5 Finding documents

Contents

5 Finding documents

1
Choosing
from the
main menu

Press **PF3** on the main menu. PROFS shows you screen D01, "Find Documents." (See "Searching through a mail log" later in this chapter.)

Start with this menu to:

- Find documents that are in your mail log or other mail logs (see "Searching through your mail log" which follows).

- Work with a list of the documents PROFS found (see "Working with a list of the documents that PROFS found" later in this chapter).

- Work with the documents that PROFS found:

  - All at once (see "Working with all of the documents that PROFS found" later in this chapter)

  - One document at a time (see "Working with one of the documents that PROFS found" later in this chapter).
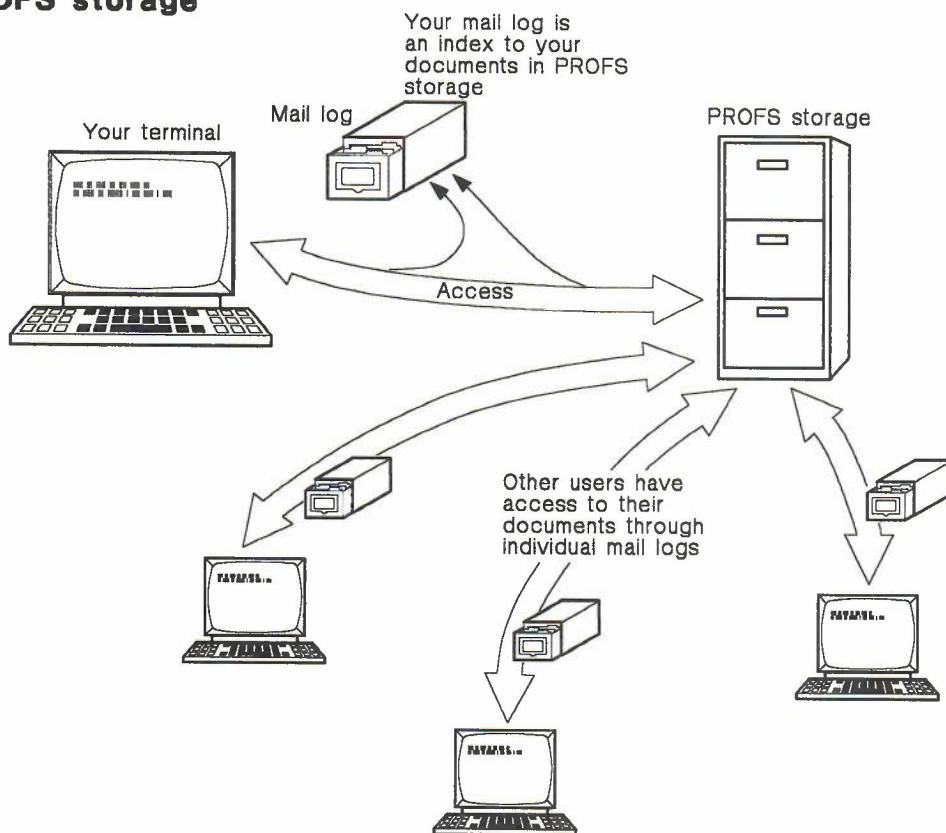
At the end of this chapter, you'll find a "fast-track" diagram that summarizes the chapter pictorially.

To review the different kinds of documents and information that are listed in your mail log, see "Sending and receiving information" in "Chapter 1: Communicating with PROFS" and see "Chapter 10: Processing the mail log."

2
Searching
through
a mail log

You use two screens to look for documents in a mail log: screen D01, "Find Documents," and screen D03, "Process the Documents Found." On screen D01 you **set up a search** by describing the documents that you are looking for. If you have been authorized, you can also **start a search in other mail logs** from this screen. You use screen D03 to find out how many documents in the mail log match the description you gave and, if necessary, to **change parts of the description** or **start the search over again**.

PROFS storage

Your mail log is an index to your documents in PROFS storage

Your terminal

Mail log

PROFS storage

Access

Other users have access to their documents through individual mail logs

Setting up a search

To set up a search, press **PF3** on the main menu. (You could also set up a search by pressing **PF1** on screen D00, "Process the Mail Log." See "Finding information about documents," in Chapter 10.) PROFS shows you screen D01, "Find Documents."

If you are authorized, you can type another user name, nickname, or distribution list here.

```
                             FIND DOCUMENTS                              D01

    To search another mail log, type:        (user name or distribution list)
   ┌Type the information below.  To change the search, press the PF key(s).
   │  Time period:       _              /
   │                    --------------------  --------------------
   │   From:                         /                /
   │ AND               ------------------ ------------------ ------------------
   │   Key word:                     /                /
   │ AND               --------------------  --------------------  ----------------------
   │   To:                           /                /
   │ AND               ------------------ ------------------ ------------------
   │   Identifier:      /    /
   │ AND               ---  ---  ---
   │   Type:            /  /
   │ AND                _  _  _
   │   Action:          /           /
   └               ----------  ----------  ----------
    PF1  Find documents due:
                        --------------------
    PF2  Find the documents that have all the key words
    PF3  Replace AND with OR in the search above
    Now, press ENTER to start the search.
    PF9 Help    PF12 Return
```

These words are all "prompts" that ask you for information.

If you want to search someone else's mail log, type that person's user name or nickname in the blank space on the first line. If you want to search several mail logs at one time, you can type a **distribution list name**. Don't type anything here if you are searching your own mail log.

Describe the documents that you want PROFS to look for by typing information about them on the screen and using **PF1** through **PF3**.

Typing the information. The words next to the blank lines on screen D01 are **prompts**. They ask (or prompt) you to describe certain features of the documents that you are looking for. You can type information next to as many or as few prompts as you want. How much you type depends on how much you can remember about the documents and how sure you are of what you remember.

As you can see, each blank line is divided by a slash (_____/_____). Type only one word on each part. Here is how to respond to each of the prompts:

Time period. You can type the **dates** of the documents that you are looking for in a number of ways. You can type a **single day**, **month**, or **year**; a **span of days**, **months**, or **years**; or **certain parts of a year**.

1. If you want to look for documents with dates in the **last 90 days** (including today's date), leave the line next to "Time period" blank.

2. If you want to specify a span of time by **quarters** or **halves,** you may use the "Q" and "H" codes: "1Q87" means first quarter of 1987; "2H87" means second half of 1987; and so forth.

3. If you want to specify a **more particular time span,** you can type **month − month** or **mm/dd/yy − mm/dd/yy** (for example, January − March or 12/10/87 − 12/15/87). You may leave out the year if you want to search the current year only. The time span is typed before the slash.

4. If you want to look for documents with **today's date**, type **TOD** or today's date.

5. If you want to look for documents with **any date**, type **ALL.**

See Appendix I for more information about how to type dates.

From. Type the **last names** (not the user names or nicknames) of the persons who wrote the documents that you are looking for.

Key word. A key word is any word that is typed on the "Subject" line or in the "Comments" for the mail log information about the documents. For example, if the sentence "This is the January estimate" is in the "Comments" area of the mail log for the document that you are looking for, you could type **January** or **estimate** as a key word here.

You should avoid using the following six characters in your key word search: $/ \mid + \& , =$. If you must use any of these characters in your search, be sure to double it. Otherwise, your key word will be treated as an error. For example, if you want to search for the key word "Ultra+," you must type **Ultra + +**.

If one of the following special characters precedes a keyword, you do not have to type the character. PROFS will look for the keyword and will ignore the special character. The characters are:

% ¢ . < ( ) ! $ * ; ¬ - > ? : # @ ' "

```
                              FIND DOCUMENTS                            D01

     To search another mail log, type:        (user name or distribution list)
     Type the information below.  To change the search, press the PF key(s).
      Time period:   January              /
                   ------------------   ------------------
      From:      Riley              /                /
     AND         ------------------ ------------------ ------------------
      Key word:  report             / sales             /
     AND         ------------------ ------------------ ------------------
      To:                           /                /
     AND         ------------------ ------------------ ------------------
      Identifier:     /    /
     AND            ---  ---   ---
      Type:          /  /
     AND            -  -  -
      Action:            /            /
                   ----------  ----------  ----------
     PF1  Find documents due:
                              --------------------
     PF2  Find the documents that have all the key words
     PF3  Replace AND with OR in the search above
     Now, press ENTER to start the search.
     PF9 Help     PF12 Return
```

In this example, PROFS would look for all the documents listed in your mail log that are dated during January (of the current year), that are from Riley, and that have either "report" or "sales" as a word in the subject or comments line.

To. Type the last name of the person to whom the documents were written. If the documents were written to several people, type the **last name** of the first person on the list.

Identifier, Type, and **Action.** You don't have to use these fields, but they greatly increase your searching capabilities. See Appendix A for instructions on how to use them.

What PF1 does. If you want PROFS to look for documents in a mail log by due date, you type the **dates** or **date range** and press **PF1**. The following are examples of how the range of dates can be typed: **6/08/87 to 7/09/88; 4/87 - 6/88; 7/21 through 7/30.** If you don't type a year with the date, PROFS assumes that you are asking for a future date. If you press **PF1** without typing a date, PROFS shows you all the documents that are due today or are past due (instead of just the last 90 days, as PROFS usually does when you don't type a due date). The word SELECTED will appear on the line for **PF1**.

What PF2 does. The **slashes** (/) on each line mean the same thing as the word OR. For example, if you type **report** and **sales** on the "Key word" line, you are telling PROFS that you want to look for documents that have either **report** or **sales** on the "Subject" line or in the "Comments," but not necessarily both.

You can change the meaning of the slashes **only** on the "Key word" line from OR to AND by pressing **PF2**. The slashes on the "Key word" line will change to plus signs (+) and the word SELECTED will appear on the screen next to **PF2**. By pressing **PF2**, you are telling PROFS that you want to look for documents that have **all** the key words that you typed on the "Key word" line (word 1 **plus** word 2 **plus** and so forth).

What PF3 does. Notice that, except for the "Time period" prompt, the word AND appears on the screen between the prompts. This means that you are telling PROFS that you want to look for documents for which at least one piece of information on each line is true.

For example, if you type **Riley** after the "From" prompt and **sales** after the "Key word" prompt, you are telling PROFS that you want to look for documents that Riley wrote and that have the word **sales** on the "Subject" line or in the "Comments."

You can change the AND between the prompts to mean OR by pressing **PF3**. PROFS changes the word AND to OR on the screen and the word SELECTED will appear after **PF3** at the bottom of the screen.

When you press **PF3,** you are telling PROFS that you want to look for documents for which **any one piece of information that you have typed is true.** For example, if you type **Riley** after the "From" prompt and **sales** after the "Key word" prompt, and you press **PF3,** you are telling PROFS that you want to look for documents either that Riley wrote or that have the word **sales** on the "Subject" line or in the "Comments."

Remember that AND does not appear between the "Time period" prompt and other prompts, so it cannot be changed to OR. This means that if you type a **date**, PROFS always looks for documents with that date **and** for which some or all of the rest of the information is true.

IF YOU CHANGE YOUR MIND

If you change your mind after you press one of these PF keys, just press the same PF key again to cancel. The word SELECTED will disappear.

Starting the search. After you have typed the information and decided whether to use the PF keys, press ENTER to tell PROFS to search for the documents you described. (If you are searching another person's mail log, you may have to type a **READ** password and press ENTER again at this point.) PROFS then shows you screen D03, "Process the Documents Found."

```
                    PROCESS THE DOCUMENTS FOUND                          D03

   PROFS found:       3 document(s).

   Now, press one of the following PF keys.

   PF1  View the list of documents found with the mail log comments
   PF2  View the list of documents found without the mail log comments
   PF3  Save the list of documents found in a file
   PF4  Change the previous information
   PF5  Repeat the previous request without using any key words
   PF6  Repeat the previous request with the time period expanded
   PF7  Find documents using new information
   PF8  Print the mail log information for the list of documents found




   PF9 Help    PF12 Return
```

The number of documents found.

The first line on screen D03 tells you the number of documents that PROFS found that matched the description you gave. If the number seems too large or too small to you, you will probably want to change the description or start the search again. If the number seems right to you, you can begin to work with the list of documents that PROFS found. See "Working with a list of the documents that PROFS found" later in this chapter.

If PROFS doesn't find your documents, a message will appear on screen D01, "Find Documents," that says PROFS found no documents that matched your search request.

Changing the description

The first line on screen D03, "Process the Documents Found," tells you the number of documents that PROFS found which match the description that you typed on screen D01, "Find Documents." If the number seems too large or too small to you, you can continue the search in the following ways.

To change parts of the description, press **PF4.** PROFS shows you screen D01 again with the information that you typed and with the PF keys that you selected. Then:

1. Move the cursor to the lines with the information that you want to change. You can type over the information or erase it (by using the **EOF** key or by moving the space bar along the line). For example, if you had typed **September 3** on the "Time period" line and **sales** on the "Key word" line, you could change **September 3** to **September 4** and erase **sales.**

2. You can also change your choice of PF keys. For example, if you had pressed **PF3** before to change AND to OR, you could press **PF3** again so that AND is again in effect.

3. Press ENTER to start the search again.

PROFS will show you screen D03 again. The first line of screen D03 tells you the number of documents that PROFS found that match the **new** description.

To remove all the key words from the description, press **PF5** on screen D03. PROFS will look for documents that match the description you gave before on screen D01 — but as if you had **not** typed any key words. For example, if you had typed **report** and **sales** on the "Key word" line and **September 3** on the "Time period" line, PROFS will now look for **any** document with the date of **September 3,** whether or not the document has **report** or **sales** as a key word.

When you press **PF5,** PROFS shows you screen D03 again. The first line on screen D03 tells you the number of documents that PROFS found that match the **new** description.

To make the time period longer, press **PF6** on screen D03. PROFS will look for documents that match the description that you gave before — but as if you had typed a time period that was one unit longer in both directions. For example, if you typed **Feb-Mar** on the "Time period" line, PROFS will now look for documents with dates one month earlier and one month later — from January through April. If you typed **Sep 23,** PROFS will now look for documents with dates one day earlier and one day later — September 22 through September 24.

When you press **PF6,** PROFS shows you screen D03 again. The first line on the screen tells you the number of documents that match the **new** description.

Setting up a new search

You might want to set up a new search rather than change only parts of the description. Press **PF7** on screen D03.

PROFS will show you screen D01 again. All the information that you typed before is erased, and the PF keys you selected are no longer in effect. You can now type different information about the documents that you are looking for and change your choice of PF keys.

When you are ready, press ENTER to start the search again. PROFS will show you screen D03 again. The first line on the screen will tell you the number of documents PROFS found that match the **new** description.

3
Working with a list of the documents that PROFS found

You can work with a list of the documents that PROFS found by pressing **PF1**, **PF2**, **PF3**, or **PF8** on screen D03, "Process the Documents Found." (Remember that you reached this screen by pressing ENTER on screen D01.)

A list of documents is really a list of information from the mail log about each document. You can work with a list, starting from screen D03, in the following ways:

- View the list.

- Save the list in a user file.

- Print the list.

If you view a list, you can go to other menus where you can work with the text of a document. You'll find out how to work with documents later in this chapter.

Viewing a list

You can view a list that includes the comments from the mail log or a list that does not include them. Press **PF1** on screen D03, "Process the Documents Found," to view a list that **includes** comments. PROFS shows you screen D04, "List of the Documents Found."

You can type ALL here or the number of the screen shown below.

This screen shows the list with the comments.

```
                     LIST OF THE DOCUMENTS FOUND                        D04

Press the PF key for the document you want. Or, if you want to view all of
these documents, type ALL here and press ENTER===)_
      ----FROM----      -----TO-----        ACTION    IDENT TYPE   DOCUMENT NO.
PF1  Riley, L. M.    Johnson, G. J.                    RFT-F     87002TST0012
       Subject:  Report information in last memo

       Comments:  Need to check dates
PF2  Smith, G.       Johnson, G. J.                    RFT-D     87002TST0008
       Subject:  Monthly report

       Comments:  Figures are far below last month's
PF3  Johnson, G. J.  Roe, J. J.                        Graphic 87002TST0007
       Subject:  January report of sales

       Comments:
PF4  Doe, L. M.       Johnson, G. J.                   Paper    87002HDC0003
       Subject:  Monthly sales and credits

       Comments:  Good job of reporting the figures

                                                   Screen   1 of   3
PF9 Help    PF10 Next Screen    PF11 Previous Screen   PF12 Return
```

Press **PF2** on screen D03, "Process the Documents Found," to view a list **without** comments. PROFS shows you screen D06, "List of the Documents Found."

```
                     LIST OF THE DOCUMENTS FOUND                        D06

     Press the PF key for the document you want. Or, if you want to view all of
     these documents, type ALL here and press ENTER===)_
          ----FROM----      -----TO-----      ACTION    IDENT TYPE    DOCUMENT NO.
     PF1  Riley, L. M.     Johnson, G. J.                 RFT-F    87002TST0012
            Subject:  Report information is last memo
     PF2  Smith, G.        Johnson, G. J.                 RFT-D    87002TST0008
            Subject:  Monthly report
     PF3  Johnson, G. J.   Roe, J. J.                    Graphic 87002TST0007
            Subject:  January report of sales
     PF4  Doe, L. M.       Johnson, G. J.                 Paper    87002HDC0003
            Subject:  Monthly sales and credits
     PF5  Riley, L. M.     Johnson, G. J.                 Final    87002TST0001
            Subject:  January sales report




                                                         Screen    1 of    1
     PF9 Help    PF10 Next Screen    PF11 Previous Screen    PF12 Return
```

This screen shows the list without the comments.

Both screens list information about each document next to a PF key. They tell you who wrote the document, to whom it was written, the subject of the document, and the document's number and type.

For some of the documents, the screens may list the "Action" and "Identifier" information. If you pressed **PF1** on screen D03, the screen also lists the comments from the mail log.

The list may be more than one screen long. To move back and forth between screens, press **PF10** and **PF11.** You can also type the number of the screen you want to see after the arrow ===) at the top of the screen.

Saving a list in a user file

If you want to work with a list of documents some time after you have made a search or want to work with the lists from several searches at the same time, you can save the lists in a user file. You can also include this list in a note using a special command. See "Special commands for notes" in Chapter 6.

Press **PF3** on screen D03. PROFS puts the list in a file with a filename of $SEARCH$ and a filetype of OFSDATA. If this file already exists, PROFS asks you if you want to add the results to the existing file. If you type **Y,** the new list is added to the end of the existing file. If you type **N,** the old list is erased and the new list is saved.

You can work with these lists using Conversational Monitor System (CMS).

Printing a list

To print the list of documents that PROFS found, press **PF8** on screen D03. PROFS shows you screen F30, "Print the Mail Log Information."

```
                    PRINT THE MAIL LOG INFORMATION                  F30

    Press the PF key(s) to choose the way you want the information printed.

    PF1  Print without the mail log comments

         CHOOSE ONLY ONE OF THE FOLLOWING.

    PF2  Print in sequence by document number
    PF3  Print in alphabetic sequence by the last
         name of the person who wrote the document ("FROM")
    PF4  Print in alphabetic sequence by the last
         name of the person(s) to whom the document
         was sent ("TO")

    Then, press ENTER.








    PF9 Help    PF12 Return
```

The list will be printed with the information from the mail log. If you want to print a list without the comments from the mail log (but with all the other information), press **PF1** on screen F30.

You can print the list in any of three different orders (press only **one** of these PF keys).

1. To print the list in order **by document number,** press **PF2.** (This is the same as printing the list in order by date, because the first part of the document number is the document's date. PROFS will print the oldest documents first.)

2. To print the list alphabetically **by the last name of the person who wrote the document,** press **PF3.**

3. To print the list alphabetically **by the last name of the person to whom the document was written,** press **PF4.**

You can press **PF1** and one (but only one) of the other three PF keys, **PF2, PF3**, or **PF4.** When you press one of these keys, the word SELECTED will appear next to it.

Press ENTER when you are ready to print the list.

IF YOU CHANGE YOUR MIND

If you change your mind and decide you want to print the documents in some other sequence, or decide that you do want to print the comments, just press the appropriate PF key again. The word SELECTED will disappear.

4
Working with all of the documents that PROFS found

If you are viewing a list of documents that PROFS found, you can go to other screens where you can work with the documents themselves. You can work with all of the documents on one screen at once or you can work with one document at a time.

To work with all of the documents shown on one screen at once, type **ALL** on the command line after the arrow at the top of screen D04 or D06. PROFS shows you screen D07, "Process the Documents Found."

```
                    PROCESS THE DOCUMENTS FOUND                    D07

     Press one of the following PF keys.

     PF1  View all documents
     PF2  Erase all documents from the list of documents found
     PF3  Keep all documents in the list of documents found
     PF4  Erase all documents from the list of documents found and the mail log




















     PF9 Help     PF12 Return
```
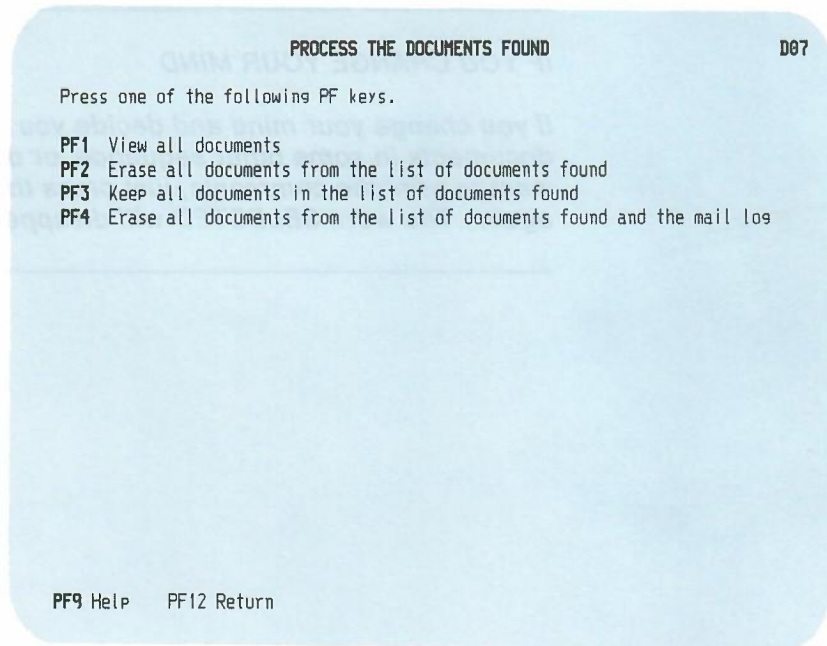
From this menu you can:

- View all documents.

- Erase all the documents from the list.

- Keep all the documents (cancelling an order to erase them).

- Erase all the documents from the list and from the mail log.

Viewing all the documents

To view all the documents on the screen, press **PF1** on screen D07. PROFS shows you the document that was first on the list of documents found. When you want to view the next document on the list, press **PF12.** (When you are viewing the last document, pressing **PF12** will take you back to screen D07, "Process the Documents Found.") If a document is longer than one screen, press **PF10** and **PF11** to move back and forth between screens.

Erasing all the documents from the list

If you don't need to work with the documents any more, press **PF2** on screen D07 to erase them from the list. If you view the list of documents on screen D04 or D06 again, you will see the word REMOVE instead of the document numbers.

IF YOU CHANGE YOUR MIND

If you change your mind and decide not to erase the documents from the list before you press **PF12** *on screen D04 or D06, type* **ALL** *again and press* **PF3** *on screen D07. The documents will remain on the list.*

Erasing all the documents from the list and from the mail log

If you don't need to work with the documents from the list and from the mail log any more, press **PF4** on screen D07. If you view the list of documents on screen D04 or D06 again, you will see the word DELETE instead of the document numbers.

IF YOU CHANGE YOUR MIND

*If you change your mind and decide not to erase the documents from the list before you press **PF12** on screen D04 or D06, type **ALL** again on and press **PF3** on screen D07. The documents will remain on the list.*

5
Working with one of the documents that PROFS found

To work with one document, press the PF key that is next to the document on screen D04 or D06. PROFS shows you one of five screens, each with a different menu, depending on whether the document is an **RFT-D** document (D41), an **RFT-F** document (D40), a **Draft** document (D11), a **Final** or softcopy document (D08), or a **Paper** document (D12).

This is the screen for
RFT-D documents.

```
                      PROCESS THE DOCUMENT FOUND                    D41

     From:    Smith, G.                    Document No.:  87002TST0008
     Subject: Contents of your memo        Type:  RFT-D
     ---------------------------------------------------------------------

     Press one of the following PF keys, or press PF10 to view more choices.

     PF1  View the document
     PF2  Erase from the list of documents found
     PF3  Keep in the list of documents found
     PF4  Erase from the list of documents found and the mail log
     PF5  Forward the document
     PF6  View the distribution list
     PF7  View or change the mail log information
     PF8  Print the document

     PF10  View more choices




     PF9 Help    PF12 Return
```

From: Riley, L. M.   Document No.: 87002TST0012
Subject: Report information in last memo Type: RFT-F

Press one of the following PF keys, or press PF10 to view more choices.

PF1   View the document
PF2   Erase from the list of documents found
PF3   Keep in the list of documents found
PF4   Erase from the list of documents found and the mail log
PF5   Forward the document
PF6   View the distribution list
PF7   View or change the mail log information
PF8   Print the document

PF10 View more choices

PF9 Help   PF12 Return

This is the screen for RFT-F documents.

From: Smith, G.   Document No.: 87002TST0002
Subject: Monthly report   Type: Draft

Press one of the following PF keys, or press PF10 to view more choices.

PF1   View the document
PF2   Erase from the list of documents found
PF3   Keep in the list of documents found
PF4   Erase from the list of documents found and the mail log
PF5   Forward the document
PF6   View the distribution list
PF7   View or change the mail log information
PF8   Print the document

PF10 View more choices

PF9 Help   PF12 Return

This is the screen for Draft documents.

```
                         PROCESS THE DOCUMENT FOUND                    D08

       From:    Riley, L. M.              Document No.:  87002TST0001
       Subject: January sales report      Type:  Final
       ---------------------------------------------------------------

       Press one of the following PF keys, or press PF10 to view more choices.

       PF1  View the document
       PF2  Erase from the list of documents found
       PF3  Keep in the list of documents found
       PF4  Erase from the list of documents found and the mail log
       PF5  Forward the document
       PF6  View the distribution list
       PF7  View or change the mail log information
       PF8  Print the document

       PF10 View more choices




       PF9 Help    PF12 Return
```

This is the screen for Final and softcopy documents.

```
                         PROCESS THE DOCUMENT FOUND                    D12

       From:    Doe, L. M.                Document No.:  87002HDC0003
       Subject: Monthly sales and credits  Type:  Paper
       ---------------------------------------------------------------

       Press one of the following PF keys.

       PF2  Erase from the list of documents found
       PF3  Keep in the list of documents found
       PF4  Erase from the list of documents found and the mail log
       PF5  Forward the document information
       PF7  View or change the mail log information








       PF9 Help    PF12 Return
```

This is the screen for Paper documents.

You can do five of the same tasks with all five types of documents, and you do them in exactly the same way. These tasks are:

- Keep the document.

- Forward the document.

- View or change the mail log information about the document.

- Erase the document from the mail log and the list.

- Erase the document from the list.

You can do five of the same tasks with RFT-F, RFT-D, Draft, Final and softcopy documents, and you do them in exactly the same way. These tasks are:

- View the document.

- View the document's distribution list.

- Print the document.

- Put the document in your personal storage.

There is one task that you can do with RFT-D documents, Draft documents, and softcopy documents.

- Change the draft.

Note: You can change a softcopy document if you use the RETRIEVE command on the command line of the main menu (screen A00) or the interrupt menu (screen S00) followed by the document number. See "Retrieving electronic documents (softcopies)," in Chapter 9 for more information about the RETRIEVE command.

Viewing the document

You can view an RFT-D document, an RFT-F document, a Draft document, or a Final or softcopy document. You can't view a Paper document because PROFS has only the mail log information for it.

To view an RFT-D document, press **PF1** on screen D41. To view an RFT-F document, press **PF1** on screen D40. PROFS shows you the DisplayWrite/370 "View" screen. To view a Draft document, press **PF1** on screen D11. To view a Final or softcopy document, press **PF1** on screen D08. PROFS shows you the document on screen I00 (or I01 for graphics documents, see Appendix L). If the document is more than one screen long, press **PF10** and **PF11** to go back and forth between screens.

Erasing a document from the list

If you don't want to work with a document any more, you can erase it from the list of documents that PROFS found. Press **PF2** on one of the "Process the Document Found" screens. If you view the list of documents after you press **PF2,** you will see the word REMOVE instead of the document's number.

IF YOU CHANGE YOUR MIND

*If you change your mind and decide not to erase the document from the list, press **PF3** on one of the "Process the Document Found" screens. The document will then remain on the list. You must press **PF3** on one of the "Process the Document Found" screens before you press **PF12** on screen D04 or D06.*

Erasing a document from the mail log and the list

If you don't need a document any longer, you can erase it from both the mail log and the list of documents that PROFS found. You can do this with any type of document. Press **PF4** on one of the "Process the Document Found" screens (screen D41 for RFT-D documents, D40 for RFT-F documents, D11 for Draft documents, D08 for Final and softcopy documents, and D12 for Paper documents). If you view the list of documents after you press **PF4,** you will see the word DELETE instead of the document's number.

If you erase the document from your mail log, you will have to know the document number to work with it again.

IF YOU CHANGE YOUR MIND

*If you change your mind and decide not to erase the document, press **PF3** before you press any other PF key.*

Forwarding a document

You can forward all five types of documents. (You forward only the mail log information for Paper documents.) Press **PF5** on one of the "Process the Document Found" screens (screen D41 for RFT-D documents, D40 for RFT-F documents, D11 for Draft documents, D08 for Final and softcopy documents, and D12 for Paper documents). PROFS shows you screen H00 for all types of documents except Paper. PROFS shows you screen H05 for Paper documents. See "Forwarding the document" in Chapter 4.

Viewing the distribution list for a document

You can see a list of other people who have received a document on your PROFS system. Just press **PF6** on one of the "Process the Document Found" screens (screen D41 for RFT-D documents, D40 for RFT-F documents, D11 for Draft documents, D08 for Final and softcopy documents). PROFS will show you screen K21, "View the Distribution List," for all document types except Paper.

Information about the document.

To whom the document has been sent.

If there is more than one page of names, use the PF keys to move among the screens.

```
                        VIEW THE DISTRIBUTION LIST                        K21

   Document No.:  87002TST0012                    Type: RFT-F
   Draft copies:  1                               Owner: RILEYL
   From:          Riley, L. M.
   To:            Johnson, G. J.
   Subject:       Report information in last memo
------------------------------------------------------------------------------

   This document has been mailed to the following.  Their user names are listed.
 JOHNSONG ******** JSMITH
 END OF LIST




  PF1 Top    PF2 Bottom    PF4 Up    PF5 Down             Screen   1 of  1
  PF9 Help    PF10 Next Screen    PF11 Previous Screen    PF12 Return
  ===) _
```

This screen shows you the user names of the people to whom you have sent the document, as long as they are on the same PROFS system as you. If you are looking for a person who was mailed a document but who is no longer on the PROFS system, you will see asterisks (********) instead of a user name.

This screen also shows you:

- The document number at the top left

- Whether the document is an RFT-D document, an RFT-F document, a Draft document, or a Final or softcopy document

- The number of versions of the document, beneath the document number

- The name of the person who wrote the document

- The owner's user name

- The subject.

Changing the mail log information about a document

You can add to, change, or erase the mail log information for any type of document, if you searched your own mail log. (If you searched other mail logs, you can view only the mail log information.) Press **PF7** on one of the "Process the Document Found" screens (D41, D40, D11, D08, or D12). PROFS shows you screen D18, "View or Change the Mail Log Information," with the information that you already put in your mail log about the document. See "Changing information about the document in your mail log" in Chapter 4.

Information about the document.

You can add comments. If the document had reference information in it, PROFS automatically puts it into the comments line. You can change the mail log information.

These are discussed in Appendix A.

Change the information by typing over it, or erase it by pressing the space bar along the line or pressing the **EOF** key. Add information by typing it on the appropriate line.

You can find out more about "Action," "Identifier," and "Type" in "Appendix A: How to index documents in PROFS."

Note: In the "Type" field, PROFS uses the letter M to mean that the document is an RFT-F or Final document, and the letter U to mean that the document is an RFT-D or Draft document.

When you are finished, press ENTER. Your additions and corrections become part of the information in your mail log.

Printing a document

You may want to have a paper copy of a document that PROFS found. The document stays in PROFS storage even if you print a copy.

You can print a copy of an RFT-D document, an RFT-F document, a Draft document, or a Final or softcopy document. Press **PF8** on one of the "Process the Document Found" screens. PROFS shows you screen J00, "Choose a Printer."

Your PROFS administrator will explain how this screen works for your system.

```
                        CHOOSE A PRINTER                        J00

     Press the PF key to select the printer you want, or send a print file
     to a user or printer not listed.  Press PF8 to see additional printer
     options.  Press ENTER when you have made your choices.


     Send a print file to: _      (name) at          (location)
                           --------          --------


     Number of copies:  1         Special print class:
                        --                              -

     PF1  SYS3203 3203 SYSTEM PRINTER - CLASS A                SELECTED
     PF2  SYS3287 3287 SYSTEM PRINTER - CLASS A
     PF3  SYS3800 3800 SYSTEM PRINTER - CLASS Y
     PF4  6670 East Tower, 9th Floor
     PF5  6670 East Tower, 17th Floor
     PF6  6670 West Tower, 2nd Floor
     PF7  Print at your workstation
                                                      Screen   1 of   1

     PF8 Options PF9 Help  PF10 Next Printers  PF11 Previous Printers  PF12 Cancel
     ===)
```

For instructions on how to use this screen, see "Printing copies of notes and documents," in Chapter 4.

Working with alternate screens

If you press **PF10** on one of the "Process the Document Found" screens (D41 for RFT-D documents, D40 for RFT-F documents, D11 for Draft documents, or D08 for Final and softcopy documents), PROFS shows you one of four other screens: (D43 for RFT-D documents, D42 for RFT-F documents, D09 for Draft documents, or D02 for Final and softcopy documents.) All these screens are also called "Process the Document Found."

As you view the following four screens, you will see the key information from the mail log is at the top of each screen: the name of the person who wrote the document as well as the "Subject," "Type," and "Document No."

*This is the screen for
RFT-D documents.*

```
                        PROCESS THE DOCUMENT FOUND                    D43

     From:    Smith, G.                      Document No.:  87002TST0008
     Subject: Monthly report                 Type:  RFT-D
     ------------------------------------------------------------------------

     If you want to work with a version other than the most current (version 1),
     type the number you want to work with here: 1

     Press one of the following PF keys, or press PF11 to view the previous
     choices.

     PF1  View the document
     PF2  Copy the document into your personal storage
     PF3  Work with the document
     PF4  Create a new document from a copy of this document


     PF11  View previous choices




     PF9 Help    PF12 Return
```

```
                         PROCESS THE DOCUMENT FOUND                      D42

From:    Riley, L. M.                      Document No.:  87002TST0012
Subject: Report information in last memo   Type:  RFT-F
-----------------------------------------------------------------------------

Press one of the following PF keys, or press PF11 to view the previous
choices.

PF1   View the document
PF2   Copy the document into your personal storage
PF4   Create a new document from a copy of this document


PF11  View previous choices



PF9 Help    PF12 Return
```

```
                         PROCESS THE DOCUMENT FOUND                      D09

From:    Smith, G.                         Document No.:  87002TST0002
Subject: Monthly report                    Type:  Draft
-----------------------------------------------------------------------------

If you want to work with a version other than the most current (version 1),
type the number you want to work with here: 1

Press one of the following PF keys, or press PF11 to view the previous
choices.

PF1   View the document
PF2   Copy the document into your personal storage
PF3   Work with the document



PF11  View previous choices


PF9 Help    PF12 Return
```

From: Riley, L. M.   Document No.: 87002TST0001
Subject: January sales report   Type: Final

If you do not want to work with the final copy of the document, key in the
number 2 to work with the draft copy. 1

Press one of the following PF keys, or press PF11 to view the previous
choices.

PF1 View the document
PF2 Copy the document into your personal storage

PF11 View previous choices

PF9 Help   PF12 Return

This is the screen for Final and softcopy documents.

If you want another version, type the number here.

Viewing different versions of a document

PROFS automatically keeps two versions of each RFT-D, Draft,
and Final document. PROFS only keeps one version of an
RFT-F document.

If you want to view a version of the document other than
version 1:

1. Type the number over the number where the cursor is
   showing. For an RFT-D or Draft document, version 2 is the
   document before the last changes were made. For a Final
   document, version 2 is the current version displayed with
   the format controls in the text. If PROFS has been told to
   keep more than two versions, there may also be a version
   3 or even 4 of an RFT-D or Draft document. Versions other
   than 1 will be available only if the time limit for keeping
   them has not passed.

2. Press **PF1** to view the document.

    PROFS shows you the DisplayWrite/370 "View" screen for
    RFT-D documents, or screen I00, "View the Document," for
    Draft, Final, and softcopy documents.

    After viewing the document, press **PF12 = END** or **PF12** to
    return to one of the "Process the Document Found" screens
    (D41, D11, or D08).

Putting a copy of a document in your personal storage

You may want to use an RFT-D, RFT-F, Draft, or Final
document to create a new and separate document. (For
example, you might use last month's report as the framework
for this month's report.) If you put a **copy** of the RFT-D, RFT-F,
Draft, or Final document in your personal storage, PROFS will
assign the copy a filename and you can make changes to it.
(The original document stays in PROFS storage with its
original number.)

Press **PF2** on screen D43, D09, or D02 to put a copy of the first
version of the document in your personal storage. To put
another version in personal storage, type the number of that
version over the number 1 at the top of the screen before you
press **PF2.** For an RFT-F document, press **PF2** on screen D42.

You can create a new RFT-D or RFT-F document using a
document you have in your personal storage. You press **PF4**
on either screen D43, "Process the Document Found," for
RFT-D documents, or screen D42, "Process the Document
Found," for RFT-F documents.

If the document is already in your personal storage when you
press **PF2**, PROFS shows you screen X10, "Copy the
Document."

The filename, filetype, and filemode of your document will be here.

```
                        COPY THE DOCUMENT                        X10

A copy of:  D0120008 RFTD   A1 is already in your personal storage.

Press one of the following PF keys.  If you want to keep the file
in your personal storage without changing the name, press PF12.

PF1  Give the file in your personal storage another name.
     Type the new filename and the filetype below first before pressing
     the PF key.  Filename and filetype===>
                                            -------- --------
PF2  Erase the file in your personal storage and continue
     with a new copy




PF9 Help    PF12 Return
```

Rename your file here.

At the top of the screen you see a message telling you that a copy of the document you requested — identified by the filename, the filetype, and the filemode — is already in your personal storage.

You have several choices. You can:

- **Leave the copy** of the document as it is in your personal storage, and not get another copy from PROFS storage. Press **PF12** and PROFS takes you back to the first "Process the Document Found" screen (D41, D40, D11, or D08).

- **Rename** the document file that is already in your personal storage and save the new document. To do this, type the new filename and filetype in the spaces after the arrow. Then press **PF1**.

- **Erase** the document file in your personal storage and save the new copy. Press **PF2**.

Changing an RFT-D or Draft document

You can make changes only to RFT-D and Draft documents (although you can make changes to **copies** of RFT-F and Final documents that you put in your personal storage — see the previous section). Press **PF3** on screen D43 or D09. PROFS shows you screen F63, "Process the Document," for an RFT-D document and screen F01, "Process the Document," for a Draft document. Press **PF2** to make changes to a copy of the document.

If you want to change an earlier version of an RFT-D document or a Draft document, type the number of that version over the number 1 at the top of screen D43 or D09 before you press **PF3**.

No one else can make changes to any version of the RFT-D document or Draft document until you've finished making changes and filed it back in PROFS storage.

Use the RETRIEVE command followed by the document number to begin working with a softcopy document you want to change. See "Appendix G: Using commands with PROFS" for more information about this command.

If you try to retrieve a document when you already have a copy in your personal storage, PROFS shows you screen F18, "Change the Document."

```
                        CHANGE THE DOCUMENT                      F18

   Document No.:  70020008

   The copy of the document you are trying to change is currently stored
   in your personal storage.

   Press one of the following PF keys.

   PF1  Erase the copy in your personal storage and get the
        copy in PROFS's storage to change
   PF2  Assign the copy in your personal storage a new document
        number




   PF9 Help    PF12 Return
```

You must then do one of the following:

- Press **PF1** to get the document from PROFS storage in order to view it or change it. The other copy in your personal storage will be erased.

- Press **PF2** to get the document and also keep the existing copy (with a new document number) in your personal storage.

- Press **PF12** if you want to do neither.

Fast Track

Note: to retrieve a document
when you know the
document number, type
RETRIEVE after the===>on
A00. PROFS shows you X01.
Type the document number
on X01. Press ENTER.

A00
Main Menu

PF3

D01
Find
Documents
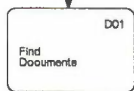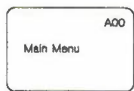
To search
someone else's
mail log, type
that person's
user name,
nickname, or
distribution list.

On all screens:

PF9 Help

PF12 Return
(except PF12 "End"
on A00)

ENTER

D03
Process the
Documents
Found

PF1 → **D04** List of Documents Found (with comments)

PF2 → **D06** List of Documents Found (without comments)

PF3 → Saves list in CMS file

PF4 → **D01** (as you had filled it out; change to widen or narrow search)

PF5 → **D03** (documents found when key words are removed from search)

PF6 → **D03** (documents found when time period is expended)

PF7 → **D01** (not filled in; ready to begin search again)

PF8 → **F30** Print the Mail Log Information

To change the way you search

ALL → **D07** Process the Documents Found

PF1 → View all (on the screen)
PF2 → Erase all from the list (on the screen)
PF3 → Keep (cancels PF2 or PF4 erase)
PF4 → Erase all (on that screen) from the list and from the mail log

PF key next to document you want

D02
D08 Process the Documents Found Final and Softcopy

D09
D11 Process the Documents Found Draft

D12 Process the Documents Found Paper

D42
D40 Process the Document Found RFT-F

D43
D41 Process the Document Found RFT-D

```
PF1
on        DisplayWrite/370
D40       "View"
D41

                   I00                    A00
PF1       View the            'EXIT'    Main
on        Document                      Menu
D08
D11

PF2    ──▶ Erase from the list of documents found

PF3    ──▶ Keep (cancels PF2 or PF4)

PF4    ──▶ Erase from the list and from the mail log

                   H00                    D43
PF5       Assign the           PF10     Process the
not       Document             on       Document
on        Distribution         D41      Found RFT-D
D12       Information                   (second screen)

                   H05                    D42
PF5       Assign the           PF10     Process the
on        Reviewer             on       Document
D12       Distribution         D40      Found RFT-F
          Information                   (second screen)

                   K21
PF6       View the
not       Distribution List
on
D12

                   D16
PF7       View or
          Change the
          Mail Log
          Information

                   J00                    D02
PF8       Choose a             PF10     Process the
not       Printer              on       Document
on                             D08      Found Final
D12                                     (second screen)

          PF8        J01                    D08
          Choose              PF10      Process the
          Printer             on        Document
          Options             D11       Found Draft
                                        (second screen)
```

```
                                              DisplayWrite/370
                                    PF1       "View"

                                                  Copy into
                                                  Personal
                                                  Storage
                                    PF2
                                                              X10
                                              If file exists  Copy the
                                                              Document (into
                                                              your personal
                                    PF3          F63          storage)
                                    PF4       Process the
                                              Document

                                                  D41
                                    PF11      Process the
                                              Document
                                              Found
                                              RFT-D
```
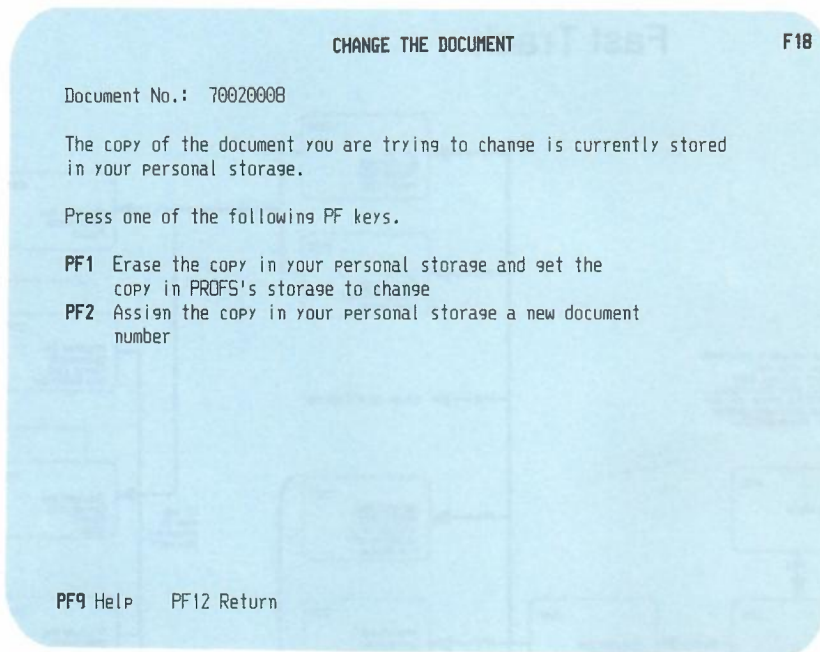
```
              I00                    A00
PF1  View the            'EXIT'    Main
     Document                      Menu
     (earlier version)

          Copy into
          personal
PF2       storage
                              X10
     If file exists       Copy the
                          Document (into
                          your personal
                          storage)

                    F01
PF3    Process the
       Document
```

```
                            DisplayWrite/370
                  PF1       "View"

                                Copy into
                                Personal
                                Storage
                  PF2
                                            X10
                            If file exists  Copy the
                                            Document (into
                                            your personal
                  PF4          F63          storage)
                            Process the
                            Document

                                D40
                  PF11      Process the
                            Document
                            Found
                            RFT-F
```