

THE

PERSONAL FILING

SYSTEM

USER MANUAL

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HARDWARE REQUIREMENTS

The Personal Filing System can operate on any SAM Coupe computer with 256K or more memory and either a television or monitor display (the latter is recommended). Refer to the section in the manual under **Recommended Configurations** for fuller details.

Versions are available to operate on other makes of computer as well (details are available on request).

ACKNOWLEDGEMENTS

SAM Coupe is supplied by West Coast Computers.

MasterDOS and MasterBASIC are copyright Betasoft.

Written by Jack Gibbons ACIB.

First published October 1993 first edition, July 2020 second edition.

Supplied by Jack Gibbons (previously Hilton Computer Services)

How to use the Personal Filing System

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The Personal Filing System (or PFS, as it will be referred to in this user manual), is designed to be a simple but effective tool at your disposal for most applications involving the storage and retrieval of information.

A filing system or database, as it is sometimes described, is one of the most adaptable, all purpose software products available and can satisfy many varied requirements.

In formulating the design of the PFS, the author has adopted the view of making a technical subject as simple as possible: for instance, the method of designing the screen and printer formats ensures that you get what you want with little effort and you can change it at any time. No need to draw pictures and note down screen coordinates on a piece of paper when you have the PFS.

The PFS is also extremely flexible: you can choose between speed and capacity for each file you set up. You decide whether to store all your information in one file which is read into memory and operates at optimum speed (especially with MasterBASIC installed). Or you can opt to split your information across two linked files which could be on separate disks and, using the combination of serial and random access files, store more than one Megabyte of data - but still retain the advantage of having all your key data in memory. We even give you the facility to change from one method to the other and vice versa, at any time.

There are lots of niceties included in the PFS which at first you might not notice. For instance, any numeric data you type in is automatically formatted and when you type in something like a postcode you can instruct the PFS to convert it into upper case. We provide a powerful field validation facility so that it will not be a case of Garbage In, Garbage Out with the PFS.

All the usual things like sorting and searching have not been overlooked either. These operations are enhanced if you have MasterBASIC installed. Quite simply, you can search for any piece or pieces of information and we provide a totalling facility also. Similarly you can sort by any field even though your file is already sorted by the primary key you defined.

Do not be put off by any technical terms used in this manual as these are explained in the **Glossary**.

We trust that you will now experience the pleasure of using the PFS. If you have suggestions as to how it can be enhanced then please let us know: your idea could be included in the next version. We ask that you complete and return our registration form so that you can take advantage of our after sale maintenance to ensure that you remain happy with our product.

The PFS should run on any SAM Coupe as follows:-

PFS version 2.6	SAMDOS (files saved as DATA only)	512K	1/2 drives
PFS version 2.7	MasterDOS	256/512K	1/2 drives (1 MEG exp)
	MasterDOS/MasterBASIC	512K	1/2 drives (1 MEG exp)

You may choose whether you wish to store all your data on one disk in drive 1 or you may wish to use both drive 1 and 2 (if available). In this instance, the keyfile(s) (serial files) and all support files are held on drive 1 and the random access file(s) on drive 2.

To effect the change from 1 to 2 drive operation, load **autoPFSIPL** and select SYSTEM PARAMETERS. Change the setting for drive 2 to **D2:** for two drive operation or back to **D1:** for one drive operation. There is no need to change the setting for drive 1 which should specify **D1:**.

To make life easier for you, the PFS configures itself for you automatically.

The autoPFS file displays a loading screen and also checks your Coupe configuration for amount of RAM (256 or 512K), if SAMDOS or MasterDOS is installed, whether MasterBASIC is installed, and if 1 MEG memory expansion is connected.

How much memory to reserve for the program, your keyfile data, RAM disk (if 1 MEG connected), screens, DOS and MasterBASIC is also determined at this time.

Each time you load a file from within FILE MANAGEMENT, the PFS performs several checks to calculate the maximum number of records that can be accommodated for the current file structure, taking into account the available memory and free disk space. This is a safe approach to ensure that whatever records you add to your PFS file then there will always be enough space left in memory and on all disks being used for storage.

Tips:

As a general rule, memory space is more scarce than disk space, so if you have two disk drives (or one drive plus 1 MEG expansion) then you can increase the record capacity by defining the minimum of fields as key fields. In this way a larger part of your data is stored in a random access file.

To enable you to store the maximum size file on disk(s), only set up one file in the PFS directory.

The sum of all field lengths in a record can be anything up to 256 characters. The shorter the record length, the more records you can have.

To produce working copies of the Personal Filing System is as easy as **A B C**:

- A** boot your Coupe by pressing **F9** as described in your user manual and insert your PFS disk (source) in drive 1
- B** type **COPY "*" TO "D1:*** and press **Return**
- C** when prompted, insert your blank formatted disk (target) in place of your PFS disk and continue to swap source and destination disks in this way.

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Should you have two drives then it is even easier: repeat the operations **A B C** (substitute **D2:** for **D1:** in operation B) and you will be prompted to insert your original PFS disk (source) in drive 1 and your blank formatted disk (target) in drive 2.

If you wish to boot from your PFS disk then you need to copy SAMDOS/MasterDOS to the original PFS disk before making copies - the first file slot has been left empty intentionally.

We recommend that you keep the original copy stored safely and use a copy for every day use. After you have set up your own file structure and formats we recommend that you make another copy at this point also. In this way you can recover your normal working version.

If you are unfortunate enough to lose everything then return a formatted disk to us together with a remittance of £3.00 to cover the cost of re-copying and return postage, etc.

Now you are ready to run our demonstration!

Chapter 4 - Using the demonstration

Insert your copy of PFS in drive 1 and press the Function key **F9**.
An initial loading screen is displayed while the main PFS program loads.

You will then be presented with the FILE MANAGEMENT menu so that you can load a file by pressing **L**. The PFS is fully menu driven so you will always know what to do next.

The initial file management screen:

Records: 0 used (512 free) File Description: No file selected

WELCOME TO THE
PERSONAL FILING SYSTEM
Version 2.07

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COMMANDS AVAILABLE	D - DISPLAY/P - PRINT	I - INITIALISE
FILE MANAGEMENT	L - LOAD FILE	E - DELETE FILE
	H - HELP	M - EXIT

The select file screen:

Records: 0 used (512 free) File Description: No file selected

Dir	Filename	Date	Records	Description
1	pfsfil	09/10/93	4	PFS Demonstration
2	pbsfil	09/10/93	36	PBS Demonstration
3	pbs_so	09/10/93	3	PBS Standing Order file
4	stamp	10/10/93	0	Stamp Collection
5	index	10/10/93	5	Publication, Volume, Page
6	random	10/10/93	12	test random access file

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
SELECT FILE	S - SELECT ITEM	M - MENU

Chapter 4 - Using the demonstration

A list of demonstration files will appear on screen and you can scroll through them by pressing **F**orward, **B**ack or use the **u**p and **d**own arrow keys (or **l**eft and **r**ight arrow keys) so that the file you want is highlighted - press **S** to select it. We suggest you choose the first one as this will be used in the manual.

After a series of messages are displayed (Loading files, Loading formats, etc), the PFS will ask whether you wish to initialise a printer. Reply with a **Y** if you have one connected or with a **N** if not. If you say no then all printer output is switched off.

The menu system consists of a main and a sub menu: the main menu contains all the options you would use on a day-to-day basis, such as entering and looking at records, sorting and enquiries.

The main menu screen:

Records: 4 used (1038 free) File Description: PFS Demonstration

COMMANDS AVAILABLE	1 - VIEW RECORDS	4 - ENQUIRIES
	2 - ADD/CHANGE/DELETE	5 - FILE MANAGEMENT
MAIN MENU	3 - SHUFFLE FILE	6 - SUB MENU

The maintenance options are actioned from the sub menu which also contains the exit option. This is where you define the files you require, design screen/printer formats and maintain any system code files that you have set up.

The sub menu (which overlays the main menu):

COMMANDS AVAILABLE	1 - NEW DIRECTORY/FILE	4 - SYSTEM CODES
	2 - FILE STRUCTURE	5 - EXIT
SUB MENU	3 - DESIGN FORMATS	6 - MAIN MENU

The demonstration files include some sample data so you can try all the operations and then read the rest of this manual! Make use of the help screens as required.

The demonstration version is configured to run from one drive only but a working version could use two drives with the disk containing your random access files in drive 2. How to change from 1 to 2 drive operation is explained in the Chapter 20 - under system configuration, so don't worry about this now.

You should not remove a disk while the PFS is running unless you are specifically prompted to. Frequent access is made to the drive(s) for file or system information. Should you cause the PFS to stop running you must make sure your PFS disk is in drive 1 and press **F9** (after making a detailed note of the problem).

Should you be in the middle of entering a series of records that would otherwise be lost, you may wish to save the data to disk by typing **SAVEFILE** followed by **Return**, before restarting the PFS.

There is a section later in the user manual devoted to error recovery.

Chapter 4 - Using the demonstration

We recommend that you select the **VIEW RECORDS** menu first so you can get a feel of how the PFS performs.

The view records menu:

COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
VIEW RECORDS	H - HELP	M - MAIN MENU

When you select **DISPLAY**, you can scroll back and forth through your records by pressing keys **B** and **F** or you may, alternatively, use the **Up** and **Down Arrow** keys.

In addition, you can use the **Left** and **Right Arrow** keys to page back and forth one screen full at a time, whereas **Shift Left** or **Shift Right Arrow** key will take you to the start or end of your file.

As all the information regarding a record is not necessarily displayed in summary format, you can use the **ZOOM** facility which explodes the first entry on screen into a detail format.

The display records menu, with zoom screen enabled:

Records: 4 used (1038 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234
Surname: [Dicker]		Firstname: [Shirley]	
Address1: []		Address2: []	
Address3: []		Postcode: []	
		Cost: []	
Telephone: []		Money: [50.00]	
Contact Date: [01JAN1992]		Analysis: []	

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	Z - ZOOM	C - CANCEL ZOOM
DISPLAY RECORDS	L - LOCATE RECORD	M - MENU

All the scroll features are still available so you can select additional items to ZOOM to by pressing **Z** again.

Press **C** to make the zoom screen go away and restore the full display of records.

Chapter 4 - Using the demonstration

You can also select different **SCREEN FORMATS** which control how you want to see your records.

Change format screen:

Records: 4 used (1138 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234

COMMANDS AVAILABLE	Format 1 of 5
CHANGE FORMAT	Select this item ? (Y/N)

The PFS provides for very flexible **ENQUIRIES** so you can list selected records according to your requirements.

The enquiry menu:

COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
ENQUIRIES	H - HELP	M - MAIN MENU

Chapter 4 - Using the demonstration

The enquiry selection screen:

Records: 4 used (1138 free)	File Description: PFS demonstration		
Surname	Firstname	Money	Telephone

Surname: [G]	Firstname: []
Address1: []	Address2: []
Address3: []	Postcode: []
	Cost: []
Telephone: []	Money: []
Contact Date: []	Analysis: []

DISPLAY ENQUIRIES	Enter search criteria for enquiry
-------------------	-----------------------------------

Pressing **TAB** during the enquiry selection causes the PFS to skip over the remaining input boxes. Make sure you have pressed **Return** to enter what you have just typed in before using **TAB**.

Use the **Left Arrow** key to move back to the previous input box.

The enquiry extract screen:

			File Extract
Records: 2 used (1140 free)	File Description: PFS demonstration		
Surname	Firstname	Money	Telephone
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234

Totals 100.00

COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
VIEW RECORDS	H - HELP	M - MAIN MENU

Note that you have extracted two records from a file of four in this example, by entering **G** in the surname field. Select **RELOAD RECORDS** to restore the full file of records when required.

First of all put the original PFS disk away so it is not picked up and used by accident.

We have grouped the various stages in setting up your new file into phases as follows:

Phase 1

This involves getting rid of all demonstration files that are listed in the PFS directory by choosing NEW DIRECTORY. This operation is not mandatory as you may wish to use some of file definitions we have supplied. The example files take up little space on your disk.

Phase 2

Next you need to enter a file name and description so you know what you are storing on your disk. Select NEW FILE to do this.

Phase 3

Now you are ready to define what kind of data you are going to enter into your file. The PFS needs this information so it can validate everything you type in. It also needs to know how to arrange your data in the file. This is known as FILE STRUCTURE.

Phase 4

The PFS offers you the complete flexibility of how you want your data displayed and printed, so you must define a detail and at least one summary format. We cover this under DESIGN FORMATS.

Phase 5

This is optional and depends on whether you have set up any fields in Phase 3 as a Lookup. You can set up your own codes and matching descriptions using SYSTEM CODES. These are automatically accessed when you wish to enter data into the related Lookup field on screen.

New Directory:

Select NEW FILE/DIRECTORY which is option 1 on the sub menu if you want to erase the demonstration (or any files) on the disk in drive 1/drive 2

New file/directory menu:

COMMANDS AVAILABLE	N - NEW DIRECTORY	F - NEW FILE
NEW FILE	D - DESIGN STRUCTURE	B - BORROW STRUCTURE
	H - HELP	M - MENU

As you are setting up your system for the first time then you may wish to select option **N** - NEW DIRECTORY, which will create a new PFS directory and erase any demonstration files.

You **ONLY** use this option when you wish to initialise a disk by creating a new PFS directory on it. If you use this option with a disk containing your latest PFS files then your existing PFS directory, containing all your file names, will be overwritten! Worse still, perhaps, the PFS will not be able to read any of your records.

New directory screen:

Records: 4 used (1038 free) File Description: PFS demonstration

- W A R N I N G - W A R N I N G - W A R N I N G - W A R N I N G -

Note that this option creates a new directory and will REPLACE any existing PFS directory and data files on the target disk

NEW DIRECTORY C - CONTINUE M - MENU

A bold warning is displayed on screen to make you aware of this before proceeding further.

The PFS gives you another chance to CONTINUE or select MENU at this point. Selecting MENU will obviously return you to the previous menu without doing anything else.

If you have chosen to CONTINUE then the PFS will create a new PFS directory on the disk in drive 1 and erase any demonstration files in the process.

New File:

Take option **F** (NEW FILE) of the NEW FILE/DIRECTORY menu and enter a file name to store your records under.

New file screen:

Records: 4 used (1038 free) File Description: PFS demonstration

Filename: [pfsfil] Description: [PFS Demonstration file]

NEW FILE NAME Correct ? (Y/N)

The PFS prompts you to respond to **Correct ? (Y/N)**. Press **N** to enable you to retype the file name and/or description, or press **Y** to accept it.

The PFS will then initialise a data file plus a series of related files to store the file structure and screen/printer layouts.

If you need to open another file then you re-select option **F** and enter another file name.

Designing a **FILE STRUCTURE** requires you to describe to the PFS how you want to store your data.

It is wise to give this some initial thought at the outset as it will save you some time. But not is all lost if you get it wrong or your requirements change, because the PFS does cater for any changes, even after you have entered some data.

The PFS can be configured to store your data in a serial file on disk or, for maximum capacity, each record can be split so that part is stored in a serial file whilst the remaining part is stored in a random access file.

The benefit here of course is that if you have two disk drives, or one drive plus a 1 MEG RAM expansion, your files can exceed 1 MEG in size! Even with one disk drive, you are still able to have files as large as the remaining space on your disk.

Of course the PFS (and MasterDOS) has to do a little more work in maintaining your records in this case and so this has an effect on speed. This is why we have provided the flexibility of choice.

See the section of this guide under the heading of **Recommended Configurations** for tips on deciding what is best for your requirements and computer set-up. Also if you are not quite sure about some of the terms used then please refer to the **Glossary**.

Example 'serial file' record:

Surname Firstname Address1 Address2 Postcode Ref

Example 'serial/random access' record:

Surname Ref KEYPTR Address1 Address2 Postcode Firstname

< serial > < random access >

It is good idea to identify which fields you are most likely to sort or search by at this time. These fields are identified as **key fields** and are stored in the serial file. As this is read into memory then sorting and searching the whole file is much improved in terms of speed (especially if you have MasterBASIC).

There is no need to extract search lists with the PFS as it holds **all** the key fields for **each** record in memory.

You will have noticed that an extra field has appeared in the second example. **KEYPTR** is used by the PFS to store the record number of the relative record in the random access file, so that the data can be extracted from two files and displayed together on your screen. This operation is totally automatic and invisible.

Refer to the demonstration file **random** on your release PFS disk as an example serial/random access file, all the other examples are defined as serial only.

Although your data may be stored physically in two files, that does not mean that you cannot make changes later ie move a field definition from the key field part of the record to the random access part or vice versa.

You can either select **DESIGN STRUCTURE** from the NEW FILE/DIRECTORY menu, which is the same as the ADD FIELD option from the FILE STRUCTURE menu, or you may choose to **BORROW STRUCTURE** from another file and modify it accordingly.

The file structure menu:

COMMANDS AVAILABLE	D - DISPLAY/P - PRINT	C - CHANGE FIELD
	A - ADD FIELD	R - RESTRUCTURE FILE
FILE STRUCTURE	H - HELP	M - MENU

The PFS requires four pieces of information to describe how you want to store your data:-

Field name - this is the narrative that appears on your screen and report formats so it is wise to make it meaningful.

Field type - used for validation purposes, choose from these:

- A** Alpha (letters and numbers)
- A1** Alpha and convert first letter of each word
- U** Alpha and convert all letters to uppercase
- D** Date format DDMMMYYYY eg 25SEP1993
- L** Lookup, the PFS will create a lookup code file with the same name as the field
- NO-3** Numbers only in four formats
eg ##, ###, #####, #####.##

Field key - identifies key and non-key fields, as follows

- PK** Primary Key for automatic sort order
- SK** Secondary Key for all other key fields also (in any position in the input box)
- T** Total, instructs the PFS to maintain a total for this field in ENQUIRIES

absence of PK and SK indicates to the PFS that the field is to be classed as part of the random access file

Field size - specify how many characters to reserve for this field. You can always modify this at a later date

If you wish to sort by a date field then you must repeat the field definition exactly, except for the field type, which becomes **N2**. The PFS will store a numerical date format (YYYYMMDD) in this field when you enter a date during data input. For example:

Contact Date	148	D	SK	9
Contact Date	157	N2	SK	8

If you have chosen the serial/random access record route (by **not** describing some fields as key fields) then you must define an additional field as **KEYPTR**, field type **A**, field key **SK**, length **2** (if using MasterBASIC) or length **5** (if not). This field is for use by the PFS and does not need to appear on any screen format.

The design structure/add field screen:

Records: 4 used (1138 free) File Description: PFS Demonstration

Field name Position in record Field Type Field key Field length

Surname	1	A1	PK	25
Firstname	25	A1	SK	10
Address1	36	A1	SK	25
Address2	61	A1	SK	25
Address3	86	A1	SK	25
Postcode	111	AU	SK	10
Telephone	121	AU	SK	12
Money	133	N3	SK	11
Analysis	144	L	SK	4
Contact Date	148	D	SK	9

Field name: [] Type: [] Key: [] Length: []

DESIGN STRUCTURE Field name describes your item of data..

Press **Y** to accept the field definition and either press **C** to continue entering more fields or **M** to finish. You can add further fields or make changes as required. The PFS will automatically calculate the respective field positions within a record and sort the fields into the order of key fields followed by non-key fields.

The PFS also provides the option of adding new fields at a later date and changing existing ones. The procedure closely follows that of DESIGN STRUCTURE.

When selecting a field to CHANGE/DELETE you can use **F** and **B** to scroll through the fields available. In addition you can use the **up** and **down arrow** keys: press the **left** and **right arrow** keys to jump several fields at once.

If you have made some changes after having entered some records then you may be asked whether you wish to **RESTRUCTURE FILE**. This may be because some key field has been re-classified as a non key field or vice versa, or the field length has changed, or perhaps you have entered another key field at a later date. We recommend that you proceed with the re-structure if you wish to ensure your data is re-organised in line with your new file structure.

It is a good idea to take a backup of everything before carrying out any file structure changes.

Tips:

Remember that a field consisting of its name and data space must fit on one line in the detail format box: the data does not wrap to the next line.

Divide long fields into several eg Address1, Address2, Address3.

Screen formats:

Summary formats provide reports with the data listed in columns whereas detail formats give you a free arrangement of data and are also used for zoom, input and enquiry screens.

You may build up to eight summary formats (this can be increased on request) so you can have different selections of data fields displayed.

The design formats menu:

COMMANDS AVAILABLE	S - SUMMARY FORMAT	D - DETAIL FORMAT
	L - LABELS	F - MERGE FILE
DESIGN FORMATS	H - HELP	M - MENU

After choosing summary or detail format, the field menu is displayed. First **SELECT FIELD**, these are presented to you in turn (use down/up/left/right arrow), then **MOVE FIELD** to position the field name (and data space) on the screen. Select **PLACE FIELD** to fix the position.

The field menu:

COMMANDS AVAILABLE	S - SELECT FIELD	M - MOVE FIELD
	P - PLACE FIELD	R - REMOVE FIELD
SUMMARY FORMAT	H - HELP	M - MENU

Repeat this until you have arranged your selected fields (you do not have to select all of them but, obviously, if you have not selected a field for the detail format then you cannot enter any data for it). Note that you can move the field around the screen and over existing fields (you may use the arrow/shift arrow keys for this). A format can be changed as many times as you like.

The move field menu:

COMMANDS AVAILABLE	L - MOVE LEFT	R - MOVE RIGHT
	U - MOVE UP	D - MOVE DOWN
MOVE FIELD	H - HELP	P - PLACE FIELD

The summary and detail screen formats are also used for the print formats.

The label and mail merge formats are similar except one is output to a printer and the other is written to a file. Fields can be overlapped on the same line on screen so that the data is joined together eg Mr Joe Bloggs (which could be three fields joined).

Chapter 9 - Entering your records

All additions, changes and deletions to your file are handled by option 2 of the PFS main menu (**ADD/CHANGE/DELETE**). Upon exit from this option your updated file is saved automatically. You will need to check that the file name displayed in the heading is the one you wish to update. If not then select FILE MANAGEMENT and load another file as required.

We recommend that if you are entering many records or making many changes that you frequently exit to the main menu and re-select this option to continue. This will keep the file updated on disk and will protect you to some extent.

The add/change/delete menu:

COMMANDS AVAILABLE	A - ADD	C - CHANGE
	F - CHANGE FORMAT	D - DELETE
ADD/CHANGE/DELETE	H - HELP	M - MAIN MENU

ADD mode operates in split screen format: the upper half of the main screen window displaying the last four records entered whereas the lower half presents you with an input screen.

The add/change/delete - add screen:

Records: 4 used (1038 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	5555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234
Surname: []	Firstname: []		
Address1: []	Address2: []		
Address3: []	Postcode: []		
	Cost: []		
Telephone: []	Money: []		
Contact Date: []	Analysis: []		

ADD MODE

You will note from the example screens that the field names that you typed in when defining the file structure are now shown on screen as literal text, next to an input box.

As you enter data into each input box the PFS automatically validates what you type, depending on what field type you have defined for the particular field.

There are four basic types:

- | | | | |
|---|---------------|---|-------------------------------|
| 1 | alpha-numeric | - | letters and numbers |
| 2 | numeric | - | numbers only |
| 3 | date | - | date format as day month year |
| 4 | lookup | - | lookup code |

Alpha-numeric:

You can enter all letters and numbers for this input. If you have set up the field type as **AU** then every letter you type will be converted into capitals. Field type **A1** will just convert the first character of each word: ideal for addresses.

Numeric:

Used for entering amounts and numbers generally, screening out any other illegal characters. What you type in is formatted and right justified according to the field type you have chosen (N0 - N3).

Date:

All dates in the PFS are entered in English. By this we mean that "1st January 1993" is entered as 01JAN1993. The PFS will convert the date into an internal, numeric format of YYYYMMDD for sorting purposes.

Lookup:

Enter the appropriate code for this record, if required. Whatever you enter will be validated against the respective code file of the same field name. Press **?** to obtain a list of codes to select from. All the system code files are optional.

Pressing the **Left Arrow** key within an input box restores the original information, if you haven't pressed **Return** to move to the next input box. Pressing the **Left Arrow** key again will take you back to the previous input box: so many of the usual mistakes can be corrected immediately.

When you have finished entering your record you are asked **Correct ? (Y/N)**. Press **N** to enable you to retrace the data entered, making corrections as required, or press **Y** to accept it and file it away.

After you have entered a record you will see it added to the list of records displayed in the upper half of the screen. This is intended as an aid to help you to ensure that you do not miss entering an item say if you are distracted during input eg., the phone rings. You can always return to the PFS and know exactly where you are at all times, even next month.

The ADD mode operates in a cycle so you can keep entering records by entering **C** to the "**C**ontinue/**M**enu" prompt or enter **M** to exit to the main menu.

Records are automatically sorted into order according to the primary key field (PK) that you have defined within the File Structure. The key data part of the record is stored in memory and saved to disk on exit to the main menu. If you have opted to use a random access file (by defining one or more fields as non key fields) then part of your record will be appended to the random access file. In this instance, the files are linked.

To cater for any little mistakes that creep into your file the PFS offers a **CHANGE** mode. You can locate a record for changing by entering a search parameter. This can be any combination of any search fields displayed on screen.

Quite often the record that you wish to change has only just been accepted as being correct. In this case when you are presented with the search choices mentioned above just press **TAB** to skip over all search fields on screen.

However you have selected your record for changing you can use the keys **B** and **F** (or **Up Arrow/Down Arrow**) to scroll either forwards or backwards to ensure that the record you wish to change is the first one in the display window in the top half of the split screen. At this point if you press **M** then you will exit to the previous menu.

Press **C** to continue with the change and a screen similar to the ADD screen will appear, but this time all the fields will be completed with information from your record that you have just selected. You can simply single step through by either pressing just **Return** to keep the original entry or re-type any fields that need changing. After you have made your change and pressed **Enter**, you can skip the remaining input boxes by pressing **TAB**. You are asked to confirm the record in the normal way.

If the incorrect record is beyond amendment or should not be there at all, you can select the **DELETE** mode. You select the record in the same way as a CHANGE but when you are satisfied with the selection you are asked to confirm the deletion.

The PFS offers comprehensive facilities for displaying and printing your records, so all the information you need is just a key press or two away. Additionally, you can choose many different screen formats so you can view the information in several ways. If you need to view all the information in respect of a particular record, then you can take advantage of the zoom facility. You can quickly find any record, using the minimum amount of information, by selecting the locate feature.

The view records menu:

COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
VIEW RECORDS	H - HELP	M - MAIN MENU

In order to view your records you select main menu option 1 (**VIEW RECORDS**) and press **D** for DISPLAY, assuming that you have already made sure that the file name displayed in the screen heading is the one you wish to look at. If not, then choose FILE MANAGEMENT (option 5 on the main menu).

The display records menu:

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	Z - ZOOM	C - CANCEL ZOOM
DISPLAY RECORDS	L - LOCATE RECORD	M - MENU

The PFS will respond by displaying the first twelve records that you have entered in this file and the menu in the bottom window will change to offer you more choices. You now have a window view of your records and by pressing **B** or **F** (or **Up Arrow, Down Arrow**) you can scroll the display **B**ackwards or **F**orwards.

In addition, you can use the **Left** and **Right Arrow** keys to page back and forth one screen full at a time, whereas **Shift Left** or **Shift Right Arrow** key will take you to the start or end of your file.

If you are processing the **PBS** Demonstration file then the first time you choose to view your records there may be a short delay while the PFS calculates the balances. When this happens a message will be displayed to this effect.

Chapter 10 - Displaying and printing your records

The display records screen:

Records: 4 used (1038 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	Z - ZOOM	C - CANCEL ZOOM
DISPLAY RECORDS	L - LOCATE RECORD	M - MENU

As all the information regarding a record may not displayed in summary format, you can use the **ZOOM** facility which explodes the first entry on screen into a detail format.

The display records menu, with zoom screen enabled:

Records: 4 used (1038 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234

Surname: [Dicker]	Firstname: [Shirley]
Address1: []	Address2: []
Address3: []	Postcode: []
	Cost: []
Telephone: []	Money: [50.00]
Contact Date: [01JAN1992]	Analysis: []

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	Z - ZOOM	C - CANCEL ZOOM
DISPLAY RECORDS	L - LOCATE RECORD	M - MENU

Press **C** to make the zoom screen go away and restore the full display of records.

Should you wish to **LOCATE** a particular record, then you press **L** to activate the enquiry selection screen. This operation closely follows that for ENQUIRIES, except that in this instance the PFS will locate the **last** record that matches the search criteria you have entered, whereas within ENQUIRIES **all** records matching the criteria are extracted.

The locate screen:

Records: 4 used (1038 free) File Description: PFS demonstration

Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234

Surname: []	Firstname: []
Address1: []	Address2: []
Address3: []	Postcode: []
	Cost: []
Telephone: [0483]	Money: []
Contact Date: []	Analysis: []

DISPLAY RECORDS	Enter search criteria to find record ...
-----------------	--

The example shown would find the last record containing **0483** in the telephone field, which would be the record for **Gibbons** in the display above. You can avail yourself of the scroll features to home in on the exact record you are interested in. Easy isn't it!

The LOCATE facility is also used in the CHANGE and DELETE modes to assist you in finding the record requiring change/deletion.

The PFS has comprehensive printing facilities. Select **P** on the **VIEW RECORDS** menu and the PFS will respond with a menu asking you to select in which format you wish to PRINT, either summary, detail or label. The summary and detail print formats are the same as for the screen *so what you see is what you print*.

The print records menu:

COMMANDS AVAILABLE	S - SUMMARY FORMAT	D - DETAIL FORMAT
PRINT RECORDS	L - LABELS	F - MERGE FILE
	H - HELP	M - MENU

The PFS will print your currently selected records if you have used ENQUIRIES to extract some, or **all** records in the file otherwise.

Before proceeding to print, the PFS asks you whether you wish to **C**ONTINUE or return to **M**ENU, just in case you wish to change your mind at this point.

If you find that your printouts do not quite fit on your printer paper, ie the heading creeps up or down each subsequent page, then you need to refer to Chapter 20 - **System configuration**. Here you will find the instructions of how to change the printer page length.

From the view records menu, the PFS provides you with a **STATISTICS** utility which informs you of how many fields have been defined for this file, plus how many screen formats have been set up. Press the **SPACE** bar to activate this (press again to make it go away).

Chapter 11 - Labels and Mail Merge

The PFS provides the facility to **PRINT LABELS**, one or more across the page of your currently selected records if you have used ENQUIRIES to extract some, or **all** records in the file otherwise.

The print labels screen:

Records: 4 used (1038 free)	File Description: PFS demonstration		
Surname	Firstname	Money	Telephone

Number of labels across: [2]	Lines down: [8]	Label size: [31]
------------------------------	------------------	------------------

PRINT LABELS	Correct ? (Y/N)
--------------	-----------------

Similarly, the **MERGE FILE** option outputs selected or all records to a named file (the file name in the PFS directory with **.OUT** appended). This is a serial file available for import to a wordprocessor, such as The Secretary.

Chapter 12 - Sorting your Records

Although your records are automatically sorted by the primary key field you specified, you can **SHUFFLE** the order at any time so that the records are sorted by one or two chosen fields. To effect this just enter a **1** in the field you wish to sort by, press **Return** followed by **TAB** to skip over remaining fields and press **Y** in response to the **Correct (Y/N)** prompt.

The shuffle screen:

Records: 4 used (1038 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Dicker	Shirley	50.00	
Dicker	Zoe	0.00	55555
Gibbons	Jack	50.00	0483 578983
Gold	Steve	50.00	1234
Surname: [1]	Firstname: [2]		
Address1: []	Address2: []		
Address3: []	Postcode: []		
	Cost: []		
Telephone: []	Money: []		
Contact Date: []	Analysis: []		
SHUFFLE FILE Enter a number to indicate shuffle order			

In order to fine sort your records, you can select a second field with a **2** when you have entered a **1** already. Enter a - in a field if you want to sort by inverse order (requires MasterBASIC).

The PFS incorporates routines to detect if you have MasterBASIC installed and will use the MasterBASIC sort if possible, thereby speeding up the sort process.

SHUFFLE operates on both serial and serial/random access files without having to build separate indexes or sort lists. If you are sorting by a field that is in the random access file then the sort speed will be slower.

The file will remain shuffled until you invoke ADD/CHANGE/DELETE or reload the file.

Tips:

If you are only interested in a selection of records from your file, it is better to extract those records using ENQUIRIES before invoking SHUFFLE.

If you find that you wish to sort by a particular field on a regular basis and it is defined as a non-key field (ie it is in the random access file) then it will be wise to select CHANGE FIELD and change the key type to **SK**.

ENQUIRIES selects records according to your selection criteria which are then stored in a temporary extract file. Further enquiries interrogate this extract file, ad infinitum. This enables you to perform very selective extracts for viewing and printing via option 1 on the main menu - this includes labels and mail merge. Select **RE-LOAD RECORDS** to restore the full file of records when required.

Select option 4 of the main menu and the PFS will ask whether you wish to output to **D**isplay or **P**rint. Choose **D** or **P** as appropriate: the PFS will produce the same output, but will re-direct the report according to your selection.

The enquiry (output selection) menu:

COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
ENQUIRIES	H - HELP	M - MAIN MENU

Next the PFS will display the enquiry screen which looks like the zoom screen, except you can enter your search requirements in the input boxes. This facility operates in a similar way to the LOCATE feature discussed earlier, except the PFS will now find **ALL** occurrences of records that meet your requirements.

The enquiry selection screen:

Records: 4 used (1038 free)	File Description: PFS demonstration		
Surname	Firstname	Money	Telephone

Surname: [Gib]	Firstname: []
Address1: []	Address2: []
Address3: []	Postcode: []
	Cost: []
Telephone: []	Money: []
Contact Date: []	Analysis: []

DISPLAY ENQUIRIES	Enter search criteria for enquiry ...
-------------------	---------------------------------------

Pressing **TAB** during the enquiry selection causes the PFS to skip over the remaining input boxes. Make sure you press **Return** first if you have entered anything. Use the **Left Arrow** key to move back to the previous input box.

Remember, you can make use of the SYSTEM CODES look up facility by pressing ? in one of the respective input boxes. The PFS will provide a list, in a separate window on your screen, from which you can make your selection. This way you can obtain a report of records selected by one or more of the categories you have identified.

The search parameter used for the enquiry is shown in the heading of the report. If you are searching by system code, then the respective description will be displayed instead of the code.

The enquiry extract screen:

File Extract			
Records: 1 used (1141 free)		File Description: PFS demonstration	
Surname	Firstname	Money	Telephone
Gibbons	Jack	50.00	0483 578983

Totals	50.00	
COMMANDS AVAILABLE	D - DISPLAY	P - PRINT
	F - CHANGE FORMAT	R - RELOAD RECORDS
VIEW RECORDS	H - HELP	M - MAIN MENU

Note that you have extracted one record from a file of four in this example. Select **RELOAD RECORDS** to restore the full file of records when required.

At the end of each page subtotals are shown for any fields that you have specified as a total. Similar totals are given at the end of the report.

In the event of no records being located for your enquiry then a message to that effect will be displayed.

Tip:

If you find that you wish to enquire by a particular field on a regular basis and it is defined as a non-key field (ie it is in the random access file) then it will be wise to select CHANGE FIELD and change the key type to **SK**.

LOADING and SAVING of files:

The loading of files is simplified by just having to make your choice from the PFS directory displayed on screen. There is no need to remember file names stored on your disk, the PFS takes care of all the remembering.

Additionally, you can configure the PFS so that when you start up it will always load the last file you were using. To activate this option you need to set the Autoload system parameter to **Y**. See the section on **System configuration** in Chapter 20.

All saving of files is handled automatically by the PFS as you exit from the ADD/CHANGE/DELETE facility.

A FILE MANAGEMENT facility is provided to enable you to view the files you have set up and load a different file when required.

The file management menu:

COMMANDS AVAILABLE:	D - DISPLAY/P - PRINT	B - BACKUP/RESTORE
	L - LOAD FILE	E - DELETE FILE
FILE MANAGEMENT	H - HELP	M - MAIN MENU

For example, when you need to load a different file then press **L** for LOAD FILE and the SELECT FILE screen will be displayed.

Select file screen:

Records: 4 used (1038 free) File Description: PFS Demonstration				
Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index
6	random	10/10/93	12	Random access file

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	S - SELECT ITEM	M - MENU
SELECT FILE		

The first file name shown on screen is always highlighted (the currently selected item) and using the **B** and **F** keys (or the **Up** and **Down Arrow** keys, or **left** and **right arrow** keys) all the file names will scroll back and forth, so you can make your selection.

System Codes:

When you are adding or changing a record in the PFS and the current field is defined as a Lookup then you will be prompted to press **?** for a list of codes to choose from. In enquiry mode the code is replaced by the respective description in the heading.

A field when defined as Lookup will cause a file of the same name to be created in order to store Lookup codes and descriptions.

These Lookup files will now be presented to you in turn for selection, so you can enter your codes and descriptions as appropriate and generally maintain them.

If you should define a Lookup code field of the same name in two or more separate files eg the Analysis code which is defined in both PBSFIL and PBS_SO

then the same Lookup code file will be referenced by both files or more.

Select SYSTEM CODES on the sub menu so that you can set up your own codes or modify those we have provided as an example. If you want a printout of your codes then press **P**.

The system codes menu:

System Codes: Analysis			
Code	Description	Code	Description

Code: [] Description: []

COMMANDS AVAILABLE	A - ADD	C - CHANGE
	L - LIST/P - PRINT	D - DELETE
SYSTEM CODES	H - HELP	M - MAIN MENU

Each code file is saved to the PFS disk in drive 1 on exit to the menu.

RAM Drives:

If a 1 MEG memory expansion is connected when you start the PFS then you will be asked whether you wish to use RAM drives for the temporary storage and retrieval of records. If you respond with a **Y** for yes then the following processes are actioned by the PFS:

RAM drives D3 (213K) and D4 (780K - same format/capacity as a disk drive) are formatted to hold serial file(s) from drive D1 and random access file(s) from drive D2 - this equates to the 1 MEG RAM plus 3 pages of 16K from the main 512K reserved for RAM disks.

Data and all support files are copied from drive D1 to D3 and random access files are copied from drive D2 to D4. If you have just drive D1 then you will be prompted to swap disks - first of all files will be copied from your PFS program disk then from your data disk (which contains random access files only).

All file loading, saving and update is then from/to drives D3 and D4 for the duration of the current session.

On exit from the PFS you are prompted to copy the files from the RAM drives to drive D1 and D2 (you will be able to swap disks again if you are using just one drive), in order to make your file changes permanent.

Remember all changes to files held in RAM drives are temporary until you have copied the files back to a real disk drive.

Should you be unfortunate in that your PFS aborts and returns you to BASIC before your file changes have been made permanent then we recommend that you follow the procedures listed under **Error Recovery** in order to protect your data.

The PFS assumes that you have an unused 1 MEG memory expansion connected at start up and does not automatically format the RAM drives if some of the 1 MEG memory already contains data. In this instance, the program will abort with an error number 1 (out of memory) so that you can investigate the contents prior to deleting it. You can use the PFS **clearRAM** procedure to initialise the 1 MEG RAM before re-starting the PFS.

We believe that you cannot attach too much importance to this subject that is why we have decided to devote a separate chapter to it.

The PFS incorporates file utilities so that you can save a copy of the PFS directory and its associated files onto a separate disk for backup purposes. However, you may wish to use a disk copy utility which is generally available.

The backup/restore menu:

COMMANDS AVAILABLE:	B - BACKUP FILES	R - RESTORE FILES
	H - HELP	M - MENU
BACKUP/RESTORE		

We recommend that you **WRITE PROTECT** your source disk (the one you are backing up) before proceeding with either backup or restore: do this by sliding the little black square in one corner of the disk so that the hole is showing.

The PFS will guide you through the backup process with prompts to insert the SOURCE and TARGET disks in the right sequence. The SOURCE disk is the one you are copying.

It is wise to operate a "parent/child" sequence of using disks for backup. With this method you backup on disk number 1 in the first instance. For the next backup you use disk number 2. On the next occasion, you backup using disk number 1 again. You keep rotating the sequence of using your disks so you never have to overwrite your latest backup copy. Do not forget to clearly label all disks for ease of identification.

How often you should take backups depends on the volumes you are handling. But it is a good idea to take copies at least once a month, or more frequently and perhaps even keep copies at a different location.

Remember to keep working copies of your PFS program disk.

We have all become more security conscious (or should have) since the Data Protection Act become law in the UK. However, the need to keep private information away from prying eyes has always been present.

The PFS has a password controlled security which can be switched on or off by using the utility PFSIPL which you may choose to keep on a separate disk to prevent its use by anybody. We have endeavoured to make the password control the least cumbersome as possible but at the same time effective.

When passwords are made active then a particular file can only be accessed if the correct password is known. You are allowed three attempts at entering the password.

Select file name screen (with passwords enabled):

Records: 4 used (1038 free) File Description: PFS Demonstration

Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index

Enter PASSWORD: []

COMMANDS AVAILABLE	F - SCROLL FORWARD	B - SCROLL BACKWARD
	S - SELECT ITEM	M - MENU
SELECT FILE		

So you can set up password profiles for selected persons to access their individual files we supply the utility PFSIPL, which is described more fully in Chapter 20 - **System configuration**.

The utility is designed so that you can select your file from the PFS directory and enter your password. The holder of the first file in the PFS directory is the Master Password holder and has access to all passwords.

Other holders of files can only enter/display/change their own password and need their existing password to display and change it.

Although every care has been taken in the design of the PFS to safeguard your data eg automatic saving of files as soon as you complete the ADD/CHANGE/DELETE process, you may be unfortunate in having an error message displayed for a variety of reasons.

Perhaps the most likely of these is that a disk is not in its drive or the write protect tab is on. In fact any errors relating to the disk drives are usually shown in full so that you can correct the matter and tell the PFS to resume.

More unexpected would be an error in running the BASIC code and, in this instance just an error number is shown. Please make a note of any errors in this situation together with what you were doing at the time the error occurred.

The PFS will allow three tries in trying to overcome the error before returning you to BASIC. This may be a problem in two cases:

- 1 you have made changes to your records and have not yet returned to the main menu so the changes have not been filed away - to overcome this problem type **SAVEFILE** and press **Return**.
- 2 you have been using RAM drives and have made changes as in 1 which have been saved to RAM drive but the PFS has not copied the modified files to disk - just type **SAVERAM** and press **Return**.

You can opt to quit upon receiving an error message by pressing **Q** instead of any other key to retry.

If you are using random access files and you have aborted with an error which has returned you to BASIC then you may see an error message **Channel used**. Before you can restart the PFS you will have to type **CLEAR #** and press **Return**.

So you can customise your PFS to your precise requirements, we provide you with an **I**nitial **P**rogram **L**oad utility - just like the biggest computer company in the world.

To run PFSIPL you can either type **LOAD "autoPFSIPL"** and press **Return**. Alternatively, you can start up the PFS first by pressing function key **F9**, then select **EXIT**. Now type **LOAD "PFSIPL"** and press **Return**.

The pfsipl main menu:

**** PFS IPL UTILITY ****

WELCOME TO THE
PFS INITIAL PROGRAM LOAD
Version 2.06

Copyright: Hilton Computer Services Ltd

COMMANDS AVAILABLE	1 - COLOURS	4 - PASSWORDS
	2 - PRINTER CONFIGURATION	5 - REPORT HEADINGS
MAIN IPL MENU	3 - SYSTEM PARAMETERS	6 - EXIT

Any changes made within PFSIPL are automatically saved to disk and become effective when you next run the PFS.

You may wish to experiment with the choice of **COLOURS** if you want a change from white on blue and white on black. The PFS operates with the SAM Coupe's default PALETTE which is set in the **autoPFS** program. Changing the PALETTE in the **autoPFS** program will provide you with a different set of colours to choose from.

To change the PALETTE settings you need to clear any program from memory by typing **NEW** and then load the autoPFS program so it does not autorun:

type **MERGE "autoPFS"** followed by **Return**

Now make your PALETTE changes and re-save the program by typing **SAVE "autoPFS" LINE 10** and press **Return**. There is no need to make any changes to the main PFS program.

The colours screen:

** PFS IPL UTILITY **

Restore defaults: [N] Border colour: [0] Foreground title colour: [7] Background title colour: [5] Foreground help colour: [7] Background help colour: [0] Foreground display colour: [7] Background display colour: [0] Foreground input colour: [7] Background input colour: [0] Foreground menu colour: [7] Background menu colour: [5]	Example colours are displayed on this side.
--	---

COLOURS	Correct ? (Y/N)
---------	-----------------

As you can see from the example display, different windows on the screen have been allocated different colour codes.

The **PRINTER CONFIGURATION** facility is intended to provide reports with different style typefaces eg elite, and bold report headings. There is an option to send an initialisation sequence of codes to your printer on start up.

The printer configuration screen:

** PFS IPL UTILITY **

Carriagereturn [13][][]	Bold [27][71][]
Linefeed [10][][]	Endbold [27][72][]
Formfeed [12][][]	Underline [27][45][1]
Elite [27][77][]	Endunderline [27][45][0]
Endelite [27][80][]	Doublewidth [27][87][1]
Condensed [15][][]	Enddoublewidth [27][87][0]
Endcondensed [18][][]	Initialise [27][77][]

PRINTER CONFIGURATION	Correct ? (Y/N)
-----------------------	-----------------

Printer codes are defined in your printer manual for your particular make and model of printer. You may enter up to three sets of numbers for each printer effect - these are entered in decimal. We have entered some example codes for you already, based on an Epson printer.

For example, the printer (or ESCape) code on an Epson RX80 for setting the character set to Elite is **ESC M**. This is entered as **27 77** with nothing in the third box - **27** is the ASCII code for **ESC**, whereas **77** is the code for **M**. A table of ASCII codes will be found in your SAM Coupe users guide and most certainly in your printer manual.

Setting the Formfeed option to **13** will turn off the automatic formfeed carried out after printing.

The PFS is a parameter driven system, reflecting its flexible design, which means it can be customised to the users' needs. The **SYSTEM PARAMETERS** option enables you to access the heart of the system. Note that changes have to be made with extreme care. Do **NOT** experiment with the parameters that you do not understand.

The system parameters screen:

**** PFS IPL UTILITY ****

```
Number of files per directory: [32]
  Records per transaction file: [256 ]
    Records per secondary file: [32 ]
Records per system code file: [64 ]
  Number of fields per record: [32]
    Number of screen formats: [8 ]
    Number of number formats: [4 ]
      Printer lines per page: [66]
        Printer page width: [80 ]
          Drive 1: [D1:      ]
          Drive 2: [D1:      ]
Activate password control (Y/N): [N]
Activate autoload option (Y/N): [N]
```

SYSTEM PARAMETERS Correct ? (Y/N)

This is where you can change your system from one drive operation to two (by changing Drive 2 to **D2:**) and vice versa. Drive 1 is used for program, system and key(data) files. Drive 2 is used for storing random access data files only.

You can also increase the size of new system code files and modify your printer settings.

To activate the password control feature enter a **Y** and you will be prompted to enter a password for each file that you load.

The PFS can be configured to automatically load the last file used when starting up. Handy if you are constantly using one file regularly. Just enter a **Y** against the autoload option.

We do not recommend your changing anything else, except under the direction of Hilton.

In order to set up and maintain the passwords used in the PFS you need to select option 4 (**PASSWORDS**) of the main ipl menu. The PFS will respond by displaying the passwords menu, which offers you the following choices:-

The passwords menu:

COMMANDS AVAILABLE	O-CHANGE OWN PASSWORD	A-CHANGE ALL PASSWORDS
PASSWORDS	D-SCROLL DIRECTORY	M-MENU

The holder of the first file in the PFS directory is the master password holder and has access to all passwords.

Other holders of files can only enter/display/change their own password and need their existing password to display and change it.

All key presses for passwords are shown as - on screen so nobody can see what you are typing (in good password tradition).

You are allowed three attempts at entering a correct password for the file selected. After three unsuccessful attempts you are returned to the passwords menu.

Selecting **CHANGE OWN PASSWORD** enables you to select a file just as if you were about to load it. You will then be prompted to enter the current password for the selected file. If you have not given it a password yet, type six spaces and press **Return**.

The enter password screen:

Records: 4 used (1038 free) File Description: PFS Demonstration				
Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index

Enter PASSWORD: []

CHANGE OWN PASSWORD

Having entered a correct password, the screen changes to show you the current password and request that you enter a new one.

The change own password screen:

Records: 4 used (1038 free) File Description: PFS Demonstration				
Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index

Current password: [JOE] Enter new password: []

CHANGE OWN PASSWORD

Selecting **CHANGE ALL PASSWORDS** enables you to select each file in turn and change the respective passwords. In order to do this you must enter the current password for the **first** file in the PFS directory. If you have not given it a password yet, type six spaces and press **Return**.

The enter password screen:

Records: 4 used (1038 free) File Description: PFS Demonstration

Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index

Enter PASSWORD: []

CHANGE ALL PASSWORDS

Having entered the correct password, the screen changes to show you the current password and request that you enter a new one.

The change all passwords screen:

Records: 4 used (1038 free) File Description: PFS Demonstration

Dir	Filename	Date	Records	Description
1	pfsfil	10/10/93	14	PFS Demonstration file
2	pbsfil	10/10/93	14	PBS Demonstration file
3	pbs_so	10/10/93	6	PBS Standing Order file
4	stamp	10/10/93	0	Stamp collection
5	index	10/10/93	10	Format index

Current password: [JOE] Enter new password: []

CHANGE ALL PASSWORDS

Having accepted the new password, or just pressed **Return** to leave it unchanged, you are then shown **each** password in turn, for **each** file in the PFS directory.

Either enter a new password or leave the password unchanged, as appropriate.

When you have cycled through all the files you are returned to the password menu. Each file is automatically updated with the new password.

Should you just wish to view the files stored in the PFS directory then select SCROLL DIRECTORY. This facility operates just like the option within FILE MAINTENANCE of the PFS.

Remember that the passwords facility only takes effect within the PFS when you have set the ACTIVATE PASSWORD CONTROL option in SYSTEM PARAMETERS to **Y**.

Chapter 20 - System configuration

The **REPORT HEADINGS** option on the main ipl menu is designed to enable you to customise the headings that will be printed on specific reports generated by the PFS. This is not yet supported.

The report headings screen:

** PFS IPL UTILITY **

Report 1: []
Report 2: []
Report 3: []
Report 4: []
Report 5: []
Report 6: []
Flag 1: []	Flag 2: []

REPORT HEADINGS	Correct ? (Y/N)
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PBS VERSION NEWS:

- o Spectrum (all models)
Version 5b is available on cassette, cartridge or 3.5 disk (specify Opus or PlusD) for £12 - all formats, with Bank Reconciliation included.

BBC B (also Archimedes)
Version 2 with its superior speed over the Spectrum is available on cassette or disk for £10.

QL (QLiberated)
Version 3.05 can be supplied on cartridge or disk for £19.95, with Bank Reconciliation included.

Amstrad CPC (disk models)
with Bank Reconciliation Version 2.02 for 464 or Version 3.02 with memory bank switching (6128 only) yours for just £19.95.

PC (Amstrad, IBM and all compatibles)
with Bank Reconciliation Version 2.09 with multiple screen formats for £39.95.
New Price: £29.95 for clients upgrading from other computers.
- o SAM Coupe 256/512K
Superior version (2.06), based on the PC variety and packed with useful, labour saving features for £19.95.

NEW RELEASES:

- o Personal Filing System
The definitive database program for the SAM Coupe - WYSIWYG screen and report formats, redesign anytime, inbuilt totalling, field validation, flexible and simple to use, for £19.95. (Specify SAMDOS/MDOS+MBAS.)
Special price of £18.00 for existing clients.
- o GamePlan for the PC
Involved in running a sports club/league? Talk to us and find out how GamePlan can help you. Full range of product and services.
- o Final Accounts for the PC
The PBS General Ledger module, which provides your final accounts, a full Profit & Loss and Balance Sheet, from your PBS transactions at £49.95 complete.
- o PBS Budget module
Analyse your expenditure. Enquiries spanning multiple a/c's, plus reports and graph.
New price: £14.95 PC or £9.95 SAM Coupe.

Exit

Records: 4 used (1038 free) Description: PFS Demonstration

Thank you for using the Personal Filing System

EXIT

Glossary

Byte:	In filing terms, usually refers to amount of memory or disk space to store one character (sometimes two characters) otherwise a unit of memory or disk space.
Database:	Usually means a file: a collection of information known as data organised into records, which are subdivided into fields. A true database consists of a number of related Tables interlinked in one file.
DOS:	Disk (or Disc) Operating System - a low level program that lets you control all access with disk drives.
Field:	A subdivision of a record into component parts so you can store your data in a regular order. eg surname, first name, address
File:	Synonymous with a file in a filing cabinet: a collection of information known as data organised into records, which are subdivided into fields.
Format:	In this instance, refers to how you arrange your fields on the screen/printer. Can also mean to initialise a disk or refer to a well known magazine in the Spectrum/SAM world.
Hilton	An underrated software house that has been supplying products for the home computer market since 1981
Index:	A method of marking your records so you can sort them into order or speed up looking for selected records - just like the index in a book.
K:	A Kilobyte is the same as 1024 bytes.
Key:	Usually refers to one or more fields which are used to create the index.
Lookup:	A method of storing a short code in a record which can be expanded into a full description on reports.
Mail merge:	The facility to create an extract file of selected records from your main file which can be read by a compatible word processor. This enables you to type one master letter which can be addressed to all the subjects mentioned in the extract file.

Glossary

Operating System:	Sometimes referred to as DOS although the OS really encompasses all the tasks needed for the computer to communicate with all devices, including screen, keyboard and memory.
RAM:	Random Access Memory - either 256 or 512K. Also used to describe RAM drives.
RAM drive:	A protected area of memory that the computer is fooled into thinking it is a disk drive. All disk commands operate in exactly the same way but everything you store on the RAM drive gets lost as soon as you reset your computer.
Random access:	A method of reading and writing to a file by physical record number that saves you having to step through all the records for the one that you want.
Read:	Copy one record from a file on disk and store it in memory.
Record:	A collection of information (data) about one subject eg surname
Relational:	A method of linking files in an efficient way to avoid duplication of data and facilitate enquiries
Serial:	Reading and writing to a file sequentially.
Structure:	How the records are organised into fields and what kind of fields.
Table:	Another name for file.
Validation:	Facility to ensure that what you type in is not rubbish as far as possible.
Write:	Copy one record from memory and store it in a file on disk.
X:	Those technical terms excluded from the glossary because of the author's ignorance.

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