ◀

mm/dd/yy hh:mmAM **TEACH**

Guided Exercises

Exercise 1: Viewing a Directory of Documents

You can view a list of all the documents in your directory, or you can direct OFIS Link to search for documents that match certain keywords that you specify. To get an idea of what a directory of documents looks like, use the following procedure:

- 1 Enter 1 in the **Select option** field of the **DMAS** menu.
- 2 Transmit.

The Document Selection menu (**DMDS**) appears (refer to figure 9-2).

Figure 9-2 Document Selection Menu (DMDS)

DMDS DOCUMENT MANAGEMENT: DOCUMENT SELECTION NEXT MENU ► GDMS ◀

Enter the criteria for the documents in which you are interested:

Document name ► STANDARD2 ◀ SHARED FILE NAME... ► ◀

Display details ► N ◀

Date created: From ... ► ◀ to ► ◀

Search subject ► Y ◀

Search references ► Y ◀

Match all keywords ... ► N ◀

Keyword: 1 ► ◀ 2 ► ◀

 3 ► ◀ 4 ► ◀

 5 ► ◀

mm/dd/yy hh:mmAM TEACH

- 3 If the **Document name** or the **Shared file** fields are not blank, press the **Spacebar** repeatedly to blank these fields.
- 4 Enter **Y** in the **Display details** field.
- 5 Transmit.

The first display of the Detail Document Directory menu (**DMDD**) appears. The details of the document filing information appear with the name of the document, showing any information the creator of that document entered when filing the document.

Notice particularly the keywords that describe each document. You will use these later in an exercise that directs OFIS Link to search for documents with the same keyword.

- 6 Transmit to view the next display of the Detail Document Directory menu.
- 7 Repeat step 6 until **END** appears on the final display of the directory.
- 8 Transmit the final display.
The **DMAS** menu reappears.

You can proceed to the next exercise.

Exercise 2: Searching for Documents with Matching Keywords

Direct OFIS Link to search for and display a directory of documents with matching keywords with the following procedure:

- 1 Enter **1** in the **Select option** field of the **DMAS** menu.
- 2 Transmit.
- 3 The **DMDS** menu appears.
- 4 Press the **Spacebar** to blank the **Document name** and **Shared file** fields.
- 5 Enter **Y** in the **Display details** field.
- 6 Enter **NEWFILESYSTEM** in the first **Keyword** field.
- 7 Transmit.

OFIS Link displays the **DMDD** menu with all of the documents in your directory that have **NEWFILESYSTEM** as a keyword and/or in the subject.

- 8 Transmit to review the next display of the Document Selection menu.
- 9 Repeat step 8 until **END** appears on the final display of the directory.
- 10 Transmit the final display.
The **DMAS** menu reappears.

You can proceed to the next exercise.

Exercise 3: Creating a Document

When you create a document using OFIS Link, you enter text in the same way you type a document on a sheet of paper. Text entry is more efficient because you can overwrite an incorrect word and move blocks of text from one position to another.

Note: You can also create a document on a BTOS workstation and transfer it to OFIS Link. For more information about transferring documents, refer to section 10.

Create a document using the following two-part procedure:

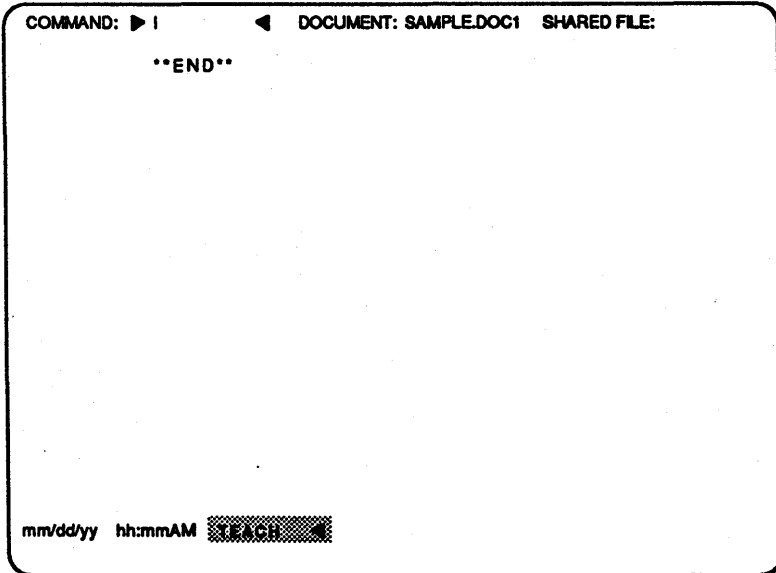
Part 1: Accessing the Text Entry Screen

- 1 Enter **3** in the **Select option** field of the **DMAS** menu.
- 2 Transmit.
The Create a Document menu (**DMCR**) appears on the screen.
- 3 Enter **SAMPLE.DOC1** in the **Document name** field.
Leave the **Shared file name**, **Subject**, **Author**, and **Keyword** fields blank for this document. You will learn how to use these fields in a later exercise.
- 4 Press the **TAB** or **RETURN** key until the cursor is located in the **Remove after** field.
- 5 Enter **10** in the **Remove after** field.
- 6 Press the **TAB** or **RETURN** key once to move the cursor to the **Overwrite existing document** field.
- 7 Enter **Y** in the **Overwrite existing document** field.
- 8 Transmit.
The Command screen appears, with **I (INSERT)** defaulted in the **Command** field (refer to figure 9-3).

9 Transmit.

A Text Entry screen appears with the message **Enter text and transmit from HOME**. You are ready to begin Part 2 of this exercise: entering the text of your document.

Figure 9-3 Command Screen



Part 2: Entering the Text of your Document

1 Enter the text in italics.

Remember to press the **RETURN** key at the end of each line; OFIS Link does not automatically hyphenate.

When you create a new document on OFIS Link, you must enter a unique name for the document in the Document Name field on the DMCR menu. In addition, you can take the following steps to make your document more identifiable and easier to locate.

If you develop a consistent pattern for naming documents, you can recognize a document by its name more easily. For example, you can begin your document names with a syllable or group of letters that identifies the general group to which the documents belong. In this case, SALES might be the first part of all names of documents pertaining to sales. Because OFIS Link displays document names alphabetically, all documents with names that begin the same appear together as a group.

2 Press the **HOME** key.

3 Transmit.

A new blank Text Entry screen appears.

4 Continue typing the material in italics.

You can also enter a subject for your document on the DMCR menu to make it easier to identify. Since you can direct OFIS Link to search for all documents with the same word in their subjects, you can quickly find a document when you know its subject.

If you enter up to five keywords on the DMCR menu, OFIS Link searches for documents with keywords that match. You can specify whether OFIS Link is to display a list of documents with keywords that match all of those you enter, or a list of documents that have at least one matching keyword.

You can enter the subject and keywords after you create and save your document, but if you enter them when you are creating a document, you can find the document easier the next time you want to access it.

5 Press the **RETURN** key.

You should be at the left margin of the line following the last line of text you entered.

- 6 Enter two virgules (/ /) in the first two character positions of the line following the last line of text entered.
- 7 Press the **HOME** key.
- 8 Transmit.
- 9 Enter **SAVE** in the **Command** field.
- 10 Transmit.

The **DMAS** menu reappears, with the document you just created, **SAMPLE.DOC1**, in the **Current document** field.

SAMPLE.DOC1 is a private document because you did not place it in a shared file. Only the creator of a private document can access the document.

You can proceed to the next exercise.

Exercise 4: Refiling a Document

After you create and save a document, you can change the filing information using the Refile Current Document activity. Refile the document you just created, using the following procedure:

- 1 Enter **8** in the **Select option** field of the **DMAS** menu.
- 2 Transmit.
The Refile a Document menu (**DMRF**) appears (refer to figure 9-4).
- 3 Press the **TAB** or **RETURN** key until the cursor is located on the **Subject** field of the **DMRF** menu.
- 4 Enter **NAMES AND PROCEDURES** in the **Subject** field.
- 5 Press the **TAB** or **RETURN** key to locate the cursor in the **Author** field.
- 6 Enter your name as the author.
- 7 Press the **TAB** key to locate the cursor in the first **Keyword** field.

Figure 9-4 Refile a Document Menu (DMRF) (Example)

DMRF DOCUMENT MANAGEMENT: REFILE A DOCUMENT NEXT MENU ► GDMS◀

Identify the document and indicate the new filing information:

Document name SAMPLE.DOC1 Shared file name
 Confidential ► N◀

New document name .. ► SAMPLE.DOC1◀ New shared file ...► ◀

Subject ► ◀
 Author ► ◀

Keyword: 1 ► ◀ 2 ► ◀
 3 ► ◀ 4 ► ◀
 5 ► ◀

Remove after ► 10 ◀ days (leave blank for permanent save)
 Retain old copy ► N◀
 Overwrite existing document ► N◀

mm/dd/yy hh:mmAM **TEACH** ◀

- 8 Enter **CREATE** in the first **Keyword** field.
- 9 Press the **TAB** key until the cursor is located over the second **Keyword** field.
- 10 Enter **FILINGINFO** in the second **Keyword** field.
- 11 Press the **TAB** or **RETURN** key until the cursor is located over the third **Keyword** field.
- 12 Enter **RETRIEVAL** in the third **Keyword** field.
 If you want to enter more keywords, follow the procedures in steps 11 and 12 for the fourth and fifth **Keyword** fields.
- 13 Enter **Y** in the **Overwrite existing document** field.
- 14 Transmit.

OFIS Link refiles the private document SAMPLE.DOC1 with the keyword, subject, and author references you entered and redispays the **DMAS** menu.

You can proceed to the next exercise.

Exercise 5: Accessing a Document for Editing

After you create and save a document, you can make changes to the text as well as the filing information. Edit SAMPLE.DOC1 with the following procedure:

- 1 Enter **4** in the **Select option** field.
- 2 Transmit.
- 3 Enter **Y** in the **Overwrite existing document** field.
- 4 Transmit.

The first 20 lines of SAMPLE.DOC1 display.

You can proceed to the next exercise.

Exercise 6: Using the Positioning Commands

To move from one position to another in a document, you use the Positioning Commands. Practice using the Positioning Commands by performing the following procedures:

- 1 Enter **B** (for Bottom) in the **Command** field.
- 2 Transmit.
The END of the document displays.
- 3 Enter **-15L** in the **Command** field and transmit.
The display moves backwards 15 lines in the document.
- 4 Enter **15L** to reposition yourself at the end of the document.
The display moves forward 15 lines in the document.
- 5 Enter **-1P** in the **Command** field and transmit.
The display moves backwards in the document 20 lines (20 lines is a full screen display, or page).
- 6 Enter **T** to reposition yourself at the top of the document and transmit.
The first 20 lines of the document display.

For a table of the Positioning Commands with a description of each command, refer to appendix C.

Exercises 7 through 11 cover five editing commands, each with a separate procedure. All the editing exercises require that SAMPLE.DOC1 be the document you are editing. The editing commands covered are:

- INSERT (I)
- MODIFY (M)
- TRANSFER TEXT (<NUMBER> X)
- INSERT STORED TEXT (I/)
- DELETE (<NUMBER> DEL)

You can proceed to the next exercise.

Exercise 7: Inserting Text or a Document

You use the **INSERT (I)** command to add new text to a document. You can add:

- words or other text to a document you created
- another document to a document you created
- text from another place in the currently displayed document that you stored

Refer to exercises 9 and 10 for this use of the I command.

You used the first type of I command when you created SAMPLE.DOC1 (the I command appeared automatically in the **Command** field). Since the document contained no text when you first began creating it, you inserted text into the blank document.

The second type of **INSERT** command inserts the text of an entire document into the text of the currently displayed document. Insert the document EDITCOMMANDS (already located in the OFIS Link training database) into SAMPLE.DOC1 with the following procedure:

- 1 Press the **HOME** key.
- 2 Enter **B** (bottom of document) in the **Command** field.
- 3 Transmit.

END (of the document SAMPLE.DOC1) displays on an otherwise blank screen.

- 4 Enter **I EDITCOMMANDS** (for **INSERT** document <EDITCOMMANDS>) in the **Command** field.
- 5 Transmit.

OFIS Link inserts the text of EDITCOMMANDS at the end of SAMPLE.DOC1.

If you want to insert a document at another position in SAMPLE.DOC1, you use the following procedure:

- 1 Position the text line of SAMPLE.DOC1 that is to follow the inserted text at the top of the display.
- 2 Enter **I** <filename> in the **Command** field.
<filename> stands for the name of the document you are inserting into the displayed document.
- 3 Transmit.
OFIS Link inserts the document you specified in the **INSERT** command into the currently displayed document.

You can proceed to the next exercise.

Exercise 8: Adding Text Using the MODIFY Command

You use the **MODIFY (M)** command to make minor changes or add lines to the displayed text. When you transmit the **MODIFY** command, OFIS Link displays extra lines at the bottom of the screen labeled <SPARE>.

When you transmit changes you make under the **MODIFY** command, OFIS Link updates your document with the lines you transmit.

Note: Any characters you move off the screen are lost.

Practice using the **MODIFY** command with the following exercise:

- 1 Enter **-1P** in the **Command** field to move backwards 20 lines in the text.
- 2 Transmit.
- 3 Enter **M** in the **Command** field.
- 4 Transmit.
The same 20 lines of the original text display, with four lines marked <SPARE> at the bottom of the screen.
- 5 Enter the text in italics in the <SPARE> lines:
The TRANSFER command stores the <number> of lines of text temporarily. Entering OX in the Command field discards the stored lines of text.
- 6 Press the **HOME** key.
- 7 Transmit.

OFIS Link adds the lines of text you typed to the text in the position where you typed them.

You can proceed to the next exercise.

Exercise 9: Storing Text in a Temporary Storage Buffer

You use the **TRANSFER (X)** command to store text in a temporary storage area, or buffer.

Store the text you entered in exercise 8 using the following procedure:

- 1 Use the Positioning Commands to position at the top of the display the first line of text you inserted in exercise 8. (For a list of the Positioning Commands, refer to appendix C).
- 2 Enter **3X** (transfer 3 lines) in the **Command** field.
- 3 Transmit.

OFIS Link stores a copy of the first three displayed lines in the temporary storage buffer. The original text remains unchanged at its original position.

You can proceed to the next exercise.

Exercise 10: Inserting Text from the Temporary Storage Buffer

You use the **INSERT** command (**I**) to insert the text you stored using the **TRANSFER** command.

Transfer the text you stored in exercise 9 to another position in the document, using the following exercise:

- 1 Enter **B** in the **Command** field to move to the **END** of the document.
- 2 Transmit.
- 3 Enter **-1P** in the **Command** field to move to the previous 20 lines.
- 4 Transmit.
- 5 Use the **L** and **-L** commands to position the following text line at the top of the display:
<number>X **Transfers the next <n> lines of text,**
- 6 Enter **4L** in the **Command** field.
- 7 Transmit.

8 Enter **I/** (**INSERT TRANSFERRED TEXT** command) in the **Command** field.

9 Transmit.

OFIS Link inserts the text you stored in the temporary buffer into the document just before the line at the top of the display.

To check your work, you enter **-5L** in the **Command** field and transmit. OFIS Link moves backwards 5 lines in the document.

You can insert the same stored text in more than one position in the document by moving to the location and using the **I/** command again.

To clear the storage buffer, enter **0X** in the **Command** field and transmit.

You can proceed to the next exercise.

Exercise 11: Deleting Text

In this exercise you continue to work with **SAMPLE.DOC1**. Delete the original copy of the text you transferred in the previous two exercises with the following procedure:

1 Use the Positioning Commands (refer to appendix C) to position the original occurrence of the transferred text at the top of the display.

2 Enter **3DEL** in the **Command** field.

3 Transmit.

OFIS Link deletes the top 3 lines of text displayed on the screen.

4 Enter **SAVE** in the **Command** field.

5 Transmit.

OFIS Link saves and files the document **SAMPLE.DOC1** with all the changes you made, and redisplay the **DMAS** menu.

You can proceed to the next exercise.

Exercise 12: Printing a Document

Print SAMPLE.DOC1 using the following procedure:

- 1 Enter **7** in the **Select option** field of the **DMAS** menu.
- 2 Enter SAMPLE.DOC1 in the **Selected document** field of the **DMAS** menu.
- 3 Transmit.
OFIS Link places SAMPLE.DOC1 in the queue for your default printer and redisplay the **DMAS** menu.

You can proceed to the next exercise.

Exercise 13: Removing a Document From a Directory

When you mark a document for removal, OFIS Link places it on a removal list. Documents on this list are retained for a period of time determined by the System Administrator. Remove the document SAMPLE.DOC1 from your directory with the following procedure:

- 1 Enter **9** in the **Select option** field of the **DMAS** menu.
- 2 Transmit.
The Remove Document Selection menu (**DMRS**) appears.
- 3 Press the **Spacebar** repeatedly to enter blanks in the **Document name** field.
- 4 Transmit.
The Remove Document Directory menu (**DMDR**) appears, containing a list of all the documents in your directory.
- 5 Enter an **X** beside the document SAMPLE.DOC1.
- 6 Transmit.
OFIS Link marks the document for removal. The **DMAS** menu reappears with the message **Document removed** displayed on line 24.

Transmit to return to the **DOCM** menu. You can proceed to the next exercise.

Exercise 14: Restoring a Document

You can restore documents you marked for removal as long as they remain on the removal list. However, you cannot restore a document you marked for immediate removal (by entering a **Y** in that field on the **DMRS** menu).

To restore a document, use the following procedure:

- 1 Enter **10** in the **Select option** field of the **DMAS** menu.
- 2 Transmit.
The Restore Document Directory menu (**DMUD**) displays.
- 3 Enter an **X** beside the document you want to restore.
- 4 Transmit.
OFIS Link restores that document to your directory. The **DMAS** menu reappears.

You can proceed to the next exercise.

Exercise 15: Selecting an OFISfile

You can select and access an OFISfile from your OFIS Link terminal or workstation. For information on OFISfile commands and procedures, refer to the *OFISfile User's Guide*, and to the *A Series/V Series OFIS Link Operations Guide*.

Note: You can only perform this procedure if there is actually an OFISfile connected to your OFIS Link system.

Select an OFISfile for processing with the following procedure:

- 1 Enter **4** in the **Select option** field of the **DOCM** menu.
- 2 Transmit.
The OFISfile Selection Menu (**DMOS**) appears (refer to figure 9-5).
- 3 Enter **1** in the **Select OFISfile** field to select OFISfile number 1.
- 4 Transmit.
The system connects you with OFISfile1 and the OFISfile dialogue menu appears (refer to figure 9-6).
- 5 Enter **D/** to disconnect from the OFISfile and return to the **DOCM** menu.

You can proceed to the Unguided Exercises.

Figure 9-5 OFISfile Selection Menu (DMOS)

DMOS DOCUMENT MANAGEMENT: OFISFILE SELECTION		NEXT MENU ▶ GDCOM ◀
	OFISfile	Comment
1.	-----	-----
2.		
3.		
4.		
5.		
▶ ◀ Select OFISfile		
mm/dd/yy hh:mmAM TEACH ◀		

Figure 9-6 OFISfile Main Menu

```

mm/dd/yy  hh:mm
To select an option, type a letter (A, B, ?, etc.) and press RETURN.

OPTIONS:
A. Search
B. Display
C. File
D. Utilities
E. End Session
?. Help

SELECT ONE:

```

Unguided Exercises

Exercise 1: Selecting and Viewing a Document

Select a document from your document directory for viewing only. (Hint: use the View Current Document activity.)

Exercise 2: Creating a Document and Inserting Another Document

Create a document of your own, and insert a document from the document directory (refer to exercises 1 and 5 for procedures, and to appendix C for Positioning and Editing Commands).

Exercise 3: Marking the Inserted Document for Removal

Mark for removal the document you inserted into the document you created in Unguided Exercise 2.

Transferring Documents

You can use the Document Transfer activity to transfer documents electronically between OFIS Link and a workstation, OFIS Link and general storage on the host computer, and a workstation and general storage. The exercises in this section demonstrate the procedures for accomplishing transfers between OFIS Link and BTOS workstations and between OFIS Link and general storage.

Note: Using the TTY module or third-party software, you can transfer documents between OFIS Link and an IBM PC or PC-compatible computer. For more information, refer to the *A Series/V Series OFIS Link TTY Operations Guide* or to the documentation accompanying your third-party software.

Background Versus Foreground Transfer

OFIS Link allows you to transfer a document or other file as a background process, known as background file transfer (BFT). With BFT, you can continue with OFIS Link activities while the transfer takes place. Document transfers between OFIS Link and general storage use BFT. Transfers between a workstation and OFIS Link use either foreground transfer or BFT, depending on the transfer software installed on the workstation.

Note: For more information on your workstation transfer software, refer to the *BTOS Document Translator Operations Guide* (for foreground transfer) or the *BTOS File Transfer Operations Guide* (for background transfer).

You fill out the same OFIS Link menus for a foreground transfer or BFT, with three differences:

- When transferring between OFIS Link and a workstation using BFT, you enter a BFT station identifier on the menu; with foreground transfer, you do not.

The BFT identifier tells OFIS Link the workstation with which the transfer will take place. It can belong to a workstation from which you are currently accessing OFIS Link or to another BFT workstation.

- With BFT, you enter the name of the workstation document on the transfer menu. With foreground file transfer, you enter it separately on a menu displayed by the transfer software.

- With BFT, once you transmit your transfer request, you return to the Document Transfer Activity menu (DMTS). You can then continue OFIS Link processing. With foreground transfer, you must wait until the transfer is complete before continuing with OFIS Link activities.

The final step in each exercise cancels your menu entries without initiating the actual transfer. Therefore, regardless of what transfer software you have on your workstation, you can practice the same exercises. (After you practice with the exercises, you can transfer actual documents in normal OFIS Link conditions using the same procedures.)

Since no actual transfer takes place, you can omit the BFT identifier, but you must enter it to do an actual BFT transfer. You can view a directory of identifiers in the Systems and Users module (refer to section 3).

Accessing OFIS Link from a BTOS Workstation

The exercises in this section give the procedures you use within OFIS Link. For instructions on how to access OFIS Link from your workstation, refer to the operations guide for your emulator program or for your transfer software.

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the Next Menu field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Document Transfer activity to perform the exercises in this section.

Accessing the Document Transfer Activity

The first exercise begins with a selection you make from the Document Transfer Activity menu (**DMTS**). This is the first menu that appears when you access the Document Transfer activity. You can access the **DMTS** menu two ways:

- From the **MAIN** menu, enter **1** in the **Select option** field and transmit.

The Document Management Main Selection menu (**DOCM**) appears.

Enter **2** in the **Select option** field and transmit.

- From any other menu, enter **GDMTS** in the **Next Menu** field and transmit.

The **DMTS** menu appears (refer to figure 10-1). You can proceed with the exercises for this activity.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Figure 10-1 Transfer Activity Menu (DMTS)

DMTS DOCUMENT MANAGEMENT: TRANSFERS ACTIVITY SELECTION NEXT MENU ► GDMTS ◀

1. Transfer document from workstation to OFIS Link
2. Transfer document from OFIS Link to workstation
3. Transfer document from general storage to OFIS Link
4. Transfer document from OFIS Link to general storage
5. Transfer between workstation and general storage

Select option ► ◀

mm/dd/yy hh:mmAM TEACH ◀

Guided Exercises

Exercise 1: Workstation to OFIS Link Transfer

You can transfer a document created on a BTOS workstation word processor and stored on a workstation disk to your OFIS Link document management directory.

Note: In this exercise, you practice completing the Workstation to OFIS Link menu (DMWO). A Secretarial Word Processing (SWP) or Professional Word Processing (PWP) document must be in Document Exchange Format (DEF) before you begin this procedure. Refer to your workstation word processor operations guide for instructions on converting a document to DEF.

Transfer a document from a workstation to OFIS Link with the following procedure:

- 1 Enter 1 in the **Select option** field of the **DMTS** menu.
- 2 Transmit.

The **DMWO** menu (refer to figure 10-2) appears.

Figure 10-2 Workstation to OFIS Link Menu (DMWO) (Example)

```

DMWO DOCUMENT MANAGEMENT: WORKSTATION TO OFIS LINK NEXT MENU ► GDMS ◀
Indicate how this document is to be filed:

W/S Location ..... ► ◀
W/S File Name ..... ► ◀

Document name ..... ◀ Shared file name ... ► ◀
Confidential ..... ► N◀
Subject ..... ► ◀
Author ..... ► ◀

Keyword: 1 ..... ► ◀ 2 ..... ► ◀
        3 ..... ► ◀ 4 ..... ► ◀
        5 ..... ► ◀

Remove after ..... ► ◀ days (leave blank for permanent save)
Overwrite existing document ..... ► N◀

Select file type ... ► 1 ◀ 1. PWP/SWP IN
                           2. OTHER
mm/dd/yy hh:mmAM TEACH ◀
  
```

- 3 Choose one of the following:
 - For BFT, enter a BFT identifier in the **W/S Location** field. If you don't know this identifier, you can leave the field blank for this training exercise; when doing an actual transfer you must fill it in.
 - For foreground transfer, leave the **W/S Location** field blank.
- 4 Choose one of the following:
 - For BFT, enter **WORKSTATIONDOC** in the **W/S File Name** field. (In an actual transfer, you enter the full path name of the workstation DEF document.)
 - For foreground transfer, leave the **W/S File Name** field blank. (In an actual transfer, you enter the name of the workstation DEF document on a menu that appears after you transmit the **DMWO** menu.)
- 5 Enter **WORKSTATION1** in the **Document name** field.
You assign the name under which you want the transferred document to be filed in OFIS Link. OFIS Link names must begin with a letter, and they can contain numbers, spaces, virgules, hyphens, and periods.
- 6 Leave the **Shared file name** field blank.
- 7 Leave **N** in the **Confidential** field.
- 8 Enter **THIRD QUARTER BUDGET** in the **Subject** field.
- 9 Enter your own name in the **Author** field.
- 10 Enter **FORECASTS** in the first **Keyword** field.
- 11 Enter **10** in the **Remove after** field.
- 12 Leave **N** in the **Overwrite existing document** field.
- 13 Enter the number of the file type that corresponds to your workstation word processor type in the **Select file type** field (the default is 1).
Your System Administrator determines the word-processor types listed. If your word processor is not listed, you can select type **Other**. Type **Other** documents can be transferred but not viewed or printed in OFIS Link.
- 14 Enter **C** in the **Next Menu** field.

15 Transmit.

Transmitting **C** discards the entries you made in the **DMWO** menu and redisplay the **DMTS** menu. During a real transfer, you transmit the menu without entering **C**. The original document on the workstation remains unchanged.

You can proceed to the next exercise.

Exercise 2: OFIS Link to Workstation Transfer

Practice transferring a document from your OFIS Link document management directory to a BTOS workstation disk, using the following procedure:

1 Enter **2** in the **Select option** field of the **DMTS** menu.

2 Transmit.

The OFIS Link to Workstation menu (**DMOW**) appears (refer to figure 10-3).

3 Enter **NEWBUDGET** (an OFIS Link document name) in the **Document name** field.

4 Leave the **Shared file name** field blank.

5 Enter in the **Select file type** field the number of the file type corresponding to the word processor on the workstation to which you are transferring the document (the default is 1).

Your System Administrator determines the word-processor types listed.

6 Choose one of the following:

- For BFT, enter a BFT identifier in the **W/S Location** field. If you don't know this identifier, you can leave the field blank for this training exercise; when doing an actual transfer you must fill it in.
- For foreground file transfer, leave the **W/S Location** field blank.

Figure 10-3 OFIS Link to Workstation Menu (DMOW)

DMOW DOCUMENT MANAGEMENT: OFIS LINK TO WORKSTATION TRANSFER NEXT MENU ► GDMTS ◀

Identify the document to be transferred:

Document name ► ◀ Shared file name ... ► ◀

Select file type ► 1 ◀

1. PWP/SWP OUT
2. OTHER

W/S Location ... ► ◀
W/S File Name .. ► ◀

mm/dd/yy hh:mmAM **TEACH** ◀

7 Choose one of the following:

- For BFT, enter **NEWBUDGETCOPY** (a name you wish to assign the transferred document) in the **W/S File Name** field. (In an actual transfer, you follow the file-naming conventions for the word processor to which you are transferring the document.)
- For foreground transfer, leave the **W/S File Name** field blank. (In an actual transfer, you enter the name you wish to assign the transferred document on a menu that appears after you transmit the **DMOW** menu.)

- 8 Enter **C** in the **Next Menu** field.
- 9 Transmit.

OFIS Link discards the entries you made in the **DMOW** menu and redisplay the **DMTS** menu. When you transfer a real OFIS Link document to a workstation, you press **TRANSMIT** without entering **C**. OFIS Link transfers a copy of the document you specified to the workstation disk. The document arrives in **DEF** format.

You can proceed to the next exercise.

Exercise 3: Transferring a Document from General Storage to OFIS Link

Transfer a document from the system disk pack to your OFIS Link directory using the following procedure:

- 1 Enter **3** in the **Select option** field of the **DMTS** menu.
- 2 Transmit.

The General Storage to OFIS Link menu (**DMGO**) appears (refer to figure 10-4).

Figure 10-4 General Storage to OFIS Link Menu (DMGO)

DMGO DOCUMENT MANAGEMENT: GENERAL STORAGE TO OFIS LINK NEXT MENU ► GDMTS ◀

Identify the file to be transferred:

Pack name ► ◀

File name ► ◀ ◀

Indicate how this document is to be filed:

Document name ... ► ◀ Shared file name ... ► ◀

Confidential ► N◀

Subject ► ◀

Author ► ◀

Keyword: 1 ► ◀ 2 ► ◀

 3 ► ◀ 4 ► ◀

 5 ► ◀

Remove after ... ► ◀ days (leave blank for permanent save)

Overwrite existing document ► N◀

mm/dd/yy hh:mmAM **TEACH** ◀

- 3 Enter **XXX** in the **Pack name** field.
- 4 Enter **PROPOSAL1** in the **File name** field.
When doing the actual transfer, you enter the name of the General Storage document in this field.
- 5 Enter **PROPOSAL** in the **Document name** field.
You assign the name under which you want the transferred document to be filed in OFIS Link.
- 6 Enter **STANDARD ELECTRIC COMPANY** in the **Subject** field.
- 7 Enter your name in the **Author** field.
- 8 In **Keyword** fields 1 through 3, enter **NEWBUSINESS**, **FASTFILESYSTEM**, and **UTILITIES**.
- 9 Leave the **Remove after** field blank.
- 10 Leave **N** in the **Overwrite existing document** field.
- 11 Enter **C** in the **Next menu** field.
- 12 Transmit.

OFIS Link discards the entries you made on the **DMGO** menu and redisplayes the **DMTS** menu. When you transfer a real General Storage document to OFIS Link, you press **TRANSMIT** without entering **C**. OFIS Link transfers a copy of the document you specified to your OFIS Link directory.

You can proceed to the next exercise.

Exercise 4: OFIS Link to General Storage Transfer

Transfer a document from your OFIS Link directory to a system disk pack using the following procedure:

- 1 Enter **4** in the **Select option** field of the **DMTS** menu.
- 2 Transmit.

The OFIS Link to General Storage menu (**DMOG**) appears (refer to figure 10-5).

Figure 10-5 OFIS Link to General Storage Menu (DMOG)

```

DMOG DOCUMENT MANAGEMENT: OFIS LINK TO GENERAL STORAGE NEXT MENU ► GDMTS ◀

Identify the document to be transferred:
Document name .....► ◀ Shared file name ... ► ◀

Identify the file to be created on the system:
Pack name .....► ◀ ◀
File name .....► ◀ ◀

mm/dd/yy hh:mmAM TRANSMIT ◀

```

- 3 Enter **PROPOSAL1** in the **Document name** field.
- 4 Leave the **Shared file name** field blank.
- 5 Enter **XXX** in the **Pack name** field.
- 6 Enter **PROPOSAL** in the **File name** field.
- 7 Enter **C** in the **Next Menu** field.
- 8 Transmit.

OFIS Link discards the entries you made on the DMGO menu and redisplayes the DMTS menu. When you transfer a real OFIS Link document to General Storage, you press **TRANSMIT** without entering **C**. OFIS Link transfers a copy of the document you specified to General Storage.

You can proceed to the next exercise.

Exercise 5: Viewing the Background File Transfer Status Directory

Practice checking the status of background file transfers with the following procedure:

- 1** Enter **X** in the **Next Menu** field of the menu displayed.
- 2** Transmit.
- 3** The Background File Transfer Status Directory displays.
- 4** Transmit.

The menu you were last viewing displays.

You can proceed to the Unguided Exercises.

Unguided Exercises

To practice what you have learned about Document Transfers, you can do the following exercises.

Exercise 1: Transferring a Document from a Workstation to OFIS Link

Select a document stored on a workstation disk and fill out the **DMWO** menu to transfer it to the **OFIS Link Document Management** directory. Remember to enter **C** instead of transmitting at the end of the procedure, or **OFIS Link** will actually transfer your document.

Exercise 2: Transferring a Document from OFIS Link to General Storage

Select an **OFIS Link** document in the **Document Management** directory of the training database and transfer it to the system disk pack. (Hint: Refer to section 9 for instructions on selecting an **OFIS Link** document.)

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Selecting Printers

You use the Printer Selection module to select the printer and printer attributes you want to use to print documents, mail items, distribution lists, and directories within OFIS Link.

If you create a document using OFIS Link, you use the Printer Selection module to control the appearance of the printout (page length, margin, spacing, and number of lines per page) as well as the type of printer. If you create a document on a word processor, you use the word processor to format the document; the word processor formatting overrides OFIS Link formatting.

Your site may also use printer pass-through (PPT) to print on printers connected to a terminal or workstation rather than to OFIS Link. Two types of PPT printing are available: letter quality and draft quality. Letter-quality PPT printing allows documents to retain most word-processing attributes and formats, such as boldface and superscript; draft PPT printing does not.

The Printer Selection module also maintains a directory of print requests and their status. You can remove requests not yet printed, except for line printer and PPT requests. You access the Printing Status menu from any module by entering **P** in the **Next Menu** field.

The exercises in this section give you practice in:

- viewing a directory of available printers
- changing your current session printer
- changing printer attributes
- requesting a printer for the next print request

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Printer Selection module to perform the exercises in this section.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Accessing the Printer Selection Module

The first exercise in this section begins with a selection you make on the Printing Activity Selection (**PACT**) menu. This is the first menu that appears when you access the Printer Selection module. You can access the **PACT** menu in two ways:

- From the **MAIN** menu, enter **7** in the **Select option** field and transmit.
- From any other menu, enter **GPACT** in the **Next Menu** field and transmit.

The **PACT** menu appears (refer to figure 11-1). You are ready to begin exercise 1.

Note: To print a word processor document with an OFIS Link printer, you must first transfer the document to your OFIS Link document management files. Refer to section 10 for instructions on transferring a document.

Figure 11-1 Printing Activity Selection Menu (PACT)

PACT	PRINTING: ACTIVITY SELECTION	NEXT MENU ► GPACT ◀
	<ol style="list-style-type: none"> 1. View directory of printers 2. Update default printers 3. Define printer for next request 4. Update printer attributes 	
Select option	► ◀	
Printer ID	► ◀	Printer Models:
Printer model	► ◀	01 LINE PRINTER 05 AP 1310
		02 AP 1301 06 AP 1350
		03 AP 1340 99 PPT
mm/dd/yy	hh:mmAM	TEACH ◀

Guided Exercises

Exercise 1: Viewing a Directory of Available Printers


The Print Directory (**PDIR**) menu shows you a list of the printers available to you. For each printer, the menu lists an identifier (ID) you use to select it for a print request, comment, category (data comm or line printer), and model.

View the **PDIR** menu with the following procedure:

- 1 Enter 1 in the **Select Option** field of the **PACT** menu.
- 2 Transmit.

The **PDIR** menu appears (refer to figure 11-2), listing each of the printers available to you.

Figure 11-2 Printer Directory Menu (PDIR) (Example)

Printer ID	Comment	Category	Model
-----	-----	-----	-----
LINEPRINTER	Computer Room	LINE PRINTER	LINE PRINTER
AP501	First floor, Wing A	DATA COMM	AP1350
AP502	First Floor, Wing B	DATA COMM	AP1350
PPT1	Seventh Floor, Wing B	DATA COMM	PPT
END			
mm/dd/yy hh:mmAM TEACH 			

3 Note the printer ID and model for several of the printers listed (you enter this information in later exercises).

4 Transmit.

The **PDIR** menu can have multiple displays, depending on the number of printers available. To view additional **PDIR** displays, you transmit until you reach the last one. **END** marks the end of the directory.

When you transmit the last **PDIR** display, **OFIS Link** returns you to the **PACT** menu.

You can proceed to the next exercise.

Exercise 2: Changing Your Current Session Printer

One of the printer IDs listed in the **PDIR** menu is your personal default printer. OFIS Link sends all your print requests to this printer, unless you specify another printer by:

- changing your personal default printer
- selecting another printer for the current session (this selection overrides your personal default printer until you sign off OFIS Link)
- designating a specific printer for the next print request (designating a printer for the next print request overrides both the personal default and current session printer for that print request only)

You can also specify a different default printer for your incoming mail.

Determine which printer is your personal default printer and change your current session printer with the following procedure:

1 Enter **2** in the **Select Option** field of the **PACT** menu.

2 Transmit.

The **PTSL** menu displays on your screen (refer to figure 11-3), showing the identifiers of your default printers.

3 Enter a different printer identifier in the **Current Session Printer ID** field by overtyping the identifier shown with the identifier of another printer listed in the **PDIR**. Blank out any remaining letters by spacing over them.

4 Transmit.

The printer whose ID you entered becomes your printer for the current session. The **PACT** menu reappears.

You can proceed to the next exercise.

Figure 11-3 Printer Selection Menu (PTSL) (Example)

```

PTSL          PRINTING: PRINTER SELECTION          NEXT MENU ► GPACT ◀

Please enter:

Personal default Printer ID ..... ► LINEPRINTER ◀
Current session Printer ID ..... ► LINEPRINTER ◀
Incoming mail Printer ID ..... ►          ◀
Incoming mail print option ..... ► 1 ◀          1 - No Print
                                                2 - Print & Retain
                                                3 - Print & Discard

mm/dd/yy  hh:mmAM  ████

```

Exercise 3: Changing Printer Attributes

Each printer available to OFIS Link has values set for attributes such as left margin and page length settings that control the format of the printed page. If you create a document on a word processor, you set some of these through your word processing program. When you create a document through OFIS Link, however, you establish most of the formatting through the printer attribute menus.

In addition, you use the printer attribute menus to set some attributes that apply regardless of where you create the document. For example, you can change the number of copies and suppress the print banner (pages that print before and after your print request containing information such as user ID and date and time of printing).

Change the attributes for your current session printer with the following procedure:

- 1 Enter 4 in the **Select option** field of the **PACT** menu.
- 2 Enter the ID of your current session printer in the **Printer ID** field.

3 Enter the number associated with the model of your current session printer in the **Printer model** field.

4 Transmit.

The printer attribute menu for the model printer you selected appears. This menu will be **PALP** for line printers and **PDCP** for data comm printers.

5 Enter **40** in the **Lines per page** field under **CURRENT SESSION**.

This changes the number of printed lines per page to a maximum of 40.

6 Transmit.

The **PACT** menu reappears. **OFIS Link** changes the lines per page attribute to a maximum of 40 printed lines per page.

There is a printer attribute menu for each available printer. Initially, the System Administrator sets the values for the attributes.

For more information about the attributes available for data comm and line printers, you can request the Help screen for the specific printer attribute menu or refer to the *A Series/V Series OFIS Link Operations Guide*.

You can proceed to the next exercise.

Exercise 4: Requesting a Printer for the Next Print Request

You can select a printer to print only the next print request you transmit. Select a printer for a single print request with the following procedure:

1 Enter **3** in the **Select Option** field of the **PACT** menu.

2 Enter the Printer ID of the printer you want to use for this print request in the **Printer ID** field of the **PACT** menu (you can view a list of all the available printers using the procedure in exercise 1).

If you leave this field blank, the current session printer you specified in exercise 2 appears in the **PRIN** menu.

3 Transmit.

The PRIN menu (refer to figure 11-4) displays the ID and attributes of the printer you selected. You can change any of these attributes by overtyping the values that appear on the menu.

Note: To view Help screens on the attributes shown in the PRIN menu, you enter H in the Next Menu field. Any entries you make before you request help are restored to the display when you return to the PRIN menu.

4 Transmit.

If you were to make a print request at this time, the printer you just selected would print the request, using the attributes as they appeared when you transmitted the PRIN menu.

You can proceed to the Unguided Exercises.

Figure 11-4 Next Print Request Menu (PRIN) (Example)

PRIN PRINTING: NEXT PRINT REQUEST		NEXT MENU ▶ GPACT ◀
Printer ID	▶ LINEPRINTER ◀	
Page length	▶ 66 ◀	Range 5 - 112
Lines per page	▶ 60 ◀	1 - 112
Pitch	▶ 10 ◀	10
Left margin	▶ 1 ◀	1 - 127
Translate to uppercase	▶ N ◀	Y/N
Wait on each page	▶ N ◀	Y/N
Spacing	▶ 1 ◀	1 - 3
Double sided printing	▶ N ◀	Y/N
Character quality	▶	
Printing color	▶	
Sheet feeder bin - first pg	▶	
others	▶	
envelope	▶	
Additional copies	▶	From 0 To 99
Print priority	▶ 1 ◀	1 = High 2 = Medium 3 = Low
Suppress print banner	▶ N ◀	Y/N

mm/dd/yy hh:mmAM **TEACH**

Unguided Exercises

To practice what you have learned about Printer Selection, you can do the following exercises.

Exercise 1: Changing Your Personal Default Printer

Enter the command **M** in the **Next Menu** field to find out the menu identifier for the Printer Selection menu (refer to appendix C for more information about the OFIS Link commands). Use menu jumping to jump to this menu and change your personal default printer.

Exercise 2: Changing the Attributes for the Next Print Request

Use the procedures in exercise 4 to select a printer for the next print request and change the attributes. Experiment. What happens if you enter a value in an attribute field that the printer you select cannot use?

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Customizing Form Letters

You can create a form letter on a BTOS workstation using the Secretarial Word Processor or the Professional Word Processor, then use OFIS Link to insert variable data from record files you set up. For example, you might create a form letter, then direct OFIS Link to insert the names and addresses of recipients from a record file containing the address list.

The exercises in this section give you practice in the following tasks:

- creating the skeleton letter on a BTOS workstation and transferring it to OFIS Link
- defining the form letter variable information
- creating data records
- assembling and printing form letters
- checking form letter print status
- updating data records

Before You Start

To do the exercises in this section, you must sign on to OFIS Link from a BTOS workstation with document transfer software installed. For more on document transfer software, refer to section 10. On a workstation using background file transfer (BFT), you will need its BFT identifier to do exercise 3. If you do not have this information, you can view a directory of such identifiers by selecting option 3, View directory of remote systems, in the Systems and Users module (refer to section 3).

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter **2** in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Accessing Local Workstation Processing

Since you must create the skeleton letter and transfer it to OFIS Link, the first exercise in this section does not begin with the Form Letters Activity Selection menu (**LTRS**). (**LTRS** is the first menu that appears when you access the Form Letters module.) Instructions for accessing the Form Letters module appear when you need them in exercise 4. Instead, you begin by accessing local workstation processing. To do this, use the following procedure:

- 1 Choose one of the following:
 - From the **MAIN** menu, enter **1** in the **Select option** field and transmit.
 - From any other menu, enter **GDOCM** in the **Next Menu** field and transmit.
- 2 Enter **3** in the **Select option** field and transmit.
Your BTOS workstation Executive screen appears.

You can proceed to Exercise 1.

Note: If you need additional information about the OFIS Link menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Guided Exercises

There are several steps to creating a unique form letter. The first step is to create the skeleton letter on your workstation word processor.

Exercise 1: Creating the Skeleton Letter

To create a skeleton letter, you open a new document on your workstation word processor, type the letter, and then mark the keywords that OFIS Link replaces with variable data. Create the skeleton letter using the following procedure:

- 1 Using your standard letter format, type the letter shown in figure 12-1.
- 2 Press the **Attribute** key (**f10**).
- 3 Press the **MergKey** key (**f7**).
- 4 Position the cursor under the first letter of the first word (**DATE**) that appears in boldface in figure 12-1.
- 5 Press the **MARK** key.
The system highlights the first letter of the word.

- 6 Position the cursor under the last letter of the same word.
- 7 Press the **BOUND** key.
The system highlights the word.
- 8 Press the **On** key (**f9**).
The system marks the word as a keyword, or locator (a word that serves as a marker), where OFIS Link inserts variable data from the records you create.
- 9 Repeat the procedure in steps 2 through 8 to mark the remaining keywords.

You can proceed to the next exercise.

Figure 12-1 Form Letter (Example)

**DATE
NAMEFIRST NAMELAST
COMPANYNAME
STREET
CITY STATE ZIP
DEAR SALUTATION NAMELAST:**

**IT IS OUR PLEASURE TO AWARD YOU THE ENCLOSED CERTIFICATE FOR
RATING PERFORMANCE IN OUR OFIS LINK TRAINING CLASS. IT
CERTIFIES THAT YOU ARE NOW TRAINED TO OPERATE OFIS LINK SOFTWARE.**

**CONGRATULATIONS ON YOUR SUCCESSFUL COMPLETION OF THE TRAINING
COURSE.**

SINCERELY,

**CHARLES C. CARTER
TRAINER, OFFICE AUTOMATION PRODUCTS**

Exercise 2: Converting the Skeleton Letter to Document Exchange Format

The document you transfer to the OFIS Link Document Management directory must be in Document Exchange Format (DEF). The procedure for converting a document to DEF depends on the workstation word processor on which you create the document. This guide does not give the procedures for each word processor; you can find instructions in your word processor operations guide.

Some recent word processor versions can convert the document to DEF automatically. If your word processor does so, you can skip step 1 of the following procedure.

- 1 Following the procedure in your word processing operations guide, convert the skeleton letter you created in exercise 1 to DEF.
- 2 Assign the name **FORM.DEF** to the new document in DEF.
- 3 Exit your word processing program.

You can proceed to the next exercise.

Exercise 3: Transferring the Skeleton Letter to OFIS Link

Return to OFIS Link processing and transfer the skeleton letter to OFIS Link with the following procedure:

- 1 Choose one of the following:
 - For a BFT transfer, enter **B T E** on the Executive Command line, press **GO**, enter **R**, and transmit.
 - For a foreground file transfer, enter **ON OMS** on the Executive Command line and press **GO**.

The **DOCM** menu appears.

- 2 Enter 2 in the **Select option** field.
- 3 Transmit.

The **DMTS** menu appears.

- 4 Enter 1 in the **Select option** field.
The **DMWO** menu appears (refer to figure 12-2).

5 Choose one of the following:

- If you are using BFT, complete the **DMWO** menu as shown in figure 12-2, but in addition, enter your BFT identifier in the **W/S Location** field and the full path name of the workstation DEF document in the **W/S File Name** field.
- If you are using foreground file transfer, complete the **DMWO** menu as shown in figure 12-2.

6 In the **Select file type** field, enter the number shown next to the PWP/SWP listing on the menu if it is different than 1. (The number can vary depending on how your System Administrator entered this information.)

7 Transmit.

With BFT, the **DMTS** menu displays immediately with the message **Transfer request queued**. This ends the procedure for a BFT transfer.

With foreground file transfer, a BTOS screen displays and prompts you to enter the workstation file name. Enter **FORM.DEF** and transmit. The message **Transfer in Progress** appears until the transfer is complete; then the **DMTS** menu displays with the transferred document as the current document.

You can proceed to the next exercise.

Figure 12-2 Workstation to OFIS Link Menu (DMWO) (Example)

```

DMWO DOCUMENT MANAGEMENT: WORKSTATION TO OFIS LINK NEXT MENU ► GDMS ◀
Indicate how this document is to be filed:

W/S Location ..... ► ◀
W/S File Name ..... ► ◀

Document name ..... ► FORMLETTER ◀ Shared file name ... ► ◀
Confidential ..... ► N ◀
Subject ..... ► FORM LETTER FOR OFIS LINK DIPLOMA ◀
Author ..... ► YOUR NAME ◀

Keyword: 1 ..... ► TRAINING ◀ 2 ..... ► OFIS FORM ◀
3 ..... ► ◀ 4 ..... ► ◀
5 ..... ► ◀

Remove after ..... ► ◀ days (leave blank for permanent save)
Overwrite existing document ..... ► N ◀

Select file type ... ► 1 ◀ 1. PWP/SWP IN
2. OTHER

mm/dd/yy hh:mmAM TEACH
    
```


Exercise 4: Accessing the Form Letters Module

You access the Form Letters module with the following procedure:

- 1 Enter **GLTRS** in the **Next Menu** field to jump to the Form Letters Activity Selection menu.
- 2 Transmit.
- 3 The Form Letters Activity Selection menu (**LTRS**) appears (refer to figure 12-3).

You can proceed to the next exercise.

Figure 12-3 Form Letters Activity Selection Menu (LTRS)

LTRS FORM LETTERS: ACTIVITY SELECTION MENU NEXT MENU ► GLTRS ◀

Current form data list name **NONE**
 Current form data description name **NONE**

1. View directory and select list
2. View directory and select description
3. Create form data list
4. Delete form data list
5. Create form data file description
6. Update form data file description
7. Delete form data list description
8. Update form data record
9. Print form data list
10. Print form data list directory
11. Print form data file description directory
12. Print form letter
13. Check print status of form letter

Select option ► ◀

Form data list name: ► ◀
 Form data file description name: ► ◀

mm/dd/yy hh:mmAM SEARCH

- 4 Enter **DATE** in the **Name** field.
- 5 Enter **12** in the **Maximum Length** field beside the **DATE**.
This means that the dates you enter for OFIS Link to insert in the skeleton letter must contain no more than 12 characters.

Note: For the rest of the entries in this exercise the **Name** and **Maximum Length** fields will be entered in the same step. Use the **TAB** key to move to the next field.
- 6 Enter **NAMEFIRST** in the **Name** and **15** in the **Length** field.
- 7 Enter **NAMELAST** in the **Name** and **20** in the **Length** field.
- 8 Enter **COMPANYNAME** in the **Name** and **30** in the **Length** field.
- 9 Enter **STREET** in the **Name** and **30** in the **Length** field.
- 10 Enter **CITY** in the **Name** and **15** in the **Length** field.
- 11 Enter **STATE** in the **Name** and **2** in the **Length** field.
- 12 Enter **ZIP** in the **Name** and **10** in the **Length** field.
- 13 Enter **SALUTATION** in the **Name** and **4** in the **Length** field.
- 14 Enter **RATING** in the **Name** and **15** in the **Length** field.
- 15 Transmit.

The Update Form Data Record Menu (**LTUP**) displays with **DIPLOMA.DATA** appearing in the **Current form data list name** field (refer to figure 12-5).

You can proceed to the next exercise.

Exercise 6: Creating an Individual Data Record

The **LTUP** menu (refer to figure 12-5) displays on your screen with the number **1** in the **Record number** field. The field names you created on the **LTCF** menu display beside an entry area, bounded by delimiters, in the size you specified for that field.

Figure 12-5 Update Form Data Record Menu (LTUP) (Example)

```

LTUP      FORM LETTERS: UPDATE FORM DATA RECORD      XMT TO CONTINUE ► ◀
          Form data list name . . DIPLOMA.DATA          Record number . . . 1
          Delete this record . . . ► N◀

DATE:     ► ◀
COMPANYNAME: ► ◀
NAMEFIRST: ► ◀
NAMELAST: ► ◀
STREET:   ► ◀
CITY:     ► ◀
STATE:    ► ◀
ZIP:      ► ◀
SALUTATION: ► ◀
RATING:   ► ◀

NEXT ACTION: Add new record . . . ► Y◀ Update/delete record . . . ► ◀

mm/dd/yy  hh:mmAM  TEACH

```

You may find it helpful to think of the data record you create in this exercise as an index card where you enter the information that goes in the first form letter. The information you enter in each field is a data item.

Note: You use the **TAB** or **RETURN** keys to move to the next field.

Create the first record using the following procedure:

- 1 Enter the current date in the **Date** field (for example, 1 Nov. 1987).
- 2 Enter **GREG** in the **Namefirst** field.
- 3 Enter **ALLEN** in the **Namelast** field.
- 4 Enter **OFFICEPRODUCTS** in the **Companyname** field.
- 5 Enter **1200 MAIN ST.** in the **Street** field.
- 6 Enter **ANYTOWN** in the **City** field.
- 7 Enter **CA** in the **State** field.
- 8 Enter **00000-0000** in the **ZIP** field.
- 9 Enter **MR.** in the **Salutation** field.
- 10 Enter **EXCELLENT** in the **Rating** field.
- 11 Enter **Y** in the **Add new record** field.
- 12 Transmit.

You have created record number one for your form letter. You add data records to the **DIPLOMA.DATA** form data file by performing those steps again for each additional record. Each time you transmit a completed record, the number in the **Record number** field increases by one.

Table 12-1 contains the field information for records two through five. Each line corresponds to one of the 10 fields you defined. (For the first field, substitute the current date.)

- 13 Enter the 10 fields of Record#2 from table 12-1.
- 14 Enter the 10 fields of Record#3 from table 12-1.
- 15 Enter the 10 fields of Record#4 from table 12-1.
- 16 Enter the 10 fields of Record#5 from table 12-1.
- 17 Enter N in the **Add new record** field.
- 18 Transmit.

The **LTRS** menu displays on your screen with **DIPLOMA.DATA** in the **Current form data list name** field.

You can proceed to the next exercise.

Table 12-1 Data Table for Records Two through Five

RECORD#2	RECORD#3	RECORD#4	RECORD#5
(date)	(date)	(date)	(date)
BOB	JANE	JEFF	JOAN
GREEN	WILLIAMS	PETERS	STEVENS
OFFICEPRODUCTS	GOVERNMENT	OFFICEPRODUCTS	GOVERNMENT
1201 MAIN ST.	1202 MAIN ST.	1203 MAIN ST.	1204 MAIN ST.
ANYTOWN	CITY	SUBURB	CITY
CA	CA	CA	CA
11111-1111	22222-2222	33333-3333	44444-4444
MR.	MS.	MR.	MS.
A SATISFACTORY	AN EXCELLENT	A SATISFACTORY	AN EXCELLENT

Exercise 7: Assembling and Printing Form Letters

Assemble and print the form letter, using the skeleton letter FORMLETTER (in your OFIS Link document management directory) and the data records you created in exercise 5. (The letters will print on your default printer. Refer to section 11 for information about selecting a different printer.)

- 1 Enter **12** in the **Select Option** field of the **LTRS** menu.
The Print Form Letters menu (**LTPR**) appears (refer to figure 12-6).
- 2 Enter **FORMLETTER** in the **Form letter name** field.
- 3 Leave the **Form letter shared file** field blank.
- 4 Enter **DIPLOMA.DATA** in the **Form data list name** field.
- 5 Leave the **Form data file description name** field blank.

Figure 12-6 Print Form Letters Menu (LTPR) (Example)

LTPR	FORM LETTERS: PRINT FORM LETTERS	NEXT MENU ▶ GLTRS ◀
	Form letter name ▶ FORMLETTER	◀
	Form letter shared file ▶	◀
	Form data list name ▶ DIPLOMA.DATA	◀ ◀
	Form data file description name . ▶	◀
	First letter to print ▶ ◀	
	Number of letters to print ▶ ◀	
	Continuous printing ▶ N◀	
mm/dd/yy hh:mmAM TEACH ◀		

6 Enter 1 in the First letter to print field.

OFIS Link prints the form letters sequentially, beginning with the first letter you specify in this field. The first letter contains the variable data you entered in the first record in exercise 5.

7 Leave the Number of letters to print field blank.

This directs OFIS Link to print all of the letters for which you created data records.

To limit the number of letters you want printed, you enter a number instead of leaving the **Number of letters to print** field blank.

8 Leave Y in the Continuous printing field.

When you enter **Y** in this field, OFIS Link generates all your letters, then prints them one after the other.

On an active system with many users, a large form letter job would probably not be printed as one continuous printout.

9 Transmit.

OFIS Link assembles and prints the form letters. The **LTRS** menu displays, with **DIPLOMA.DATA** appearing in the **Current form data list name** field.

You can proceed to the next exercise.

Exercise 8: Checking the Print Status of a Form Letter Printout

If an error occurs in the process of merging the form letter with the individual form data lists, OFIS Link generates only the first letter. The merge process stops, the first letter prints, and a status message appears indicating that an error has occurred. Check the status of your form letter print job with the following procedure:

1 Enter 13 in the Select Option field of the LTRS menu.**2 Transmit.**

The Check Print Status menu (**LTST**) appears (refer to figure 12-7), with **FORMLETTER** in the **Form letter name** field.

Table 12-2 Form Letter Error Messages (continued)

Message	Description
Form data item not alpha <xxxx>	<xxxx> is the name of the form data list alpha field in which the error occurred.
Form data item not numeric <xxxx>	<xxxx> is the name of the form data list numeric field in which the error occurred.

Exercise 10: Updating a Form Data Record

If you want to change the information in an existing form data record or verify that the information is entered correctly, you use the procedures in this exercise.

- 1 Verify that **DIPLOMA.DATA** appears in the **Current form data list name** field. Enter **DIPLOMA.DATA** in this field if it does not already appear.
- 2 Enter **8** in the **Select Option** field of the **LTRS** menu.
- 3 Transmit.

The **LTUP** menu (figure 12-5) appears, with **DIPLOMA.DATA** in the **Form Data List Name** field and **001** in the **Record Number** field.

001 in the **Record number** field indicates that you are updating record number 1 in the current form data list.

- 4 Verify that **N** appears in the **Delete This Record** field.
- 5 Change the name in the **NAMEFIRST** field to **GREGORY** by overwriting the existing entry.
- 6 Verify that **N** appears in the **Add New Record** field.
- 7 Transmit.

Record #2 for student Bob Green displays on your screen, with **002** appearing in the **Record number** field.

- 8 Compare the display for this record with the information listed in table 12-1 for Record #2.

Note: To select any record from the form data list name file, you enter the number of the record you want to update in the **Update/delete record** field and transmit. The selected record appears.

- 9 Verify the records using the procedure in steps 4, 6, and 7 until the last record (for student **JOAN STEVENS**) displays.

10 Transmit.

The **LTRS** menu displays with **DIPLOMA.DATA** appearing in the **Current form data list name** field.

You can proceed to the Unguided Exercises.

Unguided Exercises

To practice what you have learned about Form Letters, you can do the following exercises.

Exercise 1: Adding a Record to a Form Data List

Add a new record with your own name and address to the form data list records you created in exercise 6. (You can access the **LTUP** menu from the **LTRS** menu.)

Exercise 2: Creating a Meeting Form Letter

Create a brief meeting form letter with the time, place, and addressees as data items. Mark the locators, transfer the document to OFIS Link, create the form data list, and print the form letter. (Refer to the Help screens or to the exercises in this section if you need help.)

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

Archiving

You use the Archiving module to store documents in mass storage media external to OFIS Link and retrieve them to OFIS Link. OFIS Link can archive calendars automatically if your System Administrator has selected this option; if so, you can retrieve and view them.

You can archive or retrieve a single document, or you can display a directory of documents meeting criteria you specify and mark those you want to archive or retrieve.

OFIS Link places your archive or retrieve requests on a list, or queue, of such requests and processes the list periodically. You can view or print a directory listing the status of your archive or retrieve requests. If a listed file is not yet archived or retrieved, you can cancel the request.

Archiving a document does not remove it from your Document Management files. For information on removing documents, refer to section 9.

The exercises in this section give you practice in the following Archiving activities:

- archiving a specific document
- archiving documents meeting criteria you specify
- viewing an archive status directory and canceling archive requests

You will find the menus and procedures for retrieving documents almost identical to those covered in the archiving exercises. For more about retrieving, refer to the Help screens or the *A Series/V Series OFIS Link Operations Guide*.

Before You Start

You must be in **TEACH** mode to use the training exercises in this section, and you must have initialized the training database. (If you have not initialized the database, refer to section 2 for instructions.)

If **TEACH** does not appear on the status line, enter **TEACH** in the **Next Menu** field and transmit.

The **TEACH** menu appears with **TEACH** highlighted on the status line. If the message **Current state of database: AVAILABLE** appears in the middle of the screen, enter 2 in the **Select option** field and transmit.

The OFIS Link Main Activity Selection menu (**MAIN**) appears.

Access the Archiving module to perform the exercises in this section.

Note: If you need additional information about the menu you are working with, you can enter **H** in the **Next Menu** field and transmit. For more information about Help screens, refer to appendix C.

Accessing the Archiving Module

The first exercise in this section begins with a selection you make on the Archiving Activity Selection menu (**ARAS**). This is the first menu that appears when you access the Archiving module. You can access the **ARAS** menu in two ways:

- From the **MAIN** menu, enter **8** in the **Select option** field and transmit.
- From any other menu, enter **GARAS** in the **Next Menu** field and transmit.

The **ARAS** menu appears (refer to figure 13-1). You are ready to begin exercise 1.

Figure 13-1 Archiving Activity Selection Menu (ARAS)

ARAS	ARCHIVING: ACTIVITY SELECTION	NEXT MENU	▶ GARAS ◀
<ol style="list-style-type: none"> 1. Archive 2. Retrieve 3. View status of archive requests 4. View status of retrieve requests 5. Print archive directory 			
Select option ▶ ◀			
Document Filing dates: From . . . ▶ ◀ to ▶ ◀			
Calendars archived through:			
Calendar dates month ▶ ◀ year ▶ ◀ thru month ▶ ◀ year ▶ ◀			
mm/dd/yy	hh:mmAM	TEACH ◀	

Guided Exercises

Exercise 1: Archiving a Specific Document

There are two ways to archive documents:

- archive one document you specify by name
- display a directory of documents meeting criteria you specify and select one or more documents to archive

This exercise demonstrates the first method; exercise 2 demonstrates the second.

Archive a specific document with the following procedure:

- 1 Enter 1 in the **Select option** field of the **ARAS** menu.
- 2 Leave the other fields blank.
- 3 Transmit.

The Archiving Document Selection menu (**ARDS**) displays with the word **ARCHIVE** in the **Action** field (refer to figure 13-2).

Figure 13-2 Archiving Document Selection Menu (ARDS)

ARDS ARCHIVING: DOCUMENT SELECTION NEXT MENU ▶ GARDS ◀

Action: ARCHIVE

Enter the criteria for the documents in which you are interested:

Document name ▶ ◀ Shared file name ... ▶ ◀

Display details ▶ N ◀

Date created: From .. ▶ ◀ to ▶ ◀

Last modified: From .. ▶ ◀ to ▶ ◀

Last accessed: From .. ▶ ◀ to ▶ ◀

Date archived: From .. ▶ ◀ to ▶ ◀

Search subject ▶ Y ◀

Search references ▶ Y ◀

Archive and remove ... ▶ N ◀

Overwrite existing document ▶ N ◀

Match all keywords ▶ N ◀

Keywords: 1 ▶ ◀ 2 ▶ ◀

 3 ▶ ◀ 4 ▶ ◀

 5 ▶ ◀

mm/dd/yy hh:mmAM TEACH

- 4 Enter **STANDARD1** in the **Document name** field.
- 5 Leave the defaults in the remaining fields.
- 6 Transmit.

The **ARAS** menu reappears and displays the message **Document queued for archiving**. **OFIS Link** adds the document to a list of documents to be archived.

You can proceed to the next exercise.

Exercise 2: Archiving Documents Meeting Criteria You Specify

When you display a directory of documents meeting criteria you specify, you can choose to display a summary directory (listing document names and subjects only) or a detail directory (listing full details about the documents).

Display a summary directory of documents meeting criteria you specify and select one to archive with the following procedure:

- 1 Enter **1** in the **Select option** field of the **ARAS** menu.
- 2 Leave the other fields blank.
- 3 Transmit.

The Archiving Document Selection menu (**ARDS**) displays with the word **ARCHIVE** in the **Action** field (refer to figure 13-2).

- 4 Leave the **Document name** and **Shared file name** fields blank.
- 5 Leave the default **N** in the **Display details** field.
To view a detail directory, you enter **Y** in this field.
- 6 Use the **Return** key to move to the first **Keywords** field, leaving the defaults in the remaining fields.
- 7 Enter the following in the **Keywords** fields:

NEWBUSINESS

NEWFILESYSTEM

UTILITIES

You are instructing **OFIS Link** to search for documents that match all three keywords you entered. For more about keywords, refer to section 9, **Processing Documents**.

8 Transmit.

The Summary Document Directory menu (**ARAD**) appears listing the documents filed by the keywords you listed.

9 Enter **X** next to one or more of the documents.**10** Transmit.

The **ARAS** menu reappears and displays the message **Document queued for archiving**. OFIS Link adds the document to a list of documents to be archived.

You can specify various other criteria to archive documents. Refer to the Help screens or to the *A Series/V Series OFIS Link Operations Guide* for an explanation of the remaining fields on the **ARDS** menu.

You can proceed to the next exercise.

Exercise 3: Cancelling an Archive Request

View a directory of archive or retrieve requests and cancel a request with the following procedure:

- 1** Enter **3** in the **Select option** field on the **ARAS** menu.
- 2** Leave the remaining fields blank.
- 3** Transmit.

The Archive Status Directory menu (**ARSD**) appears (refer to figure 13-3). It lists the names of the documents you selected for archiving in exercises 1 and 2, with the message **Queued** in the **Status** field.

- 4** Enter **1** in the field to the left of each request.
- 5** Transmit.

The **ARAS** menu reappears and displays the message **Archiving request removed**. OFIS Link cancels the archive requests you marked.

You can proceed to the Unguided Exercises.

Figure 13-3 Archive Status Directory Menu (ARSD) (Example)

```

ARSD      ARCHIVING: ARCHIVE STATUS DIRECTORY      NEXT MENU ► GARAS ◀

Enter "1" to delete queued or aborted requests,
"2" to requeue aborted requests.

► ◀ Document name... Proposal      Shared file ...
   Status ..... Queued

► ◀ Document name... Standard1    Shared file ...
   Status ..... Queued

► ◀ Document name... Standard2    Shared file ...
   Status ..... Queued

** END **

mm/dd/yy hh:mmAM TEACH ◀

```

Unguided Exercises

To practice what you have learned about Archiving, you can do the following exercises.

Exercise 1: Archiving a Document

Archive the document **STANDARD2** (refer to exercise 1 if you need help).

Exercise 2: Cancelling an Archive Request

View the archive status directory and cancel any archive requests listed (refer to exercise 3 if you need help).

You can proceed to another section of this guide, or you can exit the **TEACH** mode by entering **QUIT** in the **Next Menu** field and transmitting.

OFIS Link Components

You can use a variety of Unisys workstations, terminals and printers with OFIS Link. This appendix lists these and briefly describes their capabilities.

Workstations

You can use a workstation to access OFIS Link activities such as Calendar and Electronic Mail. In addition, you can create a document on a workstation using stand-alone word-processing and then transfer the document to OFIS Link for storage, display, or distribution. Conversely, you can transfer documents from the Document Management directory in OFIS Link to a workstation for local word processing. You can use the OFIS Link menu option for local processing to move from OFIS Link to local processing on your workstation, then back to OFIS Link processing without signing off and on OFIS Link.

To use the workstation to access OFIS Link requires terminal emulation and data communications software installed on the workstation. To use the document transfer and local processing capabilities, document transfer software must be installed on your workstation.

You can use the following models of BTOS workstations as OFIS Link workstations: B 26, B 27, B 28, and B 38.

You can use the B 21 and B 22 workstations or an OFISwriter 300/400 workstation to access OFIS Link but not to transfer documents or do local processing.

Terminals

You cannot use an OFIS Link terminal as a stand-alone word processor. However, using the terminal's display screen and typewriter-like keyboard, you can enter, view, and modify information.

There are several types of OFIS Link terminals:

- MT 983/985
- ET 1100
- ET 1200
- ET 2000
- T 27

OFIS Link Printers

OFIS Link requires that each system installation have a system line printer for high-speed printing.

In addition to the system line printer, the AP 1301 daisywheel printer and AP 1310, AP 1340, AP 1350 and AP 1350-1 dot matrix printers may be connected to OFIS Link.

Printer Pass-through Printers

The printer pass-through (PPT) feature allows you to print using a printer connected to an ET 1100, ET 1200, or T 27 terminal or a BTOS workstation.

Two kinds of PPT are available:

- Draft-quality PPT is available on AP 1314, AP 1351, AP 1351-1, and AP 1354 dot matrix printers connected to an ET 1100, ET 1200, or T 27 terminal or a BTOS workstation

Draft-quality PPT printing does not support word-processing attributes and formatting, such as boldface type and superscripts and subscripts.

- Letter-quality PPT is available on the AP 1305 and AP 1307 daisywheel printers and the AP 9208, and AP 9215 laser printers when connected to a BTOS workstation running the required software.

Letter-quality PPT printing allows documents to retain most word-processing attributes and formats.

OFISfile

The OFISfile is an electronic information management system that stores, locates, and retrieves text. OFIS Link users can use their workstation or terminal to search and access documents from the OFISfile.

Signing On to OFIS Link

The procedures you use to sign on to OFIS Link depend upon your specific equipment and associated software. Because OFIS Link can run on many system configurations, there are several different sign-on procedures. Table B-1 lists information you need to have before you can select the sign-on procedure for your system. You can ask your System Administrator if you need help identifying any of these items.

Table B-1 Information for Signing on to OFIS Link

Information Item	Description
System type	A system can be a large or medium system. Large systems are Unisys B 6900/7900 and A series mainframe computers. Medium systems are Unisys B 3900/4900 and V series mainframe computers.
Terminal or Workstation type	A terminal can be one of the following: MT 983, MT 985, ET 1100, ET 1200, ET 2000, or T 27. A workstation can be a BTOS workstation or a personal computer.
Message Control System (MCS) your system uses	An MCS is a series of programs that direct messages between mainframe software programs and terminals or workstations.
Your identifier and password	Your System Administrator assigns your password and identifier. OFIS Link uses your identifier as your "address" for electronic mail, and as a filing reference for your calendar, documents and other files. You use your password to restrict access to your documents, files, or calendar.

In addition to the items in table B-1, you need to:

- Ensure that your MCS is running and you are signed on to it.
- Determine the name your System Administrator assigned at your site to the OFIS Link program in the sign-on procedure. If your System Administrator has assigned a name other than OFIS Link, you substitute that name for **OFIS Link** in the procedures in this section.

Since BTOS workstations require an emulator, a program that simulates terminal functions on a BTOS workstation, you need additional information if you are using a BTOS workstation:

- the command to execute the emulator; check with your System Administrator to verify your emulator command
- whether you have an enhanced or non-enhanced emulator

Sign-on Procedures

Procedures for signing on to medium and large systems appear following the heading for the system type. When you complete the sign-on procedure, the Sign-on screen appears (refer to figure B-1) and you enter your identifier and password.

Figure B-1 Sign-on Screen

```

HELO      OFIS LINK: SIGN-ON      NEXT MENU ► GHELO ◀

Welcome to OFIS Link

Friday mm dd, yy      hh:mm PM

Please enter:

Your OFIS Link Identifier. . . . . ►      ◀

Your OFIS Link password . . . . . ► ██████████ ◀

```

To find your sign-on procedure, you do the following:

- 1 Find the heading for your system type (medium or large).
- 2 Following the heading for your system type, find the subheading for your terminal or workstation type.
- 3 Following the heading for your terminal or workstation type, find the heading for your MCS type.

Medium Systems

OFIS Link on a medium systems computer operates under the GEMCOS MCS. Before you sign on to OFIS Link, the OFIS Link programs must be included in your TCL. You can check with your System Administrator to confirm that this has been done.

Note: These sign-on procedures assume the following:

- you are signed on to GEMCOS
- your GEMCOS control character is an asterisk (*)

You can verify your GEMCOS control character with your System Administrator.

Medium Systems Sign-on from a Terminal

To sign on from a terminal, you use the following procedure:

- 1 Enter ***VERIFY OMSDC1** in HOME position.
- 2 Transmit.
VERIFY displays the number of copies of OMSDC1 currently running. If the number of copies running is 0, perform Steps 3 through 10; otherwise, perform steps 6 through 10.
- 3 Enter ***VERIFY OMSDC2** in HOME position.
- 4 Transmit.
- 5 Enter ***RUN OMSDC1 ON <pack id>** in HOME position and transmit.
<pack id> is the identifier of the pack on which the object code resides.
- 6 Enter ***ASSIGN TO PROGRAM OMSDC1** in HOME position.
- 7 Transmit.
- 8 Press the **HOME** key.
- 9 Press the **Spacebar** once.
- 10 Transmit.

The Sign-on screen appears (refer to figure B-1).

Medium Systems Sign-on from an OFISwriter

To sign on from an OFISwriter 300/400, you use the following procedure:

- 1 Clear the screen.
- 2 Press **SET + u** (use lowercase and press simultaneously).
- 3 Press **b**.
- 4 Complete your sign-on by following the procedure under Medium System Sign-on from a Terminal.

Medium Systems Sign-on from a BTOS Workstation

To sign on to OFIS Link from a BTOS workstation, you use one of the following procedures (check with your System Administrator if you are not sure which emulator you have):

Enhanced MT emulator

- 1 Enter **ON OMS** in the **Command** field.
- 2 Press **GO**.

The Sign-on screen appears (refer to figure B-1).

Unisys Emulator (BTE) or Non-enhanced MT emulator

To sign on from a BTOS workstation with BTE or a non-enhanced MT emulator, you use the following procedure:

- 1 Execute the emulator appropriate to your workstation.
- 2 Enter ***VERIFY OMSDC1** in **HOME** position.
- 3 Transmit.
VERIFY displays the number of copies OMSDC1 currently running. If the number of copies running is 0, perform Steps 5 through 13; otherwise, perform steps 9 through 13.
- 4 Enter ***VERIFY OMSDC2** in **HOME** position.
- 5 Transmit.
- 6 Enter ***RUN OMSDC1 ON <pack id>** in **HOME** position.
<pack id> is the identifier of the pack on which the object code resides.
- 7 Transmit.
- 8 Enter ***ASSIGN TO PROGRAM OMSDC1** in **HOME** position.
- 9 Transmit.
- 10 Press the **HOME** key.
- 11 Press the **Spacebar** once.
- 12 Transmit.

The Sign-on screen appears (refer to figure B-1).

Large Systems

You use the following procedure to sign on to large systems from a terminal, OFISwriter 300/400, or a BTOS workstation running one of several MCSs. You can check with your System Administrator to confirm which MCS your computer is using.

Large Systems Sign-on from a Terminal

To sign on from a terminal, you use the following procedures, depending upon the MCS your system is running:

COMS

- 1 Enter your MARC usercode and password in the appropriate fields on the LOGON - Menu Assisted Resource Control (MARC) menu.
- 2 Enter ON in the Choice field at the bottom of the MARC menu.
- 3 Transmit.
- 4 Enter OMS in the Window to Change to field on the ON - MOVE TO ANOTHER WINDOW DIALOG menu.

Note: Check with your System Administrator to determine whether OMS is the window name your site uses to refer to the OFISLink program; otherwise, enter the appropriate window name.

- 5 Transmit.
 - 6 Press the HOME key.
 - 7 Press the Spacebar once.
 - 8 Transmit.
- The Sign-on screen appears (refer to figure B-1).

GEMCOS

- 1 Enter ON OMS in HOME position.
 - 2 Transmit.
 - 3 Press the HOME key.
 - 4 Press the Spacebar once.
 - 5 Transmit.
- The Sign-on screen appears (refer to figure B-1).

CANDE

- 1 Enter your CANDE usercode and password.
- 2 Press the **HOME** key.
- 3 Enter **EX OMS**.
- 4 Transmit.
- 5 Press the **HOME** key.
- 6 Press the **Spacebar** once.
- 7 Transmit.

The OFIS Link Sign-on screen appears (refer to figure B-1).

Large Systems Sign-on from an OFISwriter

To sign on from an OFISwriter 300/400, you use the following procedure:

- 1 Clear the screen.
- 2 Press **SET + u** (use lowercase and press simultaneously).
- 3 Press **b**.
- 4 Complete your sign-on following the procedure for your MCS under Large System Sign-on from a Terminal.

Large Systems Sign-on from a BTOS Workstation

To sign on to OFIS Link from a BTOS workstation, you use one of the following procedures:

COMS, GEMCOS or CANDE, with an Enhanced MT emulator

- 1 Enter **ON OMS** in the Command field.
- 2 Press **GO**.

The Sign-on screen appears (refer to figure B-1).

COMS, with BTE or a Non-enhanced MT Emulator

- 1 Enter **B T E** or **MT 983** in the **Command** field.

The command to execute the emulator can vary; check with your System Administrator to verify the emulator command.

- 2 Press **GO**.

- 3 Enter your MARC usercode and password in the appropriate fields on the LOGON - Menu Assisted Resource Control (MARC) menu.

- 4 Enter **ON** in the **Choice** field at the bottom of the MARC menu.

- 5 Transmit.

The ON - MOVE TO ANOTHER WINDOW DIALOG menu appears.

- 6 Enter **OMS** in the **Window to Change to** field.

Note: Check with your System Administrator to determine whether **OMS** is the window name your site uses to refer to the OFISLink program; otherwise, enter the appropriate window name.

- 7 Transmit.

- 8 Press the **HOME** key.

- 9 Press the **Spacebar** once.

- 10 Transmit.

The OFIS Link Sign-on screen appears (refer to figure B-1).

GEMCOS, with BTE or a Non-enhanced MT emulator

- 1 Enter **B T E** or **MT 983** in the **Command** field.

The command to execute the emulator can vary; check with your System Administrator to verify the emulator command.

- 2 Press **GO**.

- 3 Enter **ON OMS** in HOME position.

- 4 Transmit.

- 5 Press the **HOME** key.

- 6 Press the **Spacebar** once.

- 7 Transmit.

The Sign-on screen appears (refer to figure B-1).

CANDE with BTE or a Non-enhanced MT emulator

- 1 Enter **B T E** or **MT 983** in the **Command** field.

The command to execute the emulator can vary; check with your System Administrator to verify the emulator command.

- 2 Enter your user code and password.

- 3 Press the **HOME** key.

- 4 Enter **EX OMS**.

- 5 Transmit.

The OFIS Link Sign-on screen appears (refer to figure B-1)

OFIS Link Commands

You use several types of commands to perform tasks in OFIS Link:

- Next Menu Field Commands
You can use Next Menu Field Commands to perform such actions as access Help screens, view status screens, enter or exit OFIS Link modes such as TEACH, and exit OFIS Link.
- Positioning Commands
These commands enable you to display any portion of document or mail text.
- Editing Commands
These commands enable you to modify document or mail text.
- Mail Commands
When you are viewing or creating mail items, you can enter Mail Commands as a shortcut to do various mail tasks.

Next Menu Field Commands

You can enter commands into the **Next Menu** field of any menu to access help screens or override the current activity. You enter only the first letter of all the commands except BYE, TEACH, QUIT, LOCK, and Alternate User. For BYE, TEACH, QUIT and LOCK, you enter the complete word, and for Alternate User you enter **ALT**.

Note: You also enter menu identifiers into the **Next Menu** field to jump to specific menus. For more information on menu-jumping and a list of menu identifiers, refer to appendix D.

ALTERNATE USER (ALT)

Another OFIS Link user can authorize you to access his OFIS Link files, and to use OFIS Link on his behalf. When you enter **ALT** in the **Next Menu** field, OFIS Link displays the Alternate User menu, where you sign on to OFIS Link as an alternate user. You enter **QUIT** (refer to QUIT) to terminate processing as an alternate user. You can also authorize another user to act on your behalf.

BYE

You transmit **BYE** from the **Next Menu** field to exit OFIS Link and return to the status that you were in before you signed on to OFIS Link.

CANCEL (C)

You enter **C (CANCEL)** in the **Next Menu** field if you do not want OFIS Link to process your entries on the current menu (or a series of related menus) or to return to an earlier menu in a sequence.

EVENT STATUS (E)

You enter **E** in the first position of the **Next Menu** field to view a display of events that have been added, changed, or cancelled since you last viewed your **Events Status** menu. If there is more than one screen of events status information, an **E** appears in the **TRANSMIT TO CONTINUE** field. You transmit to view the next screen.

If you do not want to view additional screens, you blank out the **E** in the **TRANSMIT TO CONTINUE** field and transmit. OFIS Link returns to the display from which you requested event status.

HELP (H)

You enter **H** in the **Next Menu** field to view information on menu fields. There can be several Help screens for an activity. If there is another screen, **H** appears in the **TRANSMIT TO CONTINUE** field. To view the next Help screen, you transmit the current screen. When you transmit the last Help screen in a series, the menu from which you requested help reappears. Any information you entered into menu fields before you requested help remains intact.

If you do not want further help, you blank out the **H** in the **TRANSMIT TO CONTINUE** field and transmit. OFIS Link returns to the display from which you requested help.

LOCK TERMINAL (LOCK)

You use the **LOCK** command when you leave your terminal but do not want to exit OFIS Link. The **LOCK** command allows you to stay in your current work path, yet secure your terminal to keep anyone else from using your terminal or workstation to enter the system and view information on the database.

After you enter **LOCK** in the **Next Menu** field of the current menu and transmit, OFIS Link displays the **Terminal Secured** menu. To continue working with OFIS Link, you enter your OFIS Link password in the password field.

MENU IDENTIFIER LIST (M)

When you enter and transmit an **M** in the **Next Menu** field, OFIS Link displays a list of activity menus in the program to which you can jump. Menu jumping takes you directly to the specified menu. If you do not jump to a new menu from the list, OFIS Link redisplayes the menu from which you entered **M**.

Note: There are some restrictions to menu jumping; refer to appendix D and to the *A Series/V Series OFIS Link Operations Guide* for more information on menu jumping.

PRINT STATUS (P)

You can check the status of your print requests by entering **P** in the **Next Menu** field. If there is more than one screen of print status information, a **P** appears in the **TRANSMIT TO CONTINUE** field. You transmit to view the following screens.

If you do not want to view additional screens, you blank out the **P** in the **TRANSMIT TO CONTINUE** field and transmit. OFIS Link returns to the display from which you requested print status.

QUIT

You enter **QUIT** to end the current OFIS Link work session if you are signed on as an alternate user, or if you are in the **TEACH** mode.

REFRESH (R)

You enter **R** in the **Next Menu** field to restore and redisplay the current menu in its original state (the way it first appeared on your workstation), discarding any entries you made.

TRANSFER STATUS (X)

You enter **X** (TRANSFER STATUS) in the **Next Menu** field to display a list of background file transfer requests and their status. If there is more than one screen of background status information, an **X** appears in the **TRANSMIT TO CONTINUE** field. You transmit to view the following screens.

If you do not want to view additional screens, you blank out the **X** in the **TRANSMIT TO CONTINUE** field and transmit. OFIS Link returns to the display from which you requested transfer status.

Positioning Commands

With Positioning Commands, you can bring a specific portion of text to the top of the display for viewing or editing. You use these commands in the Document Management and Electronic Mail activities, entering them on a Command screen. Table C-1 lists and explains the Positioning Commands.

Table C-1 Positioning Commands

Command	Purpose	Comments
<number>P -<number>P	to move forward or back a specified number of pages (20 lines) in the document	positions the cursor ahead/back in the document, and displays a screen with 20 lines of text, beginning at the new cursor position
<number>L -<number>L	to move forward or back a specified number of lines in the document	positions the cursor ahead/back in the document, and displays a screen with 20 lines of text, beginning at the new cursor position
T	to begin at the top of the document	positions the cursor at the beginning of the document, and displays the Command Screen with the first 20 lines of the document

Table C-1 Positioning Commands (continued)

Command	Purpose	Comments
B	to go to the end of the document	positions the cursor at the end of the document, and displays the Command Screen, with a Command Line and END

Editing Commands

You use the Editing Commands (refer to table C-2) in the Document Management or the Electronic Mail activities to make changes to your document or mail item text. You enter the commands on a Command screen.

Table C-2 Editing Commands

Command	Description
I	The system displays a blank text entry screen so that you can enter text.
I <document name>	The system inserts the specified document into the displayed document or mail item immediately preceding the first line of text appearing at the top of the screen.
M	The system displays a screen with no Command Line containing the 20 lines of text just viewed plus four extra lines designated as <SPARE>. You use this command to modify the current screen, or to add up to 4 lines of new text.
<number>DEL	This command deletes the specified number of lines from the text of the current document beginning with the first line on the screen.
<number>X	This command transfers the next <n> lines of text, beginning with the first line appearing on the screen, to temporary storage.
I/	This command inserts stored text in the current document just before the first line appearing on the screen.

Table C-2 Editing Commands (continued)

Command	Description
A	This command appends the text of subsequent document entry screens to the end of the existing text. You can use Append only with a document another user created in a shared file.
END or SAVE	This command exits the editing activity and saves the text and any changes.
QUIT	This command exits the editing activity and discards any changes.

Mail Commands

You enter Mail Commands (refer to table C-3) on a Command screen when viewing or creating a mail item. OFIS Link either performs the function described or, if additional information is needed, displays the appropriate menu.

Table C-3 Mail Commands

Command	Result
Print	The entire mail item prints, with the exception of any unviewable attachments. The Command screen displays with a confirmation message.
File	The Filing Information menu displays. You can enter information to file the mail item as a document.
Forward	The Send Mail menu displays so that you can forward the mail item. You can enter a message of up to five lines.
Create Forward	A text entry screen displays. You can enter message text of unlimited length to be forwarded with a mail item.
Respond	The Send Mail menu displays so that you can respond to the mail item. You can enter a message of up to five lines in the Message field.
Create Response	A text entry screen displays. You can enter a response of unlimited length.
Follow-up <number>	The Mailbox menu displays. OFIS Link files the item in the follow-up directory; after the number of days you designate, it returns the item to the Mailbox.

Menu Identifiers

This appendix lists the identifiers for OFIS Link menus that you can access through menu jumping. The menus are grouped according to module.

To jump to one of these menus, you add the prefix **G** to the menu identifier (for example, **GMAIN**) and enter it in the **Next Menu** field of the current menu. However, there are eight menus that require only an abbreviated entry in the **Next Menu** field. For example, you enter:

- **H** to access **HELP** menus (any of the OFIS Link Help screens)
- **M** to access the special **HELP** screens that explain the **Next Menu** field commands
- **E** to access the menu Calendar Event Status menu (**CSTA**)
- **P** to access the Printing Status menu (**PSTA**)
- **TEACH** to access the training module (**TEACH**)
- **ALT** to access the Alternate User screen (**ALTU**)
- **LOCK** to access the OFIS Link Terminal Secured menu (**LOCK**)
- **X** to access the Background File Transfer Status menu (**BSTA**)

If you jump to the OFIS Link Sign-On (**HELO**) or OFIS Link Password Change (**PSWD**) menu, you must complete that menu before you can jump to another menu.

Entering an **M** in the **Next Menu** field causes a special set of Help screens to appear. These screens list all of the names and identifiers for menus that you can access through menu jumping or other **Next Menu** field commands.

A single asterisk (*) following an identifier means that you can jump to that menu only if a current item exists. An error message appears if you jump to one of these menus when there is no current item and the jump cannot occur.

OFIS Link:

HELO Sign-On
PSWD Password Change
MAIN Activity Selection
LOCK Terminal Secured (enter **LOCK** in the **Next Menu** field)
HELP Help Screens (enter **H** in the **Next Menu** field)
ALTU Alternate User (enter **ALT** in the **Next Menu** field)

Document Management:

DOCM Main Selection
DMAS Activity Selection
DMBG To/From Workstation and General Storage
DMDS Document Selection
DMDP Print Directory of Documents
DMCR Create a Document
DMED* Edit a Document
DMAD Document Assembly
DMPS Print Document Selection
DMRF* Refile a Document
DMRS Remove Document Selection
DMTS Transfers Activity Selection
DMWO Workstation to OFIS Link
DMOW OFIS Link to Workstation
DMGO General Storage to OFIS Link
DMOG OFIS Link to General Storage
DMOS OFISfile Selection
DMSA Shared File Activity Menu
DMSF Select Shared File
DMSL* Shared File Access Directory
DMSC Create a Shared File
DMSK Summary Keyword Directory
DMSM* Maintain a Shared File
DMSR* Remove a Shared File
BSTA Background File Transfer Status (Enter **X** in the **Next Menu** field)

Electronic Mail:

MAIL Activity Selection
EMDL Dead Letter Directory
EMFD Follow-up Directory
EMFM* Filing Information
EMMI Mail Item Detail
EMRD Mail Receipts Directory
EMSM Send Mail
EMVB View Mailbox
EMVR* View Mail Receipt

Calendar:

CAAS Activity Selection
CAAC User Availability Check
CADC Daily Calendar
CAAE Add/Change Event
CARC Unscheduled Recurring Events Directory
CAWC Weekly Calendar
CAMC Monthly Calendar
CASC Search Criteria
CAPC Print Calendar Selection
CALA Location Activity Selection
CALL Location List
CATD To Do List
CADT Delete To Do Items
CSTA Event Status (enter **E** in the **Next Menu** field)

Form Letters:

LTRS Activity Selection
LTSL Select List Directory
LTSD Select Description Directory
LTRL Delete List Directory
LTRD Delete Description Directory
LTPR Print Form Letters
LTST Check Print Status

Systems and Users:

USER Activity Selection
USLS User List Selection
UNLS Network Locations
UPRO User Profile
UREM Record Retention Parameters
UALT Alternate Users Activity
UAVD Alternate Users Directory
UAAD Add Alternate User

Distribution Lists:

DIST Activity Selection
DLSD Select List Directory
DLPD Print Lists Directory
DLRD Remove Lists Directory

Printer Selection:

PACT Activity Selection
PDCP Data Comm Printer Attributes
PDIR Printer Directory
PTSL Printer Selection
PRIN Next Print Request
PALP Line Printer Attributes
PSTA Print Status (enter **P** in the Next Menu field)

Archiving:

ARAS Activity Selection
ARDS Document Selection
ARRS Retrieve Status Directory
ARSD Archive Status Directory

Glossary

A (Append). This OFIS Link command adds the text of subsequent document entry screens to the end of the displayed document.

Activity. An activity is a major task you can select on an OFIS Link activity selection menu. For example, Send Mail is an activity on the Electronic Mail Activity Selection menu.

Additional Copies. This setting on OFIS Link Printer Attributes menus controls the number of additional document copies that can be printed. You can request up to 99 additional copies.

Administrator. The person in charge of supervising or maintaining either a single network or an entire facility is the Administrator. (Refer to System Administrator.)

Alpha. This is data represented by letters of the alphabet.

Alphanumeric. This is data represented by letters and digits.

Alternate ID. Using the Alternate ID option, you can designate another OFIS Link user as having limited access to your documents, mail, and calendar. Your alternate can schedule, cancel, or acknowledge meetings for you.

Annotate. To annotate is to add comments or notes to an existing document. OFIS Link adds these comments to the end of the existing document, regardless of where you enter them.

AP 1301. This is a daisywheel printer that can be attached to OFIS Link for printing.

AP 1310 and AP 1340. These are matrix printers that can be attached to OFIS Link for printing.

AP 1350. This matrix printer can be attached to OFIS Link for printing. The AP 1350 has more formatting capabilities than the AP 1310 and AP 1340.

Application. Any program that "applies" the resources of the computer is an application (for example, Electronic Mail).

Archiving. This OFIS Link activity stores and retrieves OFIS Link documents using mass storage media external to OFIS Link.

Asynchronous Terminal Emulator (ATE). This is a software program that allows a BTOS workstation to operate as an asynchronous terminal. (Refer to TTY.)

Attribute. An attribute is a value set for a printer which determines some format characteristics of your document. (Refer to Page Length and Spacing, which are printer attributes.) You can change attributes through the Printer Selection module.

Glossary-2

Banner Page. This is a page that OFIS Link prints at the beginning and end of a document. It can provide information such as user ID and date and time of printing.

B (Bottom). This OFIS Link command positions the cursor at the end of the document and displays the Command screen and END.

BTOS Workstations. These are particular models of workstations within the BTOS product line.

Calendar. This OFIS Link personal productivity tool records daily events and notes, and sets meeting locations and times electronically.

C (Cancel). This OFIS Link command cancels untransmitted entries and returns you to the previous menu within an activity.

CANDE. CANDE stands for *Command AND Edit* language, a software program required to install OFIS Link.

Cathode Ray Tube (CRT). A CRT is a video-like tube on which information is displayed.

Character. Any symbol displayed on the screen, including letters, digits, punctuation, and special characters like a dash (-), a virgule (/), and a blank space, is considered a character.

Character Quality. This setting on the OFIS Link Printer Attributes menu establishes the resolution of printed characters; you can select either draft, text, or letter quality.

Command and Edit Language. Refer to CANDE.

Component. Any subordinate element of an integrated system acting as a building block to compose a complete system.

COMS. COMS stands for **CO**mmunication **M**anagement **S**ystem, a system-level program that is one of the message control systems OFIS Link can use.

CRT. Refer to Cathode Ray Tube.

Cursor. This is a visual indicator that appears on a terminal screen and indicates where the next-typed character is entered.

Customer Support Representative (CSR). This is a Unisys employee with a data processing background, who is responsible for the technical aspects of installation and who can be consulted when system and/or hardware problems occur.

Data. Facts, numbers, letters, and symbols that a computer can process are data.

Database. User documents and the software necessary to access and maintain them comprise a database. The database resides on a disk.

Data File. A data file is a collection of related records that contain one or more fields for storing information. The system treats these related records as a unit, or file.

Date Format. This is the order in which month, day, and year are indicated in the system. The System Administrator chooses the date format for an installation.

Default. The preset value for a field or mode is called the default. For example, when you request the Create a Document activity, the Insert mode is the default; the system automatically assumes the Insert mode applies. You can usually override the default option.

<number>DEL. This OFIS Link editing command deletes the specified number of lines from the text of the displayed document.

Delete. This process removes information from the system.

Delimiters. These are special characters that appear on either side of a field between which you enter data (for example, ► ◀).

Device. Any piece of hardware or equipment designed to perform a special function in a data processing system is called a device.

Disk. A disk is a data storage medium consisting of one or more circular plates coated with magnetic material, and rotating within a hardware device. Disk can refer to either a disk pack or fixed disk storage device.

Disk Drive. This data storage device, in which one or more magnetic disk packs can be inserted, rotates within the drive and is used by a computer to store data.

Diskette. A diskette is a data storage medium in which information is recorded magnetically on the surface of a small, flexible disk. Diskettes are used with the OFISwriter or BTOS workstations.

Disk ID. A disk ID is a name that identifies a disk.

Disk Pack. An assembly of magnetic disks is a disk pack.

Distribution List. This is a list of OFIS Link identifiers used by the Electronic Mail and the Calendar Modules to simplify distribution of mail and meeting notices.

Document. A document is a unit of closely associated written information. A document can represent a record, a page, a form, or any other related group of data.

Document Management. This automated electronic filing module is used to create, edit, copy, print, and transfer documents.

Document Transfer. This is the process by which you can transfer documents between a workstation and OFIS Link or general storage or between OFIS Link and general storage.

Document Translator. This is a software program that translates document formats in and out of a neutral format for document transfers.

Draft Quality PPT. This type of printer pass-through printing does not support word-processing attributes and some word-processing formats. Refer to Printer Pass-through.

Glossary-4

Draft Quality PPT Printers. Draft PPT printers include the AP 1305, AP 1314, AP 1351, AP 1351-1, and AP 1354 matrix printers. Refer to Printer Pass-through.

E (EVENT STATUS). This **Next Menu** field command displays a list of events added, changed, or cancelled since the last time you used the **EVENT STATUS** command.

Edit Code. An edit code is comprised of a set of non-text characters that word processors use to format data. Examples include centering codes, underscoring, indentation, and subscript/superscript. These codes vary between word processors.

Electronic Mail. This is an OFIS Link activity that allows you to send, receive, forward, respond to, read, print, and follow up on mail items sent electronically through OFIS Link.

Emulator. This describes a software program that translates workstation keyboard and screen functions into those of another workstation or terminal type.

Error. An error is a condition that occurs because of an invalid entry by a user, a system malfunction, or a hardware problem. The user or System Administrator can usually correct invalid entries, while system and/or hardware problems may need to be referred to Unisys field service personnel.

Execute. This refers to the carrying out of a series of instructions in a computer program by a computer.

External System. An external system is an application program with which your local OFIS Link program can exchange information.

External Users. External users are users of an external system.

Field. A field is a part of a menu containing a single piece of information. A field can be either fixed or variable in length.

File. A file is a collection of documents or records, each unique and identifiable within the file.

File Maintenance. The activity of keeping a file up to date by adding, changing, or deleting data is called file maintenance.

Fixed Disk. A magnetic disk which cannot be removed from the hardware device is a fixed disk.

Floppy Disk. Refer to Diskette.

General Storage. General storage is comprised of the peripheral devices available for storing and transferring files, such as disk drives.

GEMCOS. GEMCOS stands for **Generalized Message Control System**, a system-level program that is one of the message control systems OFIS Link can use.

Global Default Printer. The most widely used printer is designated as the system default printer.

Hardware. Any physical equipment, such as mechanical, magnetic, electrical, or electronic devices is known as hardware.

H (HELP). This option is available on most of the OFIS Link menus. When you enter **H** in the **HOME** position, a **HELP** screen appears that explains the menu. The text entry screens in Electronic Mail and the Document Management modules do not have the **HELP** feature.

HELP Screen. A **HELP** screen is an on-line explanation of a menu you can access while running OFIS Link. Refer to **H (HELP)**.

HOME Position. The first character position of the first response field on a screen is the **HOME** position. The cursor is automatically placed in **HOME** position when you press the **CLEAR/HOME** key.

Host. The mainframe computer that is running the OFIS Link Program is known as the host.

I (Insert). This OFIS Link editing command turns on the Insert mode and allows you to enter text in a document.

I/. This OFIS Link editing command inserts stored text into the displayed document.

I <document name>. This OFIS Link editing command inserts a document into the current document.

Identifier. Refer to OFIS Link Identifier and Network Identifier.

Initialize. This process prepares a program for use by setting all values to an initial state. For example, the training database must be initialized before it can be used for training.

Interactive. Any system which performs processing by carrying on a dialogue with the user is interactive.

Interface. A connection shared between two systems is an interface. A menu is also an interface between the user and OFIS Link.

Keyboard. The typewriter-like device for encoding characters by depressing keys is the keyboard. It is the interface between the workstation or terminal and the user.

Keyword. A word you can direct OFIS Link to search for in the subject of documents.

<number>L and -<number>L. This OFIS Link command moves the cursor forward or back the specified number of lines in the displayed document.

Language ID. This setting on the User Profile menu identifies a character set for the language of a particular country. The default is 1 (English/USA).

Large Systems. Large systems are Unisys B 6900/B 7900/A Series mainframe computers.

Glossary-6

Last Print Line. This is the last line on a page that contains print. You determine the last print line by subtracting the number of desired blank lines at the bottom of the page from the page length.

Left Margin. This setting on the OFIS Link Printer Attributes menus controls where the printer places the left-hand margin on each printed page.

Letter Quality PPT. This type of printer pass-through printing retains word-processing formats and attributes. Refer to Printer Pass-through.

Letter Quality PPT Printers. These printers, qualified for letter-quality PPT printing, include the AP 1305, AP 1307, AP 9208, and AP 9215 printers. Refer to Printer Pass-through.

Lines Per Page. This setting on the OFIS Link Printer Attributes menus controls the number of lines printed on the page. The range for this setting is from 1 to the page length.

Local. 1. The mainframe computer on which your OFIS Link Program is installed is referred to as local (for example, local host computer). 2. Local is the processing mode you are in when you process data on your workstation using a program stored on your workstation disk without communicating with OFIS Link.

Location. 1. In the Calendar activity, location refers to a meeting site defined by the System Administrator. 2. In the Document Transfer activity, you use the Location field to enter a workstation's network identifier when requesting a background file transfer between a workstation and OFIS Link. 3. In Systems and Users, the Network Locations menu lists locations and network identifiers for external systems with which your local OFIS Link system can exchange information.

Log In. This procedure informs the computer that a specific user wants to start communicating with the computer, and then lets that user begin work on the computer.

M. 1. Modify. This OFIS Link editing command, entered on a Command screen, allows you to modify the displayed text. 2. This OFIS Link command, entered in the Next Menu field, displays a special set of Help Screens which list all menu names and identifiers.

Main Menu. The menu that appears when you transmit your user sign-on is the main menu. The main menu is the top or entry node in the OFIS Link tree of menus.

Matrix Printer. A matrix printer prints characters as patterns of dots. For example, the AP 1340 is a matrix printer.

MCP. MCP stands for Master Control Program, the operating system that controls the execution of the computer.

MCS. Refer to Message Control System.

Medium. Any material on which data are recorded (for example, magnetic tape or disk) is a medium.

Medium Systems. Medium systems are Unisys B 3900/B 4900/V Series mainframe computers.

Meeting Location. This is any area, for meeting, that has an assigned ID. You enter this ID in the meeting location field of the Calendar Module menus.

Menu. A displayed list of activities or information on which you make a selection or enter information is a menu.

Menu Identifier. This is a 4-letter identifier representing a specific OFIS Link menu. You use menu identifiers for menu jumping.

Menu Jumping. You enter G plus the four-letter menu identifier in the Next Menu field to jump to a specific OFIS Link menu and bypass the normal menu flow.

Message Control System (MCS). This series of system programs is designed to direct messages between software programs and terminals. The MCS object program (usually called MCSOBJ) must be running before the OFIS Link Program can be executed. The MCS directs the flow of the data communication (data comm).

Mode. A mode is a method of operation (for example, TEACH and Alternate User are OFIS Link modes).

Modem. A modem is a device that is used for TTY communications; it allows computers to pass information over communications lines (for example, over telephone lines).

Module. Any one of the eight main OFIS Link activities listed on the main menu is a module (for example, Electronic Mail).

MT. Refer to Asynchronous Terminal Emulator.

NDL. Refer to Network Definition Language.

NDL II. Refer to Network Definition Language.

Network Controller. The computer program that controls the flow of data communication messages to and from all devices listed in the NDL.

Network Definition Language (NDL). This language is used to name and keep track of all devices attached to the computer (for example, terminals, workstations, OFISfiles, and printers). The NDL is compiled to form the network controller.

Network Identifier. This 6-character identifier names an external system with which your local OFIS Link system can exchange information.

Next Menu Field. This field displays the identifier for the menu that appears when you transmit the current menu. You can enter a different identifier to perform menu jumping. You can also enter OFIS Link commands to perform such activities as access Help screens, view status screen, enter or exit OFIS Link modes, and exit OFIS Link.

Glossary-8

Noise Words. These are words which have been defined by the user and which OFIS Link ignores when searching the names of files (for example: and, or, the).

Noncooperating Users. These are external users for whom OFIS Link has not received user information—for example, Telex/EasyLink users. OFIS Link users can exchange information with noncooperating users. However, OFIS Link does not list noncooperating users in user directories or perform duplicate ID resolution on such users.

Numeric. Arabic numerals (0, 1, 2, 3, etc.) are numeric data.

ODT. Refer to Operator Display Terminal.

OFISfile. OFISfile is an electronic storage, retrieval, and communications system used for filing letters, memos, and reports. The OFISfile may be connected to mainframe computers running OFIS Link allowing local OFIS Link users to access OFISfile documents.

OFISwriter 300/400. This is a line of Unisys word processors. These devices can be connected to mainframe computers and can access OFIS Link.

OFIS Link ID. Refer to OFIS Link Identifier.

OFIS Link Identifier. An identifier is a series of up to 12 letters, numbers, and/or special characters, such as a period (.), dash (-), a virgule (/), or a blank space that names each individual user to the system. When this identifier is entered with a password on the OFIS Link Sign-on screen, communications with the OFIS Link Program can begin.

OFIS Link Mainframe Network. In an OFIS Link mainframe network, each computer is running a copy of the OFIS Link program and communicates with all the other mainframes in the network.

OFIS Link System Administrator. Refer to System Administrator.

On-line. This term refers to equipment or devices in direct interactive communication with a computer.

Operating System. Software that controls the execution of computer programs is the operating system. For OFIS Link, the operating system on the computer is the Master Control Program (MCP).

Operator Display Terminal (ODT). This is a video display that communicates with the operating system.

<number>P and -<number>P. This OFIS Link command moves the cursor forward or back the specified number of pages in the displayed document.

Pack. Refer to Disk Pack.

Page Length. This setting on the OFIS Link Printer Attributes menus tells the printer the length of the page in lines.

Parameter. This is a variable that is given a constant value for a specified application.

Password. A user-defined series of six characters that is required to sign on to the OFIS Link Program and access confidential documents is a password. Each identifier has a password associated with it.

Peripherals. Any machine which can be operated under computer control is known as a peripheral. Disk drives and line printers are examples of peripherals.

Personal Default Printer. Any printer that remains the default printer for a specified user from session to session is the personal default printer.

Pitch. This setting on OFIS Link Printer Attributes menus establishes the number of printed characters per horizontal inch.

PPT. Refer to Printer Pass-through.

Print. This is the process of using a printer to create a hard copy of letters, memos, or other documents.

P (Print). This OFIS Link command displays the Print Status screen; the Print Status screen provides information on any print requests you have made that have not yet appeared as completed on a previous Print Status screen.

Printer. Any output device that converts data into printed form is a printer.

Printer Category. OFIS Link supports printers in two categories: line and data comm.

Printer Pass-through (PPT). The printer pass-through feature of OFIS Link allows you to print using a printer connected to an ET 1100, ET 1200, or T 27 terminal or to a BTOS workstation, rather than a printer connected directly to OFIS Link.

Professional Word Processing (PWP). This is the name of a word processing software package for BTOS workstations.

Program. Any set of instructions which the computer performs in sequence is a program.

<PUBLIC>. This is the name of the shared file that is accessible to all users regardless of privileges. You place a document in this shared file when you want any system user to be able to access it.

Purge. This is the process of removing the contents from a magnetic tape.

Queue. A waiting line of messages is a queue. The system processes these messages in the order it receives them.

Record. A record is a collection of related data in a file and is treated as a unit.

Recovery. This is the process of restoring a system to working order after a failure. OFIS Link recovery is either initiated by the System Administrator or automatically started when the first user of the current session signs on to OFIS Link.

R (Refresh). This restoring action takes place when you enter R in the HOME position and press the Transmit key. The system restores the menu to its original condition so that you can reenter data.

Reminder. A reminder is a notification displayed on the screen up to 999 minutes prior to an event or meeting. Reminders are set in the OFIS Link Calendar module.

Remote Host. A remote host is any external system with which your local OFIS Link system can communicate.

Reserved Words. These are words or names that have special meaning to the system and which cannot be changed by the user (for example; <ALLUSERS>, <PUBLIC>).

Scheduler. This OFIS Link meeting organizer verifies availability and records responses to meeting invitations. It is an option for the Calendar module.

Screen. 1. This is the face of a television-like terminal (e.g., CRT, Video display terminal). 2. Screen refers to the information displayed at one time on the terminal.

Search Words. These are words you can direct OFIS Link to search for in the Calendar module.

Secretarial Word Processing (SWP). This is a word processing software package for BTOS workstations.

Session. Session is the time period that begins when a user signs on and ends when the user signs off.

Significant Words. Words contained in a search request that the OFISfile uses to match stored text are significant words.

Sign-on. Sign-on is the act of entering an OFIS Link identifier and password to start communication between a user and the OFIS Link program.

Software. The computer program and related documentation associated with the operation of a computer system is the software.

Spacing. This setting on OFIS Link Printer Attributes menus controls the number of lines skipped between each line of text.

Special Characters. These are any characters other than alpha and numeric. For example, OFIS Link uses a period (.), a dash (-), a virgule (/), and a blank space.

System Administrator. A System Administrator is a person at the installation site who coordinates and plans activities associated with OFIS Link. An administrator is responsible for user-training, planning, and organizing, as well as working with the Customer Support Representatives.

System Disk. The disk pack containing the copy of the Master Control Program (MCP) that is currently in use is the system disk.

System File. A system file is a disk file used by OFIS Link system software on the MCP.

T (Top). This OFIS Link command positions the cursor at the top of the document and displays the first 20 lines of the document.

Terminal. A terminal is a data entry device consisting of a cathode ray tube and a keyboard, without any stand-alone processing capability.

Text. That part of a message which contains the information to be conveyed is the text (sometimes called the "body" of the message).

Translate to Uppercase. This setting on OFIS Link Printer Attributes menus controls the changing to uppercase of all Alpha characters in a document sent to a printer. This feature is useful if a printer at your site is unable to print lowercase letters. Some line printers, for example, do not offer lowercase.

Transmit Key. The key you press to send your instructions and information to the computer. This key can also be labeled **XMT** or **XMIT**.

TTY Communications. This refers to communications between remote devices (for example, between a workstation and a mainframe) over communication lines (for example, telephone lines). TTY communications is characterized by transmission of single characters.

TTY Device. A TTY device is a workstation or IBM PC or PC-compatible using TTY communications to send or receive information from a host computer.

User. Any person who can access OFIS Link through a connected terminal device is a user.

User Disk. Any disk pack available to the system that is not the system disk is a user disk.

User Identifier. Refer to OFIS Link Identifier.

Video Display Terminal. Refer to Terminal.

Wait on Each Page. A special stop function on certain printers. It causes the printer to wait at the beginning of each page and requires manual control to continue. This feature allows you to insert special forms or letterhead stationery.

Word Processing. Word processing is a system for producing documents with automated typing and text-editing equipment.

WRITEone. WRITEone is a Unisys word processing program.

X (Transfer Status). This OFIS Link command displays the Background File Transfer Status menu, which lists background file transfer requests and their status.

<number>X. This OFIS Link editing command transfers the specified number of lines to a temporary storage area (buffer).

XMIT. Refer to Transmit Key.

XMT. Refer to Transmit Key.

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