

Appendix A: How to index documents in PROFS

1 Introduction to indexing documents

Note: Before you can use this appendix to index Revisable-Form Text (RFT) documents, you must be able to use DisplayWrite/370. This appendix explains the index tags and controls you can use to mark index information in your document. See *Getting Started with DisplayWrite/370* and *Using DisplayWrite/370* for step-by-step instructions for using DisplayWrite/370.

Index information about your document is very important when filing your document in the data base or when searching the mail log for documents. PROFS adds the index information about your documents to the mail log.

When you are searching for documents that you have filed in PROFS storage, PROFS uses the index information about your document to find your document. To search for documents, you type index information about the documents on screen D01, "Find Documents." PROFS uses the information you type on screen D01 to find your documents in PROFS storage.

For example, if you wanted to find all documents that you had written to M. J. Westley, you include that information in the addressee field (**To**) on screen D01. But if one of your letters to M. J. Westley was filed in PROFS storage without the addressee information, PROFS would not be able to find the letter. See "Chapter 5: Finding documents" for more information about finding documents filed in PROFS storage.

Before PROFS puts your document in PROFS storage, your document must have index information associated with it. If the document style that you are using does not require an author profile, you must type the index information on screen F66, "View or Change the Index Information," or you must mark index information in your document by using index controls. See "Chapter 7: Preparing RFT documents" for information about using screen F66.

"How to index an RFT document" in this appendix shows you how to add index controls to an RFT document. Index controls identify index information for an RFT document that you are writing or editing.

"How to use the "Action," "Identifier," and "Type" fields in this appendix explains how to add additional index information about your documents.

You can use the fields for "Action," "Identifier," and "Type" for both RFT and Document Composition Facility (DCF) documents when you are filing information in your mail log about documents. You do not have to use these fields; you can leave them blank. But you may find them very helpful in keeping track of your documents. If you regularly put codes in these fields, you can have PROFS use them when searching for documents for you.

The following topics in this appendix will be helpful when you are indexing a document:

- How to index an RFT document
- The index tags in a STANDARD RFT document
- Index tags and controls
- Getting HELP for indexing RFT documents
- Index controls in a document style
- How to use the "Action," "Identifier," and "Type" fields.

2 How to index an RFT document

Each of the index tags identifies a specific kind of information: author, addressee, company name, company address, subject, or reference. In this appendix, the words "tag" and "control" have special meanings. The tag is the word that you see on the selection menu. The control is the instruction that DisplayWrite/370 inserts into your document for that tag.

Each of the index tags that you see on the Index Tag Selection menu has a control associated with it. DisplayWrite/370 puts the control in your document when you choose the tag. The tag that you see and the control that DisplayWrite/370 inserts in your document do not look exactly alike. Controls tell DisplayWrite/370 how you want your document to look and what special tasks you want DisplayWrite/370 to perform.

When you have marked index information in your document, DisplayWrite/370 transfers that indexing information to PROFS to use when you file a document in PROFS storage.

Indexing an existing RFT document

You can use the index tags to index information in a document that you are writing or editing. This example will show you how to index the author of a letter you typed using the BLANK document style without index controls.

If you want to index the author name, you must choose the index tag "Aname" and place it in front of the author's name and the index tag "End" and place it at the end of the author's name. DisplayWrite/370 inserts the controls for the tags in your document.

```
<VAR: @BN@> Marilyn Shane <VAR: @END@>
```

Follow these steps to insert the index controls in your document:

1. Place your cursor under the first letter of the author's name (Marilyn Shane) and press **PF3 = Cmdline**.
2. When DisplayWrite/370 shows you the floating command line, type **index** and press ENTER.

**This is the name
of your document.**

**Although DisplayWrite/370 does
not show a title or a screen id,
this is the DisplayWrite/370
"Edit" screen.**

1 RFTD A Page 1

===>

<---+---1---+---2---+---3---+---V---4---+---5---+---6---+---7--->+---
-----Page 1-----

December 9, 1986
Marilyn Shane, Ext. 3985
Marketing Manager

DRAFT 1

Enter a command:

===> index

Memo to: Robert Wills

Subject: Third Quarter Profits

I have reviewed the figures that you sent to me last week. Your report indicates that the Third Quarter Profits for fiscal 1986 have exceeded the projected figure developed during our strategy meetings in July 1985.

Paul suggested that the three of us meet on December 12 at 9:00.

PF 1=Block 2=Insert 3=Cmdline 4=Instr. 5=Tspell 6=Aid
PF 7=Next 8=Command 9=HELP 10=Forward 11=Backward 12=END

DisplayWrite/370 shows you the Index Tag Selection menu.

3. When you see the Index Tag Selection menu, move the cursor under the "Aname" tag. Press ENTER.

The Index Tag Selection menu is replaced by the text of your document. The system inserts the index control into your document at the cursor position.

===)_
 <---+---1_---+---2_---+---3_---+V---4_---+---5_---+---6_---+---7_--->+---
 -----Page 1-----

December 9, 1986 DRAFT 1
 Marilyn Sha.
 Marketing M
 New Product
 Washington,

Index Tag Selection			
TAG	MEANING	CONTROL	
Address	Addressee name (person)	<VAR: @BA@>	
Caddree	Addressee name (company)	<VAR: @CADDREE@>	
Aname	Author name (person)	<VAR: @BNA@>	
Cname	Author name (company)	<VAR: @CNAME@>	
Ref	Reference	<VAR: @BRE@>	
Subject	Subject of document	<VAR: @BSE@>	
End	End of indexed information	<VAR: @ENE@>	

Memo to: Ro
 Subject: Th
 I have revie
 report indic
 have exceede
 meetings in July 1985.

Move the cursor under Aname when DisplayWrite/370 shows you the Index Tag Selection menu.

Paul suggested that the three of us meet on December 12 at 9:00.
 PF 1=Block 2=Insert 3=Cmndline 4=Instr. 5=Tspell 6=Aid
 PF 7=Next 8=Command 9=HELP 10=Forward 11=Backward 12=END

4. Now move the cursor to the end of the author's name and press **PF3 = Cmndline**. The last command you typed on the floating command line (INDEX) is still there. Press ENTER.
5. When DisplayWrite/370 shows you the Index Tag Selection menu, move the cursor to the "End" tag. Press ENTER.

The Index Tag Selection menu is replaced by the text of your document. The author information for your document is now marked for indexing.

If you type **verify variable** on the command line and press ENTER, your document will look like this:

These are the index controls that you put in your document.

VERIFY VARIABLE is in effect.

Although DisplayWrite/370 does not show a title or a screen id, this is the DisplayWrite/370 "Edit" screen.

```

1      RFTD      A                               VARIABLE                               Page 1
====>_
<---+---1_---+---2_---+---3_---+V---4_---+---5_---+---6_---+---7_--->+---
-----Page 1-----
December 9, 1986                                DRAFT 1
<VAR: @BNC> Marilyn Shane <VAR: @ENDE> , Ext.    3985
Marketing Manager
New Product Development
Washington, DC 20002

Memo to: Robert Wills

Subject: Third Quarter Profits

I have reviewed the figures that you sent to me last week. Your
report indicates that the Third Quarter Profits for fiscal 1986
have exceeded the projected figure developed during our strategy
meeting in July 1985.

Paul suggested that the three of us meet on December 12 at 9:00.
PF 1=Block      2=Insert      3=Cmdline      4=Instr.      5=Tspell      6=Aid
PF 7=Next       8=Command      9=HELP        10=Forward    11=Backward   12=END

```

To index other information in your document, repeat the steps for indexing the author name:

1. Move your cursor under the first letter of the information you want to index. Press **PF3 = Cmdline**.
2. When DisplayWrite/370 shows you the floating command line, type **index** and press ENTER.

3. When you see the Index Tag Selection menu, move your cursor to the tag you want and press ENTER.

The Index Tag Selection menu is replaced by the text of your document. The system inserts the index control into your document at the cursor position.

4. Move to the end of the information you want to index, press **PF3 = Cmdline**, type **index** on the floating command line, and press ENTER.
5. When DisplayWrite/370 shows you the Index Tag Selection menu, move your cursor to the **End** tag and press ENTER.

The Index Tag Selection menu is replaced by the text of your document. The system inserts the index control into your document at the cursor position.

Copying, deleting, or moving index controls

You can use the DisplayWrite/370 BLOCK commands to copy, delete, or move controls in an RFT document. You can also use **PF6 = Aid** and the ERASE EOF key to delete controls. See *Getting Started with DisplayWrite/370* for information about using the BLOCK and AID commands.

3 The index tags in a STANDARD RFT document

The following example shows you the index controls that are included in the STANDARD RFT document style. If you are creating a new document using the STANDARD RFT document style supplied with PROFS, the author of your document will be marked for indexing. You supply the other information (Addressee, Subject, Reference) for indexing when you type or change your document.

You can display the index controls in your document by typing **verify variable** on the command line and pressing ENTER. See *Using DisplayWrite/370* for information about the VERIFY command.

Notice that the index control (<VAR: @BN@>) is placed in **front of** the author variable control (<VAR: AUTHOR>). To index variable information, the index control must come in front of the variable control. See "Appendix P: Creating RFT document styles" for information about DisplayWrite/370 variable controls.

```
1          RFTD   A          VARIABLE          Page 1

===>_
<---+---1_---+---2_---+---3_---+_V---4_---+---5_---+---6_---+---7_--->+----
-----Page 1-----
<VAR: DATE1> December 9, 1986          <VAR: DOCNUM> DR
<VAR: @BNC> <VAR: AUTHOR> Marilyn Shane <VAR: @END@> , <VAR: TELE> 202-974-3985
<VAR: COMP> TechnoComp Unlimited
<VAR: DEPT> Marketing
<VAR: CITY> Washington, DC 20007
<VAR: ZIP> West 221

Memo to: <VAR: @BAC>
<VAR: @END@>
Subject: <VAR: @BS>
<VAR: @END@>
Reference: <VAR: @BRE>
<VAR: @END@>

Type text here.

PF 1=Block      2=Insert      3=Cmdline      4=Instr.      5=Spell      6=Aid
PF 7=Next       8=Command     9=HELP        10=Forward    11=Backward   12=END
```

Put the index control in front of the variable control if you want to index the information.

This index control marks the author name for indexing.

This control marks the end of the index information.

PROFS uses the information between the beginning and end controls for each of the index tags as index information for your document.

To turn off the display of the controls, type **verify off** on the command line and press ENTER. The system shows you your document without the controls in the style that you selected.

Your document is displayed in the style you selected.

```
1          RFTD  A                                     Page 1
===>_
<---+---1_---+---2_---+---3_---+_V--4_---+---5_---+---6_---+---7_--->+---
-----Page 1-----
December 9, 1986                                     DRAFT 1
Marilyn Shane, 202-974-3985
Marketing Manager
TechnoComp Unlimited
Marketing
Washington, DC 20007

Memo to:

Subject:

Reference:

Type text here.

PF 1=Block      2=Insert      3=Cmdline     4=Instr.      5=Spell      6=Aid
PF 7=Next      8=Command     9=HELP       10=Forward    11=Backward   12=END
```

4 Index tags and controls

You choose index tags to identify the index information in your document. There are seven index tags: six tags mark the beginning of the index information, and one tag marks the end. The "End" tag is used to mark the end of the index information for all of the beginning index tags. You should only use each beginning tag (Addree, Aname, Caddree, Cname, Ref, Subject) one time in your document. You can use the "End" tag as many times as necessary to end each beginning tag.

Note: DisplayWrite/370 stops marking information for an index tag when it finds an "End" tag or another index tag. When DisplayWrite/370 finds another index tag, it stops marking index information for the first tag as if you had used the "End" tag.

When DisplayWrite/370 displays the controls, you temporarily lose the formatted appearance of your document. When you type **verify off** on the command line and press ENTER, the formatted version of your document returns. The controls in your document will not be printed.

DisplayWrite/370 protects the controls in your documents. When you try to type over the protected area or press a key such as the DELETE key when the cursor is on a protected area, the keyboard locks. To unlock the keyboard, press the RESET key and move the cursor past the control. See *Using DisplayWrite/370* for information about working with and working around attribute bytes.

The following table lists the index tags for the information that can be indexed, how the controls look in your document, and the information that each tag indexes. The table is included to show you how the index controls appear in your document when you use the VERIFY VARIABLE command to display the controls.

Index Tag	Index Control	Information Indexed
Addree	<VAR: @BA@>	Addressee name (person)
Caddree	<VAR: @CADDREE@>	Addressee name (company)
Aname	<VAR: @BN@>	Author name (person)
Cname	<VAR: @CNAME@>	Author name (company)
Ref	<VAR: @BR@>	Reference
Subject	<VAR: @BS@>	Subject of document
End	<VAR: @END@>	End of indexed information

Note: If you use both Aname and Cname index controls, PROFS uses the information identified by the Aname control for indexing. The same is true if you use both Addree and Caddree. PROFS uses the information following the Addree control for indexing.

5 Getting HELP for indexing RFT documents

DisplayWrite/370 passes 132 characters to PROFS for each of the six index tags. However, PROFS does not use that maximum number of characters when filing or finding your documents. For more information about the number of characters PROFS uses when indexing your documents, see "Appendix O: Using DisplayWrite/370 and CLISTs."

See "Getting HELP for indexing RFT documents" in this appendix for more information about the index tags and controls.

You can get help for the INDEX command from the system:

1. Type **index** on the command line or on the floating command line of the DisplayWrite/370 "Edit" screen.
2. Press **PF9 = HELP**.

The system shows you the HELP information for the INDEX command.

Follow these steps if you need help with an INDEX tag:

1. Type **index** on the command line or on the floating command line on the DisplayWrite/370 "Edit" screen.
2. Press **PF9 = HELP**.

The system shows you the HELP screen for the INDEX command and a list of the index tags.

3. Move your cursor under the index tag that you want help for.
4. Press ENTER.

The system shows you the HELP information for the tag you selected.

You can also get help for the index tags by typing the tag on the command line or floating command line and pressing **PF9 = HELP**.

6 Index controls in a document style

After you read and understand the preceding topics about the INDEX command, you can include index controls in a document style.

If you want to include index controls in your document style, see "Appendix P: Creating RFT document styles" for information about using the DisplayWrite/370 "Document Format Creation" screen to create document styles.

7 How to use the "Action," "Identifier," and "Type" fields

When you file information in your mail log, you can put in your own codes for "Action," "Identifier," and "Type" of document for both RFT and DCF documents. You do not have to use these fields; you may leave them blank. But you may find them very helpful in keeping track of your documents. If you develop a standard way of using these fields and use them regularly, PROFS can use them when finding documents for you.

- **Action** gives you up to 10 spaces to use (a 10-character field).
- **Identifier** gives you 3 spaces to use (a 3-character field).
- **Type** gives you 1 space to use (a 1-character field).

You can include information for the "Action," "Identifier," and "Type" fields on 4 screens in PROFS:

- Screen D15, "Add Mail Log Information for a Paper Document." You reach this screen by pressing **PF1** on screen A05, "Process Documents from Other Sources." See "Chapter 9: Processing documents from other sources."
- Screen D18, "View or Change the Mail Log Information." You reach this screen by pressing **PF4** on screen D00, "Process the Mail Log." See "Chapter 10: Processing the Mail Log."
- Screen F13, "Add and Change a Document File and Its Mail Log Information." You reach this screen by pressing **PF2** on screen A05, "Process Documents from Other Sources." See "Chapter 9: Processing documents from other sources."

- Screen F66, "View or Change the Index Information." You reach this screen by pressing **PF4** on screen F63, "Process the Document." See "Chapter 7: Preparing RFT Documents."

Action

You can set up any code or combination of codes that you want to use. You can divide the 10-character field and then ask PROFS to search only part of the field. Here is one possible way to use the 10 available spaces:

Action: a r - g i j - o c t

Here the PROFS user has divided the 10 spaces into three codes. The values shown in the 10 spaces, in this example, are:

- 1 and 2 ar for "some **action is required**"
- 3 - to separate the codes
- 4-6 gij the initials of the person who must act
- 7 - to separate the codes
- 8-10 oct the month when the action is due.

If you used this code consistently, you could, for example, ask PROFS to find all of the documents on which action is required regardless of who is handling them or when they are due. You would specify:

Action: a r

on screen D01, "Find Documents."

You could ask for all the documents that the person "gij" is handling. You would specify:

Action: g i j

on screen D01.

You could ask for all the documents due in October. You would specify

Action: o c t

You could ask for combinations of your codes. You would ask for all of the documents that gjj is handling in October by specifying

Action: g i j - o c t

Note that, in the "Action" line, PROFS matches characters by position. For example, if you use positions 4, 5, and 6 for the person's initials when filing the information in your mail log, you must ask for the initials in positions 4, 5, and 6 of the "Action" line on the search screen.

Identifier

You can set up any codes that you want for "Identifier." One possible use of "Identifier" is to show where you have filed a paper document. For example, you could use:

ADM for Administrative files

BUD for Budget files

CON for Contract files

PER for Personnel files.

Type

PROFS specifies the type of document for you if the document was created using PROFS. PROFS attaches special significance to the letters U, M, and D.

U - means an **RFT-D** or **Draft** document (that can be changed by you and reviewers)

M - means an **RFT-F** or **Final** document

D - means a **deleted** document (this shows in the mail log).

Additionally, **you** can specify a "Type" for documents that come from outside PROFS. This can help you remember what the document was whenever you view the mail log entry for that document. You could, for example, use the codes:

N - for newspaper articles

J - for journal articles

P - for proposals.