



## **9 Processing documents from other sources**

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# 9 Processing documents from other sources

## 1 Choosing from the main menu

Besides the notes and documents that other people send you through PROFS, you may receive Paper documents and electronic documents from sources outside of PROFS.

**Paper** documents (sometimes called hardcopy documents) are written or printed on paper but not by PROFS and are not in the computer system. You can't work directly with them on PROFS, but you can add information about them to your mail log, and you can even send this information to other PROFS users.

**Graphic** documents in PROFS are documents that were produced by the Graphical Data Display Manager (GDDM). You can store these documents in PROFS using the "Process Documents from Other Sources" function. There are four types of information that PROFS recognizes as Graphic documents. They are:

- Picture form
- Print form
- Order form
- Chart form.

Some of these Graphic documents can be viewed **or** printed but not necessarily viewed **and** printed. Screen I01, "View the Graphics Document," is used to view the documents that can be viewed on the terminal. If you use the standard character sets, you do not have to be connected to GDDM to view the document. If you use additional characters, you must be connected to GDDM to view the document. You can print those documents that can be printed by pressing **PF8** on any of the following screens:

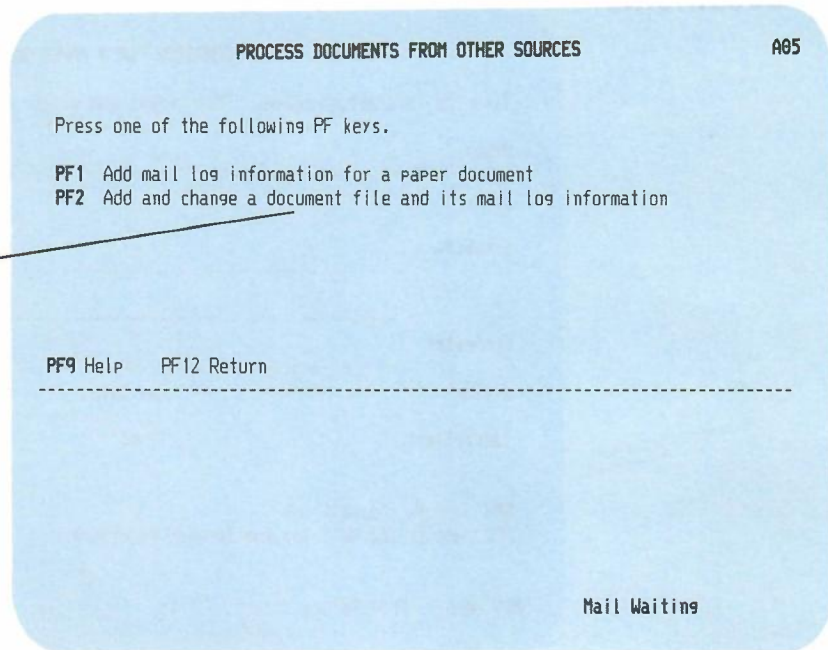
- C01, "Process the Incoming Mail"
- D08, "Process the Document Found"
- D22, "Process the Mail Log Information"
- I01, "View the Graphics Document"
- X01, "Process a Document."

For more information see "Appendix L: Working with graphics documents (GDDM)."

**Other** documents (sometimes called softcopy) are electronic documents that were not written using PROFS. These documents could be documents that are sent to you but not listed in your incoming mail, or they could be documents that you created outside of PROFS with another editing program. You can change them into PROFS documents, add information about them to your mail log, and store them in PROFS storage. When these documents are stored in PROFS, they are referred to as "softcopy." If you want to make changes to a softcopy document, you must use the RETRIEVE command. (See "Retrieving electronic documents (softcopies)" later in this chapter.)

To work with these documents, press **PF6** on the main menu.

PROFS shows you screen A05, "Process Documents from Other Sources."



The tasks you can do now depend on whether a document is Paper (see "Processing Paper documents" which follows) or another electronic document (see "Processing other electronic documents" later in this chapter).

At the end of this chapter, you'll find a "fast-track" diagram that summarizes the chapter pictorially.

## 2

If you have a Paper (hardcopy) document to work with, press **PF1** on screen A05 to add information to your mail log. PROFS shows you screen D15.

```

ADD MAIL LOG INFORMATION FOR A PAPER DOCUMENT
D15

Type the information below. Then, press one of the following PF keys.

From:      -
           -----
To:        -
           -----
Subject:   -
           -----
           -----
           -----
Comments:  -
           -----
           -----
Action:    -
           -----
Due date:  -
           -----
Identifier: -
           -----
Type:      -
           -----

PF1 Add to the mail log
PF2 Add to the mail log and forward to others

PF9 Help    PF12 Return

```

On this screen, type information about the Paper document that you want to store in your mail log. Use the following formats:

**From:** Type the name of the person who wrote the document. PROFS stores the name in the form of **Last, First M.** (where M. is the middle initial). You could type it that way, or type **First M. Last**— PROFS will change it for you. (See “Appendix I: Typing in names, dates, and times” for information on typing names.) Names are limited to 16 characters (including commas and spaces), but PROFS tells you if it cuts a name short. Only one name is allowed.

**To:** Type the name of the person to whom the document was sent. The same rules apply to the name here that applied to the "From" name.

**Subject:** Type the subject of the document. Remember that words in the subject can be used later when you want to find information in your mail log.

**Comments:** Type any comments you have about the document. These words can also be used for mail log searches later. This is the same information that you would usually find in Reference for a document.

**Due Date:** If you want to use it, type the date when you (or someone else) must respond to the document. See "Appendix I: Typing in names, dates, and times" to learn about typing dates.

**Action, Identifier, and Type:** You don't have to type information on these lines. If you want to use them, see the instructions in "Appendix A: How to index documents in PROFS."

After you have typed all the information you want to keep in the mail log about this document, you have two choices:

- Press **PF1** if you want to add this information to your mail log.
- Press **PF2** if you want to add this information to your mail log and also forward it to other PROFS users on your local PROFS system.

PROFS adds the information and shows you a message that your entry has been added to your mail log. If you pressed **PF2** on screen D15, "Add Mail Log Information for a Paper Document," PROFS shows you screen H05, "Assign the Reviewer Distribution Information."

Users on your own system.

H05

**ASSIGN THE REVIEWER DISTRIBUTION INFORMATION**

Type the distribution for document: **87002TST 0001** below. Then press PF1 or PF2 to send the document locally. -----

USER NAME	USER NAME	USER NAME	USER NAME
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----

**PF1** Send the document and attach a routing slip  
**PF2** Send the document without a routing slip  
**PF10** Add more names to the list

**PF9** Help      **PF12** Return



On this screen, type the user **names**, **nicknames**, and **distribution list names** of the people to whom you want to forward the mail log information. Then press **PF1** or **PF2**. If you press **PF1**, PROFS shows you screen H02, "Attach a Routing Slip." The people you named will receive a notice in their incoming mail about the document. Remember that they will not receive a copy of the Paper document itself – just the information you have typed in your own mail log. Because Paper documents are handled this way, you might want to use "Comments," "Action," or "Identifier" to tell people where the document is physically located (for example, "See Carol," or the volume, number, and page of a magazine).

If you type **nicknames** for people on another PROFS system or **distribution list names** that include users on another PROFS system, PROFS does not forward information from screen H05 to these people. Instead, PROFS shows you a message for each person on another system, saying that it cannot forward the mail log information to them. It will still forward the information to the other users you named who are on your PROFS system.

### 3 Processing other electronic documents

From the main menu, press **PF6** if you want to store your electronic document in PROFS storage. PROFS shows you screen A05, "Process Documents from Other Sources."

Press **PF2** on screen A05 to add information to the mail log about the electronic document. PROFS shows you screen F13, "Add and Change a Document File and Its Mail Log Information."

**ADD AND CHANGE A DOCUMENT FILE AND ITS MAIL LOG INFORMATION** **F13**

Type the file name here: \_ (filename, filetype, filemode)  
----- (the default filemode is A1)

Type the mail log information below, if you want it included.

From: -----

To: -----

Subject: -----

Comments: -----

Action: ----- Due date: -----

Identifier: --- Type: -----

Now, press ENTER.

**PF9** Help    **PF12** Return

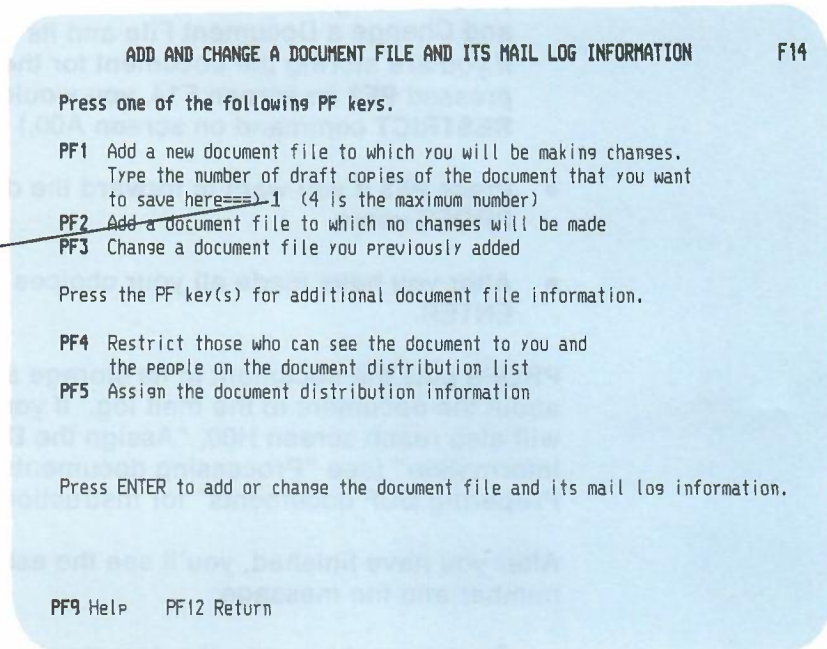
On this screen, you first type some information to identify the document in its electronic form (the cursor is already in the correct position):

- Type the **filename** and press the space bar one time.
- Type the **filetype** and press the space bar one time.
- Type the **filemode** if it is different from A1. PROFS assumes A1 if nothing is typed.
- Type **information about the document** that you want in the mail log, in the same way that you would for a Paper document (see the previous section).

- Press ENTER.

PROFS shows you screen F14.

*You can save more than one version.*



On this screen, you first choose how you want the electronic document stored:

- Press **PF1** if you are storing the document for the first time, and plan to change it later. PROFS will automatically store only one copy (version) of the document. If you want it to save more, type over the number "1" after the arrow ==> with the number you want. The limit is four copies or versions.
- Press **PF2** if you are storing it for the first time and will not be changing it.
- Press **PF3** if you are storing a changed copy of a document that is already in PROFS storage.

You can only press one of the keys, **PF1** through **PF3**. After you have made your choice, you can also restrict the document so only you and those to whom you send it can view it.

- Press **PF4** to restrict the document if you first pressed **PF1**. (You can only restrict the document from screen F14, "Add and Change a Document File and Its Mail Log Information," if you are storing the document for the first time. If you pressed **PF3** on screen F14, you would have to type the **RESTRICT** command on screen A00.)
- Press **PF5** if you want to forward the document to other PROFS users.
- After you have made all your choices with PF keys, press **ENTER**.

PROFS puts the document in its storage and adds information about the document to the mail log. If you pressed **PF5**, you will also reach screen H00, "Assign the Document Distribution Information" (see "Processing documents" in "Chapter 8: Preparing DCF documents" for instructions on this screen).

After you have finished, you'll see the assigned document number and the message:

Do you want to erase the document from your personal storage?

Type **YES** if you want the document erased from your personal storage; type **NO** if you want the document kept in your personal storage. PROFS returns you to screen A05, "Process Documents from Other Sources."

#### 4 Retrieving electronic documents (softcopies)

You can get electronic (softcopy) documents from PROFS storage when you search your mail log (**PF3** on the main menu). However, if you get a softcopy document out of storage in this way, you cannot change it—it is processed as a Final document. If you want to make changes to a softcopy document, you must type **RETRIEVE** on the command line of the main menu (screen A00) or the interrupt menu (screen S00). (You may also use this command to retrieve any document for which you already know the number.)

PROFS shows you screen X01, "Process a Document."

PROCESS A DOCUMENT

X01

Type the number of the document you want to work with below.  
Document No.==> \_

-----

If you want to work with a version other than the most current (version 1),  
type the number you want to work with here: 1

Now, press one of the following PF keys.

**PF1** View the document in the document style chosen for it  
**PF2** View the document the way it was typed  
**PF3** Copy the document into your personal storage to make changes  
**PF4** Copy the document into your personal storage  
**PF8** Print the document

**PF9** Help    **PF12** Return

After typing the document number on this screen, you can choose to view the document, copy it into your personal storage, or print it. (If you don't know the number, you can find it by pressing **PF1** on screen D00 or **PF3** on screen A00.) Type over the number 1 if you want to work with another version.

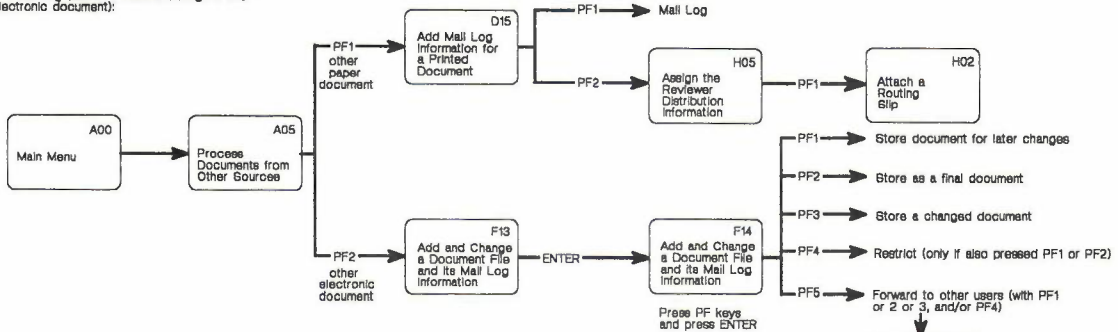
- Press **PF1** to view the formatted document.
- Press **PF2** to view the document (with format controls, if any, shown in the text).
- If you plan to make changes to the document, press **PF3** to copy it into your personal storage.
- If you do not plan to make changes to it, press **PF4** to copy it into your personal storage.
- Press **PF8** to print the document. PROFS shows you screen J00, "Choose a Printer." (For instructions on how to use this screen, see "Printing copies of notes and documents" in Chapter 4.)



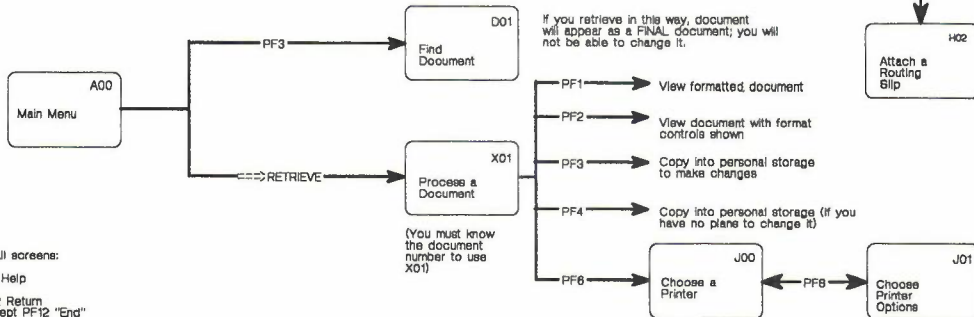
# 9 Processing Documents from Other Sources

## Fast Track

To put a document from outside PROFS into your PROFS mail log (and into PROFS storage if it is an electronic document):



To retrieve an "other" electronic document from PROFS storage:



On all screens:  
PF9 Help  
PF12 Return (except PF12 "End" on A00)