

LNO,CLINE,C,76

I01A BACKGROUND:

I01A

I01A RMS-III: Reference Management System is an annotated menu based system
I01A for handling many important data entry, view, edit, sort, search, and
I01A report operations. This frees the user from set-up and programming of
I01A the `all-purpose' database programs.

I01A

I01A RMS-III data files are compatible with Borland's dBase III, III+, and
I01A the many file-readers and operational clones based on this type file.
I01A This assures maximum data utility and portability to other systems, for
I01A actions that may be beyond the scope of this program.

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I01A ORGANIZATION:

I01A The reference system is organized as five (5) operating menus....

I01A

I00A ----

I02A ORGANIZATION:

I02A The reference system is organized as five (5) operating menus. Each
I02A Menu and Sub-Menu function is accessed by entering its number, 1-5,
I02A in a highlighted selection box and pressing "Enter" (Carriage Return).
I02A Each menu includes an option to return to the main menu.

I02A

I02A System Outline, from MAIN MENU:

I02A	1.	2.	3.	4.	5.
I02A	INFO	UTILITIES	MANAGEMENT	SEARCH	REPORTS
I02A	Terms	Information	Information	Information	Information
I02A	Outline	File Status	Open File	Open File	Open File
I02A	Notes	File Operations	Add Records	Scanning	Topic Freq
I02A		File I/O	Edit Records	Single Item	Topic Index
I02A		UserDefinitions	Scan Records	Multiple Item	Lists/Cards
I02A		Printer Set-Up	Check Dups.	Mixed-Logic	Word Proc

I02A

I02A DEFAULTS. Most choices presented have a default value. These are shown
I02A by characters in upper case (Y,n) or <2> brackets. The entire system can
I02A be reviewed by scanning the menus in default modes, using the database
I02A file "DEMO"; this is recommended as a fast introduction to the system.

I00A ----

I03A DEFINITIONS:

I03A

I03A DATABASE is a collection of "records" in a file in the data directory.
I03A It has a file name (8 characters or less) and an "extension"
I03A ("DBF", usually not shown). Databases must be "open" for use.

I03A

I03A RECORD is an item in the data base consisting of "field" entries.

I03A

I03A FIELDS are the specific items in the record, author, title, journal,
I03A year, key words, etc.

I03A
I03A INDEX is a particular order of records of a database file, arranged
I03A alphabetically or numerically on a "key" field. Indexes are
I03A named and saved (with ".NDX" extensions).
I03A
I03A RECORD NUMBER is assigned each record, which is called thereby. This
I03A number can "float" if the data base is modified. Therefore,
I03A records can also be given a fixed "Ident_No".
I03A
I00A -----
I04A MEMO FIELD in a special type of data field that is of variable size. It
I04A allows for extended data entries without using excessive disk space.
I04A It is used for free-form text. In RMS-III, the ABSTRACT/NOTES field
I04A is a memo-type. These fields are saved in a separate file, under the
I04A same name as the database file, but with an ".dbt" extension.
I04A The memo field is entered from one of the full screen data display
I04A screens by striking F4. This activates a text editor or viewer to
I04A make and edit or display entries. It is exited by ^PgUp or ESC.
I04A Operations (search or reporting) using this field tend to be slow.
I04A
I04A REFERENCE REPORTS present data from records (all or selected fields) in
I04A various formats. Formats include normal line types of various styles
I04A (bibliographic lists) or file card types. Reports can be arranged by
I04A an index based on a key field(s), arbitrary order, or subject index.
I04A Reports can be directed to the screen, a printer, or disk file.
I04A
I04A TOPICAL LISTS present special information based on specific fields within
I04A the database, e.g., keywords, authors, sources, etc. These can provide
I04A summaries - for reports, analysis of reference data, and for help/list
I04A operations where they can be useful to check consistency of entries.
I00A ----
I05A MISCELLANEOUS NOTES:
I05A
I05A OPEN FILE. Most functions require an open database file. Database files
I05A can be opened in most main function menu screens. They are closed only
I05A if changed or on program exit.
I05A
I05A RECORD/FILE SIZE. The reference record takes about 800 bytes plus that
I05A for any abstract data. Some maintenance and clean-up can be done in
I05A Utilities (Condense, Menu 2.4.4) and duplicate checking (Menu 3.6).
I05A
I05A FILE LOCATIONS. Files and programs may be on different disk drives or
I05A directories. They can be changed through the Main Menu, option 7 or 8.
I05A
I05A SETUP. Option #8 of the main menu includes setup of the drive/path and
I05A monitor settings for monochrome, gray, or color screen presentation.
I05A Note, starting problems may be due to default drive/path settings.
I05A Color settings are shown by example, but may require trial and error.
I05A Preferences can be set for different data displays and search defaults.

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I05A You can return to default values at any time through the SETUP option.
I05A SETUP need be run ONLY if you want to change basic operating conditions
I00A ----
I00B ---- SET B for RS-SETUP && drive & path notes
I01B These entries provide for drive\path locations for the program files
I01B and the data files. They are the standard DOS specifications. The drive
I01B is a single letter and must be followed by a colon. The directory path
I01B on the drive starts with a back-slash "\" for the root, and is followed
I01B by the directory\sub-directory location for the item, ending with a "\".
I01B
I01B For a hard drive system the typical (default) specifications are:
I01B Program = C:\RMS\ data files = C:\RMS\LISTS\
I01B
I01B For floppy disk operation, "A:" and/or "B:" are typical specifications.
I01B
I01B These are the locations to which the installation program tries to
I01B install the program. If you installed the program to different locations,
I01B you will have to enter the new location specification in this set-up.
I01B
I01B Data file locations can also be changed from option #7 of the Main Menu.
I01B
I01B
I00B --- 2 && color settings
I02B Monitor/color options provide for five pre-defined color sets, (1-5) plus
I02B a user definable color set (6). The user-set can take any of the pre-set
I02B definitions as a start from which to ADJUST colors as desired.
I02B
I02B Color sets 1-3 provide specific combinations for color monitors. Each
I02B of these offers a very different appearance, resulting primarily from
I02B the choice of background color - black, blue, or white.
I02B
I02B Color sets 4 and 5 are intended for non-color monitors. Set #4 is for
I02B a gray-scale monitors; it uses a combination of colors selected to give
I02B different gray levels for different characteristics in a similar manner
I02B as color is used to distinguish tasks and features with a color monitor.
I02B
I02B Set #5 is essentially black and white; the only additional attributes are
I02B reverse-video, bold, and flashing. These are combined to emphasis the
I02B different operations. If colors or grays of the pre-set combinations are
I02B not effective/attractive on your monitor, set#5 should get you started.
I02B
I00B ---- 3 && adjust color settings
I03B ADJUST colors provides user modification of the screen color set and is
I03B saved as colorset#6. It opens with the selected color set (1-6) and
I03B displays the color definitions on the left and an example display on
I03B the right. Values are entered as foreground/background pairs separated
I03B by a slash "/"; try different combinations before accepting the set.
I03B
I03B

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I00B ---- 4 && data display preferences
I04B The full screen data display in the Data Management and Search Menus
I04B include a display block showing the actions of various keys used to move
I04B within and between the data fields and data records. By preference option,
I04B this key-control-action block can be located: (1) near the top of the
I04B display or (2) at the bottom of the display. Position 1 is the original
I04B RSM-III location. Position 2, at the bottom, provides a more compact
I04B presentation of the data-fields and the upper title block; this can be
I04B useful if the key-control block is turned off (as for a screen print).
I04B

I00B ---- 5 && search defaults preferences
I05B The Multi-Item search preferences provide basis to control the nature of
I05B the search and the type (amount) of output displayed for records matching
I05B the search criteria. The default settings of these options can be adjusted
I05B to either of two forms: (1) applies broad search criteria - the ANY (OR)
I05B logic, and displays matched records as author/source/title. (2) applies
I05B more restrictive search criteria - the ALL (AND) logic, and displays data
I05B including keywords/sponsor/comments/abstract. In either case, the options
I05B can be altered by the user at the time of search/output definition - the
I05B defaults simply provide actions operative with no user interaction.

I00B ---- 6 && save values or restore original defaults
I06B Enter "Y" (the default) to record the parameters and preferences for later
I06B start-ups. Enter "N" to not save the parameters, but to try them in this
I06B session of operation - they will be lost on exit, with the prior values
I06B then operational for the next start-up.
I06B
I06B Enter "O" to reset the parameters to the original default values for the
I06B program. Be sure you really want to do this - the original system values
I06B may not be optimum for your set-up and further changes may be required.
I06B

I00B ---
I00C ----- SET C ---- #1 UTILITIES INFO

I01C The utilities provide basic handling of the files and printer.
I01C They are mostly self explanatory, e.g., list, create, index, sort,
I01C import, append, erase, etc. Only a few notes can be added here:

I01C A file can be opened in each menu, so it need not be done here.

I01C Lists displayed in the survey utility (opt#2) include database,
I01C index, style, and user specified files. Some can be listed from
I01C other utilities. Lists are not updated immediately.

I01C The condense operation can reduce excessive file size and
I01C improve data integrity. Import/export offers many options.

I01C Some printer set-up can also be handled in the report menu (#5).

I01C User Defined Styles operate only for Report output (menu 5.4, 5.5).

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I01C
I01C DOS paths, colors, data display, are treated in Main Menu opt.#8.
I01C
I00D ---- SET D MANAGE_A INFO also used in help screens
I01D FULL: There are three modes of full display: VIEW, EDIT, and ADD.
I01D SCREEN They are entered as options 3 and 4 of the Mngt.Menu. The VIEW
I01D RECORD mode allows no change of data - it is safe for browsing and is
I01D DISPLAY rapid for abstract display. EDIT allows change of record data.
I01D ADD is where new records are entered (they go at end of database).
I01D
I01D Full screen display shows status, record fields, & key operations.
I01D The status (top line) shows the open database and any index, the
I01D record mark status (OK/DEL), if insert mode is active, and the
I01D operating mode. The main screen presents the data-fields in the
I01D record. If possible, data-field color will reflect the view/edit
I01D mode. Cursor/function key actions are shown at either lower or
I01D upper screen positions. (Positioned in SET-UP, ON/OFF by F8.)
I01D
I01D SCAN: Rapid scanning of partial record data is possible in option 5.
I01D Short and long formats available; full record display options.
I01D
I01D MARK: Duplicate checking and marked records are treated in option 6.
I00D -----
I02D NOTES: Entries MUST BE LEFT JUSTIFIED and fit area (see comment below).
I02D Use upper and lower case alpha or numeric characters as desired.
I02D IDENT_NO -- must be unique for each record (might equal rec.no.)
I02D TYPE -- of source: Book, Article, Report, etc. Can control output.
I02D FIRST AUTHOR -- separate first and last name (used internally).
I02D Include an equal sign '=' to prevent re-formatting of corp.auth.
I02D OTHER AUTHORS -- should be entered first-name-first with commas
I02D separating multiple authors; 'and' can separate last entry.
I02D Though not preferred, entries can be last-name-first if ';' is
I02D used as separator. F1-9 will show interpretation of entries.
I02D (Report-output author listing style is controlled in Menu 5.0.)
I02D INDEX_NO -- for user control, typically used for branch-indexing,
I02D sub-set sorting, subject-grouped topical output control.
I02D CODE_1, CODE_2 -- user choice, e.g., Dewey, ISBN/ISSN, citation, etc.
I02D KEYWORDS & SPONSORS -- separate entries with comma and space.
I02D COMMENTS -- for general comments. Also for overflow of author,
I02D title, & source data - entered as {Cont...author(s): ____} etc.
I02D ABSTRACT -- free form entry, 78 characters wide, up to 50 lines.
I02D See WEDIT.DOC for details of editor. Searchable in Menu 4.5
I02D Opening of abstract/memo is slow in EDIT mode, fast for VIEW.
I02D YEAR -- Should be first four characters in field, month or season can
I02D follow - 1986 Dec. This allows search for year and range of years.
I02D SOURCE & TITLE -- Source is usually the name of the journal, report,
I02D book, etc., in which the referenced title is located. If the item
I02D is an entire book, it is best entered in the source field with
I02D the title field blank. This is because all output formats include

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I02D the source but do not always include the title. However, if you
I02D wish, a book title can be entered and handled correctly in the
I02D title field if the source field is empty and TYPE='BOOK'.
I02D Sources such as journals are often abbreviated. Different output
I02D formats may require different treatments which (currently) must be
I02D done by post-processing - and can be aided by consistent entries.
I02D
I02D EDITORS -- are not assigned a separate field, but are included as part
I02D of the source, with notation "Edited by", "Ed. by", or "Eds.".
I02D VOLUME -- enter the main volume number first followed by issue.
I02D PAGES -- start and end if both appropriate; total for book or report.
I02D
I02D GENERAL COMMENT: The preceding notes on data field usage and entries should
I02D not be considered 'binding' - they are general guides based mainly
I02D on use of research journal/articles. There are many other types
I02D of materials and uses for this data field structure. You should
I02D experiment to find what works best for your materials, application
I02D requirements, and work style. There are many possibilities.
I00D ---- HELP/LIST
I04D Lists of authors, sources, and keywords are available to check for
I04D consistency of entries. Consistent entries can be valuable for
I04D searching in RMS-III, and for search/replace operations that may be
I04D done later in an external word processor. To access lists, they must
I04D first be compiled (or updated) in the Report-Topic menu, screen 5.3.
I04D
I04D In option #9, author entries can be separated by individual. This
I04D will indicate if authors names will be treated properly in subsequent
I04D manipulations. In particular, acceptable entries of other-authors by
I04D first-name-first will be processed and displayed last-name-first.
I00E ---- MULTI-ITEM SEARCH HELP/INFO
I01E Enter items to search for in the appropriate fields in the top half
I01E of the screen; define the search basis and output in lower screen.
I01E NOTES:
I01E - Searches are on 'partial' basis unless changed - SMITH finds SMITHSON.
I01E - Exclamation, !, before AUTHOR or WORD/PHRASE (Keyword) entries change
I01E search from partial to exact - !SMITH finds only SMITH, not SMITHSON.
I01E - To search YEAR by range, year entries must be first in the year field.
I01E - A question mark? can represent a single unknown character in any field.
I01E - In the INDEX_NO field, use of ? facilitates 'sub-branch' searches.
I01E - WORD/PHRASE search can be applied to KEYWORDS, COMMENT and/or ABSTRACT.
I01E -- In WORD/PHRASE search, ending with \ extends entry to the next line.
I00E --- MIXED LOGIC MULTI-ITEM SEARCH HELP/INFO
I02E Define search by building a 'search string' with item, field, and logic;
I02E follow the example. Enter item sought in quotes. Author and keyword
I02E searches can be made exact by starting with a blank space and finishing
I02E with a comma. Field name entry is simplified by numerical values entered
I02E in braces {}. A special field designated {0} is available which is a
I02E combination of all major text fields; it is very powerful, but should
I02E not be used too often in a search string - it will overload the search.

I02E
I02E Logic elements available here include .OR., .AND., and .NOT.. When used
I02E with parentheses () they can be used in many combinations. Experiment!
I00E ---- Help/Info for SEARCH 4.3 - VIEW
I06E This search operation provides full screen viewing of the complete data
I06E record (abstracts on a separate screen with F4). Records can be viewed
I06E as ordered in the database or by an index. The F7 function key provides
I06E for jumps/skips over wide ranges of records.
I06E
I06E (This view operation is essentially the same as available in menu 3.4.)
I06E
I00E ---- SEARCH INFO
I03E 4.3 VIEW/SEARCH, GENERAL QUERY searches on Record No., Ident.No., or
I03E Last Name, and provides select, jump-type movement among records.
I03E All fields of the record are shown in a full screen display.
I03E (Screen 3.4 provides similar record viewing; 3.5 for quick scan.)
I03E
I03E 4.4 SINGLE FIELD SEARCH provides rapid location & listing/transfer of
I03E records based on any user specified order in unique field. It is
I03E most useful with 'ident_no' or 'code_2' fields which are likely
I03E to be unique to a single record. Display is limited, but complete
I03E records can be transferred, generating a new sub-set database for
I03E use in other operations, including transfer to a word processor.
I03E Good for building/extracting bibliographic lists from master files.
I03E
I03E 4.5 MULTI-FIELD SEARCH provides for more complex search criteria
I03E and presentations...
I03E
I04E 4.5 MULTI_FIELD SEARCH scans records of a data base file to find
I04E those matching criteria which can involve several features:
I04E
I04E A. One or more items can be specified for search.
I04E (These are entered in specific fields.)
I04E B. The multiplicity of acceptance can be specified.
I04E (The search logic: ALL or ANY matches.)
I04E (Correspond to Boolean AND or OR logic)
I04E
I04E The display screen completely defines the search and presentation
I04E of the results. The top half presents a full set of fields in
I04E which you simply enter the items sought. The second part of the
I04E screen presents a series of options controlling output details.
I04E Enter 'Y' or 'N', or accept the default values. The default output
I04E structure can be changed in the SET-UP menu preferences. There may
I04E be prompts to answer on the bottom line.
I04E
I04E F1 key will present lists of data to assist entries.
I05E
I05E 4.6 MIXED-LOGIC SEARCH allows record extraction based on Boolean
I05E logic - AND, OR, and NOT - in combinations not possible in the

I05E Multi-Item search menu (4.5).
 I05E
 I05E Mixed logic searching requires that you construct the search
 I05E string which is composed of three elements, the item sought,
 I05E the field of search, and the logic. A model provides a guide.
 I05E Field names are entered as numbers (to save entry space).
 I05E There is some checking of the entry, but not all errors can be
 I05E trapped, so be prepared to experiment. The F1 key will list
 I05E existing data to assist entries.
 I05E
 I05E When a search criteria entry is complete, options will be
 I05E presented to control record content and target of the search.
 I05E The output structure can be changed in the SET-UP preferences.
 I05E

I00F ---- 5.2 DOCUMENT GENERATION -- GENERAL INFORMATION
 I01F TOPICAL LISTS:

I01F Topical lists and indexes present information based on single fields
 I01F within the records, e.g., keywords, authors, sponsors, type, etc.
 I01F
 I01F REFERENCES, FULL REPORT:
 I01F Output formats: LINE (linear), CARD (Block), and UDS (UserDefinedStyle)
 I01F provide report types; options for included contents can be selected.
 I01F
 I01F The PRINT option provides for SCREEN and/or HARD COPY report. Pitch,
 I01F margins, & page length can be set, or default values used. Note that
 I01F the direct printing mode provides little in the way of character
 I01F embellishment (underlining, italic, bold, etc.) unless through UDS's.
 I01F
 I01F The WRITE option provides for REPORT transfer to a DISK FILE. This can
 I01F be used in many ways, e.g., in word processors to introduce any needed
 I01F embellishments, and to merge into other documents. The disk file created
 I01F is in DOS-Text (ASCII) mode which can be read directly into most word
 I01F processors. It can be with or without wordwrap (hard carriage return).
 I01F Also, see EXPORT of files, screen 2.4.4, or the separate TSX utility.
 I01F

I00F
 I00G
 I00D

I05D Special characters are entered ³ Ch.Code Ch.Code Ch.Code Ch.Code
 I05D with their ASCII numeric code. ³ € 128 ‰ 137 " 148 ¢ 162
 I05D Hold down the ALT key, type the ³ □ 129 Š 138 • 149 £ 163
 I05D number on key-pad, release ALT. ³ , 130 < 139 – 150 □ 164
 I05D Most IBM-Compatible systems will ³ f 131 Œ 140 — 151 ¥ 165
 I05D display these characters, BUT - ³ „ 132 □ 141 ~ 152 > 155
 I05D many printers will not print them ³ ... 133 Ž 142 ™ 153 œ 156
 I05D correctly - test your system. ³ † 134 □ 143 š 154 □ 157
 I05D ALSO, they will not index, sort ³ ‡ 135 □ 144 160 ¨ 168
 I05D or search as expected. ³ ^ 136 “ 147 ¡ 161 173
 I00D

