Xerox ViewPoint

VP List Manager Training

XEROX

VP List Manager
Training

Changes are periodically made to this document. Changes, technical inaccuracies, and typographical errors will be corrected in subsequent editions.

This book was created on the Xerox 6085 Professional Computer System.

Table of contents

1.   Getting started

Xerox ViewPoint List Manager is an optional software application for the 6085 Professional Computer System and 8010 Information System. Using VP List Manager, you can use a list, or portions of a list, in many different ways.

All the information pertaining to one item is referred to as a record, and a collection of records is maintained in a record file. The records can contain information about people, places, or things.

You can generate many kinds of documents from these records. The following are typical:

Letters	Memos	Directories

Status Reports	Action Items	Graphic Certificates

Financial Forms	Personnel Forms	Invoices
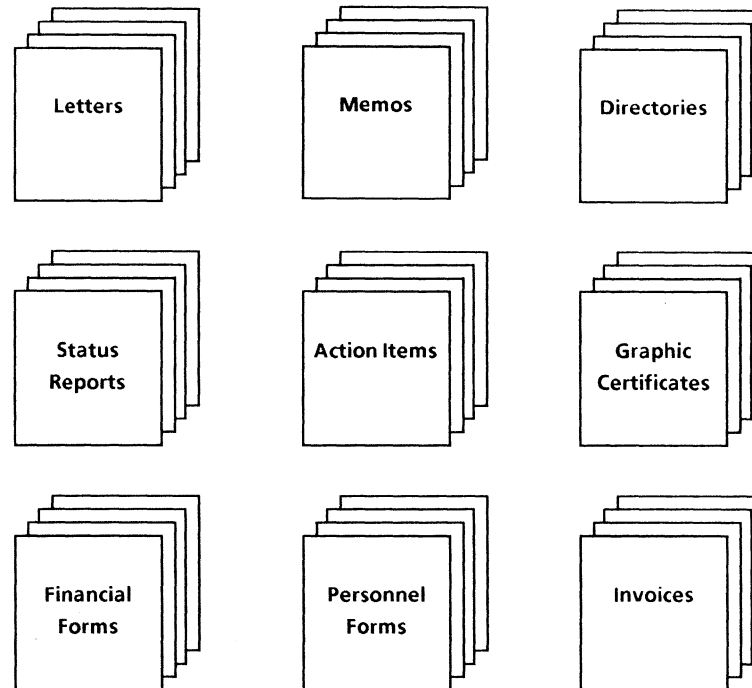
When you finish this training guide, you will be able to do the following:

- Identify record file contents.

- Sort records in alphanumeric, numeric, and date order.

- Filter records, to collect only those with certain data.

- Create new views (icons to display records in different ways).

- Add, delete, and edit records.

- Print record data in table and document form.

- Generate ViewPoint documents that include record data.

- Create a new record file.

This training guide assumes that you have completed the *VP Document Editor* training guides and their prerequisites. Two guides are particular prerequisites for VP List Manager:

- *VP Document Editor: Forms Training*

- *VP Document Editor: Tables Training*

If you have not yet worked through those guides, complete them now before continuing with this guide.

You can learn the List Manager operations without knowing how to write fill-in rules. However, you will want to learn about them if you plan to design forms that use record data. The training guide for writing fill-in rules is *VP Document Editor: Fill-in Rules Training.*

Training guide exercises

This training guide provides exercises that illustrate typical ways of working with VP List Manager. In the exercises for chapters 2 through 8, you perform operations such as sorting or printing records, using the record file supplied with this guide. You create a new record file in chapter 9.

The chapter exercises are as follows:

2	3	4	5
Identify Contents	Sort Records	Filter Records	Create Views

6	7	8	9
Add, Edit, Delete Records	Print Records	Make Document	Create New Files

If you proceed through the chapters in sequence, you will perform each major record file operation. In addition, you will understand why you want to set properties in a certain way when you create a record file in chapter 9.

If you want to learn only a specific operation, you can complete chapters 1 and 2 and then go directly to the chapter describing the operation. Except for chapters 7 and 8, which use an icon created in chapter 5, each chapter is self contained.

You can apply the techniques presented here when performing operations on your own record files. For complete information on VP List Manager, refer to the *Information Management Reference* volume of the *VP Series Reference Library*.

Hardware and software you need to begin training

Before you begin your training, make sure you have the following hardware and software:

- An operating 6085 or 8010 workstation with a desktop, a fully qualified user name, and a password. If you have a 6085 or 8010 workstation that is part of a network, you can get help from your system administrator. If your workstation is a Standalone or Documenter, you can get help from the *Workstation Administration and System Resources Reference* volume.

- Default User Profile settings. The User Profile lists the settings that control your desktop. The procedures in this training guide are designed for desktops using the default User Profile settings. Check with your system administrator to make sure your desktop has the default User Profile settings, or refer to the *General User Reference* volume.

Check the status of your applications before you begin training; consult with your system administrator or follow the next procedure.

Checking the status of applications

1. **Open** the Directory icon.

2. **Open** the Workstation divider.

3. **Open** the Loader.

4. **Compare** the list of applications in the Loader window with the list of applications here.

   - VP Document Editor 2.0

   - VP List Manager 2.0

Additional applications may be running.

If the Loader lists the applications you need and their STATUS column is set to RUNNING, select [Close All] in the Loader window header.

If the applications you need are not listed in the Loader, consult your system administrator or refer to the *General User Reference* volume for information on installing, enabling, and running the applications in the above sequence.

If the applications you need are listed, but the STATUS column is set to IDLE, change the status of the applications as described next.

Running applications

If the STATUS column of an application you need is set to IDLE, change it to RUNNING.

1. **Select** the application.

2. **Select** [Run] in the Loader window header.

3. **Select** [Close All] in the Loader window header when you are finished setting applications to RUNNING.

You can also set applications to run automatically; refer to the *General User Reference* volume for this procedure.

Training exercise documents

To assist you in completing the training exercises, a folder named "Training: List Manager" accompanies this training guide. This folder is located on the floppy disk titled "VP Training Exercises."

If the training folder and exercise icons are not already on your desktop, copy them there now. If you need help, refer to the following procedures.

Copying the training folder to the desktop

1. **Insert** the "VP Training Exercises" disk in the floppy disk drive, and **close** the door.

2. **Open** the Floppy Drive icon.

   The Floppy Drive window lists the contents of the floppy disk.

   If you do not have a Floppy Drive icon on your desktop, refer to the *General User Reference* volume for the procedure to copy the icon, or ask your system administrator.

3. **Select** the "Training: List Manager" folder, and **press** <COPY>.

4. **Select** a location on the desktop.

5. **Select** [Close] in the Floppy Drive window header.

6. **Remove** the floppy disk from the floppy disk drive, and put it in a safe location.

Copying the exercise icons to the desktop

Do not work with the exercise icons inside the training folder. Copy the exercise icons to the desktop:

1. **Open** "Training: List Manager," and **select** the icons in the folder.

2. **Press** <COPY>, and **select** a location on the desktop.

3. **Select** [Close] in the "Training: List Manager" folder window header.
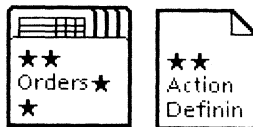
The exercise icons are now on the desktop.

Two final notes before you begin:

- This training guide uses underlining to indicate information you type; however, you do not need to underline the information you type.

- As you use this training guide, you will see terms in **_bold italic_** type. You can find more information on these terms in the Glossary, which is located in the *QuickFind Reference* volume.

You are now ready to start training.

2. Identifying record file contents

NOTE: When you perform the exercises in this guide, your windows will not open as wide as the illustrations. In most cases, you will see all you need to see.

However, when necessary, use the standard ViewPoint operations to stretch or scroll a window. Use the floating items menu at the top right of the window if a command does not appear in the window header.

(The windows in the illustrations were stretched to make the layout of the guide more pleasing to your eye as you read through it.)

For this training, use your copy of ★★Orders★★ record file. It has nine records already entered in it.

A record file icon is similar to a folder with icons inside it. Three of the icons in a record file are permanent objects. They are as follows:

• Forms Folder

• Error Folder

• Base View

Examining the Base View

1. **Open** your copy of the ★★Orders★★ record file.

2. **Open** the third icon, Base View.
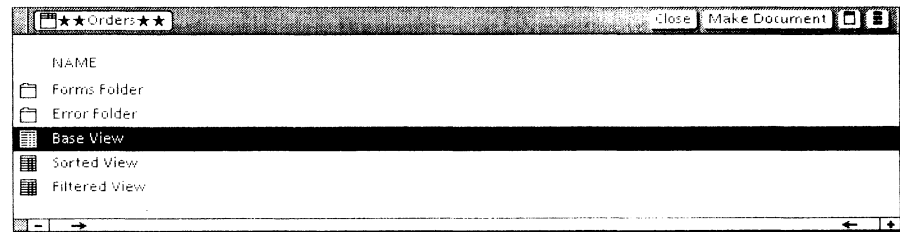
The Base View appears as shown on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes

View   A *view* is an icon that displays record file data in a certain way. There is always just one set of records in a record file, but through view icons you can look at the data in many different ways.

Base View   The *Base View* always displays all data for all records, in a form similar to a ViewPoint table.

Record   Each row contains the data for one *record*. The first record contains "Michaels" in its first column and "Joan" in its second column.

Fields   The columns are referred to as *fields*, and the column headings are the field names. Each field contains a particular kind of data. For example, the first field contains the last name of the person who is the subject of the record.

Full tabular view   The Base View is referred to as a *full tabular view* because it displays a column for every record field.

You cannot delete the Base View or move it from its position in the record file.

Displaying Base View properties

1. **Select** [Show View Prop's] in the window header.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▣ ★★Orders★★▦Base View              Close  Close All  Show View Prop's ▦ □ ▤ │
├─────────────────────────────────────────────────────────────────────────┤
│ LastName │FirstName │Address    │Company    │OrderRecd │Qty │Sent │      ↓│
└─────────────────────────────────────────────────────────────────────────┘
```
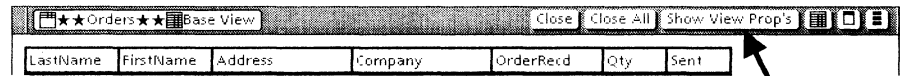
A Field Summary property sheet is displayed. It is similar to the Field Summary that is displayed for fields in a document.

2. **Select** [Properties] for the FirstName field.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▦FIELD SUMMARY PROPERTY SHEET              Done  Cancel  Defaults □ ▤ ▦  │
│  LastName  [Properties]                                              ↓   │
│  FirstName [Properties]                                              ▬   │
│  ┌─────────────────────────────────────────────────┐                    │
│  │ Description  NONE                                 │                    │
│  │ Type  TEXT                                        │                    │
│  │ NOT REQUIRED                                      │                    │
│  │ Format  NONE                                      │                    │
│  │ Range  NONE                                       │                    │
│  └─────────────────────────────────────────────────┘                    │
│  Address  [Properties]                                                   │
│  Company  [Properties]                                                   │
│  OrderRecd [Properties]                                                  │
│  Qty  [Properties]                                                  +    │
│  Sent [Properties]                                                  ↑    │
│  ▦ -  →                                                         ←  +  ▦  │
└─────────────────────────────────────────────────────────────────────────┘
```
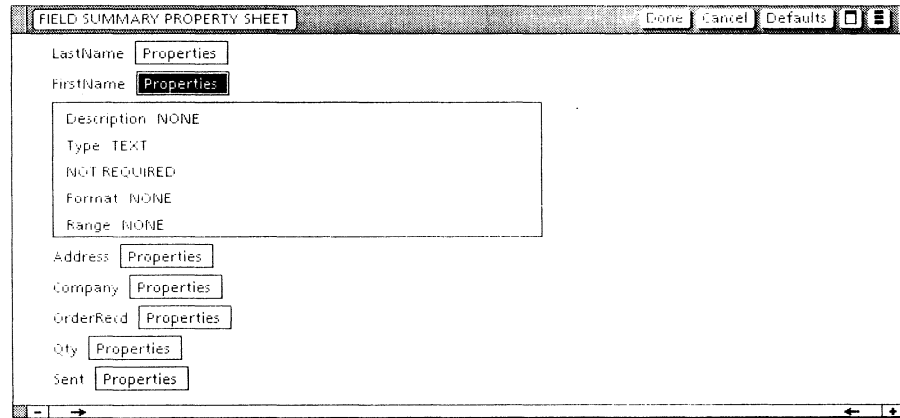
These properties were set for this record field when the record file was created. The information is read-only; no field properties can be edited after the record file has been defined.

The information is useful when you are adding records to the file or creating documents that use record data. In those cases, field names and properties must match.

The Base View has no other properties.

3. **Select** [Done] to close the property sheet.

4. **Close** the Base View.

Examining the Forms Folder

1. **Open** the first icon in the record file, the Forms Folder.

NAME	
Forms Folder	
Error Folder	
Base View	
Sorted View	
Filtered View	
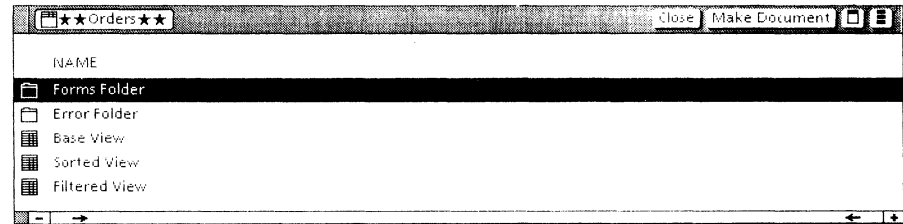
The icons in this folder are user-created forms that contain fields with the same properties as record fields.

2. **Open** the Letter document inside the Forms Folder.

Evergreen
Philanthropies

Dear ⌐⌐

We have received your request for ⌐⌐ flyers describing our upcoming fund raising event. The flyers are enclosed with this letter.

Thank you for participating. Your efforts will help make this the most successful campaign ever.

Sincerely

Campaign Manager

Flyers mailed ⌐⌐
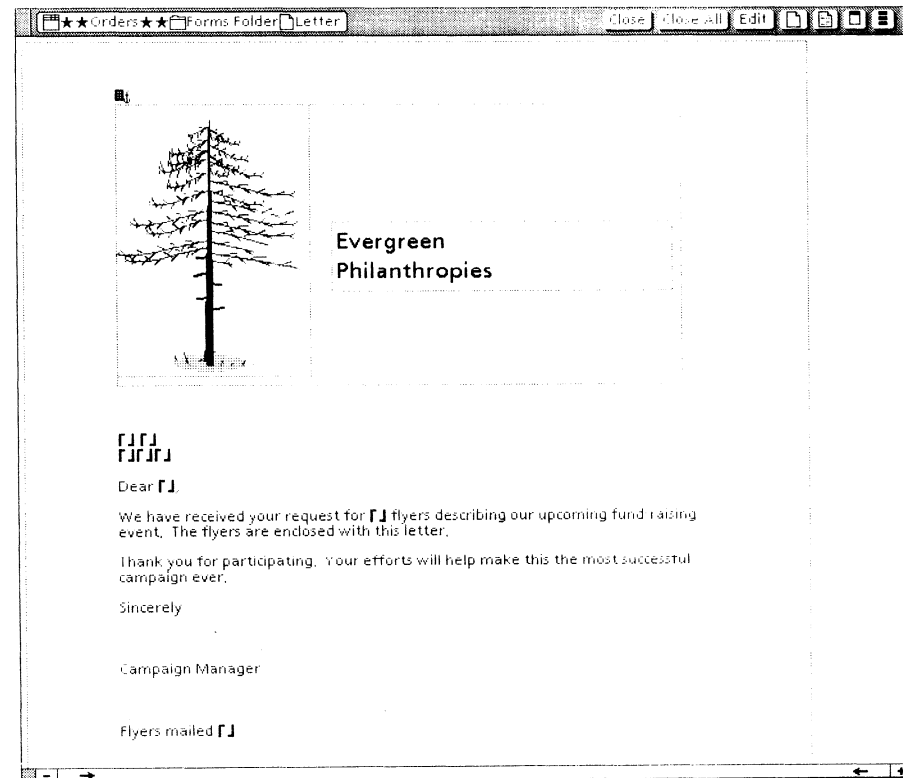
Since [Show Structure] has been selected, you can see the fields in the Letter document.

3. **Display** the properties of the first field in the document.
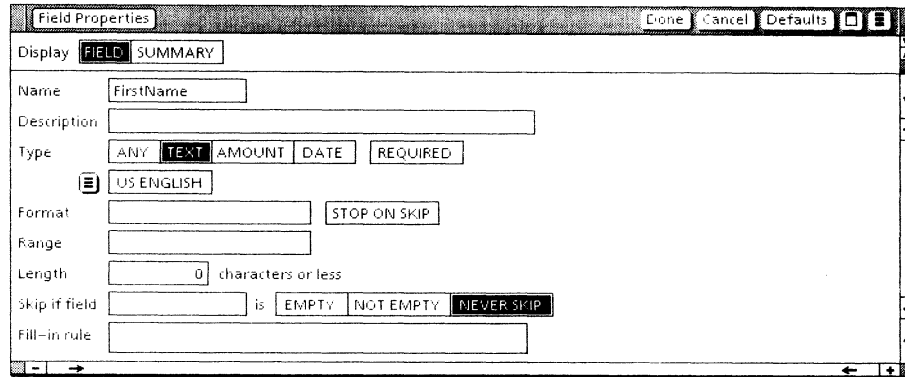
You display the properties by clicking <u>twice</u> on one of the field bounding characters and pressing < PROP'S >

The field is named FirstName, and its type is TEXT. The properties match those of the FirstName record field. Whenever you use Letter as a display form for records, a first name appears in this field.

4. **Select** [Cancel] to close the property sheet.

5. **Select** [Don't Show Structure], so that later you can see the letter filled in exactly as it will print.

6. **Close** the document.

You can move or copy documents to and from the folder, delete documents in the folder, or edit documents in the folder. You also can paginate documents inside the folder, which you should do after editing.

However, you cannot delete the Forms Folder or move it from its position in the record file.

7. **Close** the Forms Folder.

Examining the Error Folder

The Error Folder is empty. When you try to add records by copying other record files or documents to this record file icon, any records that cannot be added appear in the Error Folder. You can examine them, correct the erroneous condition, and copy the objects to the record file once again.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▐ ★★Orders★★                                         Close │ Make Document □ ▤ │
├─────────────────────────────────────────────────────────────────────────┤
│      NAME                                                               ↓ │
│ ▭ Forms Folder                                                          ▬ │
│ ▣ Error Folder                                                            │
│ ▦ Base View                                                               │
│ ▦ Sorted View                                                           ✦ │
│ ▦ Filtered View                                                         ↑ │
├─────────────────────────────────────────────────────────────────────────┤
│  −  →                                                            ←   ✦    │
└─────────────────────────────────────────────────────────────────────────┘
```
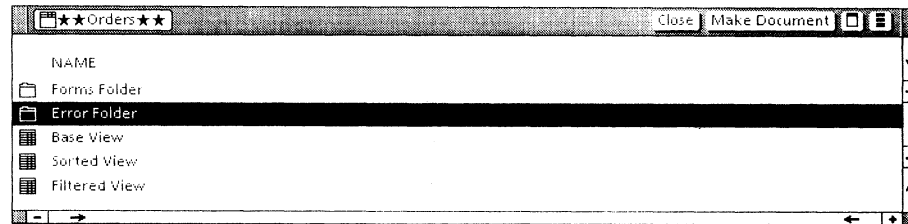
The Error Folder is a permanent object that cannot be moved or deleted, but you can move or delete objects contained in the folder.

Refer to the *Information Management Reference* volume for more information on the Error Folder.

Using other views

Although you can edit, add, or delete records in the Base View, you cannot change the order in which the records appear or otherwise rearrange the data.

You can set properties on other, user-created views, such as Sorted View. These properties allow you to see the record data as you want. In the following chapters, you sort and filter records in the Sorted View and Filtered View and also create new views.

3.   Sorting records

For your own purposes you may want to arrange records in different ways. For example, you might want to see the records in alphabetical order by last name. At another time, you might want to see them arranged in a date order.

You can sort data in alphanumeric, numeric, or date order. Sorting is based on the field type (Text, Amount, or Date) of the record field(s) on which you sort. You can sort from the lowest value to the highest, or vice versa.

Sorting on a Text field

1. Open the fourth icon, Sorted View.
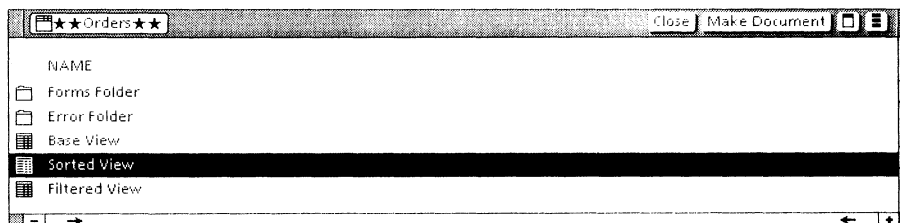
This view displays the same data as the Base View, but the records now are arranged in alphabetical order, from A to Z, based on the LastName column.

You see the identical record data in a different way because a sort order has been set on a property sheet.

The view is illustrated on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

2. **Select** [Show View Prop's] in the window header.

3. **Select** [STABLE] for the Display setting in the property sheet.

VIEW PROPERTIES   Done Apply Cancel Defaults

Display **STABLE** TRANSIENT FIELD SUMMARY

Name Sorted View

State **SAVE INDEX**   Size: View contains 9 out of 9 records.

Sort Field	LastName	**ASCENDING** DESCENDING
Sort Field		**ASCENDING** DESCENDING
Sort Field		**ASCENDING** DESCENDING
Sort Field		**ASCENDING** DESCENDING

View Filter

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent

Sort Field   Since the Sort Field entry is LastName, data is sorted by last name.

Sort Order Since [ASCENDING] has been selected as the sort order, the records are sorted in A to Z order.

Multi-level sorting: Additional sorting, to second, third, and fourth levels, can be performed by entering field names in the remaining Sort Fields.

The records in this view are in alphabetical order based on the LastName column, but note there are three "Brown" last names that are not in alphabetical order based on their first names. You add a second sort field in the next exercise.

Adding a second sort field

1. **In the second Sort Field, type:** FirstName

   FirstName is one word, with no spaces before, within, or after it. However, case does not matter. You can type it as firstname, or FIRSTname, or even FiRsTnAme.

   Instead of typing a field name, you can copy it from the column headings at the bottom of the property sheet. This guarantees that the field name is spelled correctly.

2. **Keep** [ASCENDING] selected for the second Sort Field.

Sort Field	LastName		ASCENDING	DESCENDING
Sort Field	FirstName		ASCENDING	DESCENDING
Sort Field			ASCENDING	DESCENDING
Sort Field			ASCENDING	DESCENDING

3. **Select** [Apply].

   The three "Brown" names now are in alphabetical order by last name and first name.

	★ ★Orders★ ★Sorted View			Close	Close All	Show View Prop's			

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes

Changing sort order

You sort the text fields in reverse order, from Z to A, as follows:

1. **Select** [DESCENDING] for the Sort Fields for LastName and FirstName.

Sort Field	LastName		ASCENDING	**DESCENDING**
Sort Field	FirstName		ASCENDING	**DESCENDING**
Sort Field			**ASCENDING**	DESCENDING
Sort Field			**ASCENDING**	DESCENDING

2. **Select** [Apply].

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent
Rivera	Henry	780 First Avenue New York, NY	Manhattan Hats	May 9, 1988	25	Yes
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Michaels	Joan	P, O, Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	

★★Orders★★ Sorted View   Close Close All Show View Prop's

The records now are sorted in descending order, from Z to A, based on the LastName column; they are subsorted on the FirstName column in descending order.

3. **Delete** LastName and FirstName from the first and second Sort Fields.

Sorting on an Amount field

1. In the first Sort Field, **type:** <u>Qty</u>

2. **Select** [ASCENDING] to change the sort order.

Sort Field	Qty		ASCENDING	DESCENDING
Sort Field			ASCENDING	DESCENDING
Sort Field			ASCENDING	DESCENDING
Sort Field			ASCENDING	DESCENDING

3. **Select** [Apply].

			Close	Close All	Show View Prop's		

⬜★★Orders★★▦Sorted View

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X

The records now are arranged in ascending order based on the amount entries in the Qty column. (The order for the blank Sort Fields returns to the default setting, [ASCENDING].)

4. **Delete** Qty from the first Sort Field.

Sorting on a Date field

1. In the first Sort field, **type:** <u>OrderRecd</u>

Sort Field	OrderRecd	ASCENDING	DESCENDING
Sort Field		ASCENDING	DESCENDING
Sort Field		ASCENDING	DESCENDING
Sort Field		ASCENDING	DESCENDING

2. Select [Apply].

★ Orders ★ ★ Sorted View				Close	Close All	Show View Prop's	
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent	
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes	
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent	
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes	
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X	
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25		
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25		
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50		

The records now are arranged chronologically by the dates that orders were received. The record with the earliest date is first, and the record with the latest date is last.

3. Select [Done] to close the property sheet.

4. Select [Close] to close Sorted View.

Results of sorting

Text, Amount, and Date fields

The reason you have been able to sort alphabetically, numerically, and by date is that the respective fields had Text, Amount, and Date type properties set when the record file was created.

Numerals in a Text field are not sorted as they are in an Amount field. For example, 10 comes before 2 in a Text field (because the character 1 comes before the character 2 in an alphabetic sort). In an Amount field, 1 comes before 2 because the value 1 comes before the value 2.

Dates in a Text field also are not sorted as they are in a Date field. For example, July 1, 1988 comes before March 1, 1970 in a Text field (because J comes before M in an alphabetic sort). In a Date field, the 1970 date appears before the 1988 date.

4. Filtering records

You can use a filter to display only certain records in a view of the record file. For example, you might want to see only the records that have "Brown" in the LastName field.

Filter   The *filter* is like a sieve that allows only items of a certain size and shape to pass through it. In order for a record to pass through the filter, you can require that a certain field contain certain data or a range of data. You also can specify that the field must not contain certain data, or that it must be empty.

The filter is a property. You enter your requirements in the filter area of a View property sheet.

Examining the Retrieval Filter

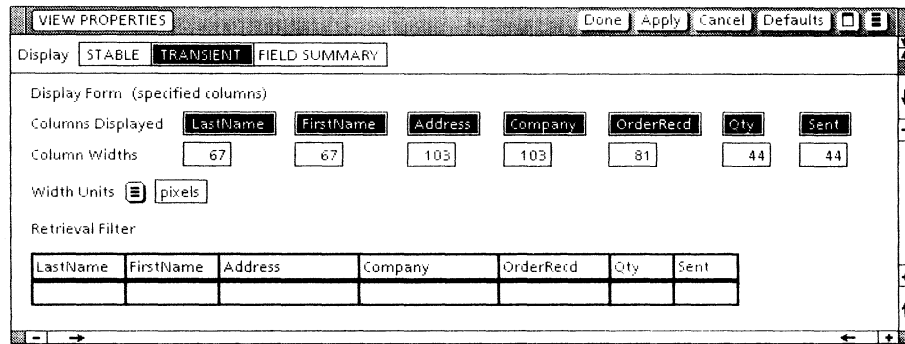1. **Open** the fifth icon, Filtered View.
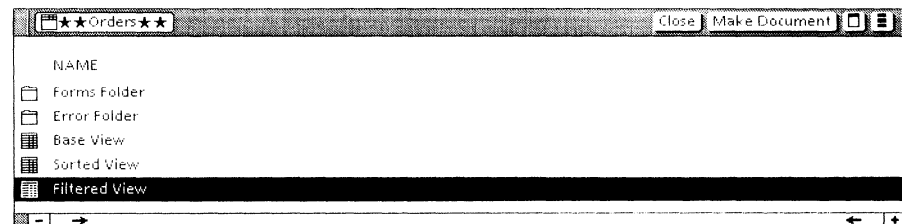
This view has been sorted by LastName and FirstName, so you will find it easy to identify records after you have applied various filters.

2. **Select** [Show View Prop's] in the window header.

3. **Select** [TRANSIENT] for the display choice on the property sheet.

The Transient properties appear as shown on the following page.

VIEW PROPERTIES   Done Apply Cancel Defaults

Display STABLE **TRANSIENT** FIELD SUMMARY

Display Form (specified columns)

Columns Displayed   LastName   FirstName   Address   Company   OrderRecd   Qty   Sent

Column Widths   67   67   103   103   81   44   44

Width Units ☰ pixels

Retrieval Filter

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent

4. Examine the Retrieval Filter at the bottom of the Transient property sheet. Note that it is in table format, with a column for each record field.

The entries you make in the Retrieval Filter are "transient" in that they are cleared whenever you close this view and access a different view.

All other properties in the Transient display, as well as those in the Stable display, remain set regardless of your closing and opening this or other views.

In the exercises that follow, you use the Retrieval Filter to set temporary filters. For some filters, you use symbols from the List Manager Special keyboard (the symbols for Ellipsis, Range, Not, and Empty).

Keyboard Window   Close
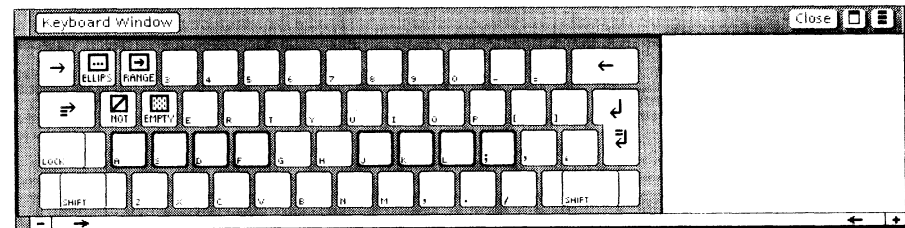
WARNING:	In the exercises, be sure to follow the instructions to delete one filter entry before replacing it with another. Otherwise, your results may not match the results described in the text.

Using a specific value as a filter

If you want to filter for a specific value in a particular field, you enter that exact value in the filter column.

1. In the LastName column of the empty row (the "entry row") in the Retrieval Filter, **type:** <u>Brown</u>

   Do not enter a space before or after the word.

   Retrieval Filter

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Brown						

2. **Select** [Apply].

   Your row becomes a new, second row in the filter, and the entry row is cleared.

   Retrieval Filter

 | LastName | FirstName | Address | Company | OrderRecd | Qty | Sent |
   |---|---|---|---|---|---|---|
   | | | | | | | |
   | Brown | | | | | | |

   The screen repaints and then displays only the three records that have the text value Brown in the LastName column. See the illustration on the following page.

LastName	FirstName	Address	Company	OrderRec'd	Qty	Sent
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	.
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes

3. Delete Brown from the LastName column of the second filter row.

NOTE: For the remainder of the exercises, use the second row of the filter. Using the entry row, you can create rows for multiple "either/or" conditions, but the exercises are limited to single filter specifications. For information on filtering for either/or conditions, refer to the *Information Management Reference* volume.

Using a "wild card" in a filter
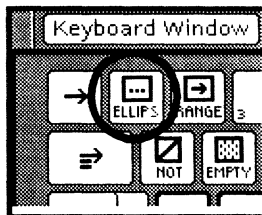
The Ellipsis symbol is in the <1> position on the Special keyboard. It is a "wild card" that represents any character(s) or no character.

1. In the LastName column of the Retrieval Filter, **type:** M

Do not enter a space.

2. Hold down <KEYBOARD>, **press** <Special> and <1>, and **release** <KEYBOARD>.

Your filter, M[...], in effect says: "Display all records whose LastName entry begins with M, followed by any character(s) or no character."

Retrieval Filter						
LastName	FirstName	Address	Company	OrderRec'd	Qty	Sent
M[.]						

3. Select [Apply].

Only the records for Michaels and Morris appear in the filtered view.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Michaels	Joan	P, O, Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes

★★Orders★★ Filtered View Close Close All Show View Prop's

4. Delete M[...] from the LastName column of the filter.

Using the Not symbol in a filter
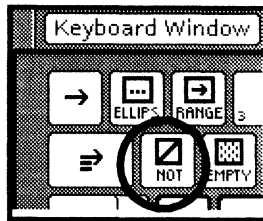
The Not symbol is in the <Q> position on the Special keyboard.

1. In the LastName column of the filter, **enter:** [/]

   Do not enter a space.

2. **Type:** Brown

Retrieval Filter						
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
☐Brown						

Your filter instruction, [/]Brown, calls for the display of all records that do not have Brown in the LastName field.

3. **Select** [Apply].

   All records, except those for the three Browns, are displayed.

★★Orders★★ Filtered View			Close	Close All	Show View Prop's			
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	x
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

4. **Delete** [/]Brown from the LastName column of the filter.

Using a range in the filter
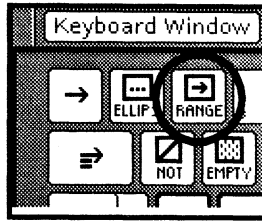
The Range symbol is in the <2> position on the Special keyboard. It allows you to filter for a range of text, or amounts, or dates.

The meaning of the Range symbol depends on its position, which can be illustrated as follows:

- [→]Value

  Meaning: Lowest value up to and including Value. For example, [→]M means everything from A through M.

- Value1[→]Value2

  Meaning: Value1 up to and including Value2. For example, G[→]L means everything from G through L.

- Value[→]

  Meaning: Value up to and including the highest value. For example, G[→] means everything from G through Z.

Filtering on a text range

1. In the LastName column of the Retrieval Filter, **enter** the following characters (with no spaces):

   [→]M[...]

   The Range symbol is in the <2> position on the Special keyboard; the Ellipsis symbol is in the <1> position.

Retrieval Filter						
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
☐M☐						

2. **Select** [Apply].

   The screen displays only the records that have last names beginning with A through M, as shown on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes

If you omitted the Ellipsis symbol after the M, no last names starting with M would display. The instruction would end the range with the single character M, and there is no last name that is just "M."

3. Delete the entry in the LastName column of the filter.

Filtering on an amount range

1. If necessary, **scroll** the filter to the left (or stretch the property sheet window) to display the Qty column.

2. In the Qty column, **enter:** 25[→]50

The Range symbol is in the <2> position on the Special keyboard.

Retrieval Filter						
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
					25⊟50	

3. Select [Apply].

The screen displays only records that have amount values between 25 and 50 in the Qty column, as shown on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

4. **Delete** the entry in the Qty column of the filter.

Filtering on a date range

1. If necessary, **scroll** the filter to display the OrderRecd column.

2. In the OrderRecd column, **enter**:

   May 1, 1988[→]May 31, 1988

   The Range symbol is in the < 2 > position on the Special keyboard..

| Retrieval Filter						
LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
				May 1, 1988☐May 31, 1988		

3. **Select** [Apply].

   The screen displays only records for orders received during the month of May, as shown on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

(Window title bar: ★★Orders★★ Filtered View — Close Close All Show View Prop's)

4. Delete the entry in the OrderRecd column of the filter.

Ranges rely on field type in the same manner as sort orders. To specify meaningful ranges on amounts or dates, the field types must have been set to Amount or Date when the record file was created.

Using the Empty symbol

(Keyboard Window illustration: → ELLIPS RANGE ⇒ NO EMPTY)
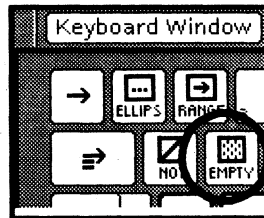
The Empty symbol is in the <W> position on the Special keyboard. It allows you to filter for records that have nothing in a certain field.

1. If necessary, **scroll** the filter to display the Sent column.

2. In the Sent column of the filter, **enter** the Empty symbol: [::]

Do not enter a space before or after the symbol.

Retrieval Filter

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
						▨

3. Select [Apply].

The screen displays only records that have no entry in the Sent column, as shown on the following page.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Alexander	Gary	12605 Elm Street Chicago, IL	Fox Stationers	June 30, 1988	50	
Brown	Carlos	45 Pennsylvania Washington, DC	Super Printing	June 12, 1988	25	
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	

4. Delete the Empty symbol from the Sent column of the filter.

Using the Not Empty symbols

1. In the Sent column of the filter, **enter** the symbols for Not and Empty: **[/][::]**

The Not symbol is in the <Q> position on the Special keyboard; the Empty symbol is in the <W> position.

Do not space before or after either character.

Retrieval Filter

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
						▨▦

2. Select [Apply].

The filtered records are shown on the following page.

Records display if they have any entry (are not empty) in the Sent column. Note that the records contain different entries, such as "Yes" and "X," in the Sent column.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Brown	George	2359 Oak Street Miami, FL		May 28, 1988	50	X
Brown	Maureen	35 Main Street Dallas, TX		May 22, 1988	75	Yes
Harris	Terry	2519 Purdue Atlanta, GA	Southern Corp.	May 15, 1988	100	X
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

The Not Empty specification is useful in situations where the data is not identical from record to record. However, it is much better to follow a pattern for entering data in your records.

In this case, if you had filtered for "Yes," you would not have seen the records for all the confirmation letters that had been sent. You would have seen only those records with a "Yes" entry.

3. **Delete** the entry in the Sent column of the filter.

Examining the View Filter

1. **Select** [STABLE] for the Display setting (at the top of the view property sheet).

2. **Examine** the View Filter at the bottom of the Stable properties.

The View Filter has the same structure as the Retrieval Filter you have used for the previous exercises. You enter specifications in the View Filter exactly as you entered them in the Retrieval Filter.

You use the View Filter when you want permanent filter settings. They remain with the view until you personally change or delete them, whereas the settings in the Retrieval Filter are cleared when you close that view and access another view.

If you have settings in both filters, List Manager first applies the View Filter, then applies an additional layer of filtering based on the Retrieval Filter settings.

3. **Select** [Done] to close the property sheet.

4. **Close** Filtered View.

Refer to the *Information Management Reference* volume for information on additional ways to filter, such as filtering for "this AND that" and "this OR that."

5.   Creating new views

To create a new view, you copy the Base View or any other view icon, and set properties for the new view.

Although you copy the icon the same way you copy any icon, there is one important difference in the result: The records are not copied. The new view displays the very same records as the old view, not copies of records. *There is only one set of records.*

- Each view accesses the same information but displays it in a way that matches the properties you set for it (such as sort and filter properties).

- When you delete a view, no records are deleted. You simply delete that particular way to look at the one internal set of records.

- Setting a view is like turning a kaleidoscope. The same pieces are there; you just see them differently, as in these two views of the same pieces:
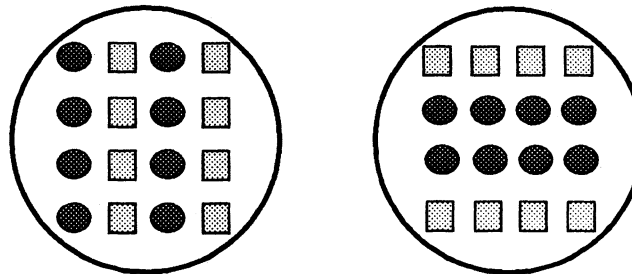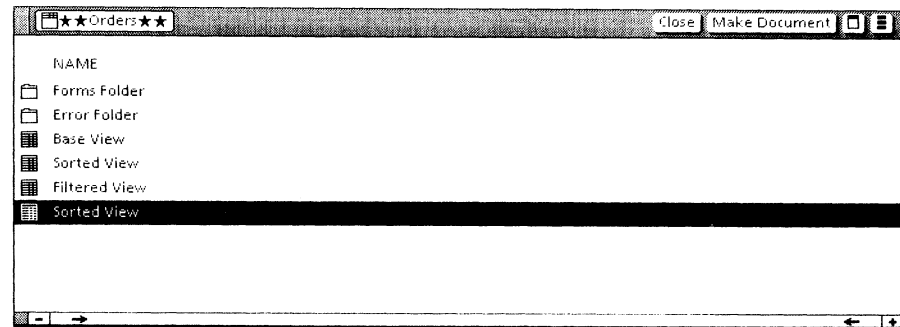

You can set most properties on sheets you display by pressing <PROP'S> for the view icon or by selecting [Show View Prop's] in an open view. However, the following properties must be set on the icon property sheets:

- The name of the icon

- The name of the Display Form for a document view
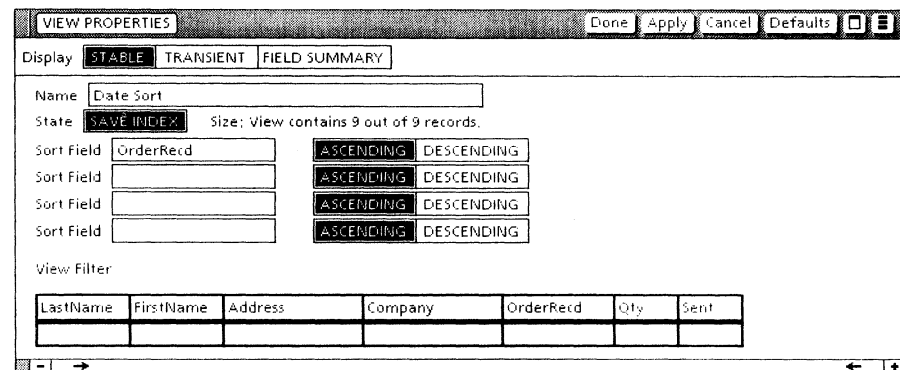
Creating a new tabular view

1. **Select** the Sorted View icon, and **copy** it to the bottom of the record file directory, below the Filtered View icon.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▓▓★★Orders★★▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓  Close │ Make Document │ □ │ ▤ │
├─────────────────────────────────────────────────────────────────────────┤
│   NAME                                                                   ↕│
│  ☐ Forms Folder                                                          ─│
│  ☐ Error Folder                                                           │
│  ▦ Base View                                                              │
│  ▦ Sorted View                                                            │
│  ▦ Filtered View                                                          │
│  ▦ Sorted View                                                            │
│                                                                          ◆│
│                                                                          ↑│
│ ▓ − │  →                                                       ←  │ + ▓  │
└─────────────────────────────────────────────────────────────────────────┘
```

2. **Press** <PROP'S>.

   The property sheet that displays is the same one you have seen inside an open view window. The only difference in the Stable properties is that the Name property can be edited.

3. **Rename** the view: <u>Date Sort</u>

4. **Verify** that OrderRecd is the name in the first SortField and [ASCENDING] is selected for its sort order.

```
┌─────────────────────────────────────────────────────────────────────────┐
│ ▓ VIEW PROPERTIES ▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓  Done │ Apply │ Cancel │ Defaults │ □ │ ▤ │
├─────────────────────────────────────────────────────────────────────────┤
│ Display │ STABLE │ TRANSIENT │ FIELD SUMMARY │                          ▼▲│
│                                                                          ↕│
│   Name  │ Date Sort                          │                           │
│   State │ SAVE INDEX │   Size: View contains 9 out of 9 records.         ─│
│   Sort Field │ OrderRecd    │      │ ASCENDING │ DESCENDING │            │
│   Sort Field │              │      │ ASCENDING │ DESCENDING │            │
│   Sort Field │              │      │ ASCENDING │ DESCENDING │            │
│   Sort Field │              │      │ ASCENDING │ DESCENDING │            │
│                                                                           │
│   View Filter                                                             │
│   ┌─────────┬──────────┬─────────┬─────────┬──────────┬─────┬──────┐     │
│   │ LastName │ FirstName │ Address │ Company │ OrderRecd │ Qty │ Sent │    ◆│
│   ├─────────┼──────────┼─────────┼─────────┼──────────┼─────┼──────┤     │
│   │         │          │         │         │          │     │      │     ↑│
│ ▓ − │  →                                                       ←  │ + ▓  │
└─────────────────────────────────────────────────────────────────────────┘
```

5. **Select** [Done].

Displaying specified columns

You can "turn off" any column by selecting its name in the Columns Displayed option, and "turn on" any column by selecting its name again. The names of displayed columns are highlighted.

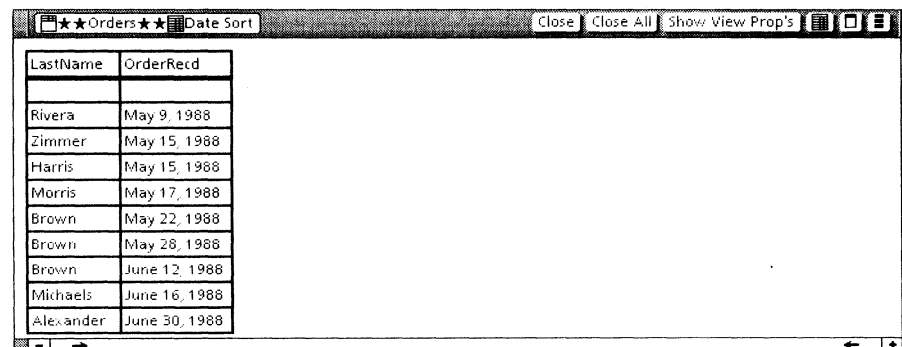1. **Open** Date Sort, and **select** [Show View Prop's].

   The Transient properties are displayed.

2. **Turn off** all columns except LastName and OrderRecd.

   Stretch the property sheet window to see all the column names.
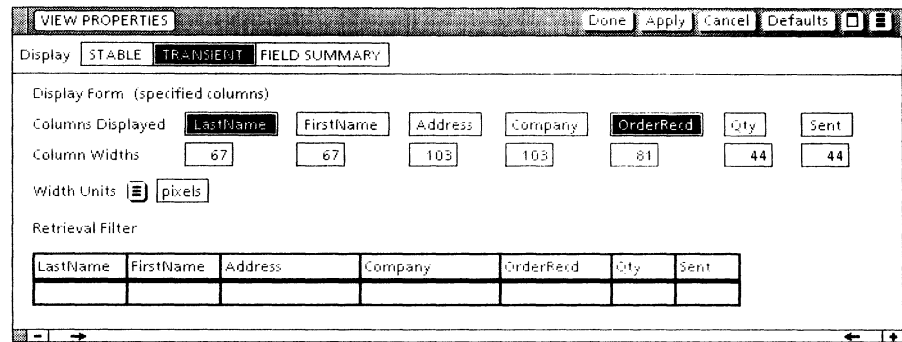
3. **Select** [Apply].

   Only the LastName and OrderRecd columns are displayed.

Changing column width

You can change column widths by selecting the desired Width Units and editing the numbers below column names. You can select [Apply] to see the result before closing the property sheet.

Pixel The default for Width Units is *pixels*. A pixel is one screen bit (picture element) and is equal to approximately 1/75th of an inch.

1. **Select** [inches] in the Width Units auxiliary menu.

2. **Delete** the current width entry under LastName, and type: <u>2.5</u>
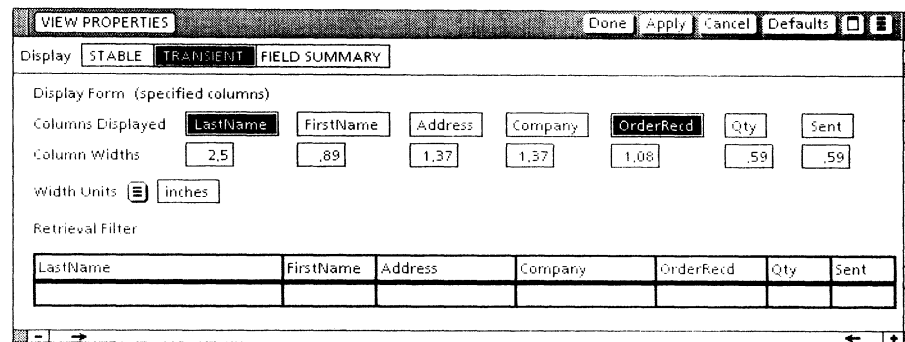
3. **Select** [Done].

The LastName column is now 2.5 inches wide.
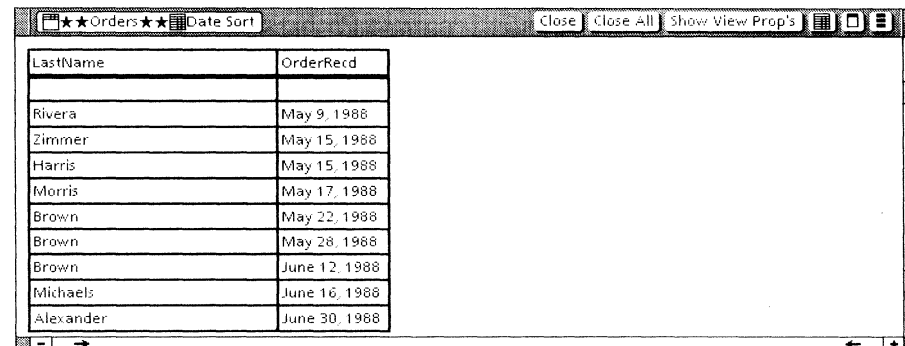
4. **Close** Date Sort.

Scrolling tabular views

The sample record file has very few records, and thus there is no need to scroll to see all the records. However, your own record files will have many records and possibly many fields.

To scroll horizontally or vertically in a tabular view, you use the same techniques you use for scrolling a wide, long table.

Creating a document view

A document view displays records through fields in a document that has been placed in the Forms Folder.

1. **Select** the Base View icon, and **copy** it to the bottom of the record file directory, below Date Sort.
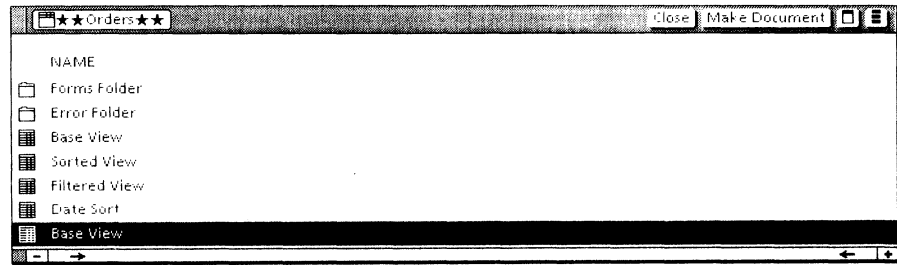
2. **Press** < PROP'S >.

    The Stable properties are displayed.

    Although the Base View property sheet consists only of the Field Summary, copies of the Base View have all the Stable and Transient properties, as well as the Field Summary.

3. **Rename** the view: Letter View

4. In the first Sort Field, **type:** LastName

5. In the second Sort Field, **type:** FirstName

6. **Verify** that [ASCENDING] is selected for both Sort Fields.
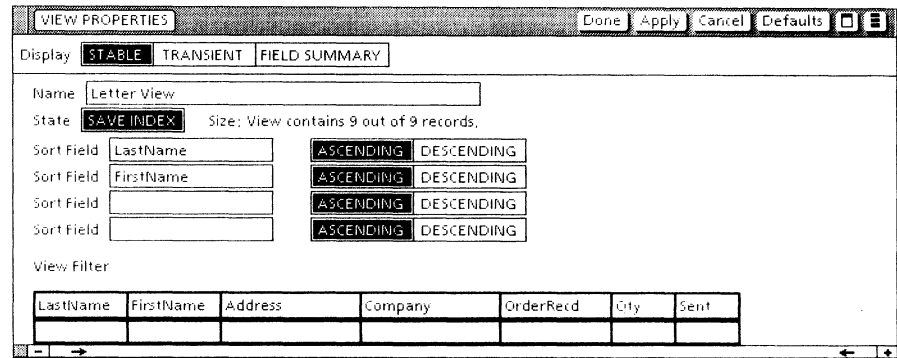
Selecting a Display Form

1. **Select** [TRANSIENT] for the Display setting.

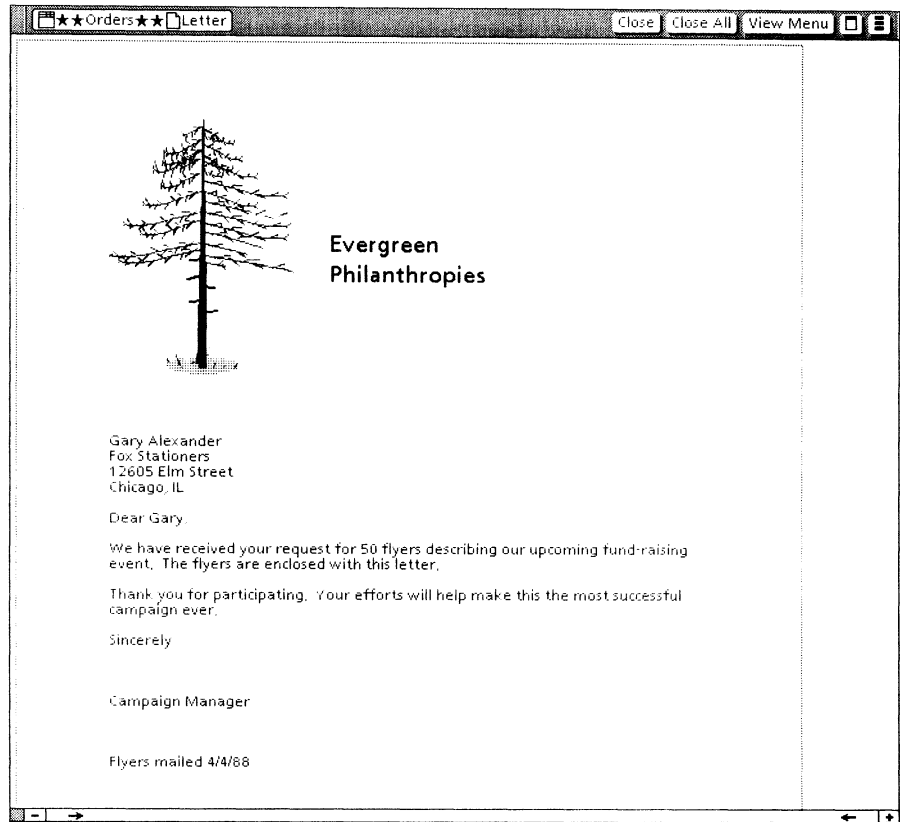2. **Select** [Letter] for the Display Form option.
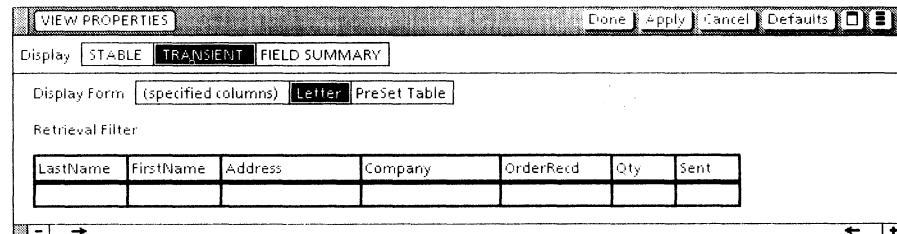
3. **Select** [Done].

Moving through records in a document view

1. **Open** the Letter View icon.

   The view appears as shown on the next page.

Because you set an ascending sort order on the LastName field, the first record that appears is for Gary Alexander.

Fields in the document view contain record data if those fields match record fields. For example, the first field in the inside address is a text field named FirstName, which matches a record field. Some fields, such as the one for the date at the bottom of the letter, have fill-in rules.

2. Select [Next] in the View Menu in the window header.
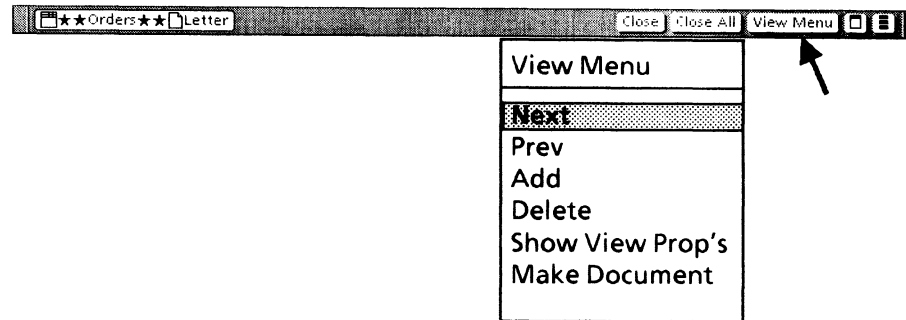
The next record in the sort order appears.

3. Select [Next] to advance through the records, or **select** [Prev] to go back to the previous record.

Moving through records in a a document view is like moving through documents in a folder, using [Next] and [Prev].

4. Close Letter View.

Identifying fields in the Display Form (optional exercise)

1. Open the Forms Folder.

2. Open the Letter icon, and **select** [Show Structure].

3. Display the properties of a field, and **select** [SUMMARY] for the Display setting.

To display field properties, click <u>twice</u> on a field bounding character and press <PROP'S>.

4. Display the properties of each field in sequence by selecting [Properties] next to the field name.

In Letter View, each field with the same name as a record field was filled with record data. Other fields were filled by their fill-in rules.

Note especially the properties of the following fields:

- *Salutation:* The field name is Salutation, rather than FirstName. In a document view, data from a record field can be copied to only *one field* with the same name. This document has a field in the inside address with the name FirstName, so a different name is needed for the salutation. To repeat the first name in the Saluation field, it has a fill-in rule of FirstName.

- *OptionalReturn:* This field follows the Company field on the second line of the inside address. Some records have data in the Company field and others do not. However, there is no extra, blank line if a record has no entry for Company because the "optional" field has a fill-in rule that enters a new-paragraph character only if Company contains data.

Refer to the *Information Management Reference* volume for helpful information on designing display forms for your own record files.

For example, the reference volume includes information about other "optional" fields. For personal names, you can have a space after a Middle Initial field if there is data in the field. In form letters, you even can have entire paragraphs that are included or not, based on data in a certain field.

5. **Close** the Field Summary and the Letter document.

6. **Close** the Forms Folder.

6. Adding, deleting, and editing records

You can add, delete, or edit a record in any open view. The change is made to the one set of records and is immediately visible in the Base View or any view that displays the changed record.

WARNING:	When you add, delete, or edit records in any view, you are actually adding, editing, or deleting them from the one internal set of records, and thus from all views.

For the exercises in this chapter, use Sorted View.

Adding records

1. **Open** the Sorted View icon.

2. **Select** in the first column of the blank entry row at the top of the view.

3. **Enter** data for a new record, using the information shown in the table below.

   Use <NEXT> to move from field to field as you enter the data. Use the same editing features you use when editing a document; however, you cannot change character properties.

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Lowen	Sandi	82 First Avenue Rochester, MN		June 12, 1988	50	

4. Confirm the record: **press** <NEXT> when the caret is in the last field of the record, or **select** [Confirm] in the window header.

In a sorted view, the confirmed record is placed in the proper sort order, as is the case in this exercise. If you add a record that does not meet the view's filter, it is added to the record file but does not appear in the view. The entry row is cleared after confirmation.

Adding records in different ways

You can add records by typing directly in a view, by copying certain documents to the record file, or by copying records from other record files.

Typing directly in a view

- Type the data in the entry row of a tabular view, as you have done in the previous exercise.

- Copy a row in a tabular view, and edit the copy so it reflects the data for the new record.

- Type the data in blank fields of a document view.

Copying documents with fields or tables
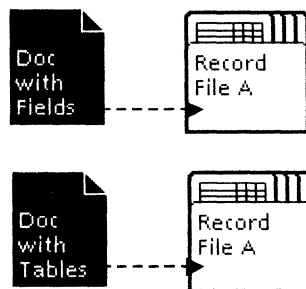
- Copy closed documents that contain fields to the closed record file icon. Data in document fields that match record fields become the data in new record(s).

- Copy closed documents that contain tables to the closed record file icon. Data in the table columns that match record fields become the data in new record(s).

  If you need to add a large number of new records, it is very efficient to create them as rows of a table and copy the table document to the record file. You practice this method in chapter 9.

Copying records from other record files
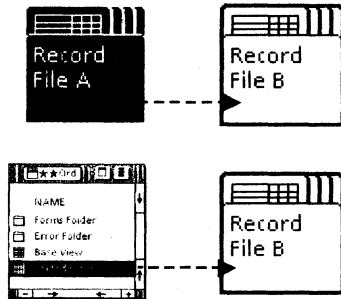
- Copy a record file icon (A) to a record file icon (B). New records are added to B if any fields in A match fields in B. (Data is copied from matching fields in every record in A.)

- Copy a view icon (the source) to a record file icon (B). New records are added to B if any fields in the source match fields in B. (Data is copied only from matching fields in records that appear in the source view.)

Refer to the *Management Information Reference* volume for more information on adding records efficiently.

Deleting records

1. Select the row with the LastName entry of Morris (in Sorted View).

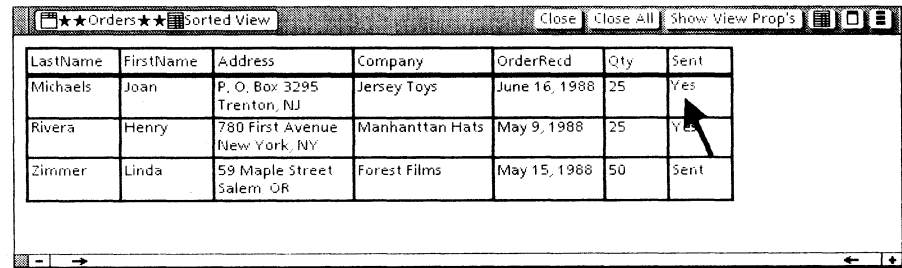| LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Michaels	Joan	P, O, Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	
Morris	John	4359 Franklin San Diego, CA		May 17, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem, OR	Forest Films	May 15, 1988	50	Sent

Selecting a row in a tabular view is like selecting a row in a table. You select with the left mouse button in one cell, then select with the right mouse button in another cell of the same row.

2. Press <DELETE>.

There is no request for confirmation of the delete action. The record is deleted. It no longer appears in any view.

Editing records

1. In the Michaels row (in Sorted View), **select** inside the Sent column and **type:** <u>Yes</u>

LastName	FirstName	Address	Company	OrderRecd	Qty	Sent
Michaels	Joan	P. O. Box 3295 Trenton, NJ	Jersey Toys	June 16, 1988	25	Yes
Rivera	Henry	780 First Avenue New York, NY	Manhanttan Hats	May 9, 1988	25	Yes
Zimmer	Linda	59 Maple Street Salem OR	Forest Films	May 15, 1988	50	Sent

Window title: ★★Orders★★ Sorted View   Close | Close All | Show View Prop's

2. **Press** < NEXT >.

   The edited record is confirmed because you pressed < NEXT > when the cursor was in the last field of the record.

3. **Close** Sorted View.
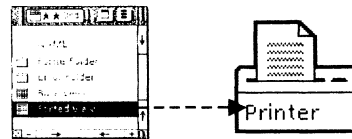
7.   Printing records

To print records, you copy a view icon to a printer icon.

Printing a tabular view

1. **Select** the (closed) Sorted View icon.
2. **Press** <COPY>, and **select** the desired printer icon.

The Printing option sheet appears. In addition to the standard
options, it presents choices for the appearance of the table document
that will be printed. See the illustration on the next page.

3. **Change** the following options to make them match those in the illustration.

- Font Size: 10

- Between Rows: first width

- Between Columns: first width

- Border: first width

- After Header: second width
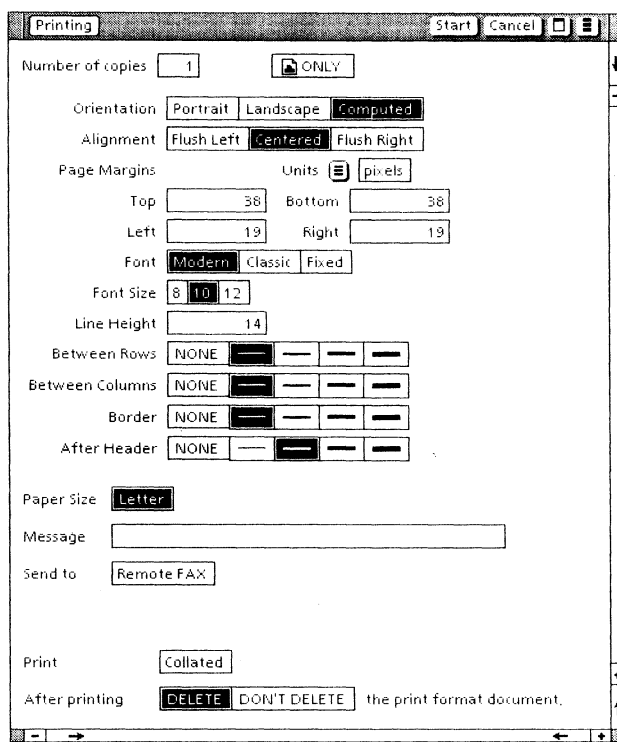
4. **Select** [Start].

A table is printed, with one row for each record in the selected view. It is printed in 10-point font, with ruling lines as you set them in the Printing option sheet.

Printing a document view (optional exercise)

This exercise takes a few minutes since several documents are printed, one for each record in the view.

1. **Copy** the Letter View icon to a printer icon.

   (Letter View was created in chapter 5. If you skipped that chapter, refer to it now to create Letter View.)

2. **Select** [Start] on the Printing option sheet.

   One document is printed for each record in the view.

# 8.   Generating documents

You can generate documents from your record files and edit, print, file, or mail them like any other documents.

If you use a tabular view, the resulting document contains a table with one row for each record in the view.
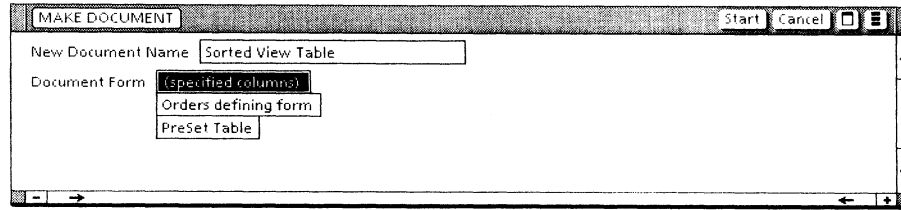
If you use a document view, the resulting documents contain a copy of the view's display form with fields filled in from the view's record data. One document is created for each record in the view.

Making a table document in default format

1. **Select** the Sorted View icon.

2. **Select** [Make Document] in the record file window header.
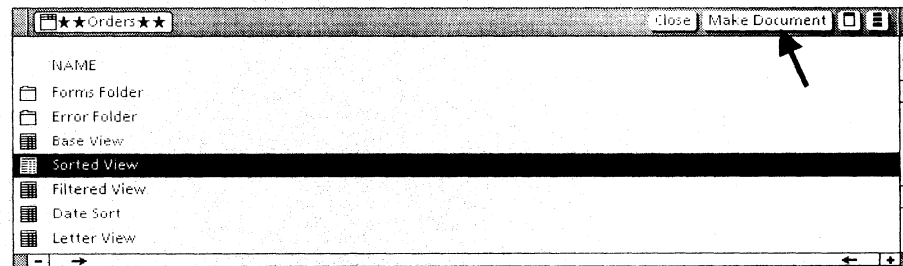
The resulting option sheet (shown on the next page) allows you to change the name of the document that will be created.

```
MAKE DOCUMENT                                    Start  Cancel ☐ ▤
New Document Name  Sorted View Table
Document Form     (specified columns)
                  Orders defining form
                  PreSet Table
```

3. Next to the New Document Name option, after "Sorted View," **type:** Table

4. **Select** [(specified columns)].

5. **Select** [Start].

   A document icon, with the name Sorted View Table, appears in the first available position on your desktop.

6. **Open** the Sorted View Table document.

   You can edit the table in this document as if you had created it yourself, and you can manipulate the document like any other document.

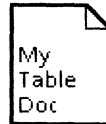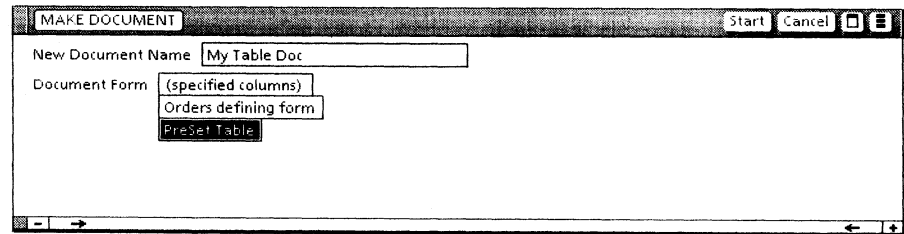7. **Close** and **delete** the Sorted View Table document.

Making a table in a defined format

1. **Select** the Sorted View icon.

2. **Select** [Make Document] in the record file window header.

   The Make Document option sheet appears.

3. **Edit** the New Document Name to make it:
   My Table Doc

4. **Select** [PreSet Table] as the Document Form.

   The edited option sheet is shown on the following page.

5. Select [Start].

A document icon, with the name My Table Doc, appears in the first available position on your desktop.

Updating fields and comparing the document to the form

1. Open My Table Doc, and **select** [Edit].

Note that the table generated has a caption, bold column headings, and columns that are more narrow than those in the tabular view. Only certain record fields appear in the table.

2. Select [Update Fields] in the document auxiliary menu.

The two fields in the text are filled in, based on their respective fill-in rules (SUM [Table1.Qty], and CurrentDate).

3. Open the Forms Folder, and **open** PreSet Table.
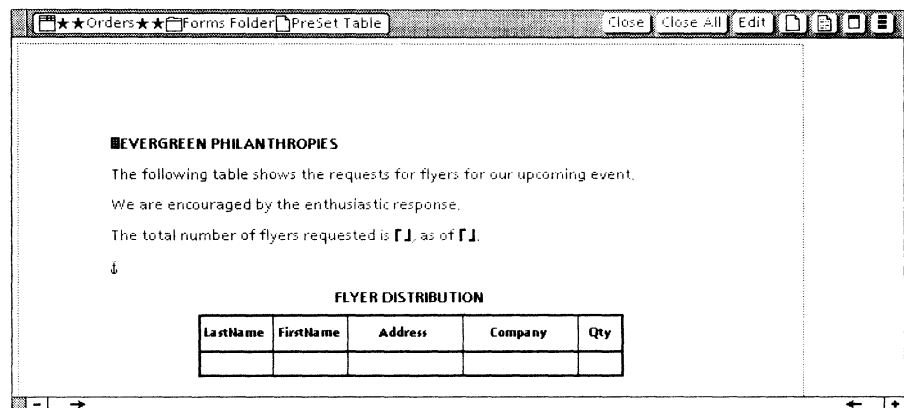
4. **Compare** the appearance of the table in the PreSet Table document with that in My Table Doc.

The appearance is the same, except that My Table Doc has a row added for each record in Sorted View.

5. **Close** PreSet Table and the Forms Folder.

6. **Close** and **delete** My Table Doc.

Making field documents

From your records, you can generate a single document or a folder of documents.

Making a single document

1. **Open** the Letter View icon.

(Letter View was created in chapter 5. If you skipped that chapter, refer to it now to create the Letter View icon.)

2. **Select** [Next] in the View Menu (in the window header) until the record for George Brown is displayed.

3. **Select** [Make Document] in the View Menu.

A single document appears on the desktop. Its name is Letter, followed by the date and time you generated the document.

4. **Open** the Letter document, and **note** that its content is the same as the record you displayed.

5. **Close** and **delete** the Letter document.
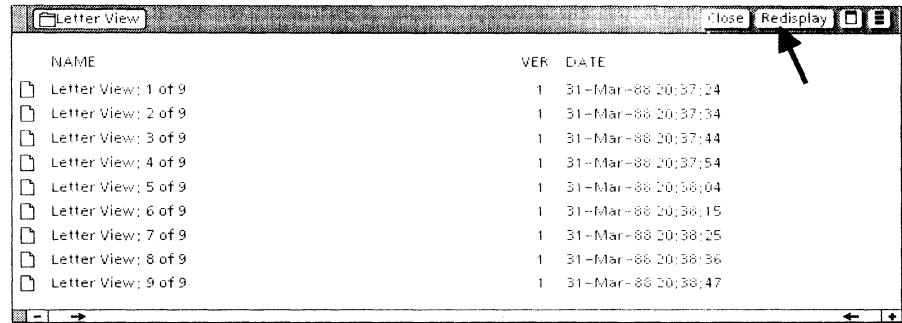
6. **Close** the Letter View icon.

Making a folder of documents (optional exercise)

TRY THIS

1. **Select** the Letter View icon.

2. **Select** [Make Document] in the record file window header.

   The pointer appears as a number, which advances one digit as each document is created. A folder named Letter View appears on the desktop.

   Inside the folder, there is a document for each record in the view. The documents are named consecutively, as shown in the illustration.

NAME	VER	DATE
Letter View: 1 of 9	1	31-Mar-88 20:37:24
Letter View: 2 of 9	1	31-Mar-88 20:37:34
Letter View: 3 of 9	1	31-Mar-88 20:37:44
Letter View: 4 of 9	1	31-Mar-88 20:37:54
Letter View: 5 of 9	1	31-Mar-88 20:38:04
Letter View: 6 of 9	1	31-Mar-88 20:38:15
Letter View: 7 of 9	1	31-Mar-88 20:38:25
Letter View: 8 of 9	1	31-Mar-88 20:38:36
Letter View: 9 of 9	1	31-Mar-88 20:38:47

3. **Open** the Letter View folder, and **examine** the documents.

4. **Close** and **delete** the Letter View folder.

5. **Close** the ★★Orders★★record file.

9.   Creating a new record file

WARNING:	It is important that you have completed the guides for *VP Document Editor: Forms Training* and *VP Document Editor: Tables Training*, or that you have a working knowledge of fields and tables. Portions of this chapter assume you are familiar with fields and tables.

At the time you create a new record file, you define its structure. The defining procedure allows you to establish the number of fields, the field names, and the type of data that will be accepted in each record field.

Once a record file is defined, the structure cannot be changed. For example, you cannot rename a field, add a new field, or change a field's data type from Text to Date for sorting purposes.

You set properties for record fields the same way you set them for fields or table columns. In fact, you use a document with fields or a table to define the record fields.

Defining form   The document that contains the fields or table that defines your record fields is called the **defining form.**

Creating and re-creating a record file

The first step in defining a record file is to determine the output you want from the file. When you know what output is required, you can define the fields that will produce it.

Sometimes you may make an error when defining fields for a record file. At later times, you may discover the need for an additional field. In these exercises, you not only create a record file, but you also re-create it to handle such problems.

You create small record files in the exercises, but you can apply what you learn to files of any size.

Creating the defining form

In this case, assume that you want a record file with just two fields. One field is for the names of lessees, and the other is for the names of buildings where the space is leased. You believe the default field properties are adequate for your needs.

1. **Create** a new document, named "Leases Defining Form," and **enter** a default table in it.

   To enter the table, press < KEYBOARD >, < Special >, and < F >.

   Leases Definin g Form
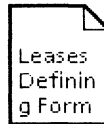
2. **Select** the first column.

   Select in one cell of the column with the left mouse button, and select in another cell with the right mouse button.

3. **Press** < PROP'S >.

   The Table Column properties sheet is displayed.

4. **Change** the entry in the Name property from Column1 to: <u>Lessee</u>.

   The edited property sheet is shown on the following page.

```
╔═══════════════════════════════════════════════════════════════════════════════╗
║ TABLE COLUMN PROPERTIES          [ Done ][ Apply ][ Cancel ][ Defaults ][ Reset ] [□][☰] ║
╟───────────────────────────────────────────────────────────────────────────────╢
║ Display [Column] TEXT │ SORT KEYS                                              ║
║                                                                                ║
║ Name        Table1. [ Lessee        ]                                          ║
║ Description      [                        ]                                    ║
║ Structure       [ Divided ]                                                    ║
║ Contents        [ FLUSH LEFT │ CENTERED │ FLUSH RIGHT │ DECIMAL ALIGNED ]      ║
║ Units           [☰] [ Inches ]                                                 ║
║ Width           [        1.19 ]                                                ║
║ Margins  Left   [        .06 ] Right  [        .06 ]                           ║
║ Type            [ ANY │ TEXT │ AMOUNT │ DATE ]    [ Required ]                 ║
║                 [☰] [ US ENGLISH ]       Text Direction [ LEFT TO RIGHT │ RIGHT TO LEFT ] ║
║ Format          [                ] [ StopOnSkip ]                              ║
║ Range           [                ]                                             ║
║ Length          [        0 ] characters or less                               ║
║ Skip if         [            ]  is  [ EMPTY │ NOT EMPTY │ NEVER │ ALWAYS ]     ║
║ Fill-in Rule    [                        ]                                     ║
╟───────────────────────────────────────────────────────────────────────────────╢
║ [-][→]                                                         [←][+]          ║
╚═══════════════════════════════════════════════════════════════════════════════╝
```

For this exercise, edit only the Name property of the first column. The other properties should remain in their default settings.

5. Select [Done].

Do not edit the properties of the second column.

6. Close the Leases Defining Form document.

Defining the record file

```
┌─────────┐
│ ▤   ▥▥  │
│         │
│ Blank   │
│ Record  │
│ File    │
└─────────┘
```

1. Copy the Blank Record File icon from the Basic Icons divider in the Workstation divider of the Directory to the desktop.

Use the desktop copy to make other copies of the Blank Record File icon as you need them.

2. Rename a copy of the Blank Record File icon, on the icon property sheet, to: <u>Leases</u>

3. Open the Leases record file.

4. **Select** the Leases Defining Form icon, and **select** [Define Structure] in the record file window header.
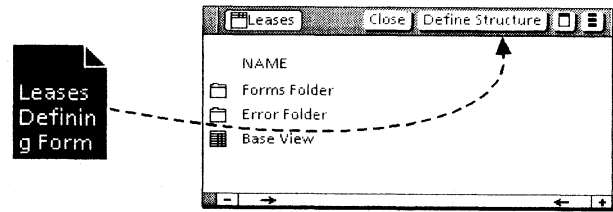
The file has been defined, and [Define Structure] disappears from the window header. The record file cannot be redefined. (The command, [Make Document], now appears in the window header.)

5. **Open** the Base View.

The record file has the two fields you need. One is named Lessee, and the other is named Column2.

However, you really meant to name the second column "Building."

6. **Close** the Leases record file.

You are going to delete this record file because it was not defined as you intended.

7. **Press** <DELETE>.

You cannot rename the fields in a defined record file, but you can modify your defining form and use it to create a new file.

Solving the column name problem

1. **Open** the Leases Defining Form document that you created in the previous exercise, and **select** [Edit].

2. **Change** the entry in the Name property for the second column from Column2 to: <u>Building</u>

Display the properties by selecting in one cell of the column with the left mouse button, selecting in another cell with the right mouse button, and pressing <PROP'S>.

3. **Close** the Leases Defining Form document.

4. **Define** a new Leases record file, using your edited defining form and following the same procedure that you used in the previous exercise.

Entering records in the Leases file

1. **Open** the Base View in the Leases record file.

   Notice that the column names are now Lessee and Building.

2. **Type** the data shown below, to add four records to the file.

Lessee	Building
Koch	Empire
Spacek	Wilshire
Fonda	Wilshire
Allen	Empire

3. **Close** the Leases record file.

Solving the omitted field problem

You now know that you need a third field, for telephone numbers.

Again, you cannot change the structure of your existing record file, but you can modify your defining form and use it to create a new record file with the additional field.

Do not delete your existing Leases file. It has records that you want to transfer to a new record file.

Leases Definin g Form

1. **Open** your edited Leases Defining Form document, and **select** [Edit].

2. **Add** a third column to the table.

   You can select an existing column (select in one cell with the left mouse button and in another cell of the same column with the right mouse button) and copy it to the right edge of the table.

 | | | |
   |---|---|---|
   | | | |
   | | | |

3. **Change** the entry in the Name property from Column3 to: Telephone.

   Display the properties by selecting in one cell of the third column with the left mouse button, selecting in another cell with the right mouse button, and pressing <PROP'S>.

4. **Close** the Leases Defining Form document.

5. **Rename** a copy of the Blank Record File icon to: Leases Revised

6. **Define** the Leases Revised record file, using your newly edited form. Follow the same procedure mentioned previously in "Defining the record file."

7. **Examine** the Base View in the new file to be sure that its columns are named Lessee, Building, and Telephone.

8. **Close** the Leases Revised record file.

Copying records to the new file

1. **Copy** the closed Leases record file icon to the closed Leases Revised record file icon.
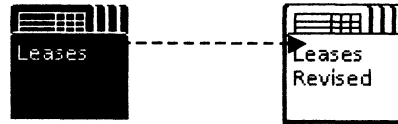
2. **Open** the Base View in the Leases Revised file to verify that the four records from the old Leases file are now entered in your new file.

   In "real life," you would now edit each record to add a number in the Telephone field.

3. **Delete** the old Leases record file.

4. **Close** the Leases Revised record file.

   A source field is copied only if it has the same name (and certain other properties) as a field in the destination file. If you want to know how to transfer data to a field with different properties, refer to the procedure detailed in the *Information Management Reference* volume.

Using an existing table to define structure and add records (optional exercise)

You are going to create a record file and name it Action Items.
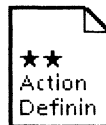
You do not need to create a new defining form since you already have an appropriate table. The table is in the document named "Action Defining Form," which is one of the icons you copied earlier from the training folder.

The purpose of the record file is to track action items, enabling you to check for the following information:

- The action items

- To whom items are assigned

- When the assignments are due

- All the items that have been assigned to a certain person

- All the items that are due by a certain date

- The items that have been completed

In addition, you might want to generate memos from the record file, reminding subordinates of the work due from time to time.

You also might want to create a view to see the items grouped by persons assigned. This would be valuable when making decisions about workload distribution.

Determining fields required in the record file

The fields for the record file have been determined. The following columns are already entered in the defining form:

ActionItem (type Text)

DueDate (type Date, for sorting)

LastName (type Text)

FirstName (type Text)

Status (type Text)

Checking the defining form for Action Items

1. **Open** Action Defining Form.

2. **Examine** the table.

ActionItem (name on prop sheet)	DueDate (name on prop sheet)	Status (name on prop sheet)	LastName (name on prop sheet)	FirstName (name on prop sheet)
Hardware development estimate for Bronco	6/22/88	Pending. Need figures from Zebra Company	Chan	Tom
Requirement spec for Mustang	7/8/88	Not started	Brewer	Pete
Software development estimate for Bronco	6/22/88	Pending	Lundquist	Johanna
Requirement spec for Bronco	5/22/88	Done	Brewer	Pete

3. **Display** the property sheet for the first column in the table.

   Display the properties by selecting in one cell of the first column with the left mouse button, selecting in another cell with the right mouse button, and pressing < PROP'S >.

   The property sheet is illustrated on the following page.

```
TABLE COLUMN PROPERTIES          Done  Apply  Cancel  □  ▤

Display  Column  TEXT  SORT KEYS

Name          Table2.  ActionItem

Description   

Structure     Divided

Contents      FLUSH LEFT  CENTERED  FLUSH RIGHT  DECIMAL ALIGN

Units         ▤  Inches

Width                    1.9

Margins  Left      .06   Right      .06

Type          ANY  TEXT  AMOUNT  DATE       Required

              ▤  US ENGLISH        Text Direction  LEFT TO RIGHT

Format                              StopOnSkip

Range         

Length              0  characters or less

Skip if                    is  EMPTY  NOT EMPTY  NEVER

Fill-in Rule  
```

Properties for all the columns have been set for you, and they will become record field properties as noted below.

Name   The property sheet name of the column (not any text in the column heading) becomes the name of a record field.

It is wise to make the name one word, with no spaces before or after it, so it is easy to use in display form fill-in rules.

Description This area is blank for all columns except Status. Its description is: "When an entry is complete, enter: Done." When the Field Summary for a view is displayed, the description is a reminder to enter identical data for completed items, making it easy to filter for them.

Width   The width entry (based on the Units selection, which is inches for these columns) becomes the width of each column in the Base View. However, as you learned in chapter 5, you can always change the width in your own views.

Type	The types Any and Text become type Text for the record field. The default, Any, is kept selected for all columns except DueDate.
	The DueDate column is type Date, so it can be sorted by date.
Required	For every record, you want the ActionItem column to have data, so Required has been selected for that column. The other columns do not have Required selected since their data may not be known at the time a record is added.
Language	US English is the default. Other language choices result in different formats for Date and Amount fields, to conform to the other language customs.
Format	This is blank for all columns except DueDate since no format restrictions are appropriate. DueDate has a format of mm/dd/yy.
Range	This is blank for all columns, so no range restrictions are applied to data entries in the record fields.

All other properties are ignored by List Manager when the record file is defined.

You can have any text in the column headings, captions, or rows of the table, but the table must have no divided columns. You can have any other text or graphics in the document that contains the table. When you use a table to define a record file, List Manager looks only at the <u>column properties</u>.

4. **Close** the property sheet, and **close** the Action Defining Form document.

Using the existing table to define the record file

1. **Rename** a copy of the Blank Record File icon to:
   Action Items

2. **Define** the Action Items record file.

   Use the Action Defining Form document, and follow the procedure you used in "Defining the record file" in the previous section.

   Look at the Base View. There is a corresponding column for each column in the defining form. There are no records in the record file. List Manager used only the column properties when it defined the file.

Using the existing table to add records

You now can add the rows of the table as records in your new record file.

1. **Close** the Action Defining Form document, and **close** the Action Items record file, if they are not already closed.

2. **Copy** the Action Defining Form *icon* to the Action Items record file *icon*.

   Each row in the table becomes a record.

   ★★
   Action
   Definin
   ----------▶ Action
   Items
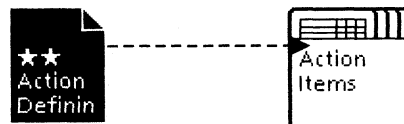
3. **Open** the record file, and **open** the Base View.

   Note the four records. They were added because columns in the table had the same properties as fields in the record file.

TRY THIS →

If you want more practice on record file operations, you can create your own views in the Action Items record file. For example, you can create views for the following purposes:

- Sort the records by LastName.

- Sort the records by DueDate.

- Filter for all items that are due from Pete Brewer.

- Filter for records that are "Done."

- Filter for records that are not "Done."

- Print a table that shows all items due by June 22.

- A document view in memo form. For this, create a memo (telling your subordinates what a wonderful job they have done on their assignments) with a field for FirstName, and move it to the Forms Folder.

You can refer back to the individual chapters on sorting, filtering, and other operations in this training guide, or to the List Manager help document in your workstation's Help icon.

Creating other record files

The following will help when creating your own record files:

- To determine the fields you need, analyze all the documents you want to generate from the record file.

- Check the Base View immediately after you define a record file. You can verify the properties of each field by selecting [Show View Prop's]. If the properties are not as you intended, delete the record file, correct your defining form, and use it to define a new file.

- Put a copy of your defining form (with blank fields or blank table row) in the Forms Folder of the record file. It will be convenient for adding records, defining a similar record file, or using as a display form.

10. Utilizing your resources

The more you know about VP List Manager, the more valuable this software will be to you.

You can use the training record files to practice different record file operations. Repeat any exercise you want. Examine the documents in the Forms Folder of the ★★Orders★★ record file to see how they were created and how their field properties were set.

In addition, the following resources can be of particular help to you:

*   The *VP Document Editor: Forms Training, VP Document Editor: Fill-in rules Training, VP Document Editor: Tables Training* guides

*   The *Information Management Reference* volume

*   *Document Editor Reference* volume 4

*   Document Editor help documents for Tables, Fields, Fill-in rules, and Mail Merge

*   List Manager help document

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