

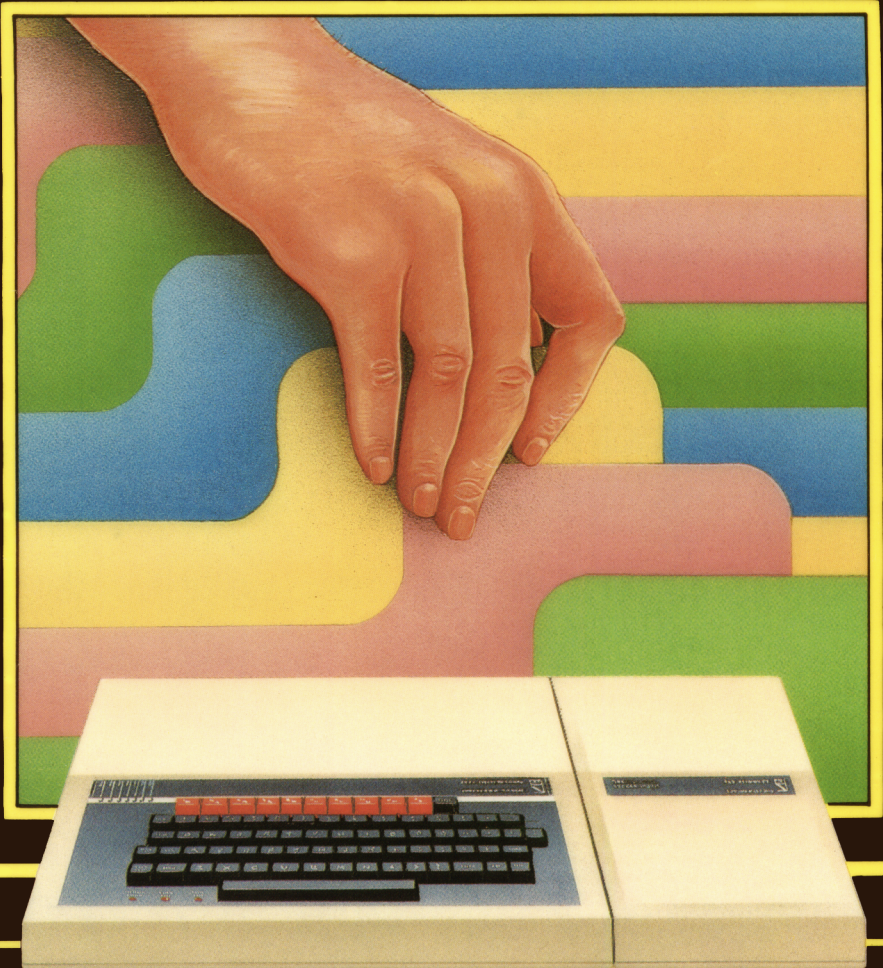


BRITISH BROADCASTING CORPORATION

MICROCOMPUTER SYSTEM

# File Plan

for the BBC Microcomputer with Z80 second processor





# FilePlan

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**Guide to the database software in the BBC  
Microcomputer Z80 Pack**

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Within this publication the term 'BBC' is used as an abbreviation for 'British Broadcasting Corporation'

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# Contents

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<b>Conventions used in this guide</b>	<b>6</b>
---------------------------------------	----------

---

<b>1 FilePlan</b>	<b>7</b>
-------------------	----------

---

<b>2 Using worksheets</b>	<b>8</b>
---------------------------	----------

---

<b>3 Working with FilePlan</b>	<b>10</b>
--------------------------------	-----------

---

Starting	10
The screen	11
Messages and prompts	12
Giving commands	13
Leaving FilePlan	14

<b>4 Trying out FilePlan</b>	<b>15</b>
------------------------------	-----------

---

Planning your worksheet	15
Naming the worksheet	15
Designing the worksheet	16
Naming the fields	17
Deciding field formats	17
Writing prompts	18
Entering data	19
Working in the entry line	21
Moving the data pointer	22
Editing a worksheet	22
Looking at one record	23
Sorting your worksheet	23
Finding records	26
Printing activities	28
Saving your work	28
Using FilePlan	29

<b>5 Setting up a worksheet</b>	<b>30</b>
Setting disc drive and printer options	30
Naming	31
Planning	31
Enlarging, formatting and writing prompts	32
<b>6 Entering and editing data</b>	<b>35</b>
Choosing a worksheet	35
Moving around a worksheet	36
Data entry	36
Editing before entry	37
Editing after entry	37
<b>7 Sorting</b>	<b>38</b>
Sorting a worksheet	38
Sorting a list	39
Saving lists	39
Deleting lists	40
<b>8 Finding records</b>	<b>41</b>
Finding one record	41
Finding a set of records	42
Adding records to a list	44
Merging lists	45
Removing records from a list	45
<b>9 Printing worksheets</b>	<b>46</b>
Printing a worksheet	46
Printing the dictionary	47
<b>10 Printing address labels and form letters</b>	<b>48</b>
Preparing a report	49
Mailing label report	49
Form letter report	51
Starting to print	52

<b>11 Handling a worksheet</b>	<b>53</b>
Isolating one record	53
Copying a worksheet and enlarging its data capacity	53
Deleting a worksheet	54
Clearing	55
<b>Error messages</b>	<b>56</b>
<b>Glossary</b>	<b>58</b>
<b>Index</b>	<b>61</b>

# Conventions used in this guide

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In this guide, we use a set of standard notations to refer to keys on the keyboard, to FilePlan commands, and to items you type in. The following examples will show how the conventions work.

**ESCAPE**

refers to a key on the keyboard — in this case, the key marked 'ESCAPE'

**undo**

refers to a FilePlan command, which you give by pressing a function key; the command names are shown on your FilePlan function key card

<field number>

means type in a field number: do not type in the angled brackets

**CTRL** **BREAK**

means: while holding down **CTRL**, press **BREAK**



# 1 FilePlan

---

FilePlan is a computerised filing system. You can use it to store records which you would otherwise keep in your head or on index cards. You'll be able to update, sort, find and read your records quickly and accurately.

It's particularly useful for:

- stock and sales records
- mailing lists
- catalogues
- telephone and address directories.

You can print out your records, and you can also use FilePlan to print address labels and letters, inserting names and addresses automatically. This feature can save you hours of laborious work.

In the next chapter, we explain the idea of a worksheet. Chapter 3 tells you how to load the program and start it running.

Chapter 4 guides you through your first FilePlan session. Read this chapter before you start doing real work with the program — you can try out the activities it describes as you go through it. It's only an introductory survey, but it will tell you all you need to know to get started.

The main part of the manual (chapters 5 to 11) is a complete guide to all the FilePlan activities. It's arranged to make it easy for you to find the information you need. If you want to find out how to sort your records, for example, look up chapter 7, *Sorting*.

At the back of the guide, you'll find:

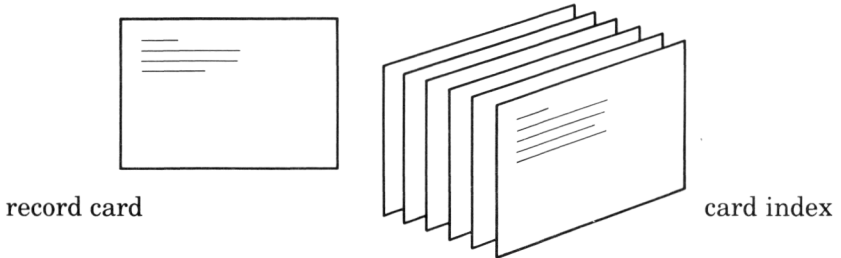
- a list of the error messages that might appear on your screen
- a glossary
- an index.

Before you start, please read carefully your *Z80 user guide*. It contains essential information on setting up your equipment, loading its operating system and preparing discs.

# 2 Using worksheets

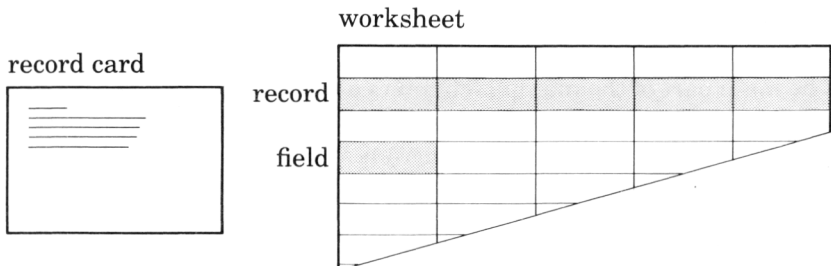
---

FilePlan is the computerised equivalent of a card index; a set of record cards, each containing several items of data.



The program contains the equivalent of a store of blank record cards: about 1500 are available on each floppy disc that you use with FilePlan.

From that store, you fill in cards, to form a card index. You can have as many different indexes as you like. Each card is called a record, and is shown on the screen as a single row of data. Your FilePlan card indexes will consist of a series of rows — as many as you need — and are called worksheets.

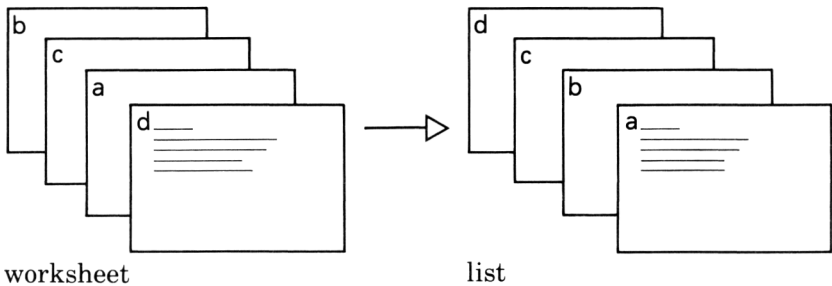


Each space in the worksheet is called a field.

Initially, the program lets you have five fields in each record. But you can add more if you need to.

You can enter data on to your worksheet in any order, and sort it later. The worksheet is a complete, but unsorted, store of records. Each worksheet will be saved automatically on your FilePlan data disc.

When you have filled in enough records to complete an index, you will probably want to sort the records into order. There's a command that does this for you. Your sorted worksheet is called a list.



There are commands which enable you to find a particular record quickly. This is like finding one card in a card index.

Another command enables you to choose a set of records from your index. For example, out of an index of addresses you could select all the records that contain London addresses. This smaller set of records is another kind of list. From each worksheet, you can pull out as many different lists, covering as many different categories, as you like.

Each worksheet can generate as many lists as you need. If you want to keep a list, there's a command which saves it on disc.

These are the basic ideas behind FilePlan. You're now ready to start your first FilePlan session.

# 3 Working with FilePlan

---

This chapter explains:

- how to start FilePlan
- how your screen will be arranged
- how to give the program instructions
- how to leave the program.

## Starting

- 1 Make sure that everything is switched on.
- 2 Flip over your function key cards until they're open at the FilePlan page.
- 3 Put your FilePlan program disc in drive A and your data disc in drive B.
- 4 If you need to load CP/M

press **CTRL BREAK**

Otherwise,

type **CTRL C**

- 5 After the A> prompt

type **FILE RETURN**

FilePlan will start, and a blank worksheet will appear on your screen.

- 6 If the red light marked 'CAPS LOCK' is on, press the **CAPS LOCK** key to stop your typing coming up in capitals.
- 7 You may want to set disc drive and printer options for the session. Instructions are in chapter 5.



**current list name**

When you start, you have only a blank worksheet. Until you've entered data and sorted it to create a list, there will be a space after **LIST:** on your screen.

**message area**

Messages from the program will appear here.

**entry line**

The space where your commands and data will appear, as you type them in. You don't type straight into a field: Fileplan copies the data you enter into the correct worksheet position. Often the entry line will show data which you've entered earlier, which you can delete or change.

**prompt line**

Tells you what to type in.

**worksheet area**

The space where your worksheet will be shown. Only fifteen rows are shown on the screen at once.

**data pointer**

Whenever you have a worksheet on your screen, FilePlan works with one of its fields at a time. This field shows up on your screen as a highlighted block. This marker is your data pointer. When you start, the data pointer will be on the first field of the worksheet on your screen.

## **Messages and prompts**

Messages and prompts are shown in this guide like this:

Message **\*\*PLEASE WAIT\*\***

Prompt **ENTER DATA:**

## Giving commands

To give instructions to FilePlan, you use:

- the red function keys at the top of your keyboard
- the number keys in the second row of your keyboard.

Your FilePlan key card reminds you which function key gives which command. To find out about the number-key commands:

press **ESCAPE**

Your screen will change, to show this:

---

```

                                WORKSHEET: (NEW)          LIST:
> <
CHOOSE A COMMAND

0...ENTER DATA                    20...FIND RECORD
1...CREATE WORKSHEET               21...CREATE LIST
2...CHOOSE WORKSHEET/LIST         22...ADD RECORDS TO LIST
3...PRINT WORKSHEET               23...REMOVE RECORDS FROM LIST
4...REPORTS

7...ENTER FIELD FORMAT
8...NAME WORKSHEET
9...EXIT

                                25...SORT LIST
                                26...SAVE LIST

                                30...SET GLOBAL OPTIONS
                                31...COPY WORKSHEET
                                32...DELETE WORKSHEET
                                33...DELETE LIST

                                37...PRINT DICTIONARY

```

---

This display is FilePlan's main menu. You could now select a command by typing an option number, then pressing **RETURN**.

When we say something like:

select **8**

we mean:

press **ESCAPE**

to get to the menu, then

type **8 RETURN**

If you make a mistake while entering a command, press **DELETE** to rub out what you've typed, type in the correct number, and then press **RETURN**.

Every time you press **ESCAPE**, the program saves on disc any data currently on your worksheet. This always takes a few moments, but it means that your data is stored safely.

If you get into difficulties mid-way through an operation:

press **ESCAPE**

to get back to the menu. Your data won't be damaged.

## Leaving FilePlan

To stop working with FilePlan:

select 9

Message End of execution

Prompt A>

You could then take out the FilePlan program disc and, if you want to, load another program.

Always leave the program in this way before switching your computer off or taking the FilePlan disc out, otherwise the contents of the disc might be corrupted.

You can re-enter FilePlan by

typing **FILE** **RETURN**



# 4 Trying out FilePlan

---

This chapter guides you through FilePlan, step by step. It's a good idea to try out each step as you read about it. When you've worked through the chapter, you'll be familiar with all the basic rules for using the program.

## Planning your worksheet

It's always worth planning what your worksheet will contain, and how you'll want to retrieve information from it. Chapter 5 has some suggestions on this. For now, try a simple, small worksheet — a personal telephone directory, for example. Each entry might contain five items of information:

```
surname   first name   exchange name  STD code  number
```

In other words, each record will have five fields. For example, one record might contain:

```
Jones     Pamela       Cheltenham   0242       94777
```

You might like to set up your own FilePlan telephone book, following the instructions that we'll give over the next few pages.

Before you start entering data, it's a good idea to:

- give your worksheet a name
- give your fields names
- decide on the format of each field (how long it will be, whether it will contain letters or numbers, and so on)
- write yourself some prompts.

## Naming the worksheet

To name your worksheet:

```
select    8
```

That is, press **ESCAPE** to get to the menu, then type **8RETURN**.

```
Prompt   New Worksheet Name?
```

The entry line shows the name that FilePlan automatically gives your first worksheet. Delete it, type in the new name, and press **RETURN**. The name must start with a letter, and can contain up to seven more letters, numbers or symbols.

*Examples*

PHONEBK  
MEMBERS  
INDEX1

The name you've chosen will now appear at the top of your worksheet.

If you don't name your worksheet, the program will give it a name automatically like NEW0001, which you can later change if you want to.

## Designing the worksheet

To give your fields names and formats, and to write your prompts:  
select 7

A new screen display will appear, with the fields arranged vertically instead of horizontally.

---

```

ENTER FIELD FORMAT  WORKSHEET:PHONEBK  LIST:
>
ENTER FIELD HEADING (MIN=0,MAX=16)

```

	FIELD HEADING	WIDTH	KEY	TYPE	DEC	PROMPT/EDIT LINE
1	██████████	12		12 ALPHA	—	_____
2	_____	12		12 ALPHA	—	_____
3	_____	12		12 ALPHA	—	_____
4	_____	12		12 ALPHA	—	_____
5	_____	12		12 ALPHA	—	_____
6	_____					_____
7	_____					_____
8	_____					_____
9	_____					_____
10	_____					_____
11	_____					_____
12	_____					_____
13	_____					_____
14	_____					_____
15	_____					_____
16	_____					_____

---

A series of prompts will take you through the choices for field 1, then move on to field 2, and so on, so that you can decide on names, formats and prompts for each field.

## Naming the fields

The first decision will be:

prompt ENTER FIELD HEADING(MIN=0,MAX=16)

Type <name of first field> **RETURN**

*Example*

*If your first field is to contain surnames:*

type surname **RETURN**

Prompt DISPLAY WIDTH(MIN=0,MAX=75)

This prompt allows you to change the width of the field, as it appears on your screen (it doesn't affect the amount of data that can be stored in the field).

In the entry line, you will see 12. This is FilePlan's pre-set display width, 12 characters. This, and other pre-set options, are the program's default settings — the settings FilePlan will automatically use if you don't instruct it to do otherwise. If you're happy with the default setting shown in the entry line

press **RETURN**

If not, use **DELETE** to rub it out, then type in your choice, and press **RETURN**.

## Deciding field formats

The next three prompts are:

prompts KEY LENGTH USED DURING SORT.

DATA TYPE

DIGITS AFTER THE DECIMAL POINTS?

Each prompt will tell you the options you have.

For the moment, you'll probably want to accept the default settings, by pressing **RETURN** each time. The key length option affects the way the program searches through your worksheet: it's explained in chapter 8. The data type is usually alphanumeric, which means that you can use letters and numbers. Select **N** only if the field will contain nothing but numbers.

## Writing prompts

Next, you'll see:

prompt    **PROMPTS AND EDITS FOR DATA ENTRY**

This is where you type in a prompt for your field.

### *Example*

*The first field of your telephone book will be the surnames field. When you come to enter your names, FilePlan would normally display its standard prompt:*

**ENTER DATA:**

*But you can change this prompt to something more helpful, like 'Enter surname':*

*type*      Enter surname **RETURN**

There's more about writing prompts in chapter 5.

After you've typed in your prompt, the program continues with:

prompt    **ENTER FIELD HEADING (MIN=0,MAX=16)**

You're now being asked to enter a name for your second field. For your telephone book, it might be

**first name**

Carry on through the prompts until you've set up names and prompts for all your fields. The screen will look like this:

---

ENTER FIELD FORMAT    WORKSHEET:PHONEBK    LIST:

>

ENTER FIELD HEADING(MIN=0,MAX=16)

==4==	=====5=====	==6==	==7==	==8==	=11	=====13=====
	FIELD HEADING	WIDTH	KEY	TYPE	DEC	PROMPT/EDIT LINE
1	surname	12		12 ALPHA	___	Enter surname
2	first name	12		12 ALPHA	___	Enter first name
3	exchange name	12		12 ALPHA	___	Enter exchange name
4	STD code	12		12 ALPHA	___	Enter STD code
5	number	12		12 ALPHA	___	Enter number
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						

---

When you're sure the details are correct:

press **ESCAPE**

to return to the worksheet.

## Entering data

Now start entering your data.

The data pointer shows you where you are on the worksheet: at the moment, you'll be at the first field of the first row.

The entry line shows the contents of that field. When you start, this field (and all the others in the worksheet) will be empty, so the entry line will be blank.

The prompt reminds you what to type in. It will be whatever you typed in as a prompt for your first field.

Type in the data to go into the first field and

press **RETURN**.



You can type in your records in any order. The program will fill your worksheet from the top, and you can ask it to sort them later.

## Working in the entry line

When you're typing data in, your position in the entry line is marked by a flashing underline symbol. This is the cursor.

If you make a mistake while typing:

<b>DELETE</b>	rub out the character to the left of your cursor
<b>delete char</b>	rub out the character marked by your cursor
<b>delete field</b>	rub out all the text in the entry line.

You can move the cursor backwards and forwards in the entry line.

<b>CTRL</b> ←	moves left one space
<b>CTRL</b> →	moves right one space.

As well as deleting mistakes in the entry line, you can insert new text wherever you want to. Move the cursor to the place where you want to insert something, and type what you want to insert. The first letter you type will appear at the cursor position, pushing the existing text one space to the right to make room for it. The cursor will move one space to the right too, so that you can type in your insertion continuously.

### *Example*

*If you accidentally miss out the word 'upon' in 'Newcastle-upon-Tyne', move the cursor so that it appears under the T of 'Tyne', and type in the word. It will appear letter by letter to the left of the cursor.*

<i>Type</i>	upon-
<i>Screen</i>	Newcastle-upon-Tyne

## Moving the data pointer

You can move from field to field by using the cursor keys. As you move the data pointer around the worksheet, the entry line at the top of the screen displays the data in that field.

← and → move the data pointer one field to the left or right.

↑ and ↓ move the data pointer one record up or down.

When you reach the right edge of the worksheet, pressing → will make your data pointer jump to the left-hand side of the next record. If, however, it reaches the left edge of a record, pressing ← will have no effect.

You can move to records off the bottom of the screen by pressing ↓ repeatedly. It might take the program a moment or two to load the new records from disc.

There's more information on moving the data pointer in chapter 6.

## Editing a worksheet

You can change data on your worksheets at any time.

Use the cursor keys to move the data pointer to the field you want to change. The contents of that field will appear in the entry line. You can now delete or insert the text in the entry line, and send it back to its position in the worksheet by

pressing **RETURN**

You can add a new record at the bottom of your worksheet (but not in the middle).

Other ways of editing data are described in chapter 6.



## Looking at one record

You can choose to have one record displayed on its own, with its fields arranged vertically on your screen. This is useful if you have more than five fields, or if the data in a field is particularly long.

Move the data pointer anywhere in that record and

press **isolate**

The record will now be shown like this:

---

```

ENTER DATA          WORKSHEET:PHONEBK   LIST:
>GRIFFITHS
  Enter surname

      : GRIFFITHS
      : ERIC
      : CAMBRIDGE
      : 0223
      : 544299
  
```

---

You can edit the record, using  and  to move between fields. To return to the normal display:

press **isolate**

## Sorting your worksheet

Once you've entered your data, you can sort your worksheet in various ways. The result of the sorting is a list. Each worksheet can be sorted into as many lists as you like.

### *Example*

*When you've finished entering records into your telephone directory (a dozen or so will do for now), you'll probably want to sort it into alphabetical order.*

To sort your worksheet:

select 25

Prompt CHOOSE A FIELD

Type the number of the field which contains the data by which you want the worksheet to be sorted.

*Example*

*You may want to sort your directory by surname. Surnames are in field 1, so*

type        1 **RETURN**

Prompt     NEXT FIELD?  
(or press <RETURN> to begin sorting)

Press       **RETURN**

to start the sort, or

type        <another field number> **RETURN**

to specify a field for a secondary sort.

*Example*

*If you have several people with the same surname — members of your family, perhaps — your list will be easier to use if people with the same surname are sorted alphabetically by first name. This is a secondary sort.*

*If first names are in field 2:*

type        2 **RETURN**

Prompt     NEXT FIELD?  
(or press <RETURN> to begin sorting)

You can specify a third level of sorting — in fact, you can ask for as many levels as you have fields. When you're ready to sort:

press       **RETURN**

and FilePlan will carry out the sort.

When sorting alphanumeric fields, FilePlan will:

- put numbers before letters
- sort numbers by their first digits (so that 123 would be put before 24)
- put capital A earlier than lower-case a
- put both A and a earlier than B or b.

*Example*

unsorted	sorted
OAK	188
birch	3556
3556	ASH
ash	ash
willow	birch
188	OAK
ASH	willow

The result of a sort is a list, and the program will give it a temporary name, which you'll see at the top of the screen.

Screen    **LIST:#IX**

You can give the list a permanent name, and save it on disc, by selecting 26

Prompt    **PLEASE TYPE IN A LIST NAME (3 characters)**

Type a name up to 3 characters long, starting with a letter or number, followed by **RETURN**.

Prompt    **PLEASE TYPE A DESCRIPTION FOR THIS LIST**

Type a description up to 40 characters long, which will help you remember what's in the list, followed by **RETURN**.

*Example*

Prompt PLEASE TYPE IN A LIST NAME (3 characters)

Type SUR **RETURN**

Prompt PLEASE TYPE A DESCRIPTION FOR THIS LIST

Type Phone directory sorted by surname **RETURN**

Prompt KEEP LIST AUTOMATICALLY UP-TO-DATE?  
(Y=YES,N=NO)

Type Y **RETURN** to have the list updated whenever you update the original worksheet

N **RETURN** if you prefer your list not to be updated.

You can delete a list by selecting **33**: this is explained in chapter 7.

## Finding records

If you want to find a set of related records:

select 21

Work out:

- which field you want the program to sort through
- what it must look for in that field, to identify the records you want.

*Example*

*To pull out of your telephone directory all the people with a Cheltenham telephone number, the program will need to look through the exchange name field for the word 'Cheltenham'.*

Prompt CHOOSE A FIELD

Type 3 **RETURN**

Prompt CHOOSE AN OPTION

FilePlan can search in eight different ways:

---

NUMBER	OPERATION
1	MATCH
2	NOT EQUAL
3	LESS THAN
4	LESS OR EQUAL
5	GREATER THAN
6	GREATER OR EQUAL
7	EXACTLY EQUAL
8	BETWEEN

---

*In this example, you'll choose operation 7, which pulls out all the records which have the word 'Cheltenham' in field 3. Chapter 8 gives more details on how these operations work.*

Type     **7 RETURN**

Prompt    ENTER A VALUE

Type here the letters or numbers you want the program to search for.

Type     Cheltenham**RETURN**

*The screen now displays the list of people with Cheltenham telephone numbers. The top line of the screen shows the temporary name FilePlan gives the list:*

screen    LIST:#IX

To save the list on a disc, select 26.

You can also:

- pull out a single record from a worksheet
- extend any list you've created
- remove records from a list.

Chapter 8 explains how.

## Printing activities

With FilePlan, you can get printouts of:

- your worksheets      select **3**
- your dictionary      select **37**

The dictionary is a complete list of all your worksheets, with details of their field formats and lists.

Full instructions are in chapter 9.

You can also print address labels and form letters. Chapter 10 explains how.

## Saving your work

You'll want to keep important worksheets and lists, so that you can refer to them again. Your current worksheet is automatically saved every time you press **ESCAPE**, but lists aren't saved unless you give FilePlan instructions to do so. To save a list:

select      **26**

You can use this command only if you have a current list. You will get an error message if you try to use it when there's a blank after **LIST :** at the top of your screen.

Worksheets and lists are saved on the disc in your data drive. This is normally drive B. To select drive A as your data drive, follow the instructions in chapter 5.

Worksheets are saved in files named

**WS0001.#DF      WS0002.#DF**

and so on.

Lists are saved in files named:

**<source worksheet>.<list name>**

For example, a list generated from worksheet 0001, to which you've given the list name SUR, will be saved as WS0001.SUR.

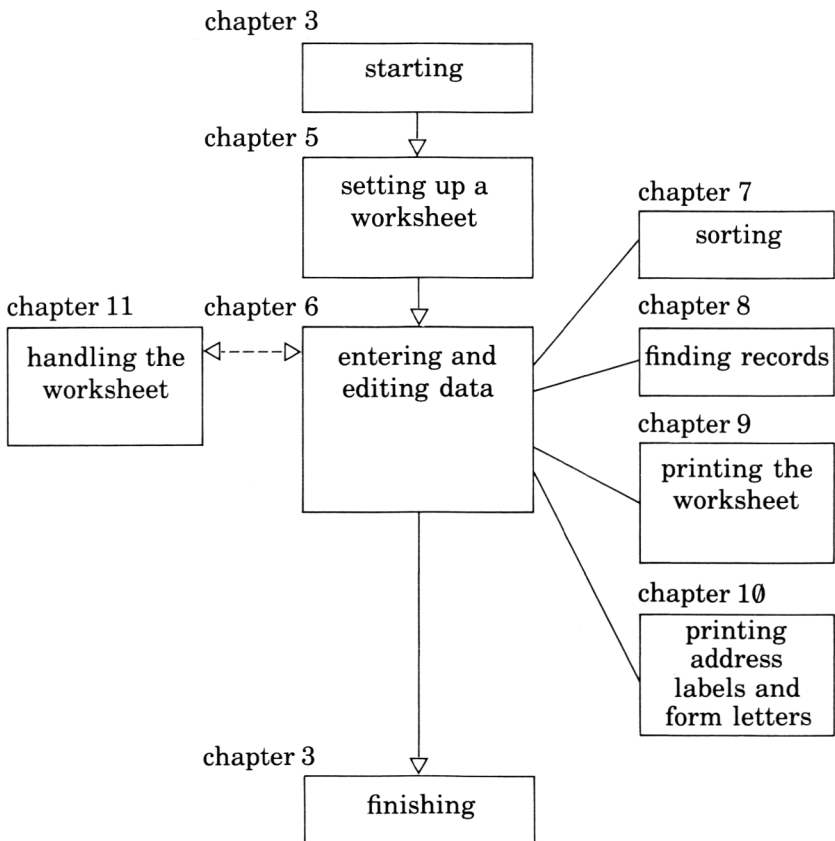
It's essential to:

- keep a paper record of the contents of your data discs
- label the data discs clearly
- make frequent back-up copies.

Your *Z80 user guide* explains how to make back-ups.

## Using FilePlan

This chapter has covered the basic rules for using FilePlan, so that you can start automating your records. From now on, you'll be able to find out anything you need to know by turning to one of the following chapters.



# 5 Setting up a worksheet

---

This chapter describes how to:

- set up disc drive and printer options
- name a worksheet
- plan a worksheet
- name its fields
- select formats for the fields
- write your own prompts.

## Setting disc drive and printer options

To set your disc drive and printer options for the session, select **30**. A new screen display will appear, with the first of a series of three prompts.

Prompts **NEW DATA DRIVE?**  
**NEW DICTIONARY DRIVE?**  
**PRINT WIDTH (in characters)?**

After each prompt, look at the entry line. If you're happy with the default decision, which will be shown there, press **RETURN**. If not, type in your choice, then press **RETURN**.

The data drive is the drive for your data disc. Normally, B will be your data drive.

The dictionary is a record of the format details of all the worksheets and lists you create. After a while, you may find you have several data discs in action, each full of worksheets and lists. As long as you keep A as the dictionary drive, your dictionary will list all of them.

The print width depends on your printer and paper. Set this figure to the maximum number of characters your printer can print on one line of the paper it's using (usually 80 or 132: check in your printer manual).

After the third prompt, you're returned to the worksheet.



## Naming

To name your worksheet, select 8.

Prompt **New Worksheet Name?**

Type **<new name> RETURN**

## Planning

Before you start entering data, you need to do some planning. Draw up a rough worksheet on paper.

Decide how many fields you'll need, by going through the following steps.

- 1 Work out how long your longest record will be. For example, if you're setting up an address index, and the longest address you have is six lines long, you'll need at least six fields.
- 2 Decide how you'll want to sort your data. In an address index, for example, you might want to sort it alphabetically by name, and to be able to find a particular service (for example, a plumber) quickly. This means you'll need to have a field for names, and a field to record each person's service.
- 3 Decide whether you'll want to use the worksheet for address labels or form letters. If you do, you'll need a field for each item to be inserted — for example: title, first name, surname, number, street, area, town, county, postcode.

For each field, work out:

- a name for the field
- how wide it will need to be when displayed on the screen
- whether it contains numbers only or both letters and numbers
- for fields containing numbers only, how many digits you want to show after the decimal point (for example, for amounts of money you'll need two).

Telephone numbers are not purely numeric, since they can include spaces, dashes and brackets.

If any of your records will be more than 100 characters long, you'll need to expand the space available. You can do this easily using command 31, which is explained in chapter 11.

## Enlarging, formatting and writing prompts

To enter the decisions you made at the planning stage, select 7. The field format screen appears. By moving over this screen, you can change the format details of any of your fields.

To enlarge your records — that is, to add more fields — move to the first clear line on the screen and type in a specification for a new field. You needn't answer all the format prompts, but you must specify a display width of 1 or more.

There are six format decisions you can make for each field. The program prompts you for each one, a field at a time, and reminds you of the options you can choose from (or of the maximum length of items you can type in).

Prompts    ENTER FIELD HEADING  
              DISPLAY WIDTH  
              KEY LENGTH.USED DURING SORT.  
              DATA TYPE  
              DIGITS AFTER THE DECIMAL POINT?  
              PROMPTS AND EDITS FOR DATA ENTRY

After each prompt, look at the entry line. If you're happy with the default decision shown there, press **RETURN**. If not, delete the default decision, type in your choice, and press **RETURN**.

The prompt shows the range you can choose from, or the maximum length, in characters, of the text you can enter. (There are no default decisions for fields 6 and onwards.)

The field name can be up to 16 characters long.

You can set a display width of 0, so that the field will be invisible on your screen display. This means you can set up extra fields to use later if you need them, but which won't fill up your screen in the meantime.

The last option allows you to write your own prompts, to make entering data into your worksheet easier. The text you type here will replace the usual ENTER DATA prompt, at the appropriate points, when you come to enter data.

There are three kinds of prompt you can write:

- ordinary text prompts
- code prompts
- range prompts.

Ordinary text prompts simply remind you what to type in.

Code prompts allow you to abbreviate what you type in. For example, you might write a prompt like this:

Type in sex (M=male,F=female)...

You can have two or more options in your prompts. When setting up code prompts:

- put the code (for example, **M**) before the full meaning (**male**)
- use upper or lower case.

When you come to enter data, you now type just **M** or **F**, and the program translates the code you type into its full meaning.

*Example*

*Prompt* Type in sex (M=male,F=female) . . .

*Type* **M**RETURN

*The field will then show:*

male

If you try to enter anything other than the options in the list, the program will display:

message VALUE NOT IN LIST OF CODES

It's important, therefore, to allow for every possible answer when writing your prompts. A well-thought-out prompt might say:

Life member? (Y=yes,N=no,?=unknown)

Range prompts, which work for numeric fields only, look like this:

Type in amount(MIN=0,MAX=999)...

You can have two or more options in your prompts. When setting up range prompts:

- do not type spaces inside the brackets
- spell **MIN=** and **MAX=** as shown here, using either upper or lower case.

Instead of specifying both minimum and maximum, you can specify a minimum value or a maximum value on its own.

When you come to enter data, the program will accept only amounts that fall within the range. Amounts outside the range will produce:

message ERROR: VALUE TOO LARGE

or ERROR: VALUE TOO SMALL

# 6 Entering and editing data

---

This chapter describes how to:

- choose a worksheet to use
- move around a worksheet
- enter data
- edit data.

## Choosing a worksheet

To use an existing worksheet, select 2.

Prompt **CHOOSE A WORKSHEET**  
(or press <TAB> key to list choices)

To see a list of all the worksheets you've saved, press **TAB**.

If you've used more than one data disc, the list will include worksheets not on the disc in drive B.

Type either the worksheet name, or its number on the list, and press **RETURN** twice. The worksheet you chose will appear on the screen.

If the worksheet isn't on the disc in drive B, you will see:

message **<worksheet name> IS NOT ON DRIVE B**









Prompt **CREATE <worksheet name>?(Y=YES,N=NO)**

Type **YRETURN** to set up a new worksheet with this name on the disc now in drive B  
**NRETURN** if you want to use the original worksheet.

If you type **N**, the FilePlan program will stop, and the **A>** prompt will reappear. You can then insert the correct data disc and restart FilePlan.

## Moving around a worksheet

This diagram illustrates how you move around your worksheet.

	left one field	right one field	
	up one record	down one record	
<b>SHIFT</b> 	up one page	down one page	<b>SHIFT</b> 
<b>CTRL</b> 	to the top of the worksheet	to the bottom of the worksheet	<b>CTRL</b> 

A page is a screenful of 15 records.

## Data entry

To display your current worksheet, select **0**.

To enter data:

- check that the data pointer is at the right field
- read the field's contents (if it has any) in the entry line
- type in the data, or edit the entry line as necessary
- press **RETURN**.

In an alphanumeric field, you can enter any letters, numbers or symbols. In a numeric field, you can enter numbers only: dashes, commas and pound signs, for example, will not be accepted.

There are limits on the data length:

	limit (characters)	can limit be changed?
space in entry line	79	no
space for displaying a field on the worksheet	12	yes: see chapter 5
total length of record	about 100	yes: see chapter 11

To enter a blank field, make sure the entry line is empty, then press **RETURN**.

To duplicate a record, move the data pointer to the blank line you want to copy into and press **duplicate**.

## Editing before entry

To edit text while it's still in the entry line:

press:	to:
<b>DELETE</b>	delete the character to the left of the cursor
<b>delete char</b>	delete the character at the position of the cursor
<b>delete field</b>	delete all the text in the entry line
<b>CTRL</b> ←	move the cursor left one character
<b>CTRL</b> →	move the cursor right one character

To insert new text, move the cursor to the point at which you want to insert text, and type it in.

## Editing after entry

To edit data already on your worksheet:

- move the data pointer to the field you want to edit
- its contents will appear in the entry line
- edit it in the entry line and press **RETURN**.

To cancel any changes you have made to the rows displayed on the current screen, press **undo**.

This will only cancel changes made since you last pressed **ESCAPE**.

# 7 Sorting

---

This chapter describes how to:

- sort a worksheet or a list
- save a list
- delete a list.

## Sorting a worksheet

To sort your current worksheet, select 25.

Prompt `CHOOSE A FIELD`

Type the number of the field you want to sort by, then press **RETURN**.

Prompt `NEXT FIELD?`  
(or press `<RETURN>` to begin sorting)

If you want sorting to begin now, press **RETURN**.

To specify a field for a secondary sort:

type `<field number>` **RETURN**

Prompt `NEXT FIELD?(or press <RETURN> to  
begin sorting)`

Again, either press **RETURN** or specify another field.

After a few moments, the sorted worksheet appears on the screen. FilePlan gives it a numerical list name.



## Sorting a list

To sort a list, select 2.

Prompt    **CHOOSE A WORKSHEET**  
               (or press <TAB> key to list choices)

Type the name or number of the worksheet the list belongs to, and press **RETURN**.

Prompt    **CHOOSE A LIST**  
               (or press <TAB> key to list choices)

Type the name or number of the list and press **RETURN**.

Then select 25 and sort the list in the same way you would sort a whole worksheet.

## Saving lists

To save a list, select 26.

Type in the list name (up to 3 characters) and the list description (up to 40 characters) after the prompts.

Prompt    **KEEP LIST AUTOMATICALLY UP-TO-DATE?**  
               **(Y=YES,N=NO)**

Type        **Y RETURN**    and any changes you make to the  
                                          worksheet will automatically be made to  
                                          the list too  
               **N RETURN**    if you prefer your list not to be updated.

You can use this command only if you have a current list. FilePlan lets you have up to three automatically-updated lists at once.

## Deleting lists

To delete a list, select 33.

Prompt CHOOSE A LIST NAME(or press <TAB>  
to see your choice)

Type <list name>**RETURN**

Prompt CONFIRM?(Y=YES,N=NO)

Type **Y****RETURN**

to confirm that this is the list you want to delete.

After either Y or N, you'll be returned to the menu.

# 8 Finding records

---

This chapter describes how to:

- find one record and pull it out of your worksheet
- find a set of records and pull them out of your worksheet
- add records to a list
- merge lists
- remove records from a list.

## Finding one record

First, get to the appropriate worksheet and then select 20.

Prompt CHOOSE A FIELD

Type <field number>**RETURN**

Prompt ENTER A VALUE

The value is the exact word or number in the field you have specified that you want FilePlan to search for.

Type <value>**RETURN**

and the screen will display the worksheet with the record you specified at the top. If this value occurs more than once in the worksheet, FilePlan will find the occurrence that's nearest the top of the worksheet.

If you key in something other than the exact word, you will see:

message **WARNING: NO MATCHING RECORD WAS FOUND**

Prompt **START FROM TOP OF WORKSHEET? (Y=YES,N=NO)**

Type **Y****RETURN** to search again  
**N****RETURN** to return to your worksheet.

## Finding a set of records

To find a set of records in the current worksheet, select 21.

Prompt CHOOSE A FIELD

Type <field number> **RETURN**

Prompt CHOOSE AN OPTION

The screen will remind you of the operations available.

---

NUMBER	OPERATION
1	MATCH
2	NOT EQUAL
3	LESS THAN
4	LESS OR EQUAL
5	GREATER THAN
6	GREATER OR EQUAL
7	EXACTLY EQUAL
8	BETWEEN

---

Type <operation number> **RETURN**

Prompt ENTER A VALUE

Type <value> **RETURN**

In a **BETWEEN** operation, you'll be asked for a second value:

Prompt (SECOND VALUE)

Type <value> **RETURN**

The screen now displays the records found — a list. The top line of the screen shows the name FilePlan gives the list:

Screen LIST:#IX

Remember: if you want to keep the list, save it by selecting 26.

The eight operations find records in the following ways.

<b>MATCH</b>	<p>finds every value that starts with the characters you specify.</p> <p>You can vary the effects of <b>MATCH</b> by changing the key length setting. With a key length of three, for example, the program will find every value that starts with the three characters you specify. The default key length is 12, but you can change it by selecting 7 (instructions on this command are in chapter 5).</p> <p><i>Example: if you have a key length of 3, car will find car, carriage, caravan.</i></p>
<b>NOT EQUAL</b>	<p>finds every value that is different from the value you specify.</p>
<b>LESS THAN</b>	<p>in an alphanumeric field finds every value earlier alphabetically than the one you specify. (If you specify a number, it finds one starting with a lower digit.)</p> <p><i>Examples:</i>  <i>car will find bicycle, cab.</i>  <i>246 will find 240, 237842.</i></p> <p>in a numeric field finds every lower value than the one you specify.</p>
<b>LESS OR EQUAL</b>	<p>finds everything <b>LESS THAN</b> finds, plus values equal to the value you specify.</p>
<b>GREATER THAN</b>	<p>in an alphanumeric field finds every value later alphabetically than the one you specify. (If you specify a number, it finds one starting with a higher digit.)</p> <p><i>Examples:</i>  <i>car will find caravan, lorry.</i>  <i>246 will find 499244, 31.</i></p> <p>in a numeric field finds every higher value than the one you specify.</p>
<b>GREATER OR EQUAL</b>	<p>finds everything <b>GREATER THAN</b> finds, plus values equal to the value you specify.</p>
<b>EXACTLY EQUAL</b>	<p>finds values the same as the value you specify. It ignores the distinction between upper and lower case.</p> <p><i>Example:</i>  <i>car will find car and CAR.</i></p>
<b>BETWEEN</b>	<p>in an alphanumeric field finds values between (and not including) the two you specify.</p> <p><i>Examples:</i>  <i>car is between bicycle and carriage.</i>  <i>246 is between 12 and 3.</i></p> <p>in a numeric field finds values numerically between (and not including) the two you specify.</p>

If the program finds nothing, it will display:

message **NO RECORDS MET CRITERIA. VIEW ORIGINAL  
WORKSHEET?(Y=YES,N=NO)**

If you want to start again:

type **Y** **RETURN**

## **Adding records to a list**

To extend a current list with more records from the current worksheet, save the list first using 26, then select 22.

Prompt **CHOOSE ONE**  
1) **SELECT MORE RECORDS TO MERGE**  
2) **MERGE RECORDS FROM ANOTHER LIST**

Type **1** **RETURN**

Three prompts appear, as in command 21.

Prompts **CHOOSE A FIELD**  
**CHOOSE AN OPTION**  
**ENTER A VALUE**

Type in your choice after each prompt. In a **BETWEEN** operation, you'll be asked for a second value. The screen now displays the extended list.

## Merging lists

To merge the current list with a second one, select 22.

Prompt CHOOSE ONE  
 1) SELECT MORE RECORDS TO MERGE  
 2) MERGE RECORDS FROM ANOTHER LIST

Type 2 **RETURN**

Prompt CHOOSE A LIST NAME

Type <name of second list> **RETURN**

Your list then reappears, with the second list merged in.

## Removing records from a list

Select 23. Three prompts appear, as in 21.

Prompts CHOOSE A FIELD  
 CHOOSE AN OPTION  
 ENTER A VALUE

Type in your choice after each prompt. In a **BETWEEN** operation, you'll be asked for a second value. The screen now displays the list, with the records you specified removed. This command simultaneously removes records from the specified list and the original worksheet.

# 9 Printing worksheets

---

This chapter describes how to:

- print a worksheet
- print a dictionary.

## Printing a worksheet

Select **3**. A series of four prompts will appear.

```
Prompts  TITLE LINE?
          DATE?
          SPACING?(1=SINGLE,2=DOUBLE)
          SUBTOTALLING?(Y=YES,N=NO)
```

After each, type your choice, then press **RETURN**. Subtotalling will be carried out on numerical fields.

```
Message  READY PRINTER.HIT RETURN
```

When the printer is switched on and the paper lined up, press **RETURN** to start printing.

If your worksheet is wider than your current print width you'll see:

```
message  WARNING: WORKSHEET WIDER THAN PRINT
          WIDTH - TRUNCATE(Y=YES,N=NO)
```

```
Type     Y RETURN   to have your fields cut short, so that each
          record fills just one line of print
          N RETURN   to have each long record continued on the
          next print line.
```

To change your print width, select **30**. Instructions on using this command are in chapter 5.

To stop printing press **ESCAPE**.



## Printing the dictionary

The FilePlan dictionary contains the definitions of all the worksheets and lists you create (on all the data discs you use), and of the fields in each worksheet. It's held in a file called DPDB.FIL.

Select 37

Prompt **PRESS ANY CHARACTER WHEN PRINTER IS READY**

Check that the printer is switched on and the paper lined up. Press any key and printing will start.

The dictionary will look like this:

---

FILEPLAN DICTIONARY (DPDB.FIL)

RECORD NO.: 1 TYPE: DATABASE DATABASE: FILEPLAN  
NO. OF WORKSHEETS: 0018

RECORD NO.: 2 TYPE: WORKSHEET DATABASE: FILEPLAN WORKSHEET NO.: 0001  
CP/M FILENAME: WS001.#DF NO. OF SEGMENTS: 1 NO. OF FIELDS: 6  
TITLE: NAME  
AUTO-UPDATED LISTS: 1) 2) 3)

RECORD NO.: 3 TYPE: FIELD DATABASE: FILEPLAN WORKSHEET NO.: 0001  
FIELD NAME: surname TYPE: A WIDTH: 12  
FIELD NO.: 2 KEY LENGTH: 12  
DECIMAL PLACES  
PROMPT/EDIT LINE: Enter surname

RECORD NO.: 9 TYPE: LIST DATABASE: FILEPLAN WORKSHEET NO.: 0001  
LIST CP/M FILE NAME: WS001.SUR DESCRIPTION: Phone directory sorted by surname  
NO. OF FIELDS: 5 TOTAL KEY LENGTH: 26  
1ST SORT FILE: FIELD NO. 1 TYPE: A KEY LENGTH: 12  
2ND SORT FILE: FIELD NO. 2 TYPE: A KEY LENGTH: 12  
3RD SORT FILE: FIELD NO. TYPE: A KEY LENGTH:  
4TH SORT FILE: FIELD NO. TYPE: A KEY LENGTH:  
5TH SORT FILE: FIELD NO. TYPE: A KEY LENGTH:

---

The dictionary is divided into entries, called records. Each contains the definition of one particular worksheet, field or list, except for record 1, which holds the number of worksheets you've created. The dictionary above shows an example of each kind of record.

# 10 Printing address labels and form letters

---

This chapter describes how to:

- prepare a layout for printing address labels and form letters
- print them.

To print address labels or form letters, you use MemoPlan to prepare a format file (a file containing text into which FilePlan will insert the names and addresses) and you ask FilePlan to:

- go through a worksheet you specify
- find the first name and address there
- insert it at the appropriate places on your label or letter
- print out that label or letter
- go to the next record, and read the name and address there
- insert it again
- print out a second label or letter, and so on.

This means you can automate the sending out of newsletters, circulars or price lists, and each letter you send out will look as though it's been individually typed.

If you want to use this feature, it's a good idea to prepare the worksheet so that:

- data is in lower case
- first names and surnames are in different fields.

To create the format file, leave FilePlan, load MemoPlan and follow the instructions in chapter 14 of the MemoPlan guide. Save the file on your FilePlan data disc.

## Preparing a report

FilePlan holds details of the layout under which your file will be printed as a report. A report is a set of layout decisions, with a report name. You can have as many different reports as you need. To prepare a report, select 4.

Prompt CHOOSE A REPORT(or "0" for a new report)

Type **0 RETURN**

Prompt CHOOSE A REPORT TYPE(1=MAILING LABEL,  
2=FORM LETTER)

Type **1 RETURN** to prepare address labels  
**2 RETURN** to prepare form letters.

## Mailing label report

If you type 1, a new screen display appears:

---

REPORT WORKSHEET:NEW0001 LIST:

>  
REPORT NAME(MIN=1,MAX=40)

REPORT	:	11
REPORT NAME	:	<b>████████████████████████████████████████</b>
FORMAT	:	_____
WORKSHEET	:	_____
LABEL LENGTH	:	_____
TOP MARGIN	:	6
LEFT MARGIN	:	1
LABELS	:	3
2nd MARGIN	:	37
PRINT WIDTH	:	32

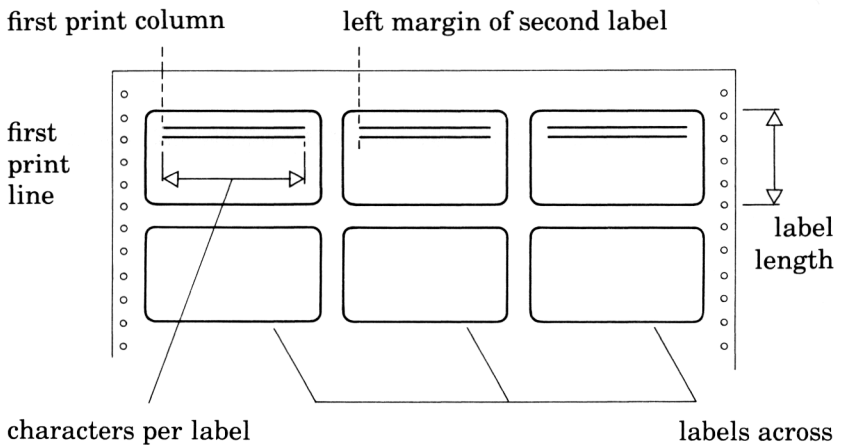
---

A series of prompts appear, to remind you of the range of options you have.

- Prompts **REPORT NAME**
- FORMAT FILENAME**
- WORKSHEET NAME -- DEFAULT IS CURRENT**
- LABEL LENGTH -- IN LINES**
- 1ST PRINT LINE**
- 1ST PRINT COLUMN**
- HOW MANY LABELS ACROSS??**
- LEFT MARGIN OF SECOND LABEL**
- MAXIMUM CHARACTERS TO PRINT PER LABEL**

After each prompt, look at the entry line. If you're happy with the default decision, which will be shown there, press **RETURN**. If not, delete the default decision, type in your choice and press **RETURN**.

Measure up your label stationery to work out the answers.



Your decisions will be filled in at the appropriate places on the screen.

After the last prompt in the series, the first prompt will reappear, to give you a chance to go back through them, changing your mind if you wish. As soon as you're happy with your decisions, press **ESCAPE** to return to the main menu.

## Form letter report

If you type 2 after CHOOSE A REPORT TYPE a display appears, like the screen shown above.

A series of prompts now appears.

```
Prompts  REPORT NAME
          FORMAT FILENAME
          WORKSHEET NAME -- DEFAULT IS CURRENT
          PAPER LENGTH -- IN LINES
          1ST PRINT LINE
          MAXIMUM PRINT LINES PER PAGE
          1ST PRINT COLUMN
          MAXIMUM CHARACTERS TO PRINT PER LINE
          PAUSE BETWEEN PAGES?
```

After each prompt, look at the entry line. If you're happy with the default decision, which will be shown there, press **RETURN**. If not, delete the default decision, type in your choice and press **RETURN**.

Your decisions will be filled in at the appropriate places on the screen.

After the last prompt in the series, the first prompt will reappear, to give you a chance to go back through them, changing your mind. As soon as you're happy with your decisions, press **ESCAPE** to return to the main menu.

## Starting to print

Switch your printer on and line up the paper, then select 4.

Prompt CHOOSE A REPORT (or "0" for a new report)

Type <report name> **RETURN**

Prompt CHOOSE ONE: (1=EDIT DEFINITION,2=PRINT)

Type 1 **RETURN** to make last-minute changes to the layout  
decisions for the report you specified  
2 **RETURN** to start printing.

Prompt PREPARE PRINTER. PRESS ANY KEY TO START  
PRINTING.

Press any key. Printing will start.

Message PRESS ANY KEY TO PAUSE

To stop printing, press any key. If you do this, the program will display:

Prompt CHOOSE ONE: (1=RESUME,2=RESUME FROM  
THE TOP OF THE CURRENT FORM)

To stop printing altogether, press **ESCAPE**.

# 11 Handling a worksheet

---

This chapter describes how to:

- isolate one record
- copy a worksheet
- enlarge its data capacity
- delete a worksheet
- clear your screen, setting up a new, blank sheet.

## Isolating one record

To look at a single record with nothing else on the screen move the data pointer to that record and:

press **isolate**

To return to the worksheet from which you called the record press **isolate** again.

## Copying a worksheet and enlarging its data capacity

With this command you can:

- copy the worksheet from one disc to another
- expand the space allocated to each record
- copy data on to new worksheets.

Select 31

Prompt ENTER NAME OF INPUT WORKSHEET

This is the name of the worksheet to be copied, so

type <name of worksheet> **RETURN**

Prompt ENTER DISK DRIVE FOR OUTPUT WORKSHEET

This is the disc drive which you wish to copy to, so

type     **A RETURN**     for drive A  
           **B RETURN**     for drive B.

Prompt   **ENTER NAME OF OUTPUT WORKSHEET**

Type in the name for the copy of the worksheet, even if it is to be the same as the original worksheet.

Type     <output worksheet name> **RETURN**

Prompt   **ENTER RECORD SIZE (IN SEGMENTS) FOR  
 OUTPUT WORKSHEET**

This prompt allows you to expand your record size if you want to, so that each record can contain more data. A segment is a unit of about 100 characters. The default number of segments is 1. For more space, enter a number between 2 and 8.

Type     <record size> **RETURN**

The screen display then returns to the menu.

## Deleting a worksheet

Select   32

Prompt   **CHOOSE A WORKSHEET**  
 (or press <TAB> to list choices)

Type     <number or name of worksheet> **RETURN**

Prompt   **CONFIRM? (Y=YES, N=NO)**

Type     **Y RETURN**     to delete the worksheet and return to the  
                           menu  
           **N RETURN**     if you change your mind.



## **Clearing**

To clear the screen and set up a new, blank worksheet, select 1. You will be given a blank worksheet, exactly the same as the first screen that the program automatically displays when you start up.

# Error messages

---

If you make a mistake, the program will display a message on the screen, to tell you where you went wrong. In most cases, the message is self-explanatory, and it will be clear what you should do next.

There are 11 kinds of error that might happen.

## **CP/M errors**

example: `Bdos Err On B: Select`

Error messages that start `Bdos Err` come from the CP/M operating system. There's a guide to them in your *Z80 user guide*.

## **Mistakes when entering data**

example: `ERROR: INPUT IS TOO LONG`

The program will tell you what you did wrong. Enter the data correctly.

## **Mistakes when calling up worksheets and lists**

example: `ERROR: WORKSHEET NOT FOUND`

If you ask for a worksheet, list or report and the program can't find it on your disc, you'll get a message like this. Normally, it's best to leave FilePlan, insert the right disc, and start the program again.

## **Entering too much data**

example: `NOT ENOUGH ROOM FOR THIS DATA`

You'll need to expand the space allotted to each record. Follow the instructions in chapter 11. (You will need to re-enter the data that caused the message.)

## **Running out of space**

example: `NO SPACE REMAINS ON THE DISK`

Your data disc is full. Leave FilePlan, format a new data disc, and start again. You can have as many different data discs in use as you like; the dictionary will record all the worksheets you create on all your data discs.

**Printing errors**

example:

**ERROR: TOP MARGIN AND PRINT LINES EXCEED THE TOTAL PAPER LENGTH**

You've made a mistake setting up a format for printing. Select **30** to change printer options, or **4** to redesign your address label or form letter report.

**Mistakes with lists**

example:

**ERROR: YOU CANNOT REMOVE RECORDS FROM AN AUTO-UPDATE LIST**

There are some limitations on the kinds of processing you can carry out on your lists. The message will give you details.

**Problems in finding records**

example: **WARNING: NO MATCHING RECORD WAS FOUND**

The program couldn't find the records you asked for. See chapter 8.

**Key errors**

example: **ERROR: MAXIMUM KEY LENGTH EXCEEDED**

FilePlan cannot carry out the complicated sorting operation you've asked for. You'll have to sort your worksheet in stages.

**Corrupted data**

example: **WARNING: BAD LIST**

Very rarely, data on one of your discs may get damaged. Call up the worksheet you're working with, and check its contents. If the worksheet is complete, and only a list is damaged, recreate the list (see chapters 7 and 8). If the worksheet itself is damaged, use your back-up copy, and throw away the corrupted disc.

# Glossary

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This glossary covers terms used in FilePlan. There's a more general glossary in your *Z80 user guide*.

## **alphanumeric or alpha**

Alphanumeric data is data that includes letters of the alphabet, numbers and punctuation characters.

## **code prompt**

A prompt which offers you a code to type in, to save typing an item in full. See chapter 5.

## **data pointer**

A highlighted block on your screen which shows you which field in your worksheet the program is currently looking at.

## **data drive**

The disc drive (A or B) which you use for your FilePlan data disc.

## **data type**

Data is either alphanumeric (in which case, it includes both letters and numbers) or numeric (just numbers).

## **database**

An organised collection of data; for example, a computerised card index.

## **default**

A standard setting, built into the program, but usually adjustable by you.

## **dictionary**

A file that contains details of all the worksheets and lists you have created. See chapter 9.

## **display width**

The width, in characters, of the space allotted on the screen to display a particular field. See chapter 5.

**entry line**

A line on your screen showing the contents of the field indicated by the data pointer. You can change the contents of the field by editing the text in the entry line.

**field**

A space on the screen or in a file where data can be stored. See chapter 2.

**format file**

A file containing the skeleton text for address labels or form letters. See chapter 14.

**isolate**

To display a single record, with its fields arranged vertically on the screen.

**key length**

The number of characters that the program looks at in each field when carrying out a match operation. See chapter 8.

**list**

From a worksheet you can generate as many lists as you like. Each list will be either the whole worksheet, sorted in a particular way, or a set of records selected out of the worksheet.

**range prompt**

A prompt which gives you a range of options to type in. See chapter 5.

**record**

- 1 The unit of data in a database, the equivalent of one card in a card index. See chapter 2.
- 2 An entry in a FilePlan dictionary. See chapter 9.

**report**

A set of details, specifying a layout in which an address label or a form letter will be printed. See chapter 10.

**secondary sort**

When sorting a worksheet, you tell the program which field (surnames, for example) to sort by. You may want records with the same surname to be additionally sorted by a second field (first name, perhaps). This is a secondary sort.

**segment**

A unit by which the space available for a record is measured. One segment is about 100 characters.

**select**

To choose a command from the menu and give that command. For example, to select 20, press **ESCAPE** to get to the menu, and then type 20**RETURN**.

**worksheet**

A grid on which your data is arranged: each row holds one record, and each column is one field. See chapter 2.

# Index

---

address index	31
address labels	31, 48
<b>BETWEEN</b>	42, 43, 45
CP/M errors	56
copying a worksheet	53
data	
alphanumeric	18, 36
drive	28, 30
editing	37
entry	36
data pointer	12, 19
moving	22
default settings	17, 50, 51
delete character	21, 37
delete field	21, 37
dictionary	47
drive	30
duplicating	37
editing	22, 37
entry line	12, 36, 37
error messages	56
<b>EXACTLY EQUAL</b>	43
field	8
alphanumeric	25, 36, 43
format	15, 17, 32
name	15, 17, 31, 32
numeric	36
width	17, 31
finding records	26, 41
format file	48
form letters	31, 48

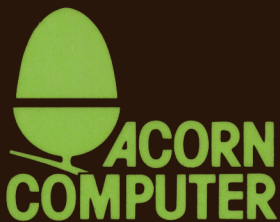
GREATER OR EQUAL	43
GREATER THAN	43
inserting	21, 37
isolate	23, 53
key length	18, 32, 43
LESS OR EQUAL	43
LESS THAN	43
list	
deleting	40
extending	44
merging	45
saving	39
sorting	39
updating	39
MATCH	43
NOT EQUAL	43
operation reminder	11
printing	46–52
starting/stopping	52
errors	57
prompt	12, 33
code	33
field	18
ordinary text	33
range	33, 34
writing	18
records	8
character limit	20
expanding space	32, 53
isolating one	53
removing	45
report	49



saving	28, 29, 39
sorting	38
alphanumeric fields	25
lists	39
secondary	24, 38
worksheets	38
worksheet	8, 11
clearing	55
copying	53
deleting	54
designing	16
editing	22
naming	15, 31
planning	15, 31
printing	46
sorting	23, 38
<i>Z80 user guide</i>	7, 29, 58







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