



7 Preparing RFT documents

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7 Preparing RFT Documents

1 Choosing from the main menu

When you are creating documents, PROFS gives you the choice of creating either Revisable-Form Text (RFT) or Document Composition Facility (DCF) documents.

You can create an RFT document at your IBM Personal Computer or Displaywriter and then transfer it to the PROFS system to be reviewed and changed by you and others that have access to PROFS storage. You can also transfer RFT documents from the PROFS system and work with them at your PC or Displaywriter. When you use DisplayWrite/370 to create and edit RFT documents, you see the formatted document. You can see the changes that you make to your document while you are editing it.

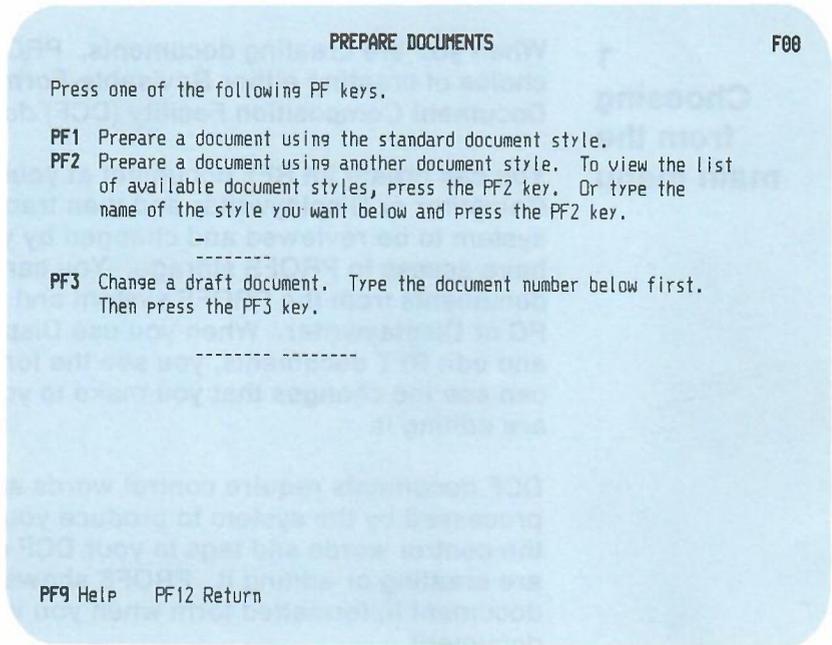
DCF documents require control words and tags that are processed by the system to produce your documents. You see the control words and tags in your DCF document when you are creating or editing it. PROFS shows you the DCF document in formatted form when you view or print the document.

You can transform your DCF documents to RFT documents and work with them using DisplayWrite/370, your PC, or a Displaywriter. See the RETRIEVE command with the XFORM option in "Appendix Q: Converting a document."

Note: Before you can use this chapter to create documents, you must be able to use DisplayWrite/370. See "Getting Started with DisplayWrite/370" and "Using DisplayWrite/370" for step-by-step instructions for using DisplayWrite/370.

This chapter tells you how to prepare RFT documents. If you need information about processing DCF documents, see "Chapter 8: Preparing DCF documents."

The memos, letters, and reports you write are more formal communications than notes. In PROFS, they are called documents. To use PROFS to prepare RFT documents, press **PF5** on the main menu. PROFS shows you screen F00, "Prepare Documents."



Now you can:

- Write a new document in any of several styles. (See “Writing a new document.”)
- Change or edit an existing RFT-D document. (See “Changing or editing an existing RFT-D document.”)
- Process the document further. (See “Processing documents”), including:
 - Viewing it
 - Proofreading it
 - Filing it in your personal storage
 - Sending an RFT-D to others to read, review, or change
 - Sending an RFT-F to others
 - Printing it
 - Erasing it.

However, if you are preparing an RFT document that requires an **author profile**, you must create an author profile. “Appendix J: Working with author profiles” tells you how to do this.

At the end of this chapter, you’ll find a “fast-track” diagram that summarizes the chapter pictorially.

2 Writing a new document

Choosing a document style

PROFS comes with several styles for memos or letters. These styles include formats for RFT documents and for DCF documents. You or your PROFS administrator can add additional styles.

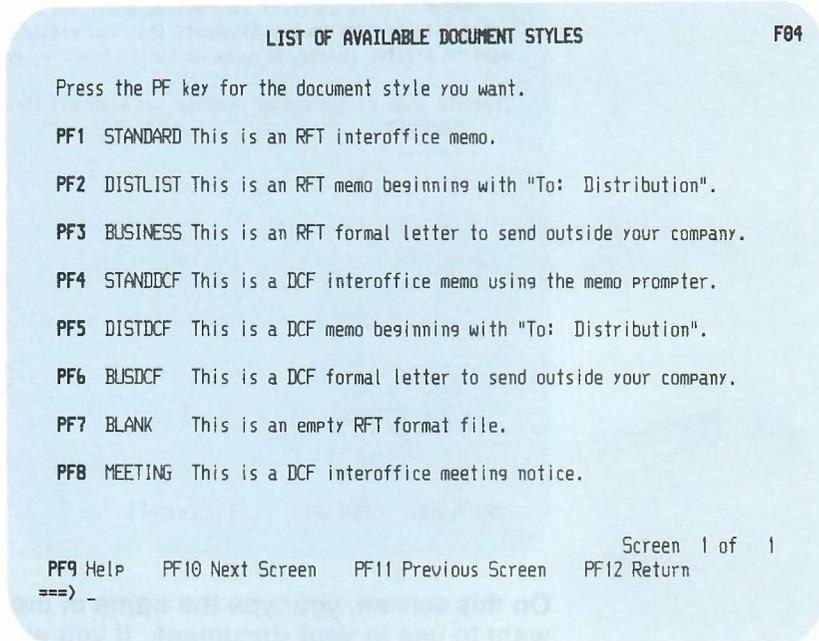
Two appendixes of this manual give you information about creating your own RFT document styles. "Appendix P: Creating RFT document styles" explains how to create your own RFT document styles and add them to screen F04, "List of Available Document Styles." "Appendix A: How to index documents in PROFS" tells you how to index an existing document. The index controls can also be included as part of your document style. See the two appendixes for more information.

When you write a new document, you can use the document style named STANDARD, the format for an interoffice memo, or one of the other styles.

Press **PF1** on screen F00, "Prepare Documents," if you want to use the STANDARD document style. PROFS comes with the STANDARD document style as an RFT document. Check with your PROFS administrator to find out what document style is standard for your site.

If you do not want the STANDARD document style and you know which style you want, type the name of the style on the line under **PF2** and press **PF2**.

If you want to see a list of the available document styles, press **PF2** without filling in the line. PROFS shows you screen F04, "List of Available Document Styles."

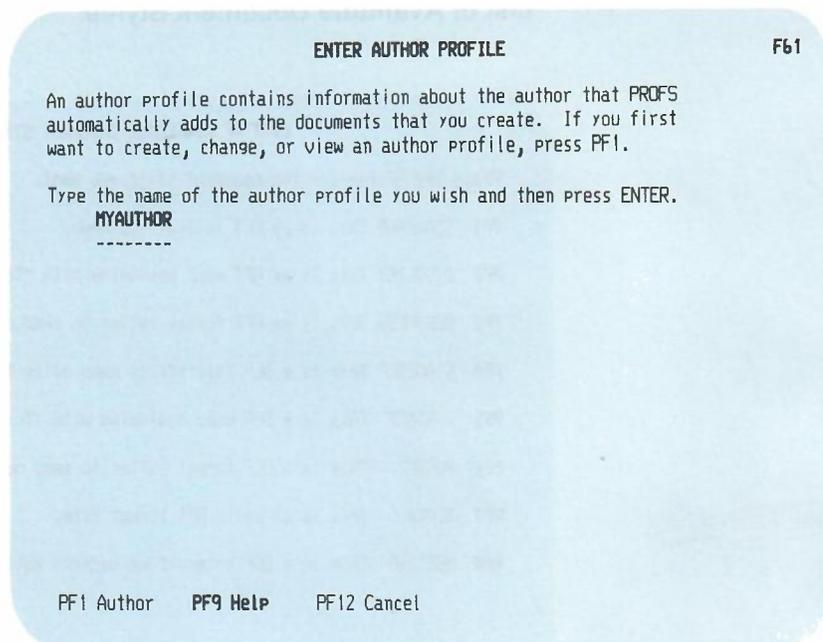


Selecting author profile information

If you choose a document style that requires an author profile, PROFS shows you screen F61, "Enter Author Profile." After you select the author profile you want to use, press **ENTER**. PROFS shows you the DisplayWrite/370 "Edit" screen. There is not a title or a screen identifier on the DisplayWrite/370 "Edit" screen.

To prepare a document using the **STANDARD** document style, press **PF1** on screen F00, "Prepare Documents."

PROFS shows you screen F61, "Enter Author Profile."



On this screen, you type the name of the author profile that you want to use in your document. If you want to use the author profile displayed, press ENTER to move on to the DisplayWrite/370 "Edit" screen.

If you want to use an author profile other than the one that appears on screen F61, "Enter Author Profile," type the name of the author profile on the line and press ENTER to move on to the DisplayWrite/370 "Edit" screen.

If you have not created the author profile that you want to use or you want to change or view an author profile, press **PF1**. PROFS will display screen T20, "Process an Author Profile." "Appendix J: Working with author profiles" gives step-by-step instructions for processing an author profile.

You can choose which author profile will appear on the F61 screen by changing the information in your user profile. See "Appendix N: Tailoring your PROFS system" to learn how to display a different author profile on the F61 screen.

Typing the document text

When you type a correct author profile on screen F61 and press ENTER, PROFS shows you the DisplayWrite/370 "Edit" screen. If you select the STANDARD document style for your document, the cursor will be placed after "Memo to" in your document. Type the addressee and then press **PF7 = Next** to move to the next place in your document to type information. The system moves the cursor and then shows you a message that identifies the information.

There are 5 prompts in the STANDARD document style. The following lists the type of prompt and the message you receive from PROFS.

Type of prompt	Message
Addressee	Prompt: Type addressee:
Subject	Prompt: Type subject:
Reference	Prompt: Type reference:
Text (body of your document)	Prompt: Type text:
Typist's initials	Prompt: Type typist's initials:

PROFS displays 12 or 24 PF keys depending on the information in your system or user profile. (See "Appendix N: Tailoring your PROFS system" to learn how to change the PF keys for your terminal.) Use this screen to type the text of your document. DisplayWrite/370 shows you the format of your document as you type it.

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.

PROFS copies this information from the author profile and includes it in your document.

```
1          RFTD      A          PROMPT          Page 1
** Prompt: Type addressee:
===>
<---+---1_---+---2_---+---3_---+V---4_---+---5_---+---6_---+---7_>-----
-----Page 1-----
December 9, 1986          DRAFT 1
Marilyn Shane , (202) 974-3985
TechnoComp Unlimited
Marketing
West Building, Room 2-5E
Washington, DC 20007
SHANE/TECHNO

Memo to:  -

Subject:

Reference:

Type text here.

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
```

**The DisplayWrite/370
"Edit" screen
with 24 PF keys.**

```

1          RFTD  A          PROMPT          Page 1
** Prompt: Type addressee:
===)
<---+---1_---+---2_---+---3_---+_V--4_---+---5_---+---6_---+---7_)---+---
-----Page 1-----
December 9, 1986          DRAFT 1
Marilyn Shane , (202) 974-3985
TechnoComp Unlimited
Marketing
West Building, Room 2-5E
Washington, DC 20007
SHANE/TECHNO

Memo to:  _

Subject:

Reference:

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
PF13=Cursor    14=Goto       15=Quit       16=Addenda   17=Rfind     18=Synonym
PF19=Left      20=Right      21=HELP       22=Format    23=Previous  24=END

```

DisplayWrite/370 uses an editing style that allows you to see the changes you make to your document as you make them. See *Getting Started with DisplayWrite/370* for information about typing a document using DisplayWrite/370.

In addition to the overall document style you have selected, DisplayWrite/370 allows you to add additional controls to change the margins, tabs, line spacing (single, double, triple), line alignment (left, right, justify), and the font. See *Using DisplayWrite/370* for an explanation of the DisplayWrite/370 FORMAT command.

Note: You will not see some of your changes until you press ENTER or use the PAGINATE command. See *Using DisplayWrite/370* for information about the PAGINATE command.

Press **PF12 = END** on the DisplayWrite/370 "Edit" screen when you have finished typing. PROFS shows you screen F63, "Process the Document." (See "Processing documents" later in this chapter.)

Before typing your own document, review the function of the following PF keys.

The PF keys on the DisplayWrite/370 "Edit" screen

Refer to *Using DisplayWrite/370* for a complete explanation of the commands assigned to the PF keys on this screen.

The following 24 PF key assignments are the ones that come with PROFS. The first 12 PF keys can be used with terminals having 12 PF keys. The additional PF keys (13 through 24) can be used with terminals having 24 PF keys. If your terminal doesn't have 24 PF keys, you can type the command assigned to the PF key on the command line or on the floating command line and press ENTER.

PF1 = Block	Mark the beginning or end of a block of text and display the DisplayWrite/370 BLOCK command menu. See <i>Getting Started with DisplayWrite/370</i> .
PF2 = Insert	Insert a fixed number of blank lines into your document. (Unused lines disappear when you press PF12 = END or ENTER.)
PF3 = Cmdline	Display the floating command line.
PF4 = Instr.	Display the DisplayWrite/370 CONTROLS (Instruction) menu. You can choose a format control from a menu to put in your document (for example, Tab, Page End, Center). See <i>Getting Started with DisplayWrite/370</i> .
PF5 = Tspell	Use the TSPELL command to check the document for misspelled words without turning off the display of controls. See <i>Using DisplayWrite/370</i> .
PF6 = Aid	Use the AID command to provide alternative spellings for a misspelled word, or to provide a display of a control at the cursor position. See <i>Getting Started with DisplayWrite/370</i> .

- PF7 = Next** Move to the next occurrence of a word identified by the VERIFY command or to the next prompt. See *Getting Started with DisplayWrite/370*.
- PF8 = Command** Display the DisplayWrite/370 COMMAND menu. You can choose one of the DisplayWrite/370 commands on this menu by moving your cursor to the command and pressing ENTER. See *Getting Started with DisplayWrite/370*.
- PF9 = HELP** Display the DisplayWrite/370 HELP information. See *Getting Started with DisplayWrite/370*.
- PF10 = Forward** Move the document one screen toward the end.
- PF11 = Backward** Move the document one screen toward the beginning.
- PF12 = END** End the editing session and save the changes to your document. PROFS shows you screen F63, "Process the Document." (See "Processing documents" later in this chapter.) This PF key can also be used to close a window (for example HELP, a command menu, or a selection menu).
- If you are using a command and press **PF12 = END** before the command is completed, PROFS does not process the command.
- PF13 = Cursor** Moves the cursor from the text to the command line and back.
- PF14 = Goto** Use the DisplayWrite/370 GOTO command. See *Getting Started with DisplayWrite/370*.
- PF15 = Quit** Use the DisplayWrite/370 QUIT command. (DisplayWrite/370 does not save your changes.) See *Using DisplayWrite/370*.

- PF16 = Addenda** Add a new term to your DisplayWrite/370 addenda dictionary. See *Getting Started with DisplayWrite/370*.
- PF17 = Rfind** Repeat the FIND command you typed. See *Getting Started with DisplayWrite/370*.
- PF18 = Synonym** Provide a synonym of the word at the cursor position. See *Getting Started with DisplayWrite/370*.
- PF19 = Left** Move the document approximately one-half screen to the right.
- PF20 = Right** Move the document approximately one-half screen to the left.
- PF21 = HELP** Display the DisplayWrite/370 main HELP menu. See *Getting Started with DisplayWrite/370*.
- PF22 = Format** Use the DisplayWrite/370 FORMAT command. See *Using DisplayWrite/370*.
- PF23 = Previous** Locate the previous word identified using the VERIFY command or return to the previous prompt. (See **PF7 = Next**.) See *Getting Started with DisplayWrite/370*.
- PF24 = END** End the editing session and save the changes to your document. PROFS shows you screen F63, "Process the Document." (See "Processing documents" later in this chapter.) This PF key can also be used to close a window (for example, HELP, a command menu, or a selection menu).
- If you are using a command and press **PF24 = END** before the command is completed, PROFS does not process the command.

See the description of EDITPFS in “Appendix O: Using DisplayWrite/370 and CLISTs” to learn how to change the PF key assignments on the DisplayWrite/370 “Edit” screen.

Note: Although the PF keys in PROFS are different from the PF key assignments in the DisplayWrite/370 manuals, the effect of the command does not change. For example, **Cmdline** is PF12 in the DisplayWrite/370 manuals and PF3 in PROFS. If you are using DisplayWrite/370 from PROFS, you will need to press **PF3 = Cmdline** to display the floating command line.

Proofreading an RFT document

The system uses the DisplayWrite/370 dictionary and user addenda dictionary to proofread your documents. To make proofreading your RFT document easier, PROFS has assigned some of the DisplayWrite/370 proofreading commands to PF keys.

- **PF5 = Tspell** on the DisplayWrite/370 “Edit” screen checks the spelling of words in your document. If you press **PF5 = Tspell** again, spelling verification is turned off.
- **PF7 = Next** moves your cursor to the next word that the system has identified as misspelled.
- **PF6 = Aid** gives you alternate spellings for a word identified by the Tspell command.

See *Using DisplayWrite/370* for more information about the AID and TSPELL commands.

If your terminal has 24 PF keys, the following proofreading commands are available:

- **PF16 = Addenda** adds a word to your DisplayWrite/370 user addenda dictionary.
- **PF18 = Synonym** gives you a synonym for the word at the cursor.
- **PF23 = Previous** moves the cursor to a previous word that the system identified as misspelled.

If your terminal doesn't have 24 PF keys, you can type the command assigned to the PF key on the command line or on the floating command line and press ENTER.

If you already have PROFS addenda dictionaries in your personal storage that you would like to be able to use with DisplayWrite/370, you can copy these dictionaries to DisplayWrite/370 by using the ADDWORDS command. See "Appendix G: Using commands with PROFS."

A complete explanation of the proofreading commands, the DisplayWrite/370 dictionary, and user addenda dictionary is in *Using DisplayWrite/370*.

3 Changing or editing an existing RFT-D document

In addition to being the screen where you originally type the document text, the DisplayWrite/370 "Edit" screen allows you to change an already existing RFT-D document. Listed below are three possible paths you can use to reach this screen:

- If you want to edit **a document you have just written, but not filed**, you can use any of the DisplayWrite/370 commands to change the document.
- If you want to edit **a document after you press PF12 = END**, press **PF2** on screen F63, "Process the Document." PROFS shows you the DisplayWrite/370 "Edit" screen.
- If you want to edit **a document you have filed** in PROFS storage or in your personal storage:
 1. Press **PF5** on A00, "PROFS Main Menu."
 2. Type the 7-, 8-, or 12-character document number or the filename and filetype of the document in the area provided at **PF3** on screen F00, "Prepare documents."
 3. Press **PF3** on F00.
 4. Press **PF2** on F63, "Process the Document." PROFS displays the DisplayWrite/370 "Edit" screen.

There are some special commands you can use while you are editing a document. See "Appendix O: Using DisplayWrite/370 and CLISTs" for more information.

The following are the special commands and their meaning:

CHGAUTH	Change the author profile for the document you are editing. PROFS shows you screen F61, "Enter Author Profile."
DOCVIEW	View the document referred to in the document you are editing.
DOCVIEW PRINT	Print the document referred to in the document you are editing. PROFS shows you screen J00, "Choose a Printer."
INDEX	Display the Index Tag Selection menu. See "Appendix A: How to index documents in PROFS" for more information.
INSERTVAR	Display the Insert Variable Selection menu. See "Appendix P: Creating RFT document styles" for more information.
NOTE	Send a note about the document you are editing.
PRINT	Print the document you are editing. PROFS shows you screen J00, "Choose a Printer."

If you use the DOCVIEW PRINT or the PRINT command, PROFS shows you screen J00, "Choose a Printer." For more information on the use of the J00 screen, see "Printing copies of notes and documents" in "Chapter 4: Opening the mail."

4 Processing documents

If you press **PF12 = END** on the DisplayWrite/370 "Edit" screen, you reach screen F63, "Process the Document."

PROCESS THE DOCUMENT F63

Document No.: 1
Type: RFT-D

Press one of the following PF keys.

PF1 View the document
PF2 Change the document
PF3 Assign a new document number
PF4 View or change the index information
PF5 File the document as a Final document (and mail if desired)
PF6 File the document in your personal storage for further changes
PF7 File the document as a Draft document (and mail to reviewers if desired)
PF8 Print the document

To erase the document from your personal storage, type **DELETE** below and press ENTER.

PF9 Help
==> _

PROFS shows you the document number.

PROFS shows you the document type.

From screen F63, you can choose what you want to do with your document:

- View or change the document.
- Give it a new number.
- View or change the index information.
- File it in three different ways:
 - as an RFT-F document in PROFS storage.
 - as an RFT-D document in PROFS storage.
 - as an RFT-D document in your personal storage.
- Print the document.
- Erase the document.

Viewing the document

Press **PF1** on screen F63 if you want to view the document but not change it. PROFS shows you the document on the DisplayWrite/370 "View" screen in the document style you selected.

There are some special commands you can use while you are viewing the document. "Appendix O: Using DisplayWrite/370 and CLISTs" explains how to use DOCVIEW, DOCVIEW PRINT, NOTE, and PRINT. The following lists the commands and what you tell the system.

DOCVIEW	View the document referred to in the document you are viewing.
DOCVIEW PRINT	Print the document referred to in the document you are viewing.
NOTE	Send a note about the document you are viewing.
PRINT	Print the document you are viewing.

The system shows you messages here.

You can type commands on this command line or on the floating command line.

This is the name of the document.

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

```
3      RFTD      A      VIEW      Page 1
===)_
<---+---1---+---2---+---3---+_V--4---+---5---+---6---+---7---+---
-----Page 1-----
February 14, 1987      DRAFT 3
Kathleen Johnson , (212) 555-1212
National Chemical Company
Market Research Division
TE2-D24
New York, NY 10007

Memo to: Samantha Houston

Subject: Regional Conference

We will host the regional conference here on Sunday, March 8. Jean
Martinez and I will give an office tour to conference attendees.

PF 1=Top      2=Bottom      3=Cmndline      4=Next      5=Docview      6=Note
PF 7=Left      8=Right      9=HELP      10=Forward      11=Backward      12=End
```

If PROFS shows you the entire document on one screen, you don't need to use the PF keys. However, if the document is larger than one screen, use **PF10 = Forward** and **PF11 = Backward** to move back and forth in the document.

On the DisplayWrite/370 "View" screen, PF keys 13 to 24 are duplicates of PF1 through PF12. Except for **PF5 = Docview**, **PF6 = Note**, **PF17 = Docview**, and **PF18 = Note**, an explanation of the command assigned to each PF key can be found in *Using DisplayWrite/370*.

The following explains what you tell PROFS when you press each key:

PF1 = Top PF13 = Top	Display the beginning of the document.
PF2 = Bottom PF14 = Bottom	Display the end of the document.
PF3 = Cmdline PF15 = Cmdline	Display the floating command line at the cursor position in the document.
PF4 = Next PF16 = Next	Display the next occurrence of a word identified by the VERIFY command.
PF5 = Docview PF17 = Docview	Display the document represented by the document number at the cursor position. A complete explanation of DOCVIEW is in Appendix O.
PF6 = Note PF18 = Note	Respond to the document you are viewing with a note. A complete explanation of the NOTE command is in Appendix O.
PF7 = Left PF19 = Left	Move the document approximately one-half screen to the right.
PF8 = Right PF20 = Right	Move the document approximately one-half screen to the left.
PF9 = HELP PF21 = HELP	Display the DisplayWrite/370 main HELP menu.
PF10 = Forward PF22 = Forward	Move the document one full screen toward the end.
PF11 = Backward PF23 = Backward	Move the document one full screen toward the beginning.
PF12 = END PF24 = END	Return to screen F63, "Process the Document."

See VIEWPFS in “Appendix O: Using DisplayWrite/370 and CLISTs” to learn how to change the PF keys on the DisplayWrite/370 “View” screen.

If you use the DOCVIEW PRINT or the PRINT command, PROFS shows you screen J00, “Choose a Printer.” For more information on the use of the J00 screen, see “Printing copies of notes and documents” in “Chapter 4: Opening the mail.”

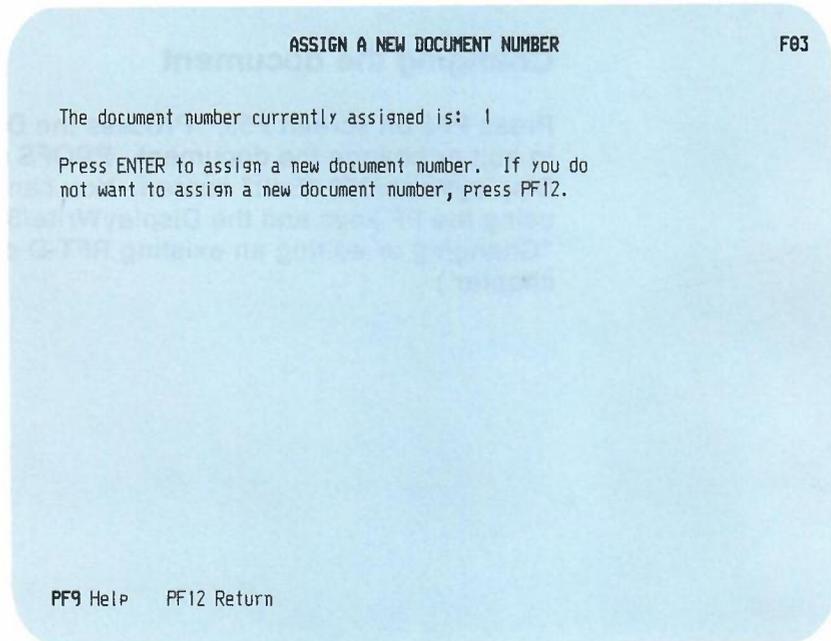
When you have finished viewing the document, press **PF12 = END** to return to screen F63, “Process the Document.”

Changing the document

Press **PF2** on screen F63, “Process the Document,” if you want to edit or change the document. PROFS shows you the DisplayWrite/370 “Edit” screen. You can edit the document by using the PF keys and the DisplayWrite/370 commands. (See “Changing or editing an existing RFT-D document” later in this chapter.)

Assigning a new document number

Normally, PROFS assigns a document number when you place the document in PROFS storage. (See "Sending and storing information" in "Chapter 1: Communicating with PROFS.") If you want to assign a new document number to your RFT-D document, press **PF3** on screen F63, "Process the Document." PROFS shows you screen F03, "Assign a New Document Number."



On this screen, press ENTER to assign a new document number that has the current date. When you press ENTER, PROFS assigns a new number. You can assign a new number as long as the document is an RFT-D document. This number will not change if you later make the document final and put it in PROFS storage.

Viewing or changing the index information

When you are searching for documents, PROFS uses the index information you type on screen D01, "Find Documents," to find your documents in PROFS storage. If you wanted to find all of the documents you had written to M. J. Westley, you include the index 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. For more information about finding document filed in PROFS storage, see "Chapter 5: Finding documents."

Before PROFS puts your document in PROFS storage, it must contain index information. If the document style that you are using does not require an author profile and you have not marked index information, you will have to index your document. If your document doesn't have index information marked, you can use index controls to identify the information in your document that you want to index, or you can use screen F66, "View or Change the Index Information," to add index information about your document. "Appendix A: How to index documents in PROFS" gives a complete explanation of the index tags and controls.

To change the "Action," "Identifier," and "Type" fields for a document you've written, you can use either screen F66, "View or Change the Index Information," or screen D18, "View or Change the Index Information." You see screen D18 when you are processing the mail log. (See "Changing information about your document" in "Chapter 4: Opening the Mail" for more information.)

The "Type" field has the following values if you do not type information in them and if the document was created using PROFS:

M RFT-F document

U RFT-D document, which can be changed by you or the reviewers

See "Appendix A: How to index documents in PROFS" for more information about using the "Action," "Identifier," and "Type" fields to index documents.

When you press **PF4** on screen F63, "Process the Document," PROFS shows you screen F66, "View or Change the Index Information." You will also reach this screen if you try to put your document in PROFS storage without any index information.

VIEW OR CHANGE THE INDEX INFORMATION F66

Type the changes you want for document no.: 1
Then press ENTER to change the index information.

From: - _____

To: _____

Subject: _____

Comments: _____

Action: _____ Due date: _____

Identifier: --- Type: -

PF9 Help **PF12** Cancel

You can change the information on screen F66 by typing over it with new information. When you press ENTER, PROFS uses the new information to index the document.

If you press **PF12** before you press ENTER, PROFS does not use the changes you made to the information. If you requested to view or change the index information and you cancel the changes, or if you tried to file a document without index information and you cancel the changes, PROFS displays screen F63, "Process the Document."

Filing an RFT document

When you file a document in PROFS storage, as RFT-F or RFT-D, PROFS checks to make sure that your document has at least one indexed field. (See "Appendix A: How to index document in PROFS.") If it does not, PROFS shows you screen F66, "View or Change the Index Information." You must identify index information for your document before PROFS can file it.

The following information describes filing and sending an RFT-F document, filing and sending an RFT-D document, and filing your document in personal storage.

Making an RFT-F document and sending it

Press **PF5** on screen F63 when you have finished changing the document and want to send the RFT-F to other people on the PROFS system. PROFS shows you screen F68, "File the Document as a Final Document."

FILE THE DOCUMENT AS A FINAL DOCUMENT **F68**

Type the information you want below, then press ENTER to file the document.

Y Mail the document. (Y - yes, N - no)
-
N Print the document. (Y - yes, N - no)
-
N Restrict those who can see the document to you and
- the people on the mailing list. (Y - yes, N - no)

PF9 Help PF12 Cancel

When you make an RFT-F document, PROFS assigns the document a permanent document number and stores the RFT-F document in PROFS storage.

You can mail the document, print it, and/or restrict who can see it to you and the mailees. You can choose any combination of these selections. You can change your user profile to automatically display your choice for each option on F68. See "Appendix N: Tailoring your PROFS system."

If you change your mind about any choices, type the letter of your choice over the one in the blank. Press ENTER after you have made your choices.

PROFS now assigns the document a permanent number using the current date unless you have already assigned a document number by using screen F03, "Assign a New Document Number."

If you choose all three, PROFS handles the tasks for you in this order:

- Printing
- Distributing
- Restricting.

Printing. Screen J00, "Choose a Printer," appears first. For more information on using this screen, see "Printing copies of notes and documents" in "Chapter 4: Opening the mail."

When you have finished typing the names, press **PF1** or **PF2**. If you press **PF2**, PROFS mails your document. If you press **PF1**, PROFS shows you screen H02, "Attach a Routing Slip." The people you name will receive a notice in their incoming mail about the document.

Type the date when you want a response.

You can select one of the messages by pressing the PF key.

In addition, you can also include your own note.

ATTACH A ROUTING SLIP H02

From: Shane, Marilyn Document No.: 87002NYC 0001
To: Wills, Robert
Subject: Second Quarter Profits
Due date: _____

Press the PF key(s) for the text you want and type a note if you want to add more text.

- PF1 For your information
- PF2 For your comments
- PF3 For your approval
- PF4 Please handle
- PF5 Please circulate
- PF6 Prepare reply for my signature

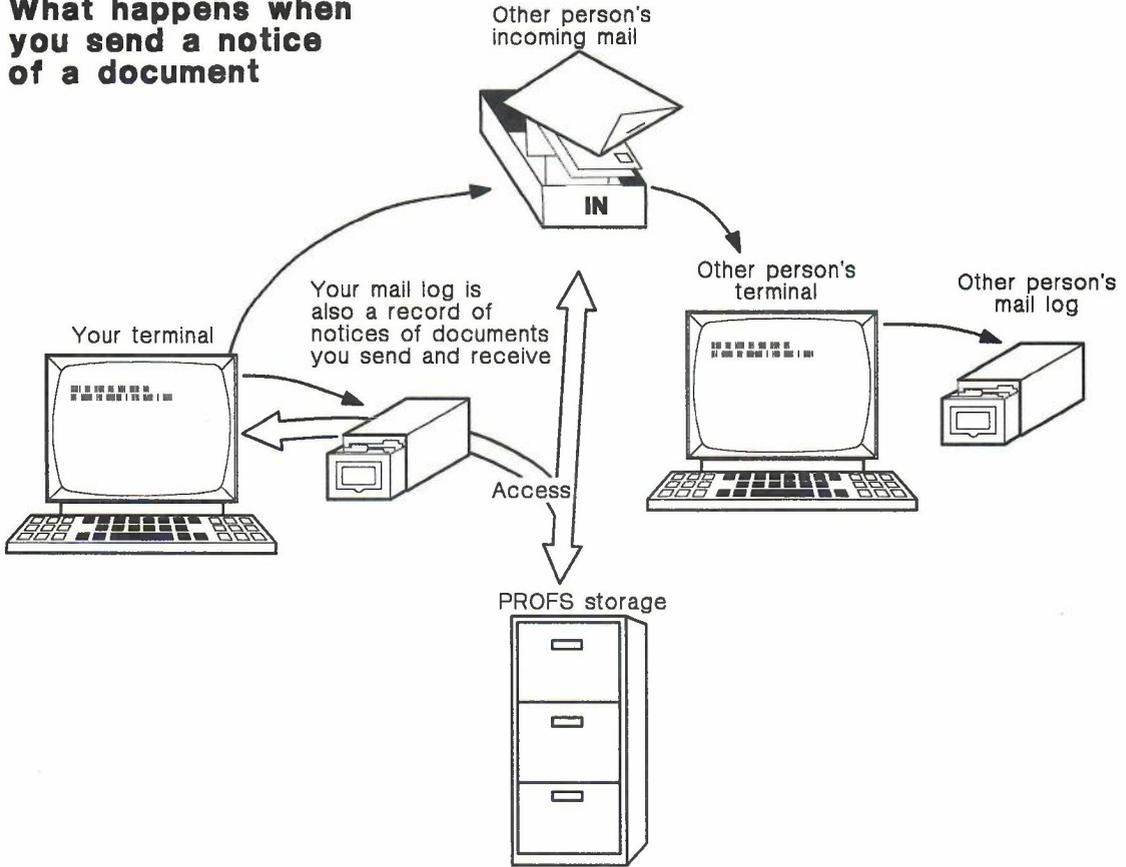
Type Note====> _

When you are finished, press ENTER.

PF9 Help PF12 Cancel distribution

Press the PF key on screen H02 for the information that you want to include in the routing slip. In addition to pressing the PF key, you can type your own note if you want to add more information. Press ENTER when you are finished. PROFS mails your document with a routing slip. See "Chapter 4: Opening the Mail" for more information about screen H02.

What happens when you send a notice of a document



When you send a notice of a document, PROFS puts information about it in your mail log and the other person's incoming mail. The document itself is filed in PROFS storage.

Restricting. You will not see a screen if you choose to restrict the document. The document will be restricted to you and the people you mail it to. They can see the document but cannot forward it. Only you, the author, can forward it.

If you want to add or remove a restriction after you have pressed ENTER, go back to the main menu and type the command RESTRICT. PROFS shows you screen F20, "Restrict Distribution of a Document." Type the document number (in either the 7-, 8-, or 12-character format). Press **PF1** to restrict the document, or press **PF2** to remove a restriction.

RESTRICT DISTRIBUTION OF A DOCUMENT F20

Type the number of the document you want to work with here==> _

Now, press one of the following PF keys.

PF1 Restrict the distribution of the document to only those
people on the distribution list

PF2 Remove the restriction placed on the document

PF9 Help **PF12** Return

Filing an RFT-D document for further changes by you and the reviewers

Press **PF7** on screen F63 to file an RFT-D in PROFS storage so that either you or other people can change it. PROFS shows you screen F70, "File the Document as a Draft Document."

```

                                FILE THE DOCUMENT AS A DRAFT DOCUMENT
                                F70

Type the information you want below, then press ENTER to file the
document.

Y          Mail the document. (Y - yes, N - no)
-
N          Print the document. (Y - yes, N - no)
-
N          Restrict those who can see the document to you and
-          the people on the distribution list. (Y - yes, N - no)

2          Type the number of draft versions of the document you
-          want to keep. (Choose 1, 2, 3, or 4.)

R30       Type the number of days (preceded by an R) you want to keep
-----   all draft versions of the document, or type the date. After
          this time only the most current version will be kept.

PF9 Help  PF12 Cancel
```

You can tell PROFS how long to keep copies of the RFT-D document. PROFS automatically keeps the RFT-D for 30 days. If you want to change the number of days, type a new number over the 30 (next to "R") on the screen, or type the date when all copies can be erased. See "Appendix I: Typing names, dates, and times" for information about typing dates in PROFS.

You can also tell PROFS to keep up to 4 versions of the RFT-D document. PROFS is set to keep 2 versions. To change this number, type the number 1, 3, or 4 over the "2."

Printing, distributing, and restricting an RFT-D document is the same as printing, distributing, and restricting an RFT-F document. The difference is that you and the reviewers can change the RFT-D version of the document you placed in PROFS storage. You can change your user profile to automatically display your choice for each of the options on screen F70. See "Appendix N: Tailoring your PROFS system."

You can send draft documents for review to another PROFS installation. Screen H00, "Assign the Document Distribution Information," allows you to specify locations (system names) as well as user names. A new document number will be assigned to the document at the receiving location.

Note: You can send an RFT-D document to other locations that have DISOSS Version 3, Release 3 or PROFS Version 2, Release 2. If the receiving location cannot accept an RFT-D document, PROFS will send you a message telling you to finalize the document and send it again.

Filing the document in your personal storage

Press **PF6** on screen F63, "Process the Document," if you want to keep the RFT-D in your personal storage. Use your personal storage rather than PROFS storage if you are not finished typing the document and you plan to return to it soon. No one else can see a document that is in your personal storage.

When you file a document in your personal storage, PROFS uses the temporary number (1 to 99) assigned to the document when it was created and shows you the number on the screen. You use the number of your RFT-D document on screen F00, "Prepare Documents," when you want to continue to work with it. If you move the document to PROFS storage, PROFS assigns the document a new number. (For more information, see "Sending and storing information" in "Chapter 1: Communicating with PROFS.")

Printing the document

You can print a document by pressing **PF8** on screen F63 or by typing a **Y** in the "Print the document" selection on screen F68, "File the Document as a Final Document," or screen F70, "File the Document as a Draft Document."

When you press **PF8** on screen F63, "Process the Document," or when you type a **Y** on the "Print the Document" selection of F68 or F70 and press ENTER, screen J00, "Choose a Printer," appears. For more information on how to use this screen, see "Printing copies of notes and documents" in "Chapter 4: Opening the mail."

Erasing the document

To erase a document from your personal storage, but not from PROFS storage, type **delete** on the command line of screen F63, "Process the Document," and press ENTER.

Note: If the document has not been filed in PROFS storage, using the DELETE command for a document in your personal storage will erase the only copy of the document. You will have to recreate the document if you need it later.



7 Preparing RFT Documents

Fast Track

