

Sheet1

MEMO_ MEMO_LINE,C,74

001001 !!!Welcome to the Action Management System
001002 Welcome to the Action Management System or AMS for short. I believe that
001003 you will find it a great tool for improving both your productivity and
001004 that of your work group. The Action Management System or AMS for short
001005 is a personal computer based management system that allows three levels
001006 of management to track assigned work activities or action items. The
001007 system includes the following features:
001008
001009 + Program and management concept proven through workplace experience
001010 + Easy to use menu driven program requires little training to learn...by
001011 boss, employee, or secretary
001012 + Traveler format allows easy copying and distribution of action items
001013 and related documents
001014 + Flexible features allow AMS to accommodate one's management style
001015 either writing action items directly on the computer or travelers
001016 + Easy to read printed reports for three levels of management: manager,
001017 supervisor, and employee.
001018 + Reports show action items in the order they are to be completed with
001019 special banners for items that are late, due this week, and due after
001020 this week
001021 + Management summary reports to show status of late items and workload
001022 distribution
001023 + Reports keyed on item type code
001024 + Reports keyed to action item priority
001025 + Record of completed items provides historical record of employee
001026 actions or actions in support of a particular activity
001027 + Historical reports that assess workload, employee performance on
001028 completing items on time and lists of completed items by supervisor,
001029 employee, or type code
001030 + Automatic scheduling of periodic or repetitive action items
001031 + Directory to track and check Type Codes to insure consistency from item
001032 to item upon item entry
001033 + Flexible program format with many options allows changes in format
001034 based organizational needs
001035 + Provides method for action item status feedback to management
001036 + A tutorial with demonstration files that can be swapped with real files
001037 to allow experimentation
001038 + Word wrap, extended fields and a spelling checker for action and status
001039 fields expand the functionality
001040
001041 Most important AMS can become an integral part of your management system
001042 that helps everyone get the job done on time.
001043
001044 A brief word about conventions. Words or letters in quotes when entered
001045 should be entered without the quotes unless specifically stated
001046 otherwise. The same goes for the greater than and less than signs, (<>),
001047 that are used to indicate a menu option.
001048

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001049 Where should you go from here? Next I would suggest that you read the
001050 Chapter: Getting Started which has important information about program
001051 setup, registration, and licensing. Next read the Chapter: Managing
001052 Action Items with AMS. This chapter explains how AMS is intended to fit
001053 into the management environment and is a key to the successful use of
001054 AMS. Then read and do the Chapter: The AMS Tutorial. The tutorial will
001055 give you a good basic understanding of AMS. These are the next 3
001056 chapters.
001057
001058 Thanks for using AMS. Bill Tucker
001059 [End of Chapter]
002001 !!!Getting Started with AMS
002002 This chapter provides the information you need to setup and get started
002003 using AMS. It includes:
002004
002005 The Shareware Concept
002006 Registration, Disclaimer, Agreement, and Limitations
002007 Initial Program Installation
002008 Update to New Program Revision
002009 Program Startup
002010
002011 ***The Shareware Concept
002012
002013 Shareware distribution gives users a chance to try software before buying
002014 it. If you try a Shareware program and continue using it, you are
002015 expected to register. Individual programs differ on details. With
002016 registration, you get the simple right to continue using the software.
002017 Copyright laws apply to both Shareware and commercial software, and the
002018 copyright holder retains all rights, with a few specific exceptions as
002019 stated below. Shareware authors are accomplished programmers, just like
002020 commercial authors, and the programs are of comparable quality. (In both
002021 cases, there are good programs and bad ones!) The main difference is in
002022 the method of distribution. The author specifically grants the right to
002023 copy and distribute the software, either to all or to a specific group.
002024
002025 Shareware is a distribution method, not a type of software. You should
002026 find software that suits your needs and pocketbook, whether it's
002027 commercial or Shareware. The Shareware system makes fitting your needs
002028 easier, because you can try before you buy. Because the overhead is low,
002029 prices are low also. Shareware has the ultimate money back guarantee that
002030 is if you don't use the product, you don't pay for it.
002031
002032 ***Registration, Disclaimer, Agreement, and Limitations
002033
002034 The registration form may be printed from the shareware screen displayed
002035 on program start up by entering a "Y" or by entering Option "X" from the
002036 Main Menu. Please print and complete the registration form. When I
002037 receive your registration and the applicable fee I will send instructions
002038 for disabling the shareware screen.

002039

002040 Users of the Action Management System must accept this disclaimer of
002041 warranty: "The Action Management System is supplied as is. The author
002042 disclaims all warranties, expressed or implied, including, without
002043 limitation, the warranties of merchandisability and of fitness for any
002044 purpose. The author assumes no liability for damages, direct or
002045 consequential, which may result from the use of the Action Management
002046 System."

002047

002048 The Action Management System is a "shareware program" and is provided at
002049 no charge to the user for evaluation. Feel free to share it with your
002050 friends, but do not give it away altered or as part of another system.
002051 Such shared copies must be in the compressed self extracting file that
002052 includes all the unaltered files that it contains.

002053

002054 The concept of "user-supported" software is to provide personal computer
002055 users with quality software without high prices, and yet to provide an
002056 incentive for programmers to continue to develop new products. If you
002057 find this program useful and find that you are using the Action
002058 Management System and continue to use the Action Management System after
002059 a reasonable trial period, you must make the registration payment. The
002060 registration fee will license one copy for use on any one computer at any
002061 one time. Treat this software just like a book. This software may be
002062 used by any number of people and may be freely moved from one computer
002063 location to another, so long as there is no possibility of it being used
002064 at one location while it's being used at another. Just as a book cannot
002065 be read by two different persons at the same time.

002066

002067 Commercial users of the Action Management System must register and pay
002068 for their copies of the Action Management System within 30 days.
002069 Evaluation copies of the Action Management System may be distributed
002070 provided the cost is \$10.00 or less and the program is distributed in an
002071 unmodified form as described above. This is not to be construed as
002072 representing the registration fee which must still be paid as described
002073 above.

002074

002075 You are encouraged to pass a copy of the Action Management System along
002076 to your friends for evaluation. Please encourage them to register their
002077 copy if they find that they can use it. All registered users will receive
002078 a copy of the latest version of the Action Management System.

002079

002080 ***Initial Program Installation

002081

002082 This section covers both initial program installation. If you have
002083 already installed AMS and are installing an updated version skip to the
002084 next section to install a program update.

002085

002086 Before proceeding you may want to check the basic system hardware and
002087 software requirements for AMS which are described in a later Chapter:

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002088 Hardware Requirements.
002089
002090 Make a backup copy of your AMS files. Consult your Operating System User
002091 Guide and Reference for detailed procedures.
002092
002093 AMS is provided in several formats. The first is a self extracting file
002094 of the format AMSxxx.EXE where xxx is the version number. The second is
002095 as a ZIP file using the PKWARE compression system and having the format
002096 AMSxxx.ZIP where xxx is the version number. (Bulletin Board System
002097 Operators may change the names to conform to their naming conventions.)
002098
002099 If AMS is in the ZIP format place the compressed file in a convenient
002100 directory on your hard disk drive other than the root directory.
002101 Decompress the file using appropriate procedures for your system.
002102
002103 If you are installing AMS using the self extracting format it is
002104 installed as follows: Place the installation diskette in an available
002105 drive which will usually be either "A" or "B". Select the drive in which
002106 the diskette is placed by entering: "A:" and press the enter key. (On
002107 some machines the "Enter" key may also be labeled "Return".) Then copy
002108 the compressed self extracting file into a convenient directory of your
002109 choosing on the hard disk. (AMS may be installed from a directory
002110 designated \AMS. This will save disk space during installation.)
002111
002112 A:\COPY AMSxxx.EXE C:\TEMP
002113
002114 Set the current directory to the directory in which it resides:
002115
002116 C:\CD\TEMP
002117
002118 Extract the files by typing the file name (the xxx should be replaced
002119 with the file Version number) and pressing "Enter":
002120
002121 AMSxxx "Enter"
002122
002123 The decompressed files will be placed in the current directory after the
002124 extraction is complete.
002125
002126 To install AMS type "INSTALL" followed by a space and the letter of the
002127 drive on which the program is to be installed. As this will usually be
002128 "C" drive it will be so assumed for the rest of this discussion and the
002129 entry should look like this:
002130
002131 INSTALL C "Enter"
002132
002133 This command will automatically install the program on drive "C" in
002134 directory "C:\AMS" and a small batch start up file "AMS.BAT" will be
002135 placed in the root directory "C:\". If you decompressed the files in the
002136 \AMS directory and are running INSTALL.BAT from that directory you will

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002137 receive the warning "File cannot ber copied onto itself" which is normal
002138 and can be ignored.
002139
002140 When the file installation is complete AMS will initiate a start up
002141 sequence that consists of several screens that provide details for basic
002142 program configuration. Follow the instructions on the screen. At the
002143 last screen save the configuration entered as instructed. If a
002144 dictionary has not been installed before AMS will index the dictionary
002145 which will take some time especially on slower machines. (If you used a
002146 temporary directory to extract the files at the completion of the
002147 installation you may erase the files in the temporary directory where
002148 they were extracted.)
002149
002150 A shareware and registration screen will then be displayed. Print a copy
002151 of the Registration form by pressing "Y". Then press any other key to
002152 display the title and password screen. If a password was selected you
002153 must enter it exactly and press "Enter". If no password was entered just
002154 press enter and the program Main Menu will be displayed.
002155
002156 This will install the program files and demonstration files in the \AMS
002157 directory.
002158
002159 Although AMS is a DOS based program it may be run from Windows. To
002160 facilitate this an ICON file and a PIF file have been placed in the \AMS
002161 directory. Complete the following steps to add the AMS program and icon
002162 to a windows menu window:
002163
002164 1. Use the "FILES" Option from the Windows Program Manager window, and
002165 select "NEW".
002166 2. Select the "ITEM" block.
002167 3. In the "TITLE" block enter "AMS".
002168 4. In the "Program" block enter "C:\AMSVAMS.PIF". (This assumes that the
002169 drive on which AMS is located is C, if it is another drive substitute
002170 the letter for that drive for C.)
002171 5. Select the "ICON" option, then "BROWSE" and find the icon file
002172 (AMS.ICO) in the \AMS Directory and select it.
002173 6. Save the above information and the AMS icon will be displayed on
002174 the selected window.
002175
002176 It should be noted that AMS must be run with CONFIG.SYS file minimum
002177 settings of at least BUFFERS=8 and FILES=45. These settings will be
002178 checked during the installation process but if these minimum settings are
002179 not met AMS may not run properly. These setting also depend on your
002180 system and the software you paln to run.
002181
002182 This completes the basic program installation. To fully utilize AMS you
002183 should complete the following:
002184
002185 + Read the next Chapter: Managing Action Items With AMS. This provides

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002186 an important prospective on how to integrate AMS into your management
002187 environment. You may want to print this chapter by selecting the
002188 chapter form the Help Menu then selection option <C> to print this
002189 single chapter.
002190
002191 + Read and complete the Chapter: The AMS Tutorial and Demonstration
002192 Files. This will take about a half hour but is much easier then trying
002193 to read the Users Manual! You may want to print this chapter by
002194 selecting the chapter form the Help Menu then selection option <C> to
002195 print this single chapter.
002196
002197 + If you desire to set advanced program options read through the Chapter:
002198 Program Setup Menu. This will tell you how to setup advanced program
002199 features.
002200
002201 + If you desire print the AMS User's Manual using Option <!> form the
002202 Help Menu. This will print the entire On-line Help in the form of a
002203 User's Manual. If this is done it will include the two chapters
002204 mentioned above and they need not be printed separately.
002205
002206 ***Update to New Program Revision
002207
002208 This procedure assumes that AMS is already installed on your system in
002209 directory \AMS.
002210
002211 Place the compressed file in the \AMS directory or other convenient
002212 directory and extract the AMS program files from the compressed file. It
002213 you extract the new files in the \AMS directory you will overwrite some
002214 of the files of the previous version but no harm will be done as the data
002215 files will not be damaged. When you are asked if you want to overwrite
002216 previous files answer yes so the new files will overwrite the old. (If
002217 you are unsure on how to do this see the section above.)
002218
002219 To update AMS shift to the directory in which the AMS update file resides
002220 and type "UPDATE" followed by a space and the letter of the drive on
002221 which the program is to be installed. Then press the "Enter" key.
002222 Assuming AMS will be installed on the "C" drive the entry should look
002223 like this:
002224
002225 UPDATE C "Enter"
002226
002227 This program will copy the new files into the \AMS directory (if other
002228 then the directory in which they were extracted). The new files will be
002229 copied over the old program files but will not heart any data entered
002230 under a previous version of AMS.
002231
002232 IMPORTANT NOTE: If you update from an earlier version it should be noted
002233 that AMS must be run with CONFIG.SYS file minimum settings of at least
002234 BUFFERS=8 and FILES=45. These settings will NOT be checked during the

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002235 update process but if these minimum settings are not met AMS may not run
002236 properly. The CONFIG.SYS file should be checked and updated. Then the
002237 computer should be rebooted before running AMS.

002238

002239 If you update AMS from a version before 5.00 an ICON and PIF file have
002240 now been included in the \AMS directory and may be used to run AMS from
002241 windows. Windows installation is described above.

002242

002243 Now start the program as normal and the appropriate changes will be
002244 incorporated automatically upon the first program start up. A brief
002245 review of the version changes is included in the Chapter: Program Update
002246 Summary. This completes program update.

002247

002248 If you update from a version before 5.00 you must pay an update fee and
002249 obtain a new license. Fees are indicated on the registration form. Your
002250 old serial number and key will not work.

002251

002252 ***Program Startup

002253

002254 Start AMS by entering "AMS" and pressing the enter key:

002255

002256 AMS "Enter"

002257

002258 This will start the Action Management System Program. If the program has
002259 not been registered a shareware and registration screen will appear.
002260 Press any key other then "Y" to proceed. A title, copyright, and
002261 password screen will be displayed and a password will be requested if one
002262 has been entered. If no password has been entered just press "Enter",
002263 and the Main Menu will be displayed. If a password is installed it will
002264 be necessary to enter the password before pressing "Enter". The password
002265 must be entered exactly using capital letters and small letters. These
002266 letters will not be displayed as they are entered for security.

002267 [End Chapter]

003001 !!!Managing Action Items with AMS

003002 This section provides an overview of how to make AMS work for you!

003003

003004 The basic concept on which AMS is based is described; however through
003005 the years AMS has evolved so there is a great deal of flexibility to use
003006 it in many ways. A few of these are described at the end of this
003007 chapter. As you read this chapter think about how you can integrate AMS
003008 into your work environment. Even though some screens and menu keys are
003009 mentioned in this chapter the important ideas are in the management
003010 concepts, the details of program operation will become clear when you do
003011 the tutorial in the next chapter.

003012

003013 The Action Management System is intended to provide an integrated
003014 management system to easily keep track of action items, tasks, or work
003015 assignments assigned to various people. Each action item typically
003016 includes a tracking number, the name of the person responsible for

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003017 completing the action, a title, a description of the required action, the
003018 status of the action, and a date the action is due to be completed. The
003019 system may be print in a number of reports that allow both the assigned
003020 individual and supervision to quickly assess the status of all items.
003021 The key working reports are printed so that items are in the sequence in
003022 which the are due to be completed. Banners on these reports alert one to
003023 which items are late, which are due this week, and which are due after
003024 next week. As work on an assignment progresses status may be added to
003025 each action item or a summary of results achieved may be entered when the
003026 task is completed.

003027

003028 In a typical work environment AMS might be setup and used as follows:

003029

003030 1. ACTION ITEM ASSIGNMENT: Action items are assigned using assignment
003031 sheets or travelers that are either hand written or composed on the
003032 computer and printed. Assignment sheets can be printed with Option "V"
003033 from the Main Menu. These assignment sheets would include as a minimum
003034 the name of the person to whom action is assigned, the action item
003035 number, a short title, description of the action, and the date it is due
003036 to be completed. A copy of the traveler and any supporting documentation
003037 such as a letter, project file, or report is routed to the responsible
003038 individual. A copy of the traveler is kept for data entry. The sheets
003039 are normal paper size to facilitate copying along with attached material
003040 for routing and copy distribution.

003041

003042 2. ENTER ACTION ITEMS IN THE COMPUTER: The action item is entered in the
003043 computer using option "A" (for Add) from the Main Menu. This may be done
003044 as part of step 1 above at which time a traveler may be printed by the
003045 computer with the pertinent information saving a step. Typically copies
003046 of action items might be saved and data entered Friday afternoon.

003047

003048 3. PRINTING PERSONAL AND SUPERVISOR REPORTS: After items have been
003049 entered two key reports are printed. (To display the Active Items Report
003050 Menu select option "1" from the Main Menu. From this Menu two key reports
003051 should be printed using options "C" and "E".) The first report provides
003052 a list of all action items listed by due date to be used by the group
003053 supervisor. The second report prints a list of action items for each
003054 person assigned items in the work group. These personal lists start on a
003055 new page for each person and are listed by due date also. These personal
003056 lists can then be split up and distributed to the responsible persons to
003057 be used as a planning tool. Changes and new items should be received by
003058 noon on Friday so they can be entered during the afternoon and reports
003059 distributed so they are available early Monday morning.

003060

003061 4. USING THE PERSONAL ACTION ITEM LISTS: Each person with action items
003062 assigned should have a list of his actions available at the start of the
003063 week on Monday morning. This list will include all items assigned
003064 listed, in the order that they will be due. Special banners are placed
003065 in the listing ahead of the items that are Overdue, Due This Week, and

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003066 Due After This Week to assist in planning. No Overdue banners should
003067 show up and if one works off the items under the Due This Week flag by
003068 the date they are due and this should keep the boss happy. As items are
003069 completed the responsible person should mark the date completed and fill
003070 in any appropriate notes on the status of the various items. This can be
003071 done on either the weekly listing or on the travelers used to distribute
003072 the action items. In addition one can mark up the report to show status
003073 of items not completed so it will be recorded on the next item listing.
003074 Then by noon Friday the list and travelers with status and completed
003075 information should be turned in for computer data entry. (Options "I",
003076 "R", and "S" from the Main Menu will be used to enter this data.)

003077

003078 5. SUPERVISOR USE OF THE FULL ACTION ITEM LIST: The full action
003079 item list (obtained with Option "C" as described in step 3 above) is
003080 intended to be used by the group supervisor to provide a composite list
003081 of all action items due for all the individuals in the group. This
003082 listing is printed in the order the items are coming due and also printed
003083 with the Overdue, Due This Week, and Due After This Week banners. The
003084 supervisor can use this list in staff meetings to highlight items due, to
003085 monitor and expedite completion of expected items, and to review status
003086 provided on weekly status reports. Also at the end of this report a
003087 summary report is provided that lists each responsible individual and the
003088 number of action items that are overdue, due this week, and due this next
003089 week. This can show who is overdue on assigned items and also help
003090 assess individual work loads. Each action item can be assigned a type
003091 code to assist in managing the action items. The type can be a 5 letter
003092 code indicating the source of the action item. The codes may be a
003093 person's initials, an organization's initials, or a special code
003094 developed by the group. The summary also provides a listing of the
003095 number of active action items by type code to help the supervisor assess
003096 sources of the group's work load.

003097

003098 6. COMPLETED ACTION ITEMS: As items are completed they are assigned a
003099 completed date. When the completed date is assigned to an item and
003100 entered into the computer the completed item will be transferred from the
003101 active file to the historical file. They will not appear on the active
003102 item reports discussed above but can be retrieved from the Historical
003103 file using the reports available from the Historical Report Menu (that is
003104 accessed using Option "2" from the Main Menu). The completed action
003105 items can be listed in various reports for later reference. Reports allow
003106 completed items to be reviewed to assist in writing personnel
003107 evaluations, to retrieve items by type and reference, or to retrieve
003108 items by action item number.

003109

003110 6. PERIODIC ACTION ITEMS: Some items are repetitive in nature such as
003111 monthly reports, preventative maintenance, and personnel performance
003112 evaluations. Rather than entering them each time they can be entered
003113 once using the Periodic Action Item Menu, (Options "P" from the Main
003114 Menu). Then each time they are come due an appropriate item will be

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003115 added to the active item list. This will help keep them from being
003116 missed, and prevent repetitive action item entry into the computer.
003117
003118 7. TYPE DIRECTORY: The type code allows one to assign a 5 letter code to
003119 each item. These codes allow items to be sorted and printed to meet
003120 special needs. The Type Directory helps check type codes against a
003121 standard list of codes to keep their use organized.
003122
003123 The material above describes one way to use AMS, but there are many more.
003124 To give you ideas on how to best use AMS a few ideas are listed below:
003125
003126 1. Use AMS to obtain a listing of projects a person has completed when
003127 written quarterly or annual personnel evaluations. The Historical
003128 Summary Report will tell you how many were completed on time.
003129
003130 2. Use the full listing by due data as part of the weekly staff meeting
003131 agenda to check on items due and obtain status.
003132
003133 3. Use type code to obtain a listing of all tasks related to a particular
003134 project or source. If sources are coded you can tell where your workload
003135 is coming from.
003136
003137 4. Use the status to maintain an ongoing log of task progress and
003138 history.
003139
003140 5. Use the periodic scheduling feature to remind people of periodic
003141 reports, personnel evaluations, maintenance activities, birthdays,
003142 anniversaries, meetings, or preparation for and input for any of there
003143 items.
003144
003145 6. To do list. Each employee can add items to his weekly assignment
003146 sheet that he is assigned outside the formal assignment process. This
003147 allows the boss to see the emergent tasks that may keep other things from
003148 getting done.
003149
003150 A number of other features help make AMS easy to use. The demonstration
003151 files can be placed in service from the Main Menu. The Help Menu is
003152 available from the Secondary Menu, Search Menu, Modify Historical Files
003153 Menu, both Report Menus, the Periodic Item Menu, and the Type Menu. The
003154 help information system is covered in more detail in another chapter.
003155
003156 SUMMARY: This system is structured around due dates assigned to action
003157 items. If a project stretches out change the due date. If the action
003158 changes change the description to clearly describe the task. Be sure that
003159 no Overdue items show up on the report, items should be completed or new
003160 due dates assigned. The system is quite flexible and can be configured
003161 and used in many ways. Program options are menu driven and easy to use so
003162 a lot of help should not be necessary. Good Luck in developing your plan
003163 to integrate AMS in to your management system!

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003164 [End of Chapter]

004001 !!!Tutorial and Demonstration Files

004002 This tutorial is intended to provide a brief overview of AMS and
004003 familiarize you with many of the features. The tutorial is listed in
004004 steps. Print this chapter and check off the steps to help keep your
004005 place.

004006

004007 1. Start AMS as described in the chapter: Getting Started and go to the
004008 Main Menu. Review the Main Menu Options displayed.

004009

004010 2. Place the demonstration files in service by selecting Option "D".
004011 (The Option should say "Swap to Demo Files", if the option reads
004012 "Swap to Normal Files" the Demo Files are already in service and this
004013 step may be skipped.) When the explanation appears respond with a
004014 capital "Y" to make the demonstration files active.

004015

004016 The demonstration files may be removed to save disk space as
004017 described in a later chapter on Program Files. If they are removed
004018 the menu item for activating and deactivating will not be displayed.

004019

004020 3. Now let's tour the report writing menus. Select Main Menu Option "1"
004021 to display the Active Report Menu or page 1 of the Report Menus.
004022 Print copies of the following reports by selecting the appropriate
004023 Options:

004024

004025 Option <A> This is a list of all action items by action item number.
004026 This is a good report for reference.

004027

004028 Option <E> This is the key to AMS! After selecting this option you
004029 will be asked to enter the name of the responsible person
004030 to search for which will allow you to print a report for a
004031 specific person, but just press "Enter" and a reports for
004032 everyone with active action items will be printed. These
004033 reports each start on separate pages and can be split up
004034 and given to the responsible people. For the demonstration
004035 files there are 3 people and each has a custom report
004036 showing his action items in the order they are due. Note
004037 the banners flagging items that are late, due this week
004038 and due next week. This report can easily be split up and
004039 distributed to the various responsible people.

004040

004041 Option <C> This is similar to report E except is lists all action
004042 items in the order they are due so the boss can monitor
004043 all the activities for the group. The last page is a
004044 summary and can be printed individually with Option "I"
004045 from this report menu. The summary shows total number of
004046 items that are overdue, due this week and due after this
004047 week. It also lists the type code for each item and how
004048 many items are in each category. The type code is a

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004049 powerful tool that can help assess where the workload is
004050 coming from. It can include project types, initials of
004051 the originator, work group initials, or codes you make up,
004052 or a combination.
004053

004054 4. Select Option "2" which will display the Historical Reports Menu.
004055 This will provide lists of completed action items. Print the
004056 following reports:
004057

004058
004059 Option This option will print a report listing action items by
004060 type and reference. After selecting the option you will
004061 be asked to enter a type to search for which will allow
004062 you to print a report for a specific type, but just press
004063 "Enter" and a report for all type codes will be printed.
004064 This report can be a good reference for disposition of
004065 completed action items that addressed actions requested by
004066 an individual, group or directed at an activity.
004067

004068 Option <K> This option will print a report that provides a summary of
004069 completed actions. Specifically it will tell what
004070 percentage of action items are completed on time and how
004071 many are completed late. Neat stuff at evaluation time.
004072 Select Option "0" to return to the Main Menu.
004073

004074 5. Select Option "H" to display page 1 of the Help Menu. (The first time
004075 you select help after installation the help will be indexed which can
004076 take a couple of minutes on an older machine.) Page 2 can be
004077 displayed by selecting 2. This menu is available from the key menus
004078 even if not specifically displayed. The on line help system is quite
004079 extensive. Each chapter is listed with the chapter number (a
004080 number), menu selection (a letter) and a chapter title. Enter the
004081 menu selection, (a letter not the chapter number) to display the
004082 chapter. One can also print the Users Manual, the Registration and
004083 Order Form, and the Technical Assistance and Suggestion Forms.
004084

004085 Select Option "E" to read about the on line help system. The menu at
004086 the bottom of the screen provides the options that are available.
004087 The keys for <N> Next, <P> Previous, <T> Top, and Bottom allow
004088 you to navigate between chapters while the <Up>, <Down>, <Page Up>,
004089 <Page Down>, <Top>, and <End> allow you to navigate through the
004090 chapter easily. Chapters are formatted with the major topic headings
004091 listed on the first screen in a list form. One can then page through
004092 the chapter and pick out these headings easily because they are
004093 highlighted in magenta. Another convenient feature is the ability to
004094 print a single chapter at a time using the Option <C>. This allows
004095 you to print only the chapters you need. When you are done looking
004096 at the on-line help go back to the Help Menu by selecting Option "0"
004097 to return to the Main Menu.

004098

004099 6. Select Option "C" from the Main Menu to display the Setup Menu. This
004100 menu consists of 8 pages. Skip through the pages one at a time to
004101 become familiar with the contents of each. On page 6 press "R" and
004102 enter a couple of name in the following format:

004103

004104 Tucker, W.

004105

004106 Then select Option <S> to sort them and place them in order. These
004107 names will be displayed on the traveler that will be printed in the
004108 next step. Now select Option <0> to return to the Main Menu. Select
004109 Option <V> to print a blank traveler. When asked how many to print
004110 enter a <1> and press "Enter". This will print a blank traveler that
004111 can be used to document an action item. These forms should be made
004112 available to those who will be assigning action items.

004113

004114 7. Options "I", "R", and "S" select action items by responsible person
004115 and action item number respectively. Select Option "I". When asked
004116 to enter an action item number just press "Enter" and the program
004117 will go to the first active action item in the file. This option
004118 displays an action item, and the menu gives several options.

004119

004120 - Use options <N>, <P>, <T>, and to move around the file.

004121

004122 - Select Option <X> and today's date will be inserted to show the
004123 item complete. When you return to the Main Menu this item will be
004124 transferred to the historical file and will not show up in the
004125 active file again. Option <Z> will erase the completion date.

004126

004127 - Select Option <C> and then Option <V>. These will print the single
004128 action item in two different forms: the first will print the simple
004129 action item, and the second will print it in the format of a
004130 traveler.

004131

004132 - Go to the last action item in the file by pressing . This
004133 action item has a longer Action field. The action and status can be
004134 up to 100 lines long with the default settings or up to 999 lines if
004135 the program Setup constant is changed on the Setup Menu. To view
004136 the action press and hold the <Alt> key and at the same time press
004137 the <Up>, <Down>, <Page Up>, <Page Down>, <Home>, or <End> keys to
004138 move through the action. These keys will allow you to scroll the
004139 action through the five line window. The <Up> and <Down> keys move
004140 it a line at a time, the <Page Up> and <Page Down> move it a page or
004141 5 lines at a time, and the <Home> and <End> keys will move to the
004142 top and bottom respectively. Similarly hold the <Ctrl> and use the
004143 other keys in a similar manner to view the Action field. Give it a
004144 try with the action field, as the status is not long enough in this
004145 action item to see the effects. You can remember that Action and
004146 <Alt> start with the same letter and that <Cont>rol helps make the

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004147 proper Status become a reality!
004148
004149 - Select Option "R" and the item general information can be revised.
004150 When complete with any revisions press the "PgDn" key as a quick way
004151 to go to the menu at the bottom.
004152
004153 - To revise the Action or Status fields press <F5> or <F6>
004154 respectively. Press <F5> to revise the Action. This will display a
004155 new menu at the top of the action with 4 options. Option <F7> will
004156 activate the spelling checker, <F8> will toggle the zoom to provide
004157 a full screen editing window or collapse it back to five lines, <F9>
004158 will quit to the action item display without saving changes, and
004159 <F10> will quit to the action item display and save the changes.
004160 Press <F8> to expand the window and make it easier to edit the text.
004161 Now press <F7> to do a spell check. The spell checker will
004162 highlight "AMS" and display a list of options. To have the spell
004163 checker suggest replacements press <H> for hunt and a list of
004164 suggestions will be displayed. The spell checker is fairly
004165 intuitive to use. Press <Q> to quit to the editing window, and then
004166 <F10> to return to the action item display. (Note: the dictionary
004167 used when the Demonstration files are active is the normal
004168 dictionary so if you add funny words to it they will also be there
004169 during normal operation.)
004170
004171 - Now select Option "1" which will allow you to search by responsible
004172 person. When requested to enter a name enter just "Ch" and press
004173 "Enter". This will display the first responsible person with these
004174 two letters in their name. If you know who has action items you can
004175 save time by entering just enough of the name to get a unique match.
004176 Now the index by responsible person is in service so as you skip
004177 through the file the action items will be in sequence by responsible
004178 person name rather than action item number. The options "1", "2",
004179 and "3" allow you to shift between the indexes. The index in
004180 service is displayed in purple just above the menu at the bottom of
004181 the screen.
004182
004183 - Select Option "0" to return to the Main Menu.
004184
004185 8. Select Option "A" to enter a new action item. Fill in the data using
004186 a type code of "ABC". Now use the "PgDn" key to skip to the bottom.
004187 Now add the text for the action by pressing <F5>. This will display
004188 a window and place the cursor in it. The keys function as described
004189 when we revised and action item above. After entering the Action
004190 press the <F10> to save it.
004191
004192 To add more action items two options are available.
004193
004194 Option <A> will save the item just entered and provide another blank
004195 action item to be filled in.

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004196
004197 Option <S> will copy the item just entered to the next item except
004198 for the responsible person which will be left blank. This
004199 option allows you to enter several similar action items
004200 with little effort.
004201
004202 Since the type code "ABC" is not in the directory a message to that
004203 effect will be displayed. Options "H" will allow one to hunt in the
004204 directory, Option "A" will allow the type code to be added to the
004205 directory, and Option "O" (not zero) will accept the type code as is
004206 and continue. Select "O" to move on.
004207
004208 Return to the Main Menu by selecting Option "0". You will now be
004209 asked if you want travelers for the items just entered. Enter "Y" to
004210 print travelers, or any other key to skip printing travelers.
004211
004212 9. Now select Option "Z" from the Main Menu to display the Secondary
004213 Menu. For functions 1 through 3 you may select each function in turn
004214 to display a screen that displays what the function dose. Each offers
004215 on option to return to the Secondary Menu without taking any action.
004216 At the end of the review select Option "0" to return to the Main
004217 Menu.
004218
004219 10. Now select Option "M" from the Main Menu to display the Modify
004220 Historical Files Menu. Menu Options "I", "R", and "S" allow one to
004221 revise completed action items in the historical file. Option "1"
004222 allow an item to be quickly transferred back to the active file.
004223 Option "2" old completed action items to be deleted from the
004224 historical file when no longer needed. Select these options to become
004225 familiar with how they function if you desire. At the end of the
004226 review select Option "0" to return to the Main Menu.
004227
004228 11. Select Option "P" to explore the Periodic Item Menu. Options "A",
004229 "I", "R", and "S" are similar to those on the Main Menu for active
004230 action item. Print a list of the periodic action items in the
004231 demonstration files using Option "1". These action items have no
004232 status lines, and also include both the codes used to set periodicity
004233 and a written description of the periodicity. The Active Items can be
004234 updated from Periodic Items, so now select Option "U". Upon return
004235 to the Main Menu the items that have been added can be reviewed by
004236 selecting Option "I" from the Main Menu then skipping to the bottom
004237 of the file. Select Option "0" to return to the Main Menu.
004238
004239 12. Select Option "T" to review the Type Menu used to maintain the Type
004240 Directory. Options "3" and "4" will list type codes used on action
004241 items but not included in the Directory. This will allow one to
004242 either add the codes or revise the action items. Select Option "0" to
004243 return to the Main Menu.
004244

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004245 Select option "D" to restore the normal files when you have completed
004246 experimenting with the demonstration files.
004247
004248 A word of CAUTION, be sure to return to DOS from the Action Management
004249 System before shutting the computer power off. This is accomplished from
004250 the Main Menu by using Option "O". IF THIS IS NOT DONE DATA MAY BE
004251 LOST!!!!
004252
004253 A few program options can make significant data changes or overwrite
004254 entire files. In these situations extensive caution notes are provided.
004255 Also most must be confirmed by entering a response such as capital "Y" in
004256 reply to a question. Although in most situations the program will
004257 respond to either upper or lower case input in these cases only upper
004258 case will be accepted.
004259
004260 This concludes the tutorial. Not all the features of AMS have been
004261 discussed, but enough to get started have been demonstrated. You can
004262 read this Users Manual and experiment with the demonstration files to
004263 learn about the other AMS features.
004264 [End of Chapter]
005001 !!!Using-On Line Help and Users Manual
005002 The on-line help facility provides quick access to assist you with the
005003 use of the Action Management System. The on-line help provides easy on
005004 screen assistance, individual chapters can also be printed or the entire
005005 help system can be printed as the Action Management System Users Manual.
005006 The on-line help is divided into chapters. At the beginning of each
005007 chapter is a brief listing of the key topics to be found in the chapter.
005008 These topic headings are highlighted with magenta print on a black
005009 background for easy identification when scrolling through the help. The
005010 major topics in this chapter are:
005011
005012 The Help Menu
005013 Printing the Action Management System Users Manual
005014 Viewing and Printing a Help Chapter
005015
005016 ***The Help Menu
005017
005018 If the help files are installed on-line help is available from the Main
005019 Menu, Secondary Menu, the Report Menus, Periodic Item Menu, Type Menu,
005020 Modify Historical Item Menu, Dictionary Menu, and the Search Menu by
005021 pressing the "H" key. This will display the Help Menu.
005022
005023 The help files may be removed to save disk space as described in a later
005024 chapter on Program Files.
005025
005026 From the Help Menu you can select specific topics, and print the Action
005027 Management System Users Manual. The Help Menu displays the help topic
005028 along with the menu selection key that is a letter and the chapter
005029 number. To select a topic press the key with the letter that corresponds

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005030 to the topic. (One can't access the help with the numbers, these are
005031 just for reference to the chapters.) The Help Menu has two menu pages.
005032 One can switch between them by pressing either <1> or <2> to view either
005033 page from the other. One can select any option from either menu even
005034 though it is not displayed.
005035
005036 From the Help Menu the following options are available:
005037
005038 Option ! > Print User's Manual: This option prints the AMS User's Manual
005039 as described in the next section.
005040
005041 Option 8 > Print Reg. and Order Form: This option prints the AMS
005042 Registration and Order Form. This form may also be used to
005043 order replacement disks, an expanded dictionary, program
005044 updates, and printed AMS User's Manual.
005045
005046 Option 9 > Print Tech. Supp. and Sugg. Form: This option prints the
005047 Technical Support and Suggestion Form. Review the later
005048 chapter on Problem Prevention and Solutions and the chapter
005049 on Technical Support, Suggestions, and Program Updates before
005050 using this form.
005051
005052 To return to the menu from which you accessed the help menu just press
005053 <0>.
005054
005055 ***Printing the Action Management System Users Manual
005056
005057 The Action Management System Users Manual provides a printed version of
005058 the on-line help nicely formatted with page numbers, a title page, and an
005059 index. It can be printed by selecting Option <!> from the. You will be
005060 asked to confirm that you want to print the Manual by entering a <Y>. If
005061 you do not want to print the entire manual you can print individual
005062 chapters from the chapter display. This provides an easy way to print
005063 just the sections that you need without printing the entire manual.
005064
005065 The AMS Users Manual is about 60 pages long so be sure you have adequate
005066 paper in your printer and are the printer is ready to print this volume
005067 of work. The actual manual length depends on page length and may vary
005068 from one setup to another.
005069
005070 ***Viewing and Printing a Help Chapter
005071
005072 Help chapters are selected and displayed as described above from the Help
005073 Menu. When a help chapter is displayed the following options are
005074 available:
005075
005076 Option <0> Ret. to Menu: This Option will return the program to the Help
005077 Menu.
005078

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005079 Option <Up>: This option will scroll the display up one line until the
005080 top of the chapter is reached.
005081

005082 Option <Down>: This option will scroll the display down one line until
005083 the bottom of the display is reached.
005084

005085 Option <Page Up>: This option will scroll the display up one page until
005086 the top of the chapter is reached.
005087

005088 Option <Page Down>: This option will scroll the display down one page
005089 until the bottom of the display is reached.
005090

005091 Option <Home>: This option will position the display to show the first
005092 page of the chapter.
005093

005094 Option <End>: This option will position the display to show the last page
005095 of the chapter.
005096

005097 The next options position the display to different chapters. One can
005098 return to the Help Menu to select another chapter or use these keys to
005099 browse through them:
005100

005101 Option <N> Next: This option will position the display to the first page
005102 of the next chapter.
005103

005104 Option <P> Previous: This option will position the display to the first
005105 page of the previous chapter.
005106

005107 Option <T> Top: This option will position the display to the first page
005108 of the first chapter.
005109

005110 Option Bottom: This option will position the display to the first
005111 page of the last chapter.
005112

005113 Option <C> Print Copy: This option will print a copy of the entire
005114 chapter being displayed. One can use this option to print
005115 just portions of the AMS Users Manual that one wants to refer
005116 to. Chapters are formatted just like they would be if the
005117 whole manual was printed. One can in fact accumulate the
005118 entire manual in this manner except for the cover sheet and
005119 index.

005120 [End of Chapter]

006001 !!!Action Item Field Descriptions

006002 This section provides a brief description of each field used in an action
006003 item along with some guidelines on format and content. The items are
006004 listed in the order that they are encountered in the normal entry
006005 display. (The fields in a Periodic Action Item or a Type Directory are
006006 described in the chapters on these respective subjects.) The action item
006007 fields are listed by their abbreviation or name used on the computer

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006008 screen followed by the full name in parenthesis.
006009
006010 Resp: (Responsible Person) This is the person who is responsible for
006011 completing the action item. The field is 15 spaces long. The
006012 normal format is last name followed by a comma, and one initial.
006013 Names should be consistent as they are used as the key field for
006014 several reports. example:
006015
006016 Tucker, B.
006017
006018 Type: This is a code that can be used for sorting in the Type Reports.
006019 This field is 5 spaces long and all letters entered in this field
006020 will be capitalized. A series of codes should be developed and
006021 used consistently. They may represent a combination of things such
006022 as persons initials, department abbreviations, or special codes.
006023 They may be used to indicate the source of assigned activities.
006024 The type may be used together with the reference field. For
006025 example type could identify the originating department of a memo
006026 and the reference show the memo serial number. (Type code
006027 management is discussed in more detail in the chapter on type
006028 codes.) example:
006029
006030 BT initials
006031 QA department abbreviation (Quality Assurance)
006032 PM a document abbreviation (Plant Modification)
006033
006034 Ref: (Reference) This provides a place to list a reference such as a
006035 letter serial number, document number, or similar item. It is
006036 used together with the type as described above under Type. This
006037 field is 15 spaces long. Although it is intended to be used with
006038 the Type field it may also be used alone so the type and reference
006039 are not necessarily related. example:
006040
006041 QA 90-0001 serial number of a memo from Quality Assurance
006042 UAB 90-003 a User Application Bulletin
006043
006044 Pri: (Priority) The priority is intended to indicate the importance of
006045 the project. Use a single number from 1 to 9 or a single letter
006046 from A to Z to indicate the relative project priority. Items with
006047 the lowest letter or number or lowest number are the most
006048 important. Thus priority 1 is more important than priority 5.
006049 One may select a lower range of numbers or letters for priority
006050 classification such as 1 to 5 or A to F. A Report may be printed
006051 by action item priority. This field is optional and may be used or
006052 not as selected using the Main Menu Option "C" which selects the
006053 Change Setup Menu. Page 2 of The Setup Menu has a flag, Display
006054 Priority, that may be turned on or off to display or suppress the
006055 Priority. If turned off the priority will not show up on the
006056 computer screens or reports, but turning it off will not destroy

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006057 data previously placed in this field.
006058
006059 AI#: (Action Item Number) This is the unique number that identifies each
006060 action item. Action item numbers are assigned by the computer in
006061 a sequential manner using a prefix, the year and a sequential
006062 number such as:
006063
006064 XXX.YY.NNNN where
006065
006066 XXX - is a 3 letter prefix that indicates the work group
006067 YY - is the last 2 digits of the year such as 95
006068 NNNN - is a sequential number assigned by the computer to each
006069 successive action item for a particular year
006070
006071 example: PPD.95.0021 might be a Plant Production Department
006072 action item assigned in 1991 as the 21st item
006073
006074 When the program is started for the first time each year the year
006075 number YY will be set to the proper year and the sequential number
006076 NNNN will be reset to 0001. The prefix is set using the Main Menu
006077 Option "C" which selects the Change Setup Menu. Page 1 of The
006078 Setup Menu has an item Responsible Plant Group that may be entered
006079 to replace the XXX with an abbreviation for the work group
006080 involved. Any time a prefix is entered it will automatically be
006081 capitalized.
006082
006083 Sup: (Supervisor) This is the supervisor of the person who is responsible
006084 for completing the action item. The field is 15 spaces long. The
006085 normal format is last name followed by a comma, followed by one
006086 initial. Names should be consistent as they are used as the key
006087 field for several reports. This field is optional and may be used
006088 or not as selected using the Main Menu Option "C" which selects
006089 the "Change Setup Menu". Page 2 of The Setup Menu has a flag,
006090 Display Supervisor, that may be turned on or off to display or
006091 suppress the Supervisor. If turned off the priority will not show
006092 up on the computer screens or reports, but turning the option on
006093 or off will not destroy data previously placed in this field. For
006094 example:
006095
006096 Smith, J.
006097
006098 Asd: (Assigned Date) This is the date the action item was originally
006099 assigned. It is set to the computer date when the item is entered.
006100 On Page 2 of the Setup Menu an option can be set to allow this
006101 date to be viewed only, upon adding a new item, or revising an old
006102 item, or it can be changed.
006103
006104 Rev: (Revision number and date) This is the number of the last revision
006105 of the action item and the date it was last revised. The initial

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006106 revision number assigned is 0. This number will be increased by
006107 one each time the action item is revised and the date updated to
006108 the current computer date.
006109
006110 example: 3 11/22/91 - This item has been revised 3 times and was
006111 last revised on November 22, 1991
006112
006113 Due: (Due Date) This is the date that the item is scheduled to be
006114 completed. This is the date that is used to sequence many of the
006115 reports to show when items are due to be completed.
006116
006117 Comp: (Completion Date) This is the date that the item is completed. When
006118 this date is filled in the action item will be automatically moved
006119 from the active file to the historical file. It will not show up
006120 on active item reports but can be retrieved using the historical
006121 reports. If an item is accidentally given a completion date it
006122 can be retrieved from the historical file by using the Modify
006123 Historical Files Menu Option "2": Single Item Restoration from
006124 Historical File to Active File".
006125
006126 Description: This field provides a one line description of the action
006127 item.
006128
006129 Action: This field provides 10 to 999 lines to describe the required
006130 action to be completed. This field can provide detailed
006131 instructions of the actions, task objectives, and reporting
006132 requirements of the action to be accomplished. This field is
006133 accessed by pressing <F5>. Once selected for editing a small menu
006134 appears above the field that allows several actions including zoom
006135 that expands the editing area to full screen, spell check, quit
006136 which quits editing without saving the changes, and save which
006137 saves the editing changes. These options are described in more
006138 detail in the next chapter. This field is initially set for a
006139 maximum of 100 lines. To set the number of lines select Option
006140 "C" titled "Change Setup Menu" from the Main Menu. Then select
006141 page 2 of the Setup Menu and set the number of lines desired using
006142 the item "Action / Status Maximum Lines". The program will check
006143 to be sure that you are not reducing the number of lines to less
006144 than the number of lines in any current action or status item in
006145 either the active, historical, or periodic files. This field is
006146 also effected by the Setup Menu, Page 2 item "Word Wrap" which
006147 turns word wrap on and off and "Zoom on Window Opening" which will
006148 cause the editing window to zoom to full screen when opened if set
006149 to on. Note the Setup Menu settings discussed here also effect
006150 the Status field described below.
006151
006152 Status: This field provides 10 to 999 lines to describe the required
006153 status of an action assignment. This field can provide detailed
006154 historical information on the status of an activity or it may only

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006155 provide a general summary when a task is completed. This field is
006156 accessed by pressing <F6>. Once selected for editing a small menu
006157 appears above the field that allows several actions including zoom
006158 that expands the editing area to full screen, spell check, quit
006159 which quits editing without saving the changes, and save which
006160 saves the editing changes. These options are described in more
006161 detail in the next chapter. This field is initially set for a
006162 maximum of 100 lines. To set the number of lines select Option
006163 "C" titled "Change Setup Menu" from the Main Menu. Then select
006164 page 2 of the Setup Menu and set the number of lines desired using
006165 the item "Action / Status Maximum Lines". The program will check
006166 to be sure that you are not reducing the number of lines to less
006167 than the number of lines in any current action or status item in
006168 either the active, historical, or periodic files. This field is
006169 also effected by the Setup Menu, Page 2 item "Word Wrap" which
006170 turns word wrap on and off and "Zoom on Window Opening" which will
006171 cause the editing window to zoom to full screen when opened if set
006172 to on. Note the Setup Menu settings discussed here also effect the
006173 Action field described above.

006174 [End of Chapter]

007001 !!!Travelers, Adding and Revising Action Items

007002

007003 This chapter describes the major functions of using travelers, and adding
007004 and revising action items. The following key topics are covered:

007005

007006 Travelers

007007 Adding New Action Items

007008 Reviewing Action and Status

007009 Revising Action Items

007010

007011 ***Travelers

007012

007013 Travelers provide a convenient way to distribute action items and any
007014 associated materials that may be appropriate such as letters, reports,
007015 more detailed instructions, etc. Blank Travelers can be printed using
007016 the Main Menu: Option V > Print Blank Travelers: This Option allows one
007017 to print up to 99 blank traveler forms. When the option is selected one
007018 will be asked how many travelers to print. Enter the number and the
007019 program will display a count of travelers printed.

007020

007021 Optionally an action item number may be printed on each traveler as
007022 selected on Page 1 of the Setup Menu. Also the starting serial number can
007023 be selected from this menu to allow synchronization with the assignment
007024 of action item numbers. This makes it easy for one receiving an action
007025 item to keep track of it's number from the start but using the numbered
007026 travelers in the proper sequence can be more of an administrative burden.
007027 A list of potential recipients of an action item is printed on the
007028 traveler. This list is established using page 6 of the Setup Menu. This
007029 option is described in the Chapter on the Setup Menu.

Sheet1

007030

007031 Travelers may also be printed using Option "V" when adding and revising
007032 action items as described later in this chapter. In these cases the
007033 detailed action item will be printed on the traveler.

007034

007035 After entering new action items one is given the option to print all the
007036 action items just printed. Also when the computer is turned on or the
007037 action items are updated from the periodic action item list one is given
007038 the option to print all the newly added action item. This is a
007039 convenient feature that allows easy printing and distribution of
007040 travelers on a timely basis as they are added.

007041

007042 The traveler is the size of a standard sheet of paper so it can go
007043 through the copier without special help like a buck slip or sticky. The
007044 traveler has a place to put all the related action item data.

007045

007046 Blank travelers may be kept handy by both supervisors who are assigning
007047 work and employees who wish to document and track other assignments so
007048 they can be completed as new actions come up.

007049

007050 ***Adding Action Items

007051

007052 This section describes how to add action items to the system. From the
007053 Main Menu select Option "A". The display is circled with a red border to
007054 identify it as the new item input screen. This will display the action
007055 item fields for a new action item. Fill in the requested data. As a
007056 minimum one should enter Responsible Person, Due Date, Description, and
007057 the Action required. The fields are described in detail in the previous
007058 chapter and the Key Board functions are described in more detail in a
007059 later chapter.

007060

007061 Once the data has been entered the following Options are available as
007062 displayed at the bottom of the screen:

007063

007064 Option <0> Save & Return to Menu: This option will save the action item
007065 just entered in the active item file and return the system to
007066 the Main Menu.

007067

007068 Option <A> Save & Add Another: This option will save the action item
007069 just entered in the active item file and display the same
007070 screen with blanks so that another action item can be entered.

007071

007072 Option <S> Save & Copy: This option is the same as "A" above except that
007073 it will copy all fields except the Responsible person to the
007074 next action item. The responsible person can then be assigned
007075 and other information revised as appropriate. This is used to
007076 expedite entry if several similar action items are being
007077 assigned.

007078

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007079 Option <R> Revise Item: This option will allow the item just entered to
007080 be revised before it is stored. It will return the cursor to
007081 the first database item and allow each to be changed in
007082 sequence.

007083
007084 Option <F5> Action: This will allow the action field to be edited. This
007085 option can not be entered if other action item fields are
007086 being revised. (Use <Page Down> to exit the other fields if
007087 they are being edited.) The action can now be entered.
007088 Normally word wrap will wrap the text from one line to the
007089 next. A small menu on the top of the display will identify the
007090 options available. These include:

007091
007092 Option <F7> Spell: This option activates the spell checker
007093 which is described in detail in the chapter on
007094 Spell Checking and Dictionary Maintenance.

007095
007096 Option <F8> Zoom: This option will toggle to zoom the editing
007097 area to full screen which will make it easier to
007098 edit the text. When zoomed the menu will still
007099 appear at the top of the window. When pressed
007100 again the editing area will return to normal and
007101 the other fields of the action item will be
007102 displayed.

007103
007104 Option <F9> Quit: This option will quit from editing the text
007105 without saving the changes just entered and return
007106 to the general action item menu.

007107
007108 Option <F10> Save: This option will quit from editing the text
007109 and save the changes just entered. It will return
007110 to the general action item menu.

007111
007112 The action field and status are also effected by several items
007113 on page 2 of the Setup Menu that are described in detail in
007114 the Chapter: Program Setup Menu:

007115
007116 - Action / Status Maximum Lines: This determines the maximum
007117 lines in an Action or Status field.

007118
007119 - Word Wrap: This turns the work wrap function on and off.

007120
007121 - Zoom on Window Opening: This will zoom the window to full
007122 size when the window is initially accessed.

007123
007124 Several editing and navigation short cuts are described for
007125 editing Action and Status in the chapter: Keyboard Functions.

007126
007127 Option <F6> Status: This will allow the status field to be edited. This

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007128 option can not be entered if other action item fields are
007129 being revised. (Use <Page Down> to exit the other fields if
007130 they are being edited.) The action can now be entered. This
007131 option has the same functions and options available as
007132 described immediately above for <F5> Action.
007133
007134 Option <D> Delete & Return to Menu: This option will delete the item
007135 that has just been entered and return to the Main Menu. If
007136 this option is used the item will be completely erased and the
007137 action item number will not be used. The same action item
007138 number will be used on the next action item entered.
007139
007140 Option <C> Copy to Print: This option will print a copy of the action
007141 item just entered on a single sheet of paper.
007142
007143 Option <V> Traveler to Print: This option will print a copy of the
007144 action item just entered being displayed on a traveler. The
007145 copy can be used to distribute a new action item to the
007146 responsible person if desired. Names of other possible
007147 addresses for routing as shown on the Setup Menu Page 6
007148 listing will also be displayed. Lines are provided at the
007149 bottom of the form for whatever use desired. In lieu of using
007150 this option to print action items one at a time they can be
007151 printed for all action items entered at the end of the entry
007152 session as described below.
007153
007154 Option <+> Eject Printer Page: This option will eject a single page from
007155 the printer.
007156
007157 After a new item has been entered and one of the above options is
007158 selected a check against the type directory may be made. If the type code
007159 is found in the type directory the selected action will proceed, if not
007160 one will be asked to check the type code. This is described in more
007161 detail in the chapter: Type Code Checking and Directory.
007162
007163 When one returns to the Main Menu using Options "0" or "D" one will be
007164 asked if action item travelers are desired. Reply with a capital "Y" if
007165 they are or any other key if they aren't. If travelers are requested
007166 they will be printed for each item that has just be entered, on separate
007167 sheets of paper.
007168
007169 It should be noted that if a completion date is entered the action item
007170 will be transferred to the historical file as one returns to the Main
007171 Menu.
007172
007173 ***Reviewing Action and Status
007174
007175 When Action and Status fields are displayed only 5 lines of text are
007176 visible at a time unless you are editing and use the zoom feature. To

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007177 allow viewing of the Action and Status fields hot key combinations have
007178 been assigned to allow one to scroll through the text quickly. These use
007179 two key combination. To view the Action use the <Alt> key in combination
007180 with the keys described below. To view the Status use the <Ctrl> in
007181 combination with the keys described below. One can help remember this
007182 because Action and <Alt> begin with the same letter and <Ctrl> is the
007183 control aspect reported back in the Status field.

007184

007185 Action Viewing:

007186

007187 <Alt> + <Up> Scroll action up a line at a time.

007188 <Alt> + <Down> Scroll action down a line at a time.

007189 <Alt> + <PageUp> Scroll action up a page, (5 lines) at a time.

007190 <Alt> + <PageDown> Scroll action down a page, (5 lines) at a time.

007191 <Alt> + <Home> Jump to the top of the action field.

007192 <Alt> + <End> Jump to the end of the action field.

007193

007194 Status Viewing:

007195

007196 <Ctrl> + <Up> Scroll status up a line at a time.

007197 <Ctrl> + <Down> Scroll status down a line at a time.

007198 <Ctrl> + <PageUp> Scroll status up a page, (5 lines) at a time.

007199 <Ctrl> + <PageDown> Scroll status down a page, (5 lines) at a time.

007200 <Ctrl> + <Home> Jump to the top of the status field.

007201 <Ctrl> + <End> Jump to the end of the status field.

007202

007203 ***Revising Action Items

007204

007205 This section describes how to view and revise action items that have
007206 already been entered. Items that are either Active or have been
007207 completed and transferred to the Historical file can be revised or
007208 deleted. The Active items are accessed from the Main Menu with Options
007209 "I", "R", or "S", and those that have been completed are accessed by
007210 first selecting Option "M" from the Main Menu which will display the
007211 Modify Historical Files Menu. From this menu Options "I", "R", or "S"
007212 are used to access the completed historical items. The functions
007213 associated with these options are very similar but the few differences
007214 will be pointed out below. To help distinguish between the active and
007215 historical item display the active item display is bordered in green and
007216 the historical item display is bordered in purple.

007217

007218 Select Option "I" to search by Action Item Number, Option "R" to search
007219 by Responsible Person, or Option "S" to search by Supervisor. After
007220 either of these options has been entered one will be requested to enter
007221 either the Action Item Number, the name of the Responsible Person or the
007222 name of the Supervisor. Enter the requested information. In the case of
007223 the Action Item Number the first three letters will automatically be
007224 capitalized and the unique action item will be displayed. In the case of
007225 the Responsible Person or Supervisor the first action item assigned to

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007226 that person as listed by action item number will be displayed. It may not
007227 be necessary to enter the full name. The program will find the first
007228 person whose name matches the letters entered. For example if Tuc is
007229 entered for responsible person the program will display action items for
007230 the first person whose name matches these three letters and depending on
007231 who has action items it will display the first of the following names
007232 encountered:
007233
007234 Tuck, M.
007235 Tucker, P.
007236 Tucker, W.
007237
007238 In other words a match will be made with as many letters as are entered.
007239 If looking for "Tucker, P." then one should enter "Tucker" and similarly
007240 if looking for "Tucker, W." then the full name must be entered. If
007241 "Tucker, W. is the only name starting with "T" then all one need enter is
007242 "T". If one is familiar with the data in the file this allows one to use
007243 the shortcut of entering just part of a name provides there are no other
007244 matches in the listing. If one merely wants to go to the top of the
007245 action item listing press only the "Enter" key and the first item will be
007246 displayed. It should be noted if the "I" option is used the action items
007247 will be indexed by Action Item Number. If the "R" option is used the
007248 action items will be indexed by Responsible Person as first priority and
007249 Action Item Number as second priority. Also if the "S" option is used
007250 the action items will be indexed by Supervisor as priority and Action
007251 Item Number as second priority. The Index in use will be displayed in
007252 purple to the right and just above the menu at the bottom of the screen.
007253 The historical file indexes used for finding the active items are
007254 constantly maintained, however those for the responsible person and
007255 supervisor may be maintained or created when needed as selected from the
007256 Revise Constants Menu.
007257
007258 The requested Action Item is displayed with a menu at the bottom. The
007259 following describes each of the functions that may be selected from the
007260 menu:
007261
007262 Option <0> Ret to Menu: This option will cause the system to return to
007263 the Main Menu.
007264
007265 Option <N> Next: This option will skip to the next Action Item in the
007266 active item listing. This will be determined by which index
007267 is in use. If the last item is already displayed the "End of
007268 File" flag will be displayed in purple to the left above the
007269 menu.
007270
007271 Option <P> Previous: This option will skip to the previous Action Item
007272 in the active item listing. This will be determined by which
007273 index is in use. If the first item is already displayed the
007274 "End of File" flag will be displayed in purple to the left

007275 above the menu.
007276
007277 Option <T> Top: This option will skip to the top of the active item
007278 listing. The "Beginning of File" flag will be displayed in
007279 purple to the left above the menu.
007280
007281 Option Bottom: This option will skip to the bottom of the active
007282 item listing. The "End of File" flag will be displayed in
007283 purple to the left above the menu.
007284
007285 Option <R> Revise: This option will allow the items in the displayed
007286 action item to be revised except for Action and Status which
007287 are revised and described below. This option will place the
007288 cursor at the first item in the display. The following items
007289 may not be revised: Assigned Date, Revision Number and Date,
007290 and Action Item Number. If a Completed Date is entered the
007291 item will be transferred from the active file to the
007292 historical file upon returning to the Main Menu. Upon
007293 completion of the revision the type code will be checked
007294 against the type code directory as described in the chapter:
007295 Type Code Checking and Directory.
007296
007297 Option <F5> Action: This will allow the action field to be edited. This
007298 option can not be entered if other action item fields are
007299 being revised. (Use <Page Down> to exit the other fields if
007300 they are being edited.) The action can now be entered.
007301 Normally word wrap will wrap the text from one line to the
007302 next. A small menu on the top of the display will identify the
007303 options available. These include:
007304
007305 Option <F7> Spell: This option activates the spell checker
007306 which is described in detail in the chapter on
007307 Spell Checking and Dictionary Maintenance.
007308
007309 Option <F8> Zoom: This option will toggle to zoom the editing
007310 area to full screen which will make it easier to
007311 edit the text. When zoomed the menu will still
007312 appear at the top of the window. When pressed
007313 again the editing area will return to normal and
007314 the other fields of the action item will be
007315 displayed.
007316
007317 Option <F9> Quit: This option will quit from editing the text
007318 without saving the changes just entered and return
007319 to the general action item menu.
007320
007321 Option <F10> Save: This option will quit from editing the text
007322 and save the changes just entered. It will return
007323 to the general action item menu.

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007324
007325 The action field and status are also effected by several items
007326 on page 2 of the Setup Menu that are described in detail in
007327 the Chapter: Program Setup Menu:
007328
007329 - Action / Status Maximum Lines: This determines the maximum
007330 lines in an Action or Status field.
007331
007332 - Word Wrap: This turns the work wrap function on and off.
007333
007334 - Zoom on Window Opening: This will zoom the window to full
007335 size when the window is initially accessed.
007336
007337 Several editing and navigation short cuts are described for
007338 editing Action and Status in the chapter: Keyboard Functions.
007339
007340 Option <F6> Status: This will allow the status field to be edited. This
007341 option can not be entered if other action item fields are
007342 being revised. (Use <Page Down> to exit the other fields if
007343 they are being edited.) The action can now be entered. This
007344 option has the same functions and options available as
007345 described immediately above for <F5> Action.
007346
007347 Option <D> Delete Item: This will set the flag to delete the item upon
007348 leaving this routine. A deleted item may also be restored
007349 with the same key before returning to the Main Menu. The item
007350 is removed from the file upon return to the Main Menu or
007351 Modify Historical Files Menu. It is suggested that this option
007352 be avoided and rather for active items that the item be closed
007353 with a completion date and a note to indicate why it was not
007354 completed. This will ensure that there is an explanation
007355 later on in the historical file.
007356
007357 Option <C> Copy to Print: This option will print a copy of the action
007358 item just entered on a single sheet of paper.
007359
007360 Option <V> Traveler to Print: This option will print a copy of the
007361 action item being displayed on a traveler. The copy can be
007362 used to distribute a new action item to the responsible person
007363 if desired. Names of other possible addresses for routing as
007364 shown on the Revise Constants Page 6 listing will also be
007365 displayed. Lines are provided at the bottom of the form for
007366 whatever use desired.
007367
007368 Option <1> Hunt by Item #: This will display a request for one to enter
007369 the Action Item Number to hunt for, just as was done upon
007370 initially entering this routine. Enter the Action Item Number
007371 and the unique Action Item will be displayed. If no Action
007372 Item Number is entered and the "Enter" key is pressed the

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007373 first item in the listing will be displayed and the Item
007374 Number Index will be placed in use. If a name is entered and
007375 no match can be found one will be allowed to try again or
007376 return to the Main Menu or the Modify Historical files Menu.
007377
007378 Option <2> Hunt by Responsibility: This will display a request for one
007379 to enter the name of the responsible person to hunt for just
007380 as was done upon initially entering this routine. Enter the
007381 name of the Responsible Person and the first action for that
007382 person by item by number will be displayed. If no name is
007383 entered and the "Enter" is pressed the first item in the
007384 listing will be displayed and the Responsibility Index will be
007385 placed in use. If a name is entered and no match can be found
007386 one will be allowed to try again or return to the Main Menu or
007387 the Modify Historical files Menu.
007388
007389 Option <3> Hunt by Supervisor: This will display a request for one to
007390 enter the name of the supervisor person to hunt for just as
007391 was done upon initially entering this routine. Enter the name
007392 of the Supervisor Person and the first action for that
007393 supervisor by item number will be displayed. If no name is
007394 entered and the "Enter" is pressed the first item in the
007395 listing will be displayed and the Supervisor Index will be
007396 placed in use. If a name is entered and no match can be found
007397 one will be allowed to try again or return to the Main Menu or
007398 the Modify Historical files Menu.
007399
007400 Option <X> Completed Todays Date: This option is displayed for active
007401 items only. This option will insert todays date in the
007402 Completed Date field. The item will be transferred from the
007403 active file to the historical file upon returning to the Main
007404 Menu.
007405
007406 Option <Z> Blank out Completed Date: This option will blank out the
007407 Completed Date field. In the case of the Historical file
007408 items this will initiate the transfer of a historical item
007409 back to the active file thus reactivating it.
007410
007411 Several flags may appear just above the Menu at the bottom of the screen
007412 as described below:
007413
007414 Beginning of File: This flag indicates the top of the file has been
007415 reached with the action item being displayed.
007416
007417 End of File: This flag indicates that the bottom of the file has been
007418 reached with the action item being displayed.
007419
007420 Only Item in File: This flag indicates that there is only one item in the
007421 file.

007422

007423 ITEM DELETED: This flag indicates that the displayed action item has
007424 been deleted. It flashes in red as a warning as record deletion is not
007425 recommended as described above.

007426

007427 Item Number Index in Use: This flag indicates that the action items are
007428 indexed and will be displayed in the order of Action Item Number. This
007429 index will be in effect if this routine is entered with Option "I" from
007430 the Main Menu, or Modify Historical Files Menu, or Option "1" from the
007431 Revision Menu.

007432

007433 Responsibility Index in Use: This flag indicates that the action items
007434 are indexed and will be displayed in the order of responsible person and
007435 then action item number. This index will be in effect if this routine is
007436 entered with Option "R" from the Main Menu, or Modify Historical Files
007437 Menu, or Option "2" from the Revision Menu.

007438

007439 Supervisor Index in Use: This flag indicates that the action items are
007440 indexed and will be displayed in the order of supervisor and then action
007441 item number. This index will be in effect if this routine is entered with
007442 Option "S" from the Main Menu, or Modify Historical Files Menu, or Option
007443 "3" from the Revision Menu.

007444 [End of Chapter

008001 !!!Searching for Action Items

008002 This section describes how to use the Search Menu. This menu allows for
008003 retrieval of various action items that contain a key word. This menu is
008004 initiated by selecting Option "E" from the Main Menu.

008005

008006 On the Search Menu just below the "0" option is a flag in purple that
008007 indicates which file will be searched. This flag may be set to search
008008 either the Active or Historical files.

008009

008010 From this menu the following Options are available:

008011

008012 Option <0> Return to Menu: This Option will return the program to the
008013 Main Menu.

008014

008015 Option 1 > Search by Word (Display Record): This Option will request a
008016 key word to search for and then search for the word in each
008017 action item in the file in use. Letter case is ignored. This
008018 Option will search the following database fields for the key
008019 word: Description, Action, Status, Type, and Reference.

008020 Letter case is ignored for purposes of the search. When the
008021 word is found the search will stop, the action item in which
008022 the word was found will be displayed and the following Options
008023 will be available:

008024

008025 Option <0> Return to Menu: This Option will return the program
008026 to the Search Menu.

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008027
008028 Option <C> Continue: This Option will continue the search
008029 until the next action item with the key word is
008030 found, which in turn will be displayed.
008031
008032 Option <1> Specify Another Word: This will terminate the
008033 search in progress and allow another key word to be
008034 selected for a search.
008035
008036 In addition the Action and Status many be reviewed and
008037 scrolled using the keys described in the chapter: Keyboard
008038 Functions, and the section: Viewing Action and Status.
008039
008040 If the key word is not found a statement to that effect will
008041 be displayed. Press any key to return to the Search Menu.
008042 When no more instances of the key word are found a statement
008043 to that effect will be displayed.
008044
008045 At the completion of the search a display will indicate either
008046 that no matches could be found or the number of action items
008047 that contained the word or phrase.
008048
008049 Option 2 > Print All Records Containing Key Word: This Option is the
008050 same as Option 1 except that all action items containing the
008051 key word will be printed in report form. Before printing this
008052 report it may be useful to preview the results using Option 1
008053 as described above.
008054
008055
008056 Option 3 > Change File in Use: This option will allow the file in use to
008057 be shifted between the Active and Historical files. The file
008058 in use will be displayed in magenta just below the top menu
008059 item. Using this Option both Active and Historical files can
008060 be searched.
008061 [End of Chapter]
009001 !!!Report Printing
009002 This chapter covers printing of reports for active and historical items.
009003 Periodic and Type reports are covered in later chapters on these
009004 respective subjects. The following key topics are covered in this
009005 chapter:
009006
009007 Report Printing Overview
009008 Active Item Reports
009009 Historical Item Reports
009010 Report Group Printing
009011 Setup Items Effecting Report Printing
009012
009013 ***Report Printing Overview
009014

Sheet1

009015 There are two report menus. The first is designated as Page 1, is
009016 circled with a green border and lists the reports that can be printed
009017 from the Active Item files. The second is designated as Page 2, is
009018 circled with a cyan border and lists the reports that can be printed from
009019 the Historical Item files. These menus are accessed from the Main Menu
009020 by using Options "1" and "2" respectively. They can be accessed from
009021 each other by entering the page number. If no records are in the Active
009022 or Historical files respectively then a note to that effect will be
009023 displayed at the bottom of the page and the reports on that menu may not
009024 be printed.

009025

009026 Reports that provide listings by type, responsible person, or supervisor
009027 will prompt for a type, responsible person, or supervisor name. If a
009028 report for just one type or person is desired enter the item for which
009029 the report is desired otherwise just press "Enter" and a full report will
009030 be printed. When entering names be sure to use the exact name used in
009031 entering the action item. Reports will be printed even if the entire
009032 name or type is not spelled out. For example if Tuc is entered for
009033 responsible person, action items for only the first of the following
009034 people will be printed:

009035

009036 Tuck, M.

009037 Tucker, P.

009038 Tucker, W.

009039

009040 In other words a match will be made with the letters entered and all
009041 items for that first name encountered will be printed. If one is familiar
009042 with the data in the file this allows one to use the shortcut of entering
009043 just part of a name provided there are no other matches in the listing.

009044

009045 ***Active Item Reports

009046

009047 The following is a brief description of the reports that can be printed
009048 from the REPORT MENU - ACTIVE ITEMS - Page 1

009049

009050 General Reports:

009051

009052 A > All by Item #: This report will list all active items by action item
009053 number. This report is particularly useful to the person maintaining
009054 the system and doing the weekly update to accumulate comments and
009055 changes.

009056

009057 B > All by Type & Reference: This report lists all items alphabetically
009058 by type and reference. If properly coded the type will allow this
009059 report to be used to review activities that are grouped by function,
009060 activity supported, etc.

009061

009062 C > All by Due Date: This is a chronological report that lists all
009063 action items in the order that they are to be completed. This report

Sheet1

009064 is intended for the boss so he can keep track of what is due next.
009065 Items should be completed in the order that they appear on the
009066 report. Three flags or headings can show up on this report to
009067 highlight items that are late (text circled in \$\$\$), items that are
009068 due in the current week (text circled in ***), and items that are due
009069 after the current week (text circled in +++). Thus late items show
009070 up first under one flag, followed by items that must be completed
009071 during the current week under the second flag. This is an excellent
009072 planning and tracking tool that allows the proper priority to be set
009073 on assigned items.

009074

009075 D > All by Priority & Due Date: This report lists all active action
009076 items by priority. Although this system is primarily driven by due
009077 dates this priority system allows one to assess projects priority
009078 relative to each other. If the Display Priority flag is not turned
009079 on on Page 2 of the Setup Menu this report option will not be
009080 displayed.

009081

009082 Weekly Reports by Due Date:

009083

009084 E > for Responsible Person: This report provides a personal report for
009085 each person assigned an action item. Each person's action items
009086 start on a new page and are numbered separately so the report can be
009087 split up and distributed on a weekly basis to the individuals with
009088 action items. This report is similar to the report described for
009089 Option "C" above. Each persons report lists the actions he is
009090 responsible for in the order that they are due and each personal
009091 report has the Late, Due this Week, and Due after this Week banner
009092 described above.

009093

009094 F > for Responsible Supervisor: This report provides each supervisor
009095 with a report of the actions assigned to his people. Each
009096 supervisor's action items start on a new page and are numbered
009097 separately so the report can be split up and distributed on a weekly
009098 basis. This report is similar to the report described for Option "C"
009099 above. Each supervisors report lists the actions his group is
009100 responsible for in the order that they are due and has the Late, Due
009101 this Week, and Due after this Week banner described above. If the
009102 Display Supervisor flag is not turned on on Page 2 of the Setup Menu
009103 this report option will not be displayed.

009104

009105 Special Reports:

009106

009107 G > Daily Report - Due Today & Late: This report is similar to the
009108 report described under Option "C" above but only lists items that are
009109 late and due on the date printed. It provided a tool for short term
009110 monitoring.

009111

009112 I > Statistical Summary: This report provides an overview of the active

Sheet1

009113 action items. The first part lists all persons assigned action items
009114 and how many items assigned to each person are late, due this week,
009115 and due after this week. This can help assess work load and who is
009116 getting behind. The second part of the report lists the number of
009117 active action items by type and shows what percent of the open action
009118 items have each type code. This can help assess what persons,
009119 projects, or activities are providing workload for the group. In
009120 addition the number of items in the historical file is listed. This
009121 report is intended to provide a management overview.

009122

009123 + > Printer Page Eject: This option will eject a single page from the
009124 printer.

009125

009126 ***Historical Item Reports

009127

009128 The following is a brief description of the reports that can be printed
009129 from the REPORT MENU - HISTORICAL ITEMS - Page 2:

009130

009131 General Historical Reports:

009132

009133 A > All by Item #: This report will list all historical items by action
009134 item number. This report provides a ready reference for to keep
009135 track of completed action items.

009136

009137 B > All by Type & Reference: This report lists all historical items
009138 alphabetically by type and reference. This provides an excellent
009139 reference of activities completed in support of types of activity, or
009140 project, or individual depending on how the type code has been used.

009141

009142 C > All by Priority & Item #: This report lists all historical items by
009143 priority and item number. It can be used to assess past proper
009144 prioritizing of projects. If the Display Priority flag is not turned
009145 on on Page 2 of the Setup Menu this report option will not be
009146 displayed.

009147

009148 Grouped Historical Reports:

009149

009150 D > All by Resp. Person & Comp. Date:

009151 E > All by Resp. Person & Type:

009152 F > All by Resp. Person & Item #:

009153 These listings provide several reports by Responsible person and
009154 either completion date, type, or item number. These reports provide
009155 a historical record of action items completed by a person. These
009156 reports can be used to review a person's performance, and the
009157 projects worked on.

009158

009159 G > All by Resp. Sup.& Comp. Date:

009160 I > All by Resp. Sup.& Type:

009161 J > All by Resp. Sup.& Item #:

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009162 These listings provide several reports by Supervisor and either
009163 completion date, type, or item number. These reports provide a
009164 historical record of action items completed by those persons
009165 reporting to the supervisor. If the Display Supervisor flag is not
009166 turned on on Page 2 of the Setup Menu this report option will not be
009167 displayed.

009168

009169 Special Reports:

009170

009171 K > Statistical Summary: This report provides an overview of the
009172 completed action items. The first part lists all persons who have
009173 been assigned action items and have completed them on time by or
009174 before the due date or have completed them later. Neat stuff at
009175 evaluation time. The second part of the report lists the number of
009176 completed active action items by type and shows what percent of the
009177 completed action items have each type code. This can help assess
009178 what persons, projects, or activities have provided the workload for
009179 the group. This report is intended to provide a management overview.

009180

009181 + > Printer Page Eject: This option will eject a single page from the
009182 printer.

009183

009184 ***Report Group Printing

009185

009186 It is often desirable to print several reports at the same time. For
009187 example at the end of the week one may want the individual action item
009188 reports for the responsible people for the next week as well as an
009189 overall report for the group supervisor and a listing by action item for
009190 the secretary who maintains the action item listings. The Group
009191 reporting feature allows a list of several reports to be established and
009192 they in turn can be printed from the Main Menu using Options "3" and "4".

009193

009194 The specific reports assigned to a group are established using the Setup
009195 Menu page 5. This allows two groups of reports to be established. The
009196 details for entering the codes to set the reports are described in the
009197 chapter: Program Setup Menu, section: Page 5.

009198

009199 Once the groups are established the report groups can be printed using
009200 the Main Menu Options "3" and "4". When a group is selected the reports
009201 to be printed will be displayed along with the following options:

009202

009203 Option <0> Return to Menu: This option will abort the process and return
009204 the program to the Main Menu.

009205

009206 Option <Y> Print this Group: This option will print the displayed group
009207 in the sequence displayed. As the group is printed the screen
009208 will display which report in the group is currently being
009209 printed.

009210

Sheet1

009211 ***Setup Items Effecting Report Printing

009212

009213 Several items on the Setup Menu can effect report printing. These

009214 include the following items on the pages of the Setup menu:

009215

009216 Page 2 - DUE BANNER and Specified Days

009217 - Display Priority

009218 - Display supervisor

009219 - Group Title which will be printed on the first page of each

009220 report if one is provided

009221 - Print blank lines in ACTIVE action and status fields

009222

009223 Page 4: - Printer designation

009224 - Lines per page for reports

009225 - Printer control codes

009226 - Print reports on two sides of sheet if allowed by the printer

009227

009228 Page 5: - Report Groups that can be setup so that several reports can be

009229 printed using Options "3" and "4" from the Main Menu without

009230 waiting for each report to print out

009231

009232 These features are described in more detail in chapter on the Setup Menu.

009233 [End of Chapter]

010001 !!!Automatic Scheduling of Periodic Action Items

010002 This chapter covers the powerful tool that allows one to schedule

010003 periodic action items without having to enter them each time. The

010004 following topics are covered in this chapter:

010005

010006 Periodic Action Item Overview

010007 Periodic Action Item Numbering

010008 Periodic Action Item Fields & Scheduling

010009 Periodic Action Item Reports

010010 Updating Active Action Item List with Periodic Action Items

010011

010012 ***Periodic Action Item Overview

010013

010014 The periodic action item feature is a powerful tool to help schedule

010015 repetitive items without having to input them each time their due date

010016 approaches. A few examples of items that might be scheduled using this

010017 feature include:

010018

010019 1. Personnel performance evaluations that come due quarterly or yearly.

010020

010021 2. Monthly, Quarterly, or Annual reports such as financial, status, or

010022 performance. Periodic action items may be setup to help coordinate

010023 all the inputs that require different time sequencing to assemble the

010024 final product.

010025

010026 3. Maintenance activities, such as periodic cleaning of disk drives,

Sheet1

010027 making backups, doing virus checks, checking emergency power supply
010028 batteries, or even mowing the lawn.
010029
010030 4. Meeting preparation and scheduling. Assign an action item to put out
010031 an agenda and schedule a meeting, and another to put out the minutes.
010032 These are just a few of the many items that may be automatically
010033 inserted into the active action item list from the periodic list. The
010034 system can be setup so that the periodic list will be scanned for
010035 periodic items once a day upon system startup and those that are due
010036 to be added can be inserted.
010037
010038 ***Periodic Action Item Numbering
010039
010040 Periodic Action Items are numbered using the following format:
010041
010042 X-NNNNN
010043
010044 where X = a prefix indicating periodicity, (W=weekly, M=monthly,
010045 Y=yearly)
010046 NNNNN = a sequential number assigned by the computer starting with
010047 00001
010048
010049 The sequential number is assigned from a base number on Page 7 of the
010050 Setup Menu, and the prefix is assigned based on the item schedule
010051 assigned on data entry. If the periodicity of a periodic action item is
010052 revised the periodic number prefix will change accordingly but the
010053 sequential number will stay the same. For example if W-00048 was changed
010054 from weekly to monthly the periodic action item number would become M-
010055 00048.
010056
010057 When a periodic action item is copied to the Active Action Item file the
010058 Periodic Action Item Number will be displayed or printed beside the word
010059 "Description" on screens and reports. This is provided for reference and
010060 can't be changed in an active or historical item.
010061
010062 ***Periodic Action Item Fields & Scheduling
010063
010064 Periodic Action Items include fields for Responsibility, Type, Reference,
010065 Priority, Supervisor, Description, and Action. Most of these fields are
010066 typical of any action item and are described in the previous chapter:
010067 Action Item Field Descriptions. In addition they include a Periodic #,
010068 (described above), and the following fields which determine how an item
010069 is scheduled and when activated:
010070
010071 Auto Schedule Activated: (Y or N) This item is normally set to Y to
010072 activate the auto schedule function. An item with this field set to
010073 N will be ignored when the active items are updated.
010074
010075 Periodicity: This has the format of NN - X where NN is a two digit number

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010076 from 1 to 99 and X is the frequency base of the item and can be Y =
010077 yearly, M = monthly, W = Weekly. eg. 1 - Y would be yearly, 3 - M
010078 would be every 3 months or quarterly, and 5 - W would be every 5
010079 weeks.
010080
010081 Method: This is the method used to determine the day of the month on
010082 which an item with a Periodicity of Y or M is determined. These
010083 codes work together with the next due date. The following codes may
010084 be used:
010085
010086 D - Schedule item on the same day of the month as used in the next
010087 due date. (If month has fewer days then the initially assigned
010088 due date item will be scheduled on the last day of the month.
010089 It is strongly suggested that items not be scheduled using this
010090 option beyond day 28 of the month.)
010091
010092 E - Schedule item the same number of days from the end of the month
010093 as the next due date. (If month has fewer days than the
010094 initially assigned due date item will be scheduled on the first
010095 of the month. It is strongly suggested that items not be
010096 scheduled using this option before 28 days from the end of the
010097 month.)
010098
010099 S - Schedule item on the same n th occurrence of the weekday as
010100 occurs in the next due date. eg. If the item is scheduled on
010101 the 3rd Tuesday of the due date month it will be scheduled on
010102 the 3rd Tuesday of the next month the item is scheduled. (If an
010103 item is scheduled for the 5th occurrence of a weekday an error
010104 message will occur as some months don't have 5 occurrences of
010105 every weekday.)
010106
010107 F - Schedule item on the same n th occurrence of the weekday from
010108 the end of the month as occurs in the next due date. eg. If
010109 the item is scheduled on the 3rd Friday from the end of the
010110 next due date month it will be scheduled on the 3rd Friday from
010111 the end of the next month the item is scheduled for. (If item
010112 is scheduled for the 5th occurrence of a weekday an error
010113 message will occur as some months don't have 5 occurrences of
010114 every weekday.)
010115
010116 Days of the Week: This item is used to indicate which days of the week to
010117 schedule an item with the Periodicity of W (for Weekly). This block
010118 represents the days of the week and a letter should be placed in the
010119 block under each day an item is to be scheduled. e.g. If Periodicity
010120 is set to 1 - W and an X is placed on Mon., Wed., and Fri. the
010121 action item will be scheduled on those 3 days each week. If a
010122 periodicity of 2 - W is used it will be scheduled on those 3 days
010123 every other week.
010124

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010125 Activate Lead Days: This can be a number from 0 to 999 and tells the
010126 system how many days before the due date to automatically copy an
010127 item from the periodic file to the active file. In setting this one
010128 should consider both how often action item listings are printed and
010129 how much time the responsible person needs to complete the assigned
010130 task.

010131
010132 Next Due Date: This is the next date that the item will be due. It is
010133 used the Activated Lead Days to determine when an item will be
010134 placed on the active list and will be the actual due date assigned
010135 to the next item so assigned. It will also be used in conjunction
010136 with the other scheduling information above to determine the
010137 scheduling pattern to be used. The default or initial value can be
010138 set using the "Default Days Lead Time to Schedule" constant found on
010139 page 7 of the Setup Menu.

010140
010141 A few examples may be helpful in explaining how the system uses these
010142 items to set due dates. The following examples will help explain how the
010143 due dates are set:

010144
010145 The following calendar will assist:
010146
010147 S M T W T F S November 1993
010148 1 2 3 4 5 6
010149 7 8 9 10 11 12 13
010150 14 15 16 17 18 19 20
010151 21 22 23 24 25 26 27
010152 28 29 30

010153
010154 Example 1:
010155 Periodicity: 1 - M
010156 Method: D
010157 SMTWTFS
010158 Days of the Week:
010159 Next Due Date: 10/25/93
010160 This example will schedule the periodic item on the 25th of each month.
010161 The SMTWTFS matrix is not used for monthly and yearly periodicity's.

010162
010163 Example 2:
010164 Periodicity: 2 - M
010165 Method: S
010166 SMTWTFS
010167 Days of the Week:
010168 Next Due Date: 10/25/93
010169 This example will schedule the periodic item on the 4th Thursday of every
010170 other month. The day of the week is determined by looking at the next
010171 due date and then determining which occurrence it has in that particular
010172 month.
010173

010174 Example 3:
010175 Periodicity: 1 - W
010176 Method:
010177 SMTWTFS
010178 Days of the Week: XXXXX
010179 Next Due Date: 10/25/93
010180 This example will schedule the periodic item on every week day of every
010181 week, excluding Saturday and Sunday.
010182
010183 Example 4:
010184 Periodicity: 2 - W
010185 Method:
010186 SMTWTFS
010187 Days of the Week: X X
010188 Next Due Date: 10/25/93
010189 This example will schedule the periodic item on Monday and Thursday of
010190 every other week.
010191
010192 Example 5:
010193 Periodicity: 10 - Y
010194 Method: E
010195 SMTWTFS
010196 Days of the Week:
010197 Next Due Date: 10/22/93
010198 This example will schedule the periodic item 8 days from the end of the
010199 month of November every 10 years starting in 1993.
010200
010201 Obviously there is a lot of flexibility in this system and it will allow
010202 one to schedule items at just about any periodic interval desired. Once
010203 periodic codes are set one can use the "X" and "V" options to increment
010204 the due date forwards and backwards and observe the change in due date to
010205 be sure it is changing as desired. These options are described in the
010206 following section.
010207
010208 ***Adding and Revising Periodic Action Items
010209
010210 Periodic action items are added by using option "A" on the Periodic Item
010211 Menu, and are revised by using options "I", "R", and "S" on the Periodic
010212 Item Menu. These options are similar to the options described in an
010213 earlier chapter on Adding and Revision Action except that they also
010214 display the following added options:
010215
010216 Option <X> NeXt Due Date: This option will increment the next due date to
010217 the next due date using the logic associated with the settings
010218 of Periodicity, Method, Days of the Week, and Next Due Date.
010219 This option is helpful in checking the logic, and in adjusting
010220 the due date to skip a periodic item if desired.
010221
010222 Option <V> PreVious Due Date: This option will increment the due date

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010223 back to the previous due date using the logic associated with
010224 the settings of Periodicity, Method, Days of the Week, and
010225 Next Due Date. This option is the reverse of option <X>
010226 described above.
010227
010228 ***Periodic Action Item Reports
010229
010230 The following reports of the periodic action items may be printed using
010231 options from the Periodic Item Menu:
010232
010233 Option <1> Print Full Periodic Item Report - by Item: This option will
010234 print a full listing of all periodic action items by item number.
010235
010236 Option <2> Print Full Periodic Item Report - by Responsible Person: This
010237 option will print a listing of all periodic items for each
010238 responsible person. Each person's listing will start on a new sheet
010239 of paper and be sequentially numbered. When the option is requested
010240 one will be asked to enter the name or portion of a name. If a name
010241 is entered a listing for only that person will be printed. If no
010242 name is entered and the "Enter" key is pressed a full listing will
010243 be printed.
010244
010245 Option <3> Print Full Periodic Item Report - by Supervisor: This option
010246 will print a listing of all periodic items for each supervisor.
010247 Each supervisor's listing will start on a new sheet of paper and be
010248 sequentially numbered. When the option is requested one will be
010249 asked to enter the name or portion of a name. If a name is entered a
010250 listing for only that person will be printed. If no name is entered
010251 and the "Enter" key is pressed a full listing will be printed.
010252
010253 ***Updating Active Action Item List with Periodic Action Items
010254
010255 The periodic action items serve as the skeleton to produce real active
010256 action items. The active action item is updated from the periodic action
010257 item listing by scanning the due dates minus the "Activate Lead Days" to
010258 see if the resulting date is earlier than the current date. If it is, a
010259 copy of the periodic action item is transferred to the active action item
010260 listing, with a new sequential number, and added status lines. The
010261 periodic action item due date is then incremented to the next due date
010262 and it in turn is checked. If it also meets the criteria another copy
010263 will be transferred to the active listing and so on until the criteria is
010264 no longer met at which time the system will look at the next periodic
010265 action item and make the same check. This will continue until all the
010266 periodic action items have been checked.
010267
010268 Periodic action items may be scanned for addition to the active list in
010269 the following ways:
010270
010271 1. By using Option <U> Update Active Items for Periodic Items, on the

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010272 Periodic Item Menu. This will scan the items and update them on
010273 demand. If no updates are required a message to that effect will be
010274 displayed.
010275
010276 2. Items can be updated each time the program is started. This option can
010277 be turned on or off using an option on Page 7 of the Setup Menu.
010278 This is explained in more detail in the chapter: Program Setup Menu.
010279 Similarly on page 7 of the Setup Menu one can have this function
010280 update the list only once a day, the first time the program is
010281 accessed. It is recommended that both these options be placed on to
010282 allow daily update just once a day.
010283
010284 3. Items can be updated each time the program leaves the Periodic Item
010285 Menu. This option can be turned on or off using an option on Page 7
010286 of the Setup Menu. Similarly on page 7 one can have this option
010287 function only once a day if desired.
010288 [End of Chapter]
011001 !!!Type Code Checking and Directory
011002 This chapter describes how to use the type code to help organize and
011003 track groups of action items. The following key topics are discussed in
011004 this chapter:
011005
011006 Type Code Directory Overview
011007 Type Code Directory Fields
011008 Adding and Revising Type Codes in the Directory
011009 Type Code Reports
011010 Checking Type Codes when Entering Action Items
011011
011012 ***Type Code Directory Overview
011013
011014 The Type Code Directory and Validation allows one to make better use of
011015 the type codes by insuring that only those defined in the directory are
011016 used on new active and periodic action items. When active or periodic
011017 items are added or revised their type codes are checked against the
011018 directory. If they are not in the directory one can accept the type
011019 code, add it to the directory, or search the directory for another type
011020 code. The Type Code Menu is used to maintain the Type Code Directory and
011021 is accessed by selecting Option "T" from the Main Menu.
011022
011023 ***Type Code Directory Fields
011024
011025 The following fields are included in the Type Code Directory:
011026
011027 Type: This is the type code that can be up to 5 letters. They will be
011028 automatically capitalized.
011029
011030 Group: Group is a field used to group type codes to facilitate listing.
011031 Typical groups might include reports, peoples initials, maintenance
011032 functions, periodic items, departmental grouping, etc. A report

011033 described below will list type codes by group.
011034
011035 Description: This should provide a brief description of the type code.
011036
011037 ***Adding and Revising Type Codes in the Directory
011038
011039 Type codes are added by using option "A" on the Type Menu, and are
011040 revised by using options "T", and "G" on the Type Menu. These options are
011041 similar to the options described in the chapter on Adding and Revising
011042 Action Items. If the "T" option is used the items are in the sequence by
011043 type code, and if the "G" option is used they are in order by group and
011044 type.
011045
011046 ***Type Code Reports
011047
011048 The following Type Directory Reports can be printed using options from
011049 the Type Menu:
011050
011051 Option <1> Print Report - by Type: This option will print a
011052 report by type code showing type code, group, and description for all
011053 type codes in the directory.
011054
011055 Option <2> Print Report - by Group: This option will print a report by
011056 group and type code showing type code, group, and description
011057 for all type codes in the directory.
011058
011059 Option <3> Print Audit Report - in Active List but not Directory: This
011060 option will print a report showing all type codes used in the
011061 active action item list but not found in the Directory. This
011062 report is useful in helping to update the Directory or correct
011063 type codes that are in error.
011064
011065 Option <4> Print Audit Report - in Historical List but not Directory:
011066 This option will print a report showing all type codes used in
011067 the historical action item list but not found in the
011068 Directory. This report is useful in helping to update the
011069 Directory or correct type codes that are in error.
011070
011071 ***Checking Type Codes when Entering Action Items
011072
011073 Type code checking can be enabled or disabled with the options on Page 8
011074 of the Setup Menu as described the chapter: Program Setup Menu. With
011075 type code checking enabled the type code of any new or revised action
011076 item or periodic action item will be checked upon selection of an option
011077 at the bottom of the screen. If the type code in the current item is in
011078 the Directory program action will continue as expected, but if it is not
011079 in the directory a message will appear to that effect at the bottom of
011080 the screen and the following options will be displayed:
011081

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- 011082 Option <K> OK: This option will accept the type code as entered, and
011083 allow program execution to continue.
011084
- 011085 Option <C> Check: This option will check a revised type code against the
011086 directory and indicate if it is or is not found in the type
011087 directory.
011088
- 011089 Option <R> Revise: This option will allow the entered type code to be
011090 revised. Once OKed, (as described above), it will be entered
011091 into the displayed action item.
011092
- 011093 Option <A> Add: This option will initiate actions to add the type code
011094 into the Directory. When selected fields for group and
011095 description will be displayed and should be filled in, after
011096 which one of the following options should be selected:
011097
- 011098 Option <0> Return to Menu: This option will exit the Directory
011099 addition option assuming one does not desire to add
011100 the type code to the Directory, and display the
011101 basic type check menu.
011102
- 011103 Option <R> Revise: This option allows one to revise the group
011104 or description that have just been entered.
011105
- 011106 Option <A> Add: This option will add the type, group, and
011107 description to the directory as just entered and
011108 allow program execution to continue.
011109
- 011110 Option <H> Hunt: This option will allow one to browse through
011111 the Type Code Directory and select a Type Code.
011112 When selected an entry block will be displayed to
011113 allow one to enter all or part of a Type Code. If
011114 it is found it will be displayed, but if not one
011115 will be given a chance to try again. When the
011116 "Enter" key is pressed with no entry the first Type
011117 Code in the Directory will be displayed. In either
011118 case the following options will also be displayed:
011119
- 011120 Option <0> Return to Menu: This option will exit
011121 the Directory addition option assuming
011122 one does not desire to use a type code
011123 from the Directory, and display the basic
011124 type check menu.
011125
- 011126 Option <K> OK: This option will accept the type
011127 code as found in the directory, and allow
011128 program execution to continue.
011129
- 011130 Option <N> Next: The option will skip to the next

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011131 type code in the directory.
011132
011133 Option <P> Previous: The option will skip to the
011134 previous type code in the directory.
011135
011136 Option <T> Top: The option will skip to the top of
011137 the directory.
011138
011139 Option Bottom: The option will skip to the
011140 bottom of the directory.
011141
011142 Option <H> Hunt: This option will initiate the hunt
011143 process described above.
011144 [End of Chapter]
012001 !!!Maintaining Items in the Historical File
012002 Although AMS is focused on getting action items completed it also
012003 provides a valuable resource in the historical file of completed actions
012004 that is referred to as the historical file. This section describes
012005 several functions associated with revising and maintaining the historical
012006 files.
012007
012008 The following key topics are discussed:
012009
012010 Revising or Deleting Historical Items
012011 Restoring Items from Historical File to Active File
012012 Purging Items from the Historical File
012013
012014 ***Revising or Deleting Historical Items
012015
012016 The Modify Historical Files Menu is accessed using Option "M" provides
012017 three options for accessing and revising historical data. These options
012018 are described in detail in the chapter Adding and Revising Action Items.
012019 It should be noted that these options can be used both to update
012020 historical items that have been completed and can be used to restore an
012021 item that was inadvertently transferred to the historical file back to
012022 the active file.
012023
012024 ***Restoring Items from Historical File to Active File
012025
012026 Occasionally it may be necessary to restore an item from the historical
012027 file to the active file either because it was accidentally given a
012028 completion date or in haste we may have found that the item was really
012029 not completed. There are two methods for accomplishing this. The first
012030 is to use the Revise Historical Items options and use Option <Z> to
012031 delete the completion date which initiates the transfer when one leaves
012032 the editing routine. Secondly one can use the Modify Historical Files
012033 Menu Option 2: SINGLE Item Restoration from Historical to Active File.
012034 This second option allows one to retrieve an action item from the
012035 Historical File, erase the completion date and place it back in the

Sheet1

012036 Active file. Upon selecting this option one will be asked to enter the
012037 action item number of the item to be retrieved. The item will be
012038 retrieved and restored to the Active File with appropriate on screen
012039 notification. If the item can't be found one will also be notified.
012040 This option is useful if it is determined that an item has not been
012041 completed.
012042
012043 ***Purging Items from the Historical File
012044
012045 With time the historical files will begin to take up valuable space on
012046 your disk drive. This section describes how to eliminate older action
012047 items that may no longer be of particular use.
012048
012049 Use the Modify Historical Files Menu Option 1: PURGE Records from the
012050 Historical File. This option will purge or erase completed action items
012051 in the Historical file that have completion dates older then a certain
012052 date that one selects. Upon selecting this option one is asked to enter
012053 a date. This function uses the completed date as the reference for
012054 determining which items to delete. Enter the desired date, or just press
012055 "Enter" to abort to the Modify Historical Data Menu. The system will
012056 then display a tabulation of the number of items to be deleted and the
012057 number of items that will remain after which one will be asked to "D"
012058 Delete the items, "R" Revise the deletion date, or "0" Abort and Return
012059 to the Modify Historical Files Menu.
012060
012061 CAUTION, this option can delete a lot of data in a hurry. Before using
012062 this option it is a good idea to print out a copy to the appropriate
012063 Historical Reports and make a Backup diskette of the data. This option
012064 can help eliminate old records that aren't being use and thus save disk
012065 space and speed up program execution.
012066 [End of Chapter]
013001 !!!Program Setup and Setup Menu
013002 This chapter provides a description of the items on the 8 pages of the
013003 SETUP MENU which determine program setup. These pages and this chapter
013004 covers the following general areas:
013005
013006 Page 1: Action Item and Traveler Numbering
013007 Page 2: Report and Screen Format
013008 Page 3: Computer Hardware
013009 Page 4: Printer Hardware and Control Codes
013010 Page 5: Preset Group Reports
013011 Page 6: Names Listing for Traveler
013012 Page 7: Periodic Scheduling Item Numbering and Constants
013013 Page 8: Type Code Checking
013014
013015 The Setup Menu is accessed as Option "C" from the Main Menu, Option "4"
013016 from the Secondary Menu, or Option "C" from the Modify Historical Files
013017 Menu. These pages are used to customize program configuration and
013018 features. Page 1 will be displayed initially. Other pages may be

Sheet1

013019 accessed from the menu by entering the page number. To revise the
013020 constants displayed press "R" and one can then change the constants. If
013021 unacceptable values are entered the cursor will not leave the entry
013022 block. Acceptable values may be shown beside many items. The items on
013023 each page are described below:

013024

013025 ***Page 1: Action Item and Traveler Numbering

013026

013027 Responsible Work Group: This should be a three letter abbreviation for
013028 work group. It will be used as the prefix for the action item
013029 number. The "XXX" initially found in this space may be left. Also
013030 a one or two letter abbreviation may be used and the spaces left
013031 blank or padded with dashes. This makes up the "XXX" part of the
013032 action item number format: "XXX.YY.NNNN". For example "GRP.91.0001".
013033 (See the chapter: Action Item Field Descriptions for a detailed
013034 description of Action Item Number structure.)

013035

013036 Action Item Year Number: This is the last 2 digits of the current year
013037 and will make up part of the action item number. It is
013038 automatically assigned by the system and will be updated each year
013039 by the computer. This makes up the "YY" part of the action item
013040 number format: "XXX.YY.NNNN". For example "GRP.91.0001". (See
013041 section 4.0 for a detailed description of Action Item Number
013042 structure.)

013043

013044 Action Item Next Increment: This is a sequential number starting with
013045 "1". The number is automatically increased by 1 each time a new
013046 Action Item Number is assigned. When the computer is started for
013047 the first time in a new year and the Action Item Year Number is
013048 increased this number will be reset to "1". This number is padded
013049 with zeros to make up the suffix, "NNNN", part of the action item
013050 number format: "XXX.YY.NNNN". For example "GRP.91.0001". (See
013051 section 4.0 for a detailed description of Action Item Number
013052 structure.) for the action item number.

013053

013054 Print Action Item # on Traveler: This determines if action item numbers
013055 will be printed on blank traveler forms which are printed using
013056 Option "V" from the Main Menu. If action items are written in one
013057 place and the numbers on the forms can be coordinated with computer
013058 input this feature should be turned on. Since action item numbers
013059 are assigned by the computer upon data entry and can't be changed it
013060 may be difficult to use the proper forms to coordinate their use.

013061

013062 Traveler Year Number: This is the last 2 digits of the current year
013063 which will make up part of the traveler action item number. It is
013064 automatically assigned by the system and will be updated each year
013065 by the computer.

013066

013067 Traveler Next Increment: This is the sequential number that is padded

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013068 with zeros to make up the suffix for the action item number that
013069 will be printed on blank travelers if the Print Action Item # on
013070 Traveler is selected. This constant allows one to coordinate
013071 sequential traveler printing with the numbers being assigned by the
013072 computer. At start up this should be "1".
013073
013074 Display Late / Due Alert Window on Main Menu: This option turns on and
013075 off the display of a small window in the top right hand corner of
013076 the Main Menu. This window will list the number of action items
013077 that are late (in red) and due today (in yellow) as an alert. If no
013078 items are late or due the window is green. This option can be
013079 turned on and off with this option.
013080
013081 Group Title: This title if entered will be placed at the top of the
013082 reports that are printed, and will customize the reports to an
013083 organizational group if desired. This field may be left blank.
013084
013085 Password: A password may be entered to prevent others from accessing the
013086 action item data. WRITE DOWN THE PASSWORD YOU ENTER AND KEEP IT IN
013087 A SAFE PLACE. It is suggested that no password be used. If one
013088 forgets or loses the password it is possible to recover. See the
013089 chapter: Problem Prevention and Solutions for more details.
013090
013091 ***Page 2: Report and Screen Format
013092
013093 DUE BANNER: This option selects how the banners in the reports are set.
013094 If option "W" is selected the DUE THIS WEEK, and DUE AFTER THIS WEEK
013095 Banner will be based on a table that depends on the day of the week
013096 on which the reports are printed. It assumes that reports printed
013097 on Friday will be used next week and as such will include the
013098 closest weekend, the following week, and the following week in the
013099 period "THIS WEEK". Similarly if printed on any day Saturday
013100 through Thursday they will consider the period through the following
013101 weekend to be part of "THIS WEEK". It works! But if all this is
013102 confusing set this item to "D" for days and the banners will be
013103 worded to state items due before a set date and items due after that
013104 date. That date as determined by a number of days is set with the
013105 item described below.
013106
013107 Specified Days: When the Due banner described above is set to "D" this
013108 item determines how far in advance the date for the Due Before and
013109 Due After banner is set. This allows one to format the report to
013110 suit when it is issued and how frequently it is issued. For example
013111 if the report is issued every two weeks then use 14 days, or every
013112 month use the number of days in the current month.
013113
013114 Display Priority: This flag is set to "Y" to display the priority field
013115 in all on the screen and provide it in reports. If set to "N" the
013116 field will not be displayed and the related reports will not be

Sheet1

013117 displayed in the menus. This field will always exist in the
013118 database but can be removed from displays and printed reports if not
013119 used.
013120
013121 Display Supervisor: This flag is set to "Y" to display the supervisor
013122 field in all on the screen and provide it in reports. If set to "N"
013123 the field will not be displayed and the related reports will not be
013124 displayed in the menus. This field will always exist in the
013125 database but can be removed from displays and printed reports if not
013126 used.
013127
013128 Allow Revision of Assigned Date: This should be "Y" to allow revision of
013129 the assigned date on entry or revision of an item otherwise the
013130 computer will assign the current date as the assigned date and it
013131 can not be altered. If items are entered promptly why not let the
013132 computer do the work.
013133
013134 Action / Status Maximum Lines: This option determines the maximum number
013135 of lines that can be entered for action or status. The default is
013136 100 lines, however the acceptable range is between 10 and 999.
013137 Normally this should be set at a value should be acceptable at 100.
013138 If larger action or status fields are needed it can be set larger.
013139 The larger number may slightly slow computer operation down when
013140 starting to edit or leaving an action or status field particularly
013141 on older, slower computers. When you leave the Setup Menu a check
013142 will be made to be sure that you are not setting the value less than
013143 the longest action or status field. If you have tried to set it
013144 shorter no harm will be done. It will set the value to the longest
013145 action or status field found and inform you of the longest field in
013146 the current active, historical, and periodic listings.
013147
013148 Word Wrap: This setting will allow one to turn word wrap for the action
013149 and status fields on or off. If it is off input will not carry over
013150 to the next line when typing input. The default is to be set on.
013151
013152 Zoom On Window Opening: This option allows you to zoom the action or
013153 status window to full screen upon selecting action or status for
013154 editing. This makes editing easier but obscures the other fields.
013155 The default is not to zoom the window upon accessing action or
013156 status.
013157
013158 Print Blank lines in reports for ACTIVE action and status fields:
013159 - By Responsible Person: Action: Status:
013160 - By Supervisor: Action: Status:
013161 - Other Reports: Action: Status:
013162 These items allow one to assign the number of added blank lines that
013163 will be added to the various ACTIVE action item reports under the
013164 action and status fields. In each case the printed text of the
013165 action and status will be printed. Below the printed text the

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013166 number of lines assigned will be provided. These allow one to add
013167 or write in status on various reports. These are then entered in
013168 the computer to update the action and status. In general it is
013169 suggested that the reports by responsible person include 2 lines
013170 under action and 4 under status. The others will normally be set to
013171 0. If more extensive reporting is necessary then more lines can be
013172 added. Acceptable values are between 0 and 9 lines. The last line
013173 effects all other ACTIVE item reports. Other reports such as
013174 historical and periodic will only print the action and status text
013175 and not be effected by these settings.

013176

013177 ***Page 3: Computer Hardware

013178

013179 Backup Drive Designation: This is the floppy drive on which the Backup
013180 copies are to be made and restored from . Usually this is drive "A"
013181 or "B", but drives A to Z are allowed.

013182

013183 Backup Diskette Size: This is the size of the floppy diskettes that will
013184 be used for backup copies. If the diskette is 5.25 inch it will be
013185 360 Kb or 1200 Kb. If the diskette is 3.5 inch it will be 720 Kb or
013186 1440 Kb. The default value is 360 Kb.

013187

013188 Color Monitor: This configures the system for color or black and white.

013189

013190 Save Historical File Indexes: This option will save the index files used
013191 to find Responsible Person or Supervisor items in historical files
013192 otherwise these files will be created each time needed. Designating
013193 this option "N" will save disk space, or alternately designating it
013194 as "Y" and saving the files will speed access with the responsible
013195 person or Supervisor name to the historical files. Since these
013196 files will be use rarely this item should probably be "N".

013197

013198 ***Page 4: Printer Hardware and Control Codes

013199

013200 Printer Designation: This is the address of the printer that will be
013201 used to print Action Item Tracking System Reports. This will usually
013202 be "PRN" or "LPT1" but LPT1, LPT2, LPT3, COM1,COM2, COM3, AND PRN
013203 are acceptable.

013204

013205 Lines per page for Reports: This designates the lines per page to be used
013206 in printing reports. The normal value is 60, but may be changed to
013207 accommodate different paper size of fonts.

013208

013209 Normal Report Printing Code: This is the printer control code used to
013210 setup the printer designated above before printing a report. Usually
013211 this will just be used to clear any other control codes that may
013212 have been sent to the printer previously. Enter printer control
013213 codes using the following formats: Place letters or symbols in
013214 parenthesis: "A", and enter ASCII character numbers using the

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013215 format: chr(27). Separate each item with a "+" sign. For example
013216 the control code for an Epson printer to reset the default setup
013217 would be: chr(27)+"@". Similarly for an HP Laserjet Printer it would
013218 be: chr(27)+"E"
013219
013220 Report Complete / Restoration Code: This code is similar to the previous
013221 one but is used to return the printer to it's normal condition in
013222 case the Normal Report Printing Code above was used to set the
013223 printer to a special setup.
013224
013225 Print Reports on Two Sides of Paper: This option should be selected as
013226 "Y" if the attached printer is capable of two sided printing, the
013227 following control code is entered, and two sided report printing is
013228 desired. This allows one to save paper. Even if the code is
013229 entered as described below this item will turn this function on and
013230 off. When two sided report printing is enabled added page ejects
013231 are issued so that reports by Responsible Person and Supervisor can
013232 be split up by person so that a full report will be ejected from the
013233 printing if printing ends on the first side of the page.
013234
013235 Two Sided Report Printing Code: This code is similar to the ones above
013236 and is used at the start of a report to activate two sided report
013237 printing when the above option is also selected. This code is reset
013238 at the completion of each report with the Report Complete /
013239 Restoration Code described above.
013240
013241 ***Page 5: Group Reports
013242
013243 Page 5 lists for two groups of reports that one can select to print using
013244 Options "3" and "4" on the Main Menu. Each group can contain up to 5
013245 reports selected from either the Active or Historical Report Menu. The
013246 reports use a two part code that represents the report menu for the first
013247 place and the specific report menu selection for the second place. The
013248 following report codes are used:
013249
013250 1st Place: 1 = ACTIVE 2nd Place: Report Letter Code from
013251 2 = HISTORICAL appropriate Report Menu
013252
013253 For example: Group 1: 1A Group 2: 2A
013254 1C 2C
013255 1E
013256
013257 This would provide two groups, the first which might be used weekly on
013258 Fridays to print weekly action item reports, and the second which might
013259 be used periodically to print historical reports for reference. Once the
013260 report numbers have been entered select Option "S" to show the report
013261 names of the reports that have been selected and confirm that the desired
013262 reports have been selected.
013263

Sheet1

013264 ***Page 6: Names Listing for Traveler

013265

013266 Page 6 lists the names of people who might be assigned action items on
013267 action item travelers. Up to 12 people may be entered. If not all
013268 spaces are filled the remaining spaces will show up as blanks that can be
013269 filled in later on the blank traveler form. Typically one should enter
013270 the names of the key people in the work group. These should be entered
013271 with the last name first and one initial as shown in the following
013272 example:

013273

013274 Smith, J.

013275

013276 Once the desired names have been entered they can be sorted
013277 alphabetically by selecting Option "S" on the menu.

013278

013279 ***Page 7 : Periodic Scheduling Item Numbering and Constants

013280

013281 Page 7 includes settings to determine how the periodic action item
013282 function will perform. It will set periodic action item sequential
013283 number and also determine when the active file is updated from the
013284 periodic file. It is suggested that if you intend to use the periodic
013285 action items that they be set to update once daily upon system Setup.

013286

013287 Next Incremental Periodic Number: This is the next incremental number
013288 that will be assigned a periodic item. The periodic item number
013289 will have the format of X-YYYYY where X is the periodicity type
013290 (Y=Yearly, M=Monthly, W=Weekly) and YYYYY is the next periodic
013291 number padded with zeroes. Numbers between 1 and 99999 are accepted.
013292 At startup this should be 1.

013293

013294 Designate options for automatic update of active items from periodic
013295 list: this option will determine when the system updates periodic
013296 items. It is possible to check in the following situations:

013297

013298 - On system startup: (N = No, Y = Yes, P = Provide Prompt)

013299

013300 - On exit from Periodic Menu: (N = No, Y = Yes, P = Provide Prompt)

013301 In these cases "N" will not update, "Y" will automatically update,
013302 and "P" will request if one wants to update the active list from
013303 the periodic items.

013304

013305 - Update for above only once per day: (Y = Yes, N = No) will update
013306 on the first of the above options encountered but will limit
013307 updates to only once per day.

013308

013309 Default days lead time to schedule: This constant determines how many
013310 days before a periodic item is due the next time that it will be
013311 transferred to the active item listing. It may be set from 0 to 999
013312 days. This may be set to a different value each time a periodic

Sheet1

013313 item is entered. The default value is 9 days.
013314
013315 ***Page 8 : Type Code Checking
013316
013317 This page turns on or off the checking of type code checking when
013318 periodic or active action items are entered.
013319
013320 Check Action Item against type dictionary: This item determines if action
013321 items (Active, Historical, and Periodic) will be checked to insure
013322 that assigned types are in the Type Directory. (Y = Yes, N = No)
013323
013324 Check New or Revised Type Code against dictionary: This will determine if
013325 new or revised type codes are checked to see if they already exist
013326 in the type directory. This helps prevent addition of duplicate
013327 type codes to the directory. (Y = Yes, N = No)"
013328 [End of Chapter]
014001 !!!Spell Checking and Dictionary Maintenance
014002 This chapter covers the use of the dictionary and spell checker to check
014003 spelling of Action and Status items. The following key topics are
014004 covered in this chapter:
014005
014006 Spell Checking Action and Status
014007 Dictionary Maintenance
014008
014009 ***Spell Checking Action and Status
014010
014011 The spelling checker allows one to check the spelling of the action and
014012 status fields after text has been added or revised. Other section
014013 describes to perform basic editing of text. The spell checker is called
014014 after an action or status field has been selected for editing. A window
014015 called the main spell dialog box will be displayed with 4 options listed
014016 in red at the top of the window. Option <F7> initiates the spell checker.
014017 The spell checker will begin checking immediately and display a rotating
014018 "propeller" in the box where the line number is displayed. When a word
014019 is not found in the dictionary checking will stop, the line number will
014020 be displayed rather than the propeller and the main spelling dialog box
014021 will be displayed with the following options:
014022
014023 Option <K> Ok: This option will accept the work and continue checking.
014024
014025 Option <R> Revise: This option will display a blank field under the
014026 misspelled work. Enter the replacement and press enter. Three
014027 options will be provided:
014028
014029 - Option <C> Continue: this option will continue with the word
014030 replacement, and then with the spelling checking. If the word
014031 is not in the dictionary the main spell dialog box will be
014032 displayed. (If no word is entered in the block this option
014033 will not be displayed.)

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014034
014035 - Option <R> Revise: which will allow one to again edit the word as
014036 was done above.
014037
014038 - Option <Q> Quit to Spell Menu: which will return the program to
014039 the main spelling dialog box.
014040
014041 Option <A> Add: This option will add the word to the dictionary and
014042 continue the spell check process.
014043
014044 Option <H> Hunt: This option will hunt through the dictionary and display
014045 up to 9 possible replacements for the word in question. If no work
014046 is found a statement to that effect will be displayed and the
014047 options of the main spell dialog box will remain as options. If
014048 possible replacements are found the main spell dialog box will be
014049 expanded to the right and the words displayed with a selection
014050 number to their left. To select a word for replacement just select
014051 the number, the word will be replaced and the spell checking process
014052 will continue. If none of the words are suitable the main spelling
014053 dialog box options are still available.
014054
014055 Option <Q> Quit: This option will cause the program to quit spell
014056 checking and return to editing.
014057
014058 If you start at the middle of the text the spell checker will ask if you
014059 want to continue when it reaches the bottom. If you choose to continue
014060 it will continue checking until it reaches the point were it started.
014061
014062 ***Dictionary Maintenance
014063
014064 The dictionary has just over 60,000 words. A dictionary with 195,000
014065 words including technical and medical terms is available as an add on.
014066 One can add words while editing text as described above. Words are case
014067 sensitive. That is the word "the" is in the dictionary but the word
014068 "thE" is not. When spell checking the spell checker analyzes words that
014069 are all upper case or at the beginning of a sentence and checks
014070 appropriately.
014071
014072 Dictionary Maintenance is performed from the Dictionary Menu which is
014073 accessed using option "W" (for words) from the Main Menu. Three
014074 functions are available from the Dictionary Menu as described below:
014075
014076 Option A > Add Words to the Dictionary: This option will allow one to add
014077 words to the dictionary. Select this option and on screen
014078 instructions will be displayed along with an entry field to add a
014079 word. Enter the word you want to add and press enter. If the word
014080 is not in the dictionary a statement confirming the addition will
014081 appear in green above the entry field. You can then add another or
014082 just press <Enter> to return to the Dictionary Menu. If the word is

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014083 in the Dictionary a statement to that effect will appear in red and
014084 a menu with the following options:
014085
014086 Options: <Q> Quit to Menu: This option will return the program to
014087 the Dictionary menu.
014088 <R> Revise: This option will allow one to revise the word
014089 just entered.
014090 <A> Add another Word: This option will blank out the word
014091 just entered and allow another to be entered.
014092
014093 To return to the Dictionary Menu just press <Enter> with the word
014094 field empty.
014095
014096 Option D > Delete Words to the Dictionary: This option will allow one to
014097 delete words to the dictionary. Select this option and on screen
014098 instructions will be displayed along with an entry field to add a
014099 word. Enter the word you want to delete and press enter. If the
014100 word is in the dictionary a statement confirming the deletion will
014101 appear in green above the entry field. You can then delete another
014102 or just press <Enter> to return to the Dictionary Menu. If the word
014103 is not in the Dictionary a statement to that effect will appear in
014104 red and a menu with the following options:
014105
014106 Options: <Q> Quit to Menu: This option will return the program to
014107 the Dictionary menu.
014108 <R> Revise: This option will allow one to revise the word
014109 just entered.
014110 <D> Delete another Word: This option will blank out the
014111 word just entered and allow another to be entered.
014112
014113 To return to the Dictionary Menu just press <Enter> with the word
014114 field empty. When you to the Dictionary Menu the dictionary files
014115 will be packed and the words that were deleted will be removed.
014116 This may take some time on older slower machines.
014117
014118 Option C > Check Words in Dictionary: This option will let you check and
014119 see if specific words are in the dictionary. When selected
014120 instructions and a field will be displayed. Just enter the words to
014121 be checked and press <Enter>. A statement indicating the word is or
014122 is not in the dictionary will be displayed and the entry field will
014123 be cleared. One can continue entering word as necessary. When
014124 complete just press <Enter> with the field empty and the program
014125 will return to the Dictionary Menu.
014126
014127 [End of Chapter]
015001 !!!Making and Restoring Backup Diskettes
015002 This chapter covers the very important subject of frequently and
015003 regularly making and restoring backup copies. One may use a plan of
015004 periodic backups for and entire hard disk on a stand alone computer or

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015005 for a network in lieu of the process described here. In any case this
015006 process also provides an easy to transport data for a group or project
015007 form on computer to another. The following key topics are covered:
015008
015009 Making a Backup
015010 Restoring a Backup
015011 Restoring A Backup Made with Older Version
015012
015013 ***Making a Backup
015014
015015 The importance of making backup copies of your data can not be over
015016 emphasized. Backup diskettes of the data should be made on a regular
015017 basis; at least every week is recommended, after entering the last data
015018 for the week. If the system is used frequently it may be advisable to
015019 backup the data more often. Using the backup routines is quite simple and
015020 is accomplished from the Secondary Menu using Options "1" to make backup
015021 diskettes, and Option "2" to restore the data from the backup diskettes.
015022 Each of these routines is quite simple and has been carefully setup to
015023 provide prompts and explain what is going on. In spite of this it is
015024 possible to loose data by retrieving data from an old backup copy and
015025 writing it over newer data so be careful and always think about what you
015026 are doing. For maximum security one should have at least two sets of
015027 backup diskettes that are used alternately to make backups. This way if
015028 one set gets damaged the other will still be available. The following
015029 describes how to make a backup copy and restore it.
015030
015031 Before using Options "1" BACKUP Data to Disks, or Option "2" RESTORE Data
015032 from Disks be sure that the Setup Menu has been setup correctly on the
015033 Revise Constants Menu, Page 3:
015034
015035 - Backup Drive Designation: This is the diskette drive that will be used
015036 to make the backup copies. This will usually be either "A" or "B".
015037
015038 - Backup Diskette Size: This is the size of the diskettes that will be
015039 used.
015040
015041 A backup is made in the following manner:
015042
015043 1. Be sure that you have enough empty formatted diskettes to completely
015044 copy the files. The number can be determined by selecting Secondary Menu
015045 Option "1" and then the backup Option you desire. If the dictionary
015046 files are installed the following options are displayed if not they will
015047 be skipped and the action item files will be backed up:
015048
015049 Option 0 > Return to Secondary Menu
015050
015051 Option 1 > Backup Both Action Items and Dictionary Files
015052
015053 Option 2 > Backup Only Action Item Files

Sheet1

015054

015055 Option 3 > Backup Only Dictionary Files

015056

015057 Generally separate backups should be made for the dictionary and the

015058 Action Item files. This will minimize the time to make a backup.

015059 Occasional dictionary backups may be appropriate based on how often you

015060 make dictionary changes and additions.

015061

015062 After one selects the files to be backed the following will be displayed:

015063 the designated drive, diskette size, number of diskettes required and the

015064 amount of space remaining on the last diskette used. If one does not want

015065 to make a backup just press "Enter" and return to the Secondary Menu.

015066 Diskettes used to make a backup be blank except that previously used

015067 backup diskettes can be used as the program will erase the old backup

015068 files.

015069

015070 2. At the first screen enter "Y" to continue with the backup. You will

015071 then be requested to insert a diskette and then press any key to

015072 continue. The program will check to ensure that there is enough room on

015073 the diskette and that it is the proper size, after which it will copy the

015074 files onto the diskette. When the files have been copied you will be

015075 requested to remove the diskette and insert another. Follow the

015076 instructions until informed that the backup is complete. Write both the

015077 diskette sequential number and date on each diskette so that they can be

015078 inserted in proper order upon restoration.

015079

015080 3. Store the diskettes in a safe place.

015081

015082

015083 A few comments:

015084

015085 1. The backup and restoration procedures are usually done as a precaution

015086 in case of damage to the disk storage system. If the system fails to work

015087 it is possible to erase system files and install the basic program again

015088 then use the restore procedure to load the backup data.

015089

015090 2. The backup and restoration procedures may also be used if several work

015091 groups are keeping action item lists and only one computer is available.

015092 This would involve restoring the backup copy each time the program is

015093 needed making changes, additions, and writing reports as necessary, then

015094 making a backup that would be kept until needed again. In this manner

015095 several groups could maintain their own data disks and use the system.

015096

015097 3. Usually one diskette will hold most of the data needed for an active

015098 action item tracking system. The following provides a summary of the

015099 approximate diskette space required for various record and database

015100 sizes:

015101

015102 # Action Items Lines: Action & Status Backup Space Kb

Sheet1

015103	100	0 + 0	7 Kb
015104	100	5 + 5	162 Kb
015105	100	10 + 10	253 Kb
015106	100	20 + 20	435 Kb
015107	1000	10 + 10	2,466 Kb

015108

015109 A backup of just the 60,000 word dictionary takes 760 Kb.

015110

015111 4. Backup copies may not be made when the demonstration files are active.

015112

015113 ***Restoring a Backup Copy

015114

015115 When files are restored all files that are on the backup copy will

015116 replace the current system files. That is if there is both dictionary

015117 and action item files, they will both be replaced. If only action item

015118 files are on the backup diskette then the current dictionary, if present

015119 will be in service after the restoration.

015120

015121 CAUTION this process will overwrite the data in the active, historical,

015122 periodic, and type directory files!

015123

015124 Restore data from a backup copy as follows:

015125

015126 1. Select Option "2" from the Secondary Menu.

015127

015128 2. After reading the caution screen enter a "Y" to continue.

015129

015130 3. Insert the first diskette as instructed, and press any key to

015131 continue. The program will check to be sure that the diskettes are

015132 entered in the proper sequence. If they are not entered in the proper

015133 sequence the actual diskette number will be displayed and one will be

015134 prompted for the correct diskette number. Once each diskette has

015135 been copied one will be requested to insert each sequential diskette

015136 until the restoration is complete.

015137

015138 During the restoration process described above the date and time of the

015139 backup will be displayed. This together with the last action item number

015140 found on Page 1 of the Setup Menu can help determine how much data must

015141 be reconstructed if restoration was being done after a loss of data.

015142

015143 Data may not be restored from a backup copy when the demonstration files

015144 are active.

015145

015146 ***Restoring Backup Made with Older Version

015147

015148 Older versions of AMS did not have all the features that the current

015149 versions have. It may however be necessary to restore files from older

015150 copies of AMS. The following provides a summary of how the restoration

015151 will be done:

Sheet1

015152
015153 Version 4.0, 4.1: Only the active and historical files will be restored.
015154 You will be given a choice of retaining the current Periodic and Type
015155 files or erasing them. The dictionary will remain as it was initially.
015156
015157 Version 5.0, 5.01: Active, historical, periodic, and type files will be
015158 restored. The dictionary will remain as it was initially.
015159
015160 It is recommended that after upgrading from an older version of AMS that
015161 you make a backup using the current features.
015162 [End of Chapter]
016001 !!!Miscellaneous Functions
016002 This chapter covers two miscellaneous functions available on the
016003 Secondary Menu that do not seem to fit anywhere else. The following
016004 topics are covered in this chapter:
016005
016006 Group Transfer of Individual Responsibilities
016007 Indexing Files
016008
016009 ***Group Transfer of Individual Responsibilities
016010
016011 Occasionally responsibilities in a group will be shifted when a person
016012 leaves a group, is promoted, or is given new responsibilities. This
016013 section tell how to use a function on the Secondary Menu Option 3: GROUP
016014 Transfer of Individual Responsibilities that will make this task much
016015 easier. This feature allows one to easily change action item assignments
016016 to accommodate organizational changes that result in changes of
016017 responsibility. Specifically this feature allows one to change the
016018 supervisor or responsible person assigned to a group of action items.
016019 Both the active and periodic databases will be updated. This will
016020 replace one persons name for another for both supervisor and responsible
016021 person. The initial screen will display an explanation along with an
016022 input screen. The following Options are available:
016023
016024 Options <O>: Ret. to Menu: This option will return the program to the
016025 Secondary Menu
016026
016027 Option <C>: Count Changes: This option will count the number of changes
016028 of each type to be made and display them on the screen.
016029 This function serves a sanity check before actual
016030 implementation with Option "U".
016031
016032 Option <R>: Revise: This option will allow data entry to determine the
016033 names of the individuals involved in the change and the
016034 extent of the change. The name entered in the OLD Name blank
016035 will be replaced with the name in the New Name blank. The
016036 Change column has a line for Supervisor and another for
016037 Responsible Person and should be marked "Y" if the changes
016038 are to be made for Responsible Person and Supervisor

Sheet1

016039 respectively. The second Swap column will also allow the NEW
016040 Name to be replaced with the OLD Name, that is two people in
016041 an organization exchange responsibilities.
016042

016043 Option <U>: Update Files: This option will implement the changes
016044 requested. Upon completion of the changes a tabulation of
016045 the number changes of each type will be displayed.
016046

016047 A few words of caution are in order. Before using these functions think
016048 out what is to be done carefully. If one person is to take the majority
016049 of the assignments it may be easier to use this function followed by a
016050 few individual changes then to make them all one at a time. Also it
016051 there is a double change be careful to sequence the changes properly.
016052 That is if one person in the group is shifting responsibility to another
016053 and also picking up new responsibilities his responsibilities should be
016054 shifted first to the other person. In complex moves it may be necessary
016055 to make intermediate transfers to a fictitious person. It should be noted
016056 that if the Display Supervisor flag is turned off on Page 2 of the Setup
016057 Menu the Supervisor options will not be available on this option.
016058

016059 ***Indexing Files
016060

016061 Secondary Menu Option 5: INDEX Files: This function is intended to
016062 reconstruct the index files. In general it will not be necessary to use
016063 this function except in case of a problem where the files are corrupted.
016064 See the following chapter for more details.
016065 [End of Chapter]

017001 !!!Problem Prevention and Solutions
017002 Hopefully you are reading this chapter because you are interested in
017003 preventing problems before the occur. As anyone who has used a computer
017004 knows a great many things can go wrong! This section provides a few
017005 solutions to problems that might be encountered. The problems are listed
017006 so as to describe the problem followed by the solution. Even though a
017007 problem you is not mentioned specifically one of the problems may be
017008 close and the solution may work or at least provide an idea that will
017009 allow solution. This chapter covers the following key topics:
017010

017011 Preventing Problems
017012 Problem Solutions to Some Common Problems
017013

017014 ***Preventing Problems
017015

017016 A few preventative measures:
017017

017018 1. Always make a backup of your data using the procedures described in
017019 the previous chapter. This should be done at least once a week, after
017020 weekly data entry is a good time. Have at least two backup disks and
017021 alternate them every other week. Also keep all raw input data for at
017022 least two weeks. It can be kept together in a file and discarded when

Sheet1

017023 new data is added.

017024

017025 2. A word of CAUTION, be sure to leave the Action Item Tracking
017026 System completely before shutting off power to the computer. This is
017027 accomplished from the Main Menu by using Option "0". Your should also be
017028 sure that your computer is not doing any more writing to the hard disk
017029 before turning it off. This can be checked by making sure that you do
017030 not hear any disk drive noise and that the light on the disk drive is
017031 out. (This may take as much as 2 or 3 seconds with some types of delayed
017032 write disk cachets.) IF THIS IS NOT DONE DATA MAY BE LOST!!!!

017033

017034 3. Periodically run copies of the complete Active and Historical Files
017035 using Option "A" form both Report Menus. This will ensure that you have
017036 copies of all the old data even if a problem occurs.

017037

017038 4. The Setup Menu provides the ability to change the action item
017039 increment number and the periodic item increment number. It is very
017040 important that different action items with the same number not be
017041 entered. If this occurs the action and status lines from different
017042 action items but with the same action item number will become mixed
017043 between the two items and recovering them will be impossible. If for some
017044 reason it is necessary to reset these numbers be sure and set them to
017045 numbers that are high enough not to interfere with existing action items.
017046 If you have a system crash during action item entry check to see which
017047 items appear to be successfully entered and be sure the next action item
017048 number is greater then any that you attempted to enter.

017049

017050 ***Problem Solutions to Some Common Problems

017051

017052 Now for some problems and solutions:

017053

017054 Individual action items can not be accessed even though they have been
017055 entered. This may be caused by a power failure, or failing to properly
017056 quit the system before turning the power off. It may also be caused by
017057 improper entry of a completion date that transfers an item from the
017058 active file to the historical. Option "3" PURGE Records from the
017059 Historical File on the Secondary Menu can also cause unexpected loss of
017060 data if not used properly.

017061

017062 The following sequence provides a normal trouble shooting sequence:

017063

017064 1. From the Secondary Menu run Option "7" Index Files.

017065

017066 2. Try again to find the lost data with Options "I" or "R" from the Main
017067 Menu.

017068

017069 3. Print a report to show what items are in both the Active and
017070 Historical files. This may be accomplished by running Option "A" on
017071 both the Active and Historical Report Menu. An item that was entered

Sheet1

017072 in the Active file may have inadvertently had a completion date
017073 entered in which it was transferred to the Historical file. A review
017074 of the reports will show this and the item can be returned to the
017075 Active file using Option "4" SINGLE Item Restoration from Historical
017076 File to Active File.

017077

017078 4. Check the reports to see if data in the last data entry session has
017079 been lost, and if so reenter it.

017080

017081 5. If the above fail to work install the program again as follows:

017082

017083 a. Erase all files in directory VAMS.

017084

017085 b. Reinstall the Action Management System as described in section
017086 initial installation.

017087

017088 c. Restore the data from the Backup diskette as described in the
017089 previous chapter.

017090

017091 d. Enter any data that was entered after the Backup diskette was
017092 made.

017093

017094 If an error message appears on the screen and a choice is given to
017095 "Quit", "Ignore", or "Retry". In general it probably will not be
017096 possible to recover from anything except a printer problem where the
017097 printer is off line. If this happens reset the printer, put it back on
017098 line, and press "R" to start the printing again. For other problems
017099 return to DOS and try again. After leaving the program attempt to
017100 restart the program a check on the data most recently entered. If there
017101 appears to be a problem follow the sequence above.

017102

017103 Another possible problem is that the FILES= statement in the CONFIG.SYS
017104 file is set to low. It must be set to at least FILES=45 for AMS to run
017105 properly with version 5.20 or higher. Also this is just a minimum. If
017106 other programs are running under windows for example a value considerably
017107 higher may be necessary. If computer power is shut off while the
017108 demonstration files are being used, start the program as you normally
017109 would and AMS should automatically restore your original data files and
017110 reconstruct the index files.

017111

017112 In some cases the memory files may become corrupted. If this occurs the
017113 memory files AMSMEMO.MEM, AMSMMEMV.MEM, AND AMSMEMW.MEM may be erased.

017114 Then start AMS as normal and you will go through the startup sequence.

017115 After completing the startup sequence it will be necessary to review all

017116 pages of the Setup Menu and update data as necessary. It will be

017117 necessary for example to set the next action item sequential number and

017118 the periodic item sequential number to a value beyond the last ones used.

017119

017120 If you observe action or status lines that look like every other line is

Sheet1

017121 from a different action item it may be because you have entered action
017122 items with the same action item number.
017123
017124 If all this fails the following chapter describes how users can get
017125 assistance.
017126 [End of Chapter]
018001 !!!Technical Support, Suggestions, and Program Updates
018002
018003 This chapter covers the following key subjects:
018004
018005 Technical Support
018006 Suggestions
018007 Program Updates
018008
018009 ***Technical Support
018010
018011 Before requesting assistance, it is strongly suggested that the AMS Users
018012 Manual or Online Help be consulted in detail first. In particular
018013 consult the previous chapter first. If you are still unable to resolve
018014 the difficulty, then use one of the two methods listed below. These are
018015 listed in order of preference and in general in the order of speed with which
018016 they will be answered:
018017
018018 1. E-Mail via CompuServe
018019 Print a copy of the Technical Assistance Form using the Help Menu Option
018020 <8>. Write an E-Mail Message using this form as guidance, answering or
018021 providing all the information requested. Be sure to provide as much
018022 information as possible to assist in solving the problem. This should be
018023 sent to:
018024
018025 Bill Tucker
018026 CompuServe Id #: 71730,2300
018027
018028 Usually I check E-Mail daily and will attempt to answer within 24 hours,
018029 although at times there may be a longer delay. THIS METHOD IS THE
018030 PREFERRED METHOD OF OBTAINING ASSISTANCE AND WILL YIELD THE QUICKEST
018031 RESULTS.
018032
018033 2. Technical Assistance Form
018034 The Technical Assistance Form is printed from the Help Menu Using Option
018035 <8>. Complete the form and mail it to the address indicated. Be sure to
018036 provide as much information as possible to assist in solving the problem.
018037 A copy of the screen or screens showing the problem and any error
018038 messages would be helpful. This can often be printed using the "Print
018039 Screen" key on the computer. A copy to any reports that have a problem
018040 should also be included. Also be sure to provide as much detail as
018041 possible on the operations and steps followed immediately before the
018042 problem was experienced.
018043

Sheet1

018044 If you have suggestions feel free to send them to me. This may be done
018045 wing the Technical Assistance form or just a quick memo. I am interested
018046 in improving AMS and have several enhancements in progress at present.
018047 Your comments are appreciated. Mail the form to:
018048
018049 Bill Tucker
018050 26058 Blossom Lane
018051 Grosse Ile, MI 48138
018052
018053 I will generally try to reply within a week.
018054
018055 ***Suggestions
018056
018057 Suggestions are always welcome! Many of the improvements that have been
018058 incorporated into AMS have been the direct result of user suggestions and
018059 requests. I usually have a list of 20 or 30 enhancements that I have
018060 contemplated on my own or that have been suggested. A later chapter
018061 titles Program Update Summary provides an idea of the improvements that
018062 have been incorporated in the last few program revisions. I can't do
018063 them all so user suggestions help prioritize which ones get incorporated.
018064 Drop me a Message on E-Mail or a letter in the Mail to the addresses
018065 provided in the previous section.
018066
018067 ***Program Updates
018068
018069 I try to put out one major revision each year, at least! These are
018070 usually issued in the first quarter of the year. (Issue date has
018071 something to do with the fact that you can't go sailing in the middle of
018072 winter with the lakes frozen over.) Updates will probably be more
018073 frequent in the future due to the backlog of improvements that behind
018074 version 5.20 which was quite time consuming.
018075
018076 Updates may be obtained in several ways:
018077
018078 1. Updates may be downloaded from the CompuServe, PC Applications Forum
018079 Library 6, as AMSxxx.EXE where the xxx is the latest revision number
018080 providing a file named AMS520.EXE for example. Be sure to do a file
018081 search using AMS*.EXE to be sure you are downloading the latest version.
018082
018083 2. Updates may be obtained by mail using the registration form. The
018084 registration form may be printed from the Secondary Menu by using Option
018085 6 on a system with a registered copy of AMS, or on one of the several
018086 other obvious selections such as option <X> from the Main Menu on an
018087 unregistered program. The cost of the latest copy of AMS is \$10.00.
018088 This does not cover registration. Upgrade from earlier versions may have
018089 an added fee.
018090
018091 Updates are available from a number of sources including BBSs and
018092 shareware distribution houses. Some of there are not the latest version.

Sheet1

018093 The CompuServe Forum mentioned above will have the latest version within
018094 a few days of issue. Upon registration if you do not have the most up to
018095 date version I will send you a copy.

018096 [End of Chapter]

019001 !!!Keyboard Functions

019002 The keys on the computer keyboard are fairly basic and one can probably
019003 muddle through from experience and by trial and error. A couple of
019004 unfamiliar functions may help speed data input and revision. In addition
019005 special hot keys have been assigned to assist in viewing the Action and
019006 Status fields when in the viewing (not editing) mode. The key sections
019007 in this chapter are:

019008

019009 Basic Keyboard Functions

019010 Action and Status Viewing Keys

019011

019012 Key names may vary depending on the brand and age of the keyboard. Also
019013 when a key pair such as <Ctrl>+<Y> is used you should press and hold the
019014 first key the press the second. The keys represented as <Left>, <Right>,
019015 <Up>, <Down> etc. are the left arrow, right arrow, up arrow, and down
019016 arrow respectively.

019017

019018 ***Basic Keyboard Functions

019019

019020 These functions apply in general when editing a data entry screen and the
019021 associated fields such as responsible person, description, etc. as well
019022 as the action and status fields. In a few cases there are differences
019023 when editing action and status fields and there will be pointed out.

019024

019025 <Back Space>: This key will delete the character to the left of the
019026 cursor and move the cursor back one space to the left of the
019027 cursor's starting position.

019028

019029 <Ctrl>+<Left>: Will skip the cursor to the next word to the left.

019030

019031 <Ctrl>+<Right>: Will skip the cursor to the next word to the right.

019032

019033 <Ctrl>+<Page Up> or <Ctrl>+<Home>: When editing Action or Status will
019034 skip to the top of the item being edited.

019035

019036 <Ctrl>+<Page Down> or <Ctrl>+<End>: When editing Action and Status will
019037 skip to the bottom of the item being edited.

019038

019039 <Ctrl>+<T>: When positioned at the first character of a word the entire
019040 word will be deleted. If positioned in the middle of a word the
019041 letter above and remainder of the word will be deleted.

019042

019043 <Ctrl>+<Y>: When the "Ctrl" key is held down and the "Y" key is pressed
019044 the remaining contents of the data entry field at and beyond the
019045 cursor will be erased. For the Action and Status fields the entire

Sheet1

019046 line will be deleted. This feature is particularly useful for
019047 revising data.
019048

019049 or <Delete>: This key will delete the character above the cursor
019050 and move the text together to fill the space.
019051

019052 <End>: This key will move the cursor to the last character in the data
019053 entry field or the last character in the line when editing Action or
019054 Status. When editing a normal data entry field it will then toggle
019055 between the last character entered in the field and the end of the
019056 field.
019057

019058 <Enter> or <Return>: This key will move the cursor to the beginning of
019059 the next field for normal data entry. When editing Action or Status
019060 lines it will start a new line, or in the middle of text will place
019061 the remainder of the line after the cursor on the next line.
019062

019063 <Home>: This key will move the cursor to the first space in the data
019064 entry field or the first character in the line when editing Action
019065 or Status.
019066

019067 <Left> and <Right>, Horizontal Cursor Movement Arrows: These keys will
019068 move the cursor one space to the right or left. When the end of a
019069 field is encountered the cursor will jump to the beginning of the
019070 next field.
019071

019072 <Ins> or <Insert>: This key will toggle between the overwrite and the
019073 insert mode. In the write over mode text will be written over the
019074 existing text. In the insert mode text will be inserted at the
019075 cursor and existing text pushed ahead of the inserted text. When
019076 editing Action and Status the mode is displayed in the box at the
019077 top right side of the editing area as "Ins." or "Over" respectively.
019078

019079 <PgDn> or <Page Down>: In the data entry mode this key will cause the
019080 cursor to skip to the last field, entering all the data displayed.
019081 This is a convenient way to exit the editing mode and activate the
019082 menu at the bottom of the page. When editing Action or Status the
019083 cursor will first skip to the bottom or top of the screen
019084 respectively and then skip an entire page at a time.
019085

019086 <Up> and <Down>: Vertical Cursor Movement Arrows: These keys will cause
019087 the cursor to jump to the beginning of the previous field (up arrow)
019088 or beginning of the next field (down arrow).
019089

019090 ***Action and Status Viewing Keys
019091

019092 When Action and Status fields are displayed only 5 lines of text are
019093 visible at a time unless you are editing and use the zoom feature. To
019094 allow viewing of the Action and Status fields hot key combinations have

Sheet1

019095 been assigned to allow one to scroll through the text quickly. These use
019096 two key combination. To view the Action use the <Alt> key in combination
019097 with the keys described below. To view the Status use the <Ctrl> in
019098 combination with the keys described below. One can help remember this
019099 because Action and <Alt> begin with the same letter and <Cont> is the
019100 control aspect reported back in the Status field.

019101

019102 Action Viewing:

019103

019104 <Alt> + <Up> Scroll action up a line at a time.

019105 <Alt> + <Down> Scroll action down a line at a time.

019106 <Alt> + <Page Up> Scroll action up a page, (5 lines) at a time.

019107 <Alt> + <Page Down> Scroll action down a page, (5 lines) at a time.

019108 <Alt> + <Home> Jump to the top of the action field.

019109 <Alt> + <End> Jump to the end of the action field.

019110

019111 Status Viewing:

019112

019113 <Ctrl> + <Up> Scroll status up a line at a time.

019114 <Ctrl> + <Down> Scroll status down a line at a time.

019115 <Ctrl> + <Page Up> Scroll status up a page, (5 lines) at a time.

019116 <Ctrl> + <Page Down> Scroll status down a page, (5 lines) at a time.

019117 <Ctrl> + <Home> Jump to the top of the status field.

019118 <Ctrl> + <End> Jump to the end of the status field.

019119 [End of Chapter]

020001 !!!Hardware Requirements

020002

020003 The following constitutes the basic requirements for running AMS.

020004 Obviously the greater the capabilities of the computer the faster the
020005 program will run.

020006

020007 1. IBM PC or compatible with at least a 386SX processor. At least a 386-
020008 33 processor is recommended, and higher will produce noticeable
020009 improvement in performance.

020010

020011 2. PC-DOS or MS-DOS version 3.3 or higher

020012

020013 3. 500 Kb total free memory of which 150 Kb must be conventional and the
020014 remainder can be extended. At least 2 Mb of memory is recommended.

020015

020016 4. Hard disk drive with about 4.2 Mb available or 2.7 Mb if AMS is
020017 decompressed in the \AMS directory.

020018 (AMS will require 4.2 Meg. to allow compressed program expansion and
020019 installation. Once installed, files in the directory from which it
020020 was installed can be erased and only 2.5 Meg. will be required.

020021 Space requirements can be reduced by eliminating the help, dictionary
020022 and demonstration files. Obviously as action items are added space

020023 requirements will increase. 100 action items with 10 lines of status

020024 and 10 lines of text will occupy about 125 Kb. of disk space.)

020025
020026 5. Video monitor, preferably color
020027
020028 6. Printer
020029 [End of Chapter}
021001 !!!Program Files
021002
021003 Because inquiring minds want to know this chapter provides information of
021004 the files used by AMS. This chapter covers the following subjects:
021005
021006 Files Names and Use
021007 Database File Size and Disk Usage
021008 Suggestions on Saving Disk Space
021009
021010 ***File Names and Use
021011
021012 The following provides a brief summary of the names and use of the
021013 various AMS files you will find on your disk:
021014
021015 AMSxxx.EXE - AMS is distributed in a self extracting file in the form
021016 AMSxxx.EXE where xxx is the version number.
021017
021018 AMSxxx.ZIP - AMS is compressed ZIP format in the form AMSxxx.EXE where
021019 xxx is the version number.
021020
021021 The self extracting file includes the following files:
021022 AMS.BAT - Batch file to set directory & start AMS
021023 AMS.PIF - Windows PIF file to start AMS from Windows
021024 AMS.ICO - Windows Icon file
021025 AMSS.EXE - Main AMS executable file
021026 AMSF.DBF - Skeleton action item file
021027 AMSP.DBF - Skeleton periodic action item file
021028 AMST.DBF - Skeleton type file
021029 AMSW.DBF - Skeleton action and status file
021030 AMSDEMAA.DBF \
021031 AMSDEMA1.DBF \
021032 AMSDEMHH.DBF \
021033 AMSDEM1.DBF \
021034 AMSDEMPP.DBF - Demonstration files
021035 AMSDEMP1.DBF - Demonstration files
021036 AMSDEMOT.DBF /
021037 AMSDEMOO.MEM /
021038 AMSFHELP.DBF - Help file
021039 STDFW001.DBF \
021040 STDFW002.DBF - Standard 60,000 word dictionary files
021041 STDFW003.DBF /
021042 INSTALL.BAT - Installation file to set up AMS system
021043 UPDATE.BAT - Update file to install a new AMS version
021044 FILE_ID.DIZ - Brief description of AMS used for

Sheet1

021045 identification by some BBS's
021046 AMS_READ.ME - Guidance for the Jack Rabbit who wants to get
021047 started fast!
021048
021049 After installation the following files are present:
021050 AMSFAAAA.DBF - Active database file
021051 AMSFHFFFH.DBF - Historical database file
021052 AMSFPPPP.DBF - Periodic database file
021053 AMSFTTTT.DBF - Type database file
021054 AMSFAAAA.CDX \
021055 AMSFAAAA1.CDX \
021056 AMSFHFFFH.CDX \
021057 AMSFHFFFH1.CDX \ -Index Files
021058 AMSFPPPP.CDX /
021059 AMSFPPPP1.CDX /
021060 AMSITTTT.CDX /
021061 AMSMEMO.MEM \
021062 AMSMEMV.MEM - Memory files for program variables
021063 AMSMEMW.MEM /
021064 AMSFHELP.DBF - Help database file
021065 AMSFHELP.CDX - Help index file (created on first use of help)
021066 AMSFW001.DBF \
021067 AMSFW002.DBF - Dictionary database files
021068 AMSFW003.DBF /
021069 AMSFW001.CDX \
021070 AMSFW002.CDX - Dictionary index files
021071 AMSFW003.CDX /
021072
021073 During program execution temporary files are occasionally created.
021074 Usually one will not see them unless there is a problem. The following
021075 are typical temporary files:
021076
021077 AMSSAVAA.DBF \
021078 AMSSAVHH.DBF \
021079 AMSSAVPP.DBF \
021080 AMSSAVA1.DBF \ Temporary files for main files while using
021081 AMSSAVH1.DBF / the demonstration files
021082 AMSSAVP1.DBF /
021083 AMSSAVTT.DBF /
021084 AMSSAVEO.MEM /
021085 AMSFXXXX.DBF \
021086 AMSFYYYY.DBF \
021087 AMSFZZZZ.DBF \ - Various Temporary files
021088 AMSFXXXX.CDX /
021089 AMSFYYYY.CDX /
021090 AMSFZZZZ.CDX /
021091 AMSIXXXX.IDX /
021092 CONFIG.AMS /
021093

Sheet1

021094 ***Database File Size and Disk Usage

021095

021096 The following is a summary of normal space use of AMS:

021097

021098 The normal newly installed AMS system occupies 2,200 Kb. of space. Of

021099 this the following items absorb part of this space:

021100

021101 Dictionary and Indexes: 1,350 Kb.

021102 Help File and Index: 350 Kb.

021103 Demonstration Files: 14 Kb.

021104

021105 The following is a summary of the space occupied by various size database

021106 files. Obviously how many lines of action or status are included and the

021107 number of action items will effect the space occupied.

021108

021109 # Action Items Lines: Action & Status Disk Space Kb

021110 100 0 + 0 37 Kb

021111 100 5 + 5 202 Kb

021112 100 10 + 10 297 Kb

021113 100 20 + 20 489 Kb

021114 1000 10 + 10 2,650 Kb

021115

021116 ***Suggestions on Saving Disk Space

021117

021118 Space can be saved during installation and update by placing the

021119 compressed distribution file in the \AMS directory and expanding it

021120 there. When it is expanded one will be asked if one wants to overwrite

021121 the existing files and one should answer yes. (This process will not

021122 damage any of your installed data files.) Then run the install.bat or

021123 update.bat from the \AMS directory as appropriate. Again on will receive

021124 the error message "File cannot be copied onto itself" which is normal.

021125

021126 Space can be saved by removing the Dictionary, Help, and Demonstration

021127 files. AMS automatically checks for there files on startup and will

021128 adjust various functions and menu items based on which of these files are

021129 present.

021130

021131 If the dictionary files are present AMS checks for the index files and if

021132 they are not present will build them on startup. The index file for help

021133 is built the first time help is accessed. The index files for the

021134 demonstration files are built each time the demonstration files are used

021135 and the normal action item index files are erased, but rebuilt once the

021136 normal files are restored. One can erase the database and index file

021137 groups for one or all of the Dictionary, Help, and Demonstration

021138 features.

021139

021140 To remove the Dictionary execute the following commands:

021141

021142 cd\ams - Go to the AMS directory

Sheet1

021143 erase amsfw00?.??? - Erase the AMS dictionary and index files

021144

021145 To remove the Demonstration files execute the following commands:

021146

021147 cd\ams - Go to the AMS directory

021148 erase amsdem???.??? - Erase the demonstration files

021149

021150 To remove the Help files execute the following commands:

021151

021152 cd\ams - Go to the AMS directory

021153 erase amsfhelp.??? - Erase the help files

021154

021155 To reinstall the various files follow the following instructions:

021156

021157 Decompress the compressed distribution file in a directory other than the

021158 \ams directory. Make the directory with the decompressed files the

021159 active directory:

021160

021161 To reinstall the Dictionary Files execute the following command:

021162

021163 copy amsfw00?.dbf \ams

021164

021165 This will reinstall the dictionary files. The indexes will be

021166 rebuilt next time AMS is started.

021167

021168

021169 To reinstall the Help Demonstration Files execute the following command:

021170

021171

021172 copy amsdem???.??? \ams

021173

021174 This will reinstall the demonstration files. The indexes will be

021175 rebuilt next time the demonstration files are made active.

021176

021177 To reinstall the Help File execute the following command:

021178

021179

021180 copy amsfhelp.dbf \ams

021181

021182 This will reinstall the help file. The index will be rebuilt next

021183 time the on-line help is accessed.

021184 [End of Chapter]

022001 !!!Program Update Summary

022002 The following describes the changes that have been incorporated in each

022003 revision of the Action Management System. Some of the original

022004 descriptive material for older changes has been deleted or summarized as

022005 it is no longer relevant.

022006

022007 Version 4.00 to 4.10

Sheet1

022008

022009 UPGRADES:

022010

- 022011 1. The Main Menu has been reorganized to incorporate new features,
022012 improve ease of use, and accommodate future enhancements.
- 022013 2. The Main Menu has modified to add an item that allows one to access
022014 the Revise/Delete Option with the Supervisors name..
- 022015 3. A Modify Historical Files Menu has been added as Option "M" on the
022016 Main Menu.
- 022017 4. Report printing on 2 sides of the page was incorporated.
- 022018 6. The Date Assigned can now be edited if desired and option is set to do
022019 so.
- 022020 7. The backup and restore functions have been improved with better
022021 prompts and changes to help deal with problems that may occur during
022022 these operations.
- 022023 8. The reference field was capitalized after entry. It is no longer
022024 capitalized so both upper and lower case letters can be used.

022025

022026 Version 4.10 to 5.00

022027

022028 UPGRADES:

022029

- 022030 1. The automatic scheduling module features were added to allow
022031 scheduling of periodic action items
- 022032 2. A type directory has been added to organize and define type codes as
022033 well as check them on new and revised action items.
- 022034 3. Print date of printing on registration form.
- 022035 4. To facilitate use with windows an ICON, and a PIF have been added to
022036 the program files.
- 022037 5. Installation and update routines have been improved to make
022038 installation and update easier and more flexible. This includes
022039 accommodation of ZIP distribution files.

022040

022041 Version 5.00 to 5.20

022042

022043 UPGRADES:

022044

- 022045 1. Rearranged menu particularly the Main Menu to accommodate new
022046 features. The Constants Revision Menu is now the Setup Menu to
022047 conform with more conventional terminology.
- 022048 2. Spell Checking has been added for the Action and Status fields with
022049 A. 60,000 work dictionary and 195,000 word dictionary available as an
022050 option.
022051 B. Repeat words are identified.
- 022052 3. Late / Due warning block display quick status and late warning on top
022053 of the Main Menu.
- 022054 4. Installed word wrap capability for action and status blocks. This
022055 upgrade included major enhancements including the following:
022056 A. Much longer (over 15 pages if desired!) field for both action and

Sheet1

- 022057 status. This feature greatly expands the flexibility of AMS.
022058 B. Text will automatically wrap to the next line when entering action
022059 and status.
022060 C. Action and status windows can be zoomed to fill the whole screen
022061 when editing.
022062 D. Action and status can be scrolled with hot keys to view entire
022063 text in the windows.
- 022064 5. Several programming upgrades have been made to improve AMS performance
022065 on your computer:
022066 A. Compact, compound, indexes are used to reduce use of disk space
022067 and to reduce the number of file handles in use.
022068 B. AMS now takes advantage of extended memory to speed performance.
022069 NOTE: This now means that you should have at least 2 Meg of
022070 Extended Memory on your machine to obtain proper performance. A
022071 machine with at least a 386SX microprocessor is required and a
022072 386DX33 or better is strongly recommended.
022073 C. Program code has been optimized to speed performance.
022074 D. AMS is compiled and the executable file is compressed to save
022075 space on your hard drive.
- 022076 6. For new installation several constant have been changed to be more
022077 consistent with the most system configurations:
022078 A. Default number of lines for printing reports is now 60 instead of
022079 66 to be consistent with more printers.
- 022080 7. Eliminated program amszap.bat that erased supplemental files. These
022081 files can still be erased from the AMS directory but I decided that
022082 having such a program around could lead to easily to accidental
022083 deletion of files.
- 022084 8. Eliminated the search menu option to find an action item by item
022085 number as this is redundant to the similar feature from the main
022086 menu.
- 022087 9. New On-line Help System has been added with expanded help and the
022088 following features:
022089 A. More on-line help chapters have been added.
022090 B. Easier navigation within chapters including highlighted
022091 subtopics.
022092 C. Each chapter can be individually printed, just print the sections
022093 you need.
022094 D. The Users Manual is now printed from the On-line Help Menu.
022095 (There is no separate file.)
022096 E. The program revision summary file has been incorporated into the
022097 on-line help, as this chapter and the separate file eliminated.
022098
- 022099 CORRECTIONS:
022100
- 022101 1. Corrected a problem with the printing routines that under unusual
022102 circumstances might cause the computer to hang (go into a loop).
022103 2. Modified a routine so it would erase temporary files used in report
022104 writing after they had served their purpose. (No functional problem
022105 would have resulted just an unnecessary file was left using up disk

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022106 space.)
022107 3. Corrected a problem that on very rare occasions might have prevented
022108 the automatic overwrite of old backup diskette files while making
022109 a new backup.
022110 4. Corrected error in demonstration files that would have given completed
022111 dates before assigned dates and have reset the next action item
022112 number and traveler number to 1 on initiation.
022113 5. Corrected a problem where an "erased" periodic item number field would
022114 indicate a no find rather than start at the beginning of the listing.
022115 [End of Chapter]
023001 !!!Other Stuff
023002 This section is intended to satisfy inquiring minds that want to know and
023003 covers the following topics:
023004
023005 Credit Where Credit is Due
023006 The AMS ICON
023007 Who is Bill Tucker
023008
023009 ***Credit Where Credit is Due
023010
023011 AMS would not have become a reality without some excellent software. This
023012 section lists some of that software and tells how it was used.
023013
023014 dBase II, by Ashton Tate - the very early grandparent of AMS was written
023015 in this buggy but remarkable program that started it all
023016
023017 CA-Clipper 5.2D, by Computer Associates - which was used to compile AMS
023018 so it could be available as a shareware product
023019
023020 CauseWay 1.2a, by Michael Devore and John Wildsmith - which was used to
023021 compile AMS and provides the 386 DOS extender features which allow
023022 it to run faster and take advantage of extended memory. The
023023 CauseWay compressor was used to compress the executable file and
023024 save you a couple hundred K of disk space.
023025
023026 FoxBase+ & FoxPro, by Fox Software and now Microsoft - which provided the
023027 initial base for most of the program development and file
023028 manipulation
023029
023030 Microsoft FoxPro Ver. 2.5 - was used for a good part of the recent
023031 program development and ease of file manipulation.
023032
023033 Stereo Shell 4.1, by Emery Wooten - a great..the greatest shell for
023034 moving files around, which made me quit hating directories, and
023035 without which I would probably still be looking for the bits that
023036 make up AMS...and Emery please do it in windows!
023037
023038 QEdit 2.1, and The SemWare Editor Version 2.0 by SemWare - the great
023039 editors that I customized and did all the programming with

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023040
023041 LHA 2.13, by Haruyasu Yoshizaki - an excellent file compression program
023042 use to make the self extracting file used to deliver AMS
023043
023044 PKZIP 2.04G, by PKWARE Inc. - the much used file compression program for
023045 distribution on BBS's.
023046
023047 Share Spell 2.3 by Acropolis Software - an excellent spelling checker
023048 used to check this manual and the help modules which in spite of my
023049 terrible spelling and typing can still figure out how to spell what
023050 I meant
023051
023052 Microsoft Word for Windows Version 6.0 which was used for much of the
023053 manual update and editing
023054
023055 Word Wrapper and Toolbox Add-on by Strategic Edge and Dr. David Lewis
023056 which provided the basis for the word wrap and spell check features
023057 incorporated in AMS.
023058
023059 Note: The names of the above programs are registered names of the
023060 indicated companies. Also PC-DOS is a registered name of the
023061 International Business Machine Inc., and MS-DOS is a registered name of
023062 Microsoft Inc.
023063
023064 ***The AMS ICON
023065
023066 An ICON is provided with AMS as AMS.ICON to allow you to customize AMS for
023067 windows use. The ICON shows the AMS symbol of a lightening bolt that
023068 symbolizes what is sometimes takes to get up going to get action item
023069 tasks completed. The lightening bolt stretches from the cloud labeled
023070 AMS at the top of the icon to the ground labeled with an X representing
023071 the action item to be completed. AMS hits the spot!
023072
023073 ***Who is Bill Tucker?
023074
023075 Bill Tucker is a 50 year old Electrical Engineer who works for a midwest
023076 electric utility at a nuclear power plant.
023077
023078 Bill graduated from the University of California with a degree in
023079 Electrical Engineering back when Ronnie was governor of California.
023080 There he took one course in FORTRAN which he hoped he would never have to
023081 use!
023082
023083 He then joined the Navy and served on Seadragon which even then was an
023084 old Nuclear Submarine.
023085
023086 He bought a computer, an IBM PC and a hard drive with the astronomical
023087 capacity of 10 Meg and dBase II for his employer. When the software
023088 arrived before the computer he read the entire dBase II manual from cover

Sheet1

023089 to cover. Yuck! Never again!

023090

023091 Bill likes to sail and scuba dive, and since he lives in Michigan and

023092 doesn't hibernate through the winters like any reasonable bear he tends

023093 to work on program updates which explains why most come out in late

023094 winter or early spring!

023095

023096 He is married to a wife Ginny. They have a daughter Lani who goes to

023097 Michigan State and like his coffee mug says "My Daughter and my MONEY go

023098 to Michigan State. Which leads me to the final commercial: PLEASE

023099 REGISTER IF YOU HAVE NOT ALREADY DONE SO, AND THANKS IF YOU HAVE!

023100 [End of Chapter]