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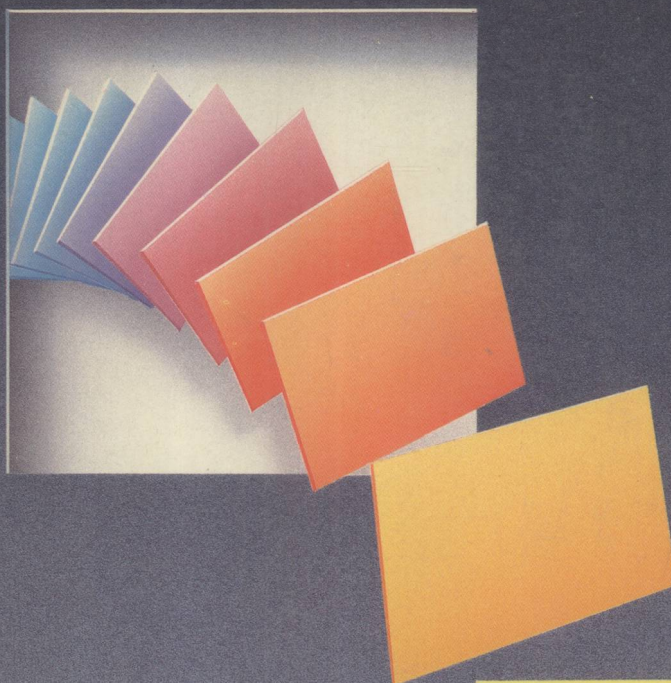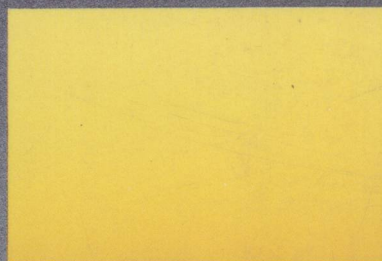
PFS:Professional ®

Write & File

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Advanced
PFS:®Professional:
Write & File

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INTRODUCTION

The original PFS series was introduced when micro-computers were in their infancy. Over the years, users like yourself have become more sophisticated, demanding more advanced features and greater performance from software programs.

PFS is changing with you by expanding into a new product line, the PFS:Professional series, consisting of three productivity programs and a network program that adds multiuser capabilities. The PFS:Professional series offers maximum performance and speed in the functional areas of database management, word processing, and spreadsheet analysis with PFS:Professional File, PFS:Professional Write, and PFS:Professional Plan. PFS:Professional Network allows multiple users access to these programs on a local area network (LAN).

The PFS:Professional modules are more fully integrated than the original PFS programs were. Used together, the PFS:Professional programs represent a complete office solution. PFS:Professional Write documents can incorporate PFS:Professional Plan spreadsheets and graphs, as well as PFS:Professional File reports. PFS:Professional Write and PFS:Professional File work together for fast mail-merge. PFS:Professional Plan can analyze PFS:Professional File list and crosstab reports.

With the PFS:Professional series, you can access mainframe files by downloading them into PFS:Professional Plan or PFS:Professional File. You can also upload data files from any of the modules to a mainframe.

PFS:Professional Network upgrades any one of the PFS:Professional series programs to allow up to five users to operate the programs on a network server.

The PFS:Professional series programs also offer extensive and flexible data transfer so that you can import from and export to other programs, such as Lotus 1-2-3, WordPerfect, dBASE III PLUS, and mainframe software. Specifically, PFS:Professional Write documents can be imported or exported in IBM Document Content Architecture (DCA) format, which allows for exchange with other word processing programs as well as minicomputers, dedicated word processors, and mainframes. The PFS:Professional Plan and PFS:Professional File modules can read data from Lotus 1-2-3 (versions 1A and 2.0) and Symphony.

Simplicity and ease of use were the hallmarks of the original PFS series. The new PFS:Professional series offers greater speed and performance without sacrificing these hallmarks. The familiar PFS design needed to be modified to accommodate all the new features. A new user interface was created—one that includes pulldown menus, speed keys, and more extensive context-sensitive Help screens.

PFS:PROFESSIONAL WRITE

PFS:Professional Write can handle the word processing needs of managers and professionals. Besides the original PFS:WRITE features, several significant features have been added to the upgraded PFS:Professional Write, including the following:

• A 77,000-word spelling checker

- A 20,000-keyword thesaurus that helps you select the exact word you want from a file containing 180,000 synonyms

- An internal address book database that can be used to look up an individual address, as well as to supply names and addresses for a mail-merge application

- A line-drawing feature that can use all keyboard characters to visually enhance your documents

- Single- and double-spaced text within the same document

- Additional cursor control keys that facilitate movement through documents

- A macro facility that allows for single keystroke execution of repetitive tasks

PFS:PROFESSIONAL FILE

PFS:Professional File is a high-performance file management and reporting program that incorporates all of the features of PFS:FILE and PFS:REPORT for data input, data manipulation, searching, sorting, and report generation. Enhancements include the following:

- Even with large data files, PFS:Professional File searches and sorts through records with increased speed. Information can be ordered in ascending, descending, alphabetic, or numeric order.

- Data entry and update time is greatly minimized with the new Quick Entry menu that includes a

"ditto key" to repeat page, record, or field data entries.

- Report generation is now a built-in feature; crosstab reports are an added capability. Crosstab reports help to analyze data by highlighting trends and data patterns.

- Printing is more flexible because you can restart printing at any page.

- The macro facility can automate repetitive tasks.

PFS:PROFESSIONAL PLAN

PFS:Professional Plan is a powerful spreadsheet that is designed to develop and analyze business plans, budgets, and financial statements quickly. PFS:PLAN features have been incorporated, as well as the following powerful additions:

- Faster recalculation time

- Five recalculation modes, including one that allows you to calculate only selected cells

- Spreadsheet size limited only by system memory

- An expanded "view" feature that allows you to work with any combination of rows and columns and to sort within or save that view as a new spreadsheet

- 94 preprogrammed functions, including mathematical, statistical, financial, and logic functions; "what-if" analysis table lookups; and regression analysis

- Enhanced graphing capability

• Formula formats for entire rows or columns, as well as for individual cells

HOW TO USE THIS BOOK

This book uses a modular approach, based on the structure of the PFS:Professional series. Part 1 covers PFS:Professional Write, Part 2 deals with PFS:Professional File, and Part 3 addresses the integration of these modules and the use of macros. At publication time, the PFS:Professional Plan and PFS:Professional Network modules had not been released, but they will be included in future editions of this book.

The following is an overview of what you'll find in the different modules.

Part 1: PFS:Professional Write Module

Chapter 1, "Getting Started," defines the basic concepts of word processing, explains the layout of the initial screens and menu structure, and introduces rudimentary word processing procedures by guiding you through a step-by-step exercise to create a memo. Chapter 2, "Editing Your Document," goes into depth about how to easily and effectively edit your documents. Chapter 3, "Formatting Your Document," explains how you change margins and tabs, set headers and footers, change justification, and adjust line spacing (single or double).

Chapter 4, "Using the Dictionary and Thesaurus," introduces the new dictionary and thesaurus features. The new drawing feature that can be used to enhance your documents is introduced in Chapter 5, "Enhancing Your Document with Lines and Boxes." Chapter 6,

"Managing Document Files," discusses how to retrieve files from disk, save files, and insert files into current documents.

All aspects of printing your documents are explored in Chapter 7, "Printing Your Document." Chapter 8, "Using the Address Book," introduces the new address book feature that can be used to retrieve an individual name or address or can be used for a mail-merge application.

Part 2: PFS:Professional File Module

Chapter 9, "Getting Started," defines basic file-management concepts and form design. It introduces elementary file procedures by guiding you through a step-by-step exercise to create a mailing list application. Chapter 10, "Designing Forms," emphasizes good form design concepts and includes several examples.

The steps involved in filling out an on-line form are discussed in Chapter 11, "Entering Data in File." The Quick Entry menu is also explained. Chapter 12, "Searching, Sorting, and Updating Files," includes instructions on how to specify search criteria. Chapter 13, "Reporting and File Merging," gives an overview of the entire reporting process and a discussion of the available report formats.

Chapter 14, "Crosstab Reports," provides an in-depth discussion on creating crosstab reports. An in-depth discussion on creating lists, including sort order, is provided in Chapter 15, "Designing and Printing Lists." Chapter 16, "Assigning and Printing Records and Labels," tells you how to print individual records and mailing labels.

Part 3: Integration of PFS:Professional Modules

Chapter 17, "Sample Tasks and Applications," includes a form letter application and a discussion of other integrated applications. A discussion of how to use macros

is found in Chapter 18, "Macros." It includes several examples.

PFS:Professional Tips

Throughout the chapters of this book you will find what are referred to as "PFS:Professional Tips." These are pointers on how to perform certain tasks more effectively and efficiently, and often represent a great savings of time. A PFS:Professional Tip typically goes beyond the elementary or even intermediate level of program implementation. The more advanced applications and program shortcuts are cited in these sections.
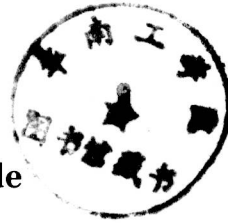
Pull-Down Menus and Speed Keys

Chapters that discuss specific menu functions present a graphic depiction of the corresponding menu items. Most menu selections can be implemented by using the speed-key combinations that are listed on the pull-down menus. A speed key is a combination of the CTRL key and another key. For example, CTRL-L is a speed key that tells PFS:Professional Write to delete a line of text at the cursor position. Speed keys allow you to bypass a menu.

Help Screens

On-screen help is only a keystroke away. By pressing the F1 key, a Help screen specific to the current function or feature will be displayed, containing an explanation of the procedure.

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To Laura with Love

ACKNOWLEDGMENTS

GETTING STARTED
CHAPTER 1

You might think that word processing is an electronic version of typing on your typewriter. The difference between word processing and using a typewriter, however, can best be stated in terms of *how* you work. Consider the following situations, some of which you have experienced at one time or another:

- You've just finished typing a multipage report. While proofreading your document, you discover a spelling error.

- You need to duplicate a business letter that you wrote several months ago.

- You need to send a copy of the same document to several individuals.

- You've just finished typing a document and would like to reposition one or more paragraphs for better continuity.

- You've completed a report, only to discover that most of the financial data included isn't accurate and needs to be changed.

- You've just finished a letter. While reading it over, you discover that you've forgotten to capitalize the name of a product referred to throughout the letter.

With a word processing program you can quickly and easily handle these situations and others in which documents need to be modified or the same document is used repeatedly for different applications.

The principal advantages of a word processing program over a typewriter can be summarized in terms of two major capabilities: on-line editing and formatting. *Editing* is the ability to revise your document as often as needed without retyping the entire document. You can easily add new text, modify or delete existing text, or rearrange paragraphs. By saving your text on disk, you can retrieve a stored document that you wish to modify and print out as many copies as you need.

Formatting is the ability to specify how a document will look when printed out on paper. For example, you can adjust margins and indentations, specify the page length, create headers and footers, underline text, assign boldface or italic print style, justify text, or add page numbers. Using these formatting features, you can alter the way your text looks so that information is presented in a way that is interesting and readily understood by your reading audience.

On a typewriter, each line of type is ended with a carriage return. With PFS:Professional Write, as well as with almost all other word processing programs, this step is unnecessary, thanks to a feature called *word wrap*. As you type your text, the software takes care of the line breaks. Text extending beyond the right margin on one line is automatically "wrapped around" to begin a new line.

There are times, however, when you will want to break your text at strategic locations—when you want to end a paragraph, end a short line, or insert a blank line in your text. By pressing the ENTER key you can manually record a line break.

PFS:Professional Write, like most word processing programs, offers two different modes for entering and editing text: Insert mode and Overstrike mode. When you work in *Insert mode,* new text is inserted at the cursor location. Existing text remains intact and is pushed to the right as each new character is entered. By contrast, when you work in *Overstrike mode* you are typing over existing text. The original text is automatically erased, character by character, as you enter new text.

PFS:Professional Tip

Use Overstrike Mode When Retyping the Same Text

Overstrike typing is the best mode to be in when you need to retype the same text. You may want to retype the same text, for example, if you need to change from uppercase to lowercase letters, from lowercase to uppercase, or a combination of the two. Unless you want to remain in Overstrike mode, you must remember to press the INS key to return to the Insert typing mode.

Whenever you start a new document in PFS:Professional Write, the Insert mode is in effect unless you otherwise select the Overstrike mode. Insert mode is the default setting for most word processing programs, allowing maximum flexibility in entering and editing text while minimizing the chances of inadvertently overwriting important text.

Now that you are familiar with the general concepts of word processing and its terminology, it is time to look at the PFS:Professional Write module.

INTRODUCTION TO THE PFS:PROFESSIONAL WRITE MODULE

Whether you are a novice word processor or an experienced user, you will find that PFS:Professional Write can satisfy all your written communication needs. With PFS:Professional Write you can produce all kinds of business documents—memos, letters, reports, and so on. In fact, the manuscript for this book was prepared using PFS:Professional Write.

The PFS:Professional Write module is a powerful yet easy-to-use word processing program that offers you many features that help you to be more productive. With PFS:Professional Write you can do all of the following:

To format your document

You can easily change margins, add headers and footers, vary line spacing, indent paragraphs, and justify text.

To proofread your document and find synonyms

It takes only two keystrokes to check your document for spelling and typographical errors. Professional Write's master dictionary includes 77,000 words. You can create several different personal dictionaries of up to 5000 words each (depending on available disk space) to include proper names, foreign words, or specialized terminology that you use often. While writing on-line,

you can find a synonym for a particular word — the dictionary doubles as a thesaurus.

To find a word and replace it with another

You can automatically find a word or phrase in your document and replace it with another word or phrase.

To create personal address books

You can maintain personal address books containing as many as 256 names. While creating a document, you can look up a name or address quickly and then automatically incorporate it in the body of your text.

To create form letters

You can easily merge names and addresses into a document to produce form letters. You can retrieve names and addresses from your personal address book, a PFS:Professional File data file, or a standard delimited ASCII text file. This makes it possible, for example, to access a database file produced by other database software.

To enhance your documents with lines

PFS:Professional Write's line-drawing feature allows you to draw lines and boxes in your documents. You can emphasize sections of text and create diagrams, maps, and organization charts. When the Drawing command is activated, the arrow keys (and other keypad keys) can be used to draw vertical, horizontal, and diagonal lines. Three different drawing styles are available.

To print in a variety of special styles

You can choose from a variety of available print styles — boldface, underline, italic, superscript, and subscript.