



Business Series-Demonstration

110347

IBM Assistant Series Quick Looks

IBM·JX
personal computer

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IBM ASSISTANT SERIES

An integrated series of programs that work together to help you be more productive.

IBM FILING ASSISTANT — Stores your information on diskettes or disks and allows you to select information in personalized formats.

IBM GRAPHING ASSISTANT — Creates colorful line, bar, and pie charts from several data sources including Filing Assistant.

IBM PLANNING ASSISTANT — Allows you to budget, plan, project, predict and forecast your financial data with electronic spreadsheets.

IBM REPORTING ASSISTANT — Sorts, calculates, and formats Filing Assistant data into custom designed reports.

IBM WRITING ASSISTANT — Allows you to edit, move, copy, and automatically spell check your documents easily. Also allows you to include data, charts, and reports created with other IBM Assistant programs.

IBM ASSISTANT SOLUTIONS — A group of products that offer predefined forms, reports, and spreadsheets to help you manage and control personal, business, and accounting matters.

Welcome . . .

to the IBM Assistant Series Quick Look. Your initial investment in an IBM Personal Computer JX was an investment in productivity. Now, with the right software, your computer can do more for you than you ever imagined.

For example, how many times have you needed to make a decision and wished you had a fast, effective method to analyze several alternative ways of doing a task. With IBM Planning Assistant you can organize your numerical data into rows and columns, creating a report called a spreadsheet. You can use this spreadsheet as a financial model to see how various business decisions will affect your targeted goal.

How many times have you wished for a filing system to handle the many forms of information that you generate? How many times have you wished for a report generating system to organize the data you have collected? The effort involved in just gathering the data can be enormous. Without a doubt it would be easier just to press a few keys and have the information on the screen in front of you and get a report that gives you the answers you need. Your IBM JX with the right filing system, IBM Filing Assistant, and the right reporting system, IBM Reporting Assistant, gives you that power and much more.

How many times have you written a document then discovered a spelling error and had to write it all over again? The time involved in rewriting affects your overall productivity. Wouldn't it be easier to press a button and have your spelling checked automatically? IBM Writing Assistant does that and a lot more.

How many times have you wished for an easy to use application that would help you analyze information? A collection of data can be confusing but IBM Graphing Assistant can quickly bring order to that data. Graphing Assistant reads IBM Filing Assistant data, as well as Multiplan* worksheets to give you increased graphics versatility. Integration with the other IBM Assistant Series members gives you a powerful business tool. With graphic representation of information and your IBM Personal Computer JX, you can make informed decisions for better productivity.

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How to Use the IBM Assistant Series Quick Looks

You will need the following to run you IBM Assistant Series Quick Looks:

- IBM Personal Computer JX
- At least 128K memory
- One diskette drive

To start a Quick Look, insert the appropriate Quick Look diskette, then press the Ctrl, Alt, and Delete keys. Enter the date and time when prompted. Follow the instructions below for the Quick Look you are using.

Filing Assistant

When the DOS prompt A> appears, type **file**. Press the Enter key and the Main Menu for IBM Filing Assistant will appear on the screen.

Note: The portions of the IBM Filing Assistant program that allow you to design a file of records larger than 10 records and also allow you to print are not included in the Quick Look.

Reporting Assistant

When the DOS prompt A> appears, type **report**. Press the Enter key and the Main Menu for IBM Reporting Assistant will appear on the screen.

Note: The portions of the IBM Reporting Assistant program that allow you to print the report has not been included in the Quick Look.

Writing Assistant

The Main Menu for IBM Writing Assistant will appear on the screen.

Note: The portions of the IBM Writing Assistant program that allow you to print or save documents are not included in the Quick Look. Also special features, such as creating personalized form letters and including graphs and reports in your document, are not included.

Graphing Assistant

The Main Menu for IBM Graphing Assistant will appear on the screen.

Note: The portions of the IBM Graphing Assistant program that allow you to print charts on a plotter and save charts or pictures are not included in the Quick Look.

Planning Assistant

When the DOS prompt A> appears, type **plan**. Press the Enter key and the Main Menu for IBM Planning Assistant will appear on the screen.

Note: The portions of the IBM Planning Assistant program that allow you to get, save, remove, or print documents are not included in the Quick Look.

IBM Filing Assistant

Introducing IBM Filing Assistant

This Quick Look introduces you to IBM Filing Assistant, the filing system that gives you ease of use along with the ability to maintain and retrieve your information on a timely basis. IBM Filing Assistant Quick Look has been designed for fast learning and usage so you can be using your data productively within 20 minutes. IBM Filing Assistant takes the guess work out of designing the file, because you can make it look like the form, 3 × 5 card, or record design that you are already using. Plus you have the availability of help at the touch of a key.

IBM Filing Assistant allows you to store and retrieve data easily and quickly. You design the files to your style and needs, so the correct information is always readily available. Data stored in your IBM Filing Assistant files can be used by the rest of the IBM Assistant Series, therefore your productivity is greatly increased.

NAME:
ADDRESS:
CITY:
ZIP:

STATE:

Experimenting with IBM Filing Assistant

This section steps you through some of the basic capabilities of IBM Filing Assistant, such as designing and searching.

1. Type a **1** in the “Selection number:” item at the Main Menu and press the Tab [⇐⇒] key.
2. Type a name for the file you are about to design in the “Directory or file name:” item, Example: **SAMPLE**
3. Press the Enter [↵] key.
4. Type a **1** in the “Selection number:” item and press the Enter key.
5. Type **NAME:** and press the Enter key two times. Type **ADDRESS:** and press the Enter key two times. Type **CITY:** and press the space bar twenty-two (22) times. Type **STATE:** and press the Enter key two times. Type **ZIP:** and press the PF10 key on the top row of the keyboard. You have now designed a form to start filing in with information.
6. Type a **2** in the “Selection number:” item and press the Enter key. (Note: you have already named the file you are going to use.)
7. Type a **1** in the “Selection number:” item and press the Enter key.
8. Enter the following information after the appropriate items, and press the Tab key. Press the PF10 key after you have typed in the zip code of the individual to get a new form.

FORM #1		FORM #2	
Anne Williams	[Tab]	Mike Cooper	[Tab]
67 Westlake Drive	[Tab]	907 Sunset Court	[Tab]
Los Altos	[Tab]	Portland	[Tab]
CA	[Tab]	OR	[Tab]
94022	[PF10]	97208	[PF10]

FORM #3		FORM #4	
Ted Russell	[Tab]	Sara Brown	[Tab]
437 Oak Street	[Tab]	1552 Bay Road	[Tab]
Palo Alto	[Tab]	Menlo Park	[Tab]
CA	[Tab]	CA	[Tab]
94301	[PF10]	94205	[PF10]
FORM #5			
John Andrews	[Tab]		
6811 Cypress Lane	[Tab]		
Dayton	[Tab]		
OH	[Tab]		
45401	[PF10]		

9. Press Escape [Esc] to discontinue entering forms and return to the Main Menu.
10. Type a **4** in "Selection number:" and press the Enter key. You now see the Search spec screen.
11. Press the PF10 key and you will see the last form that you entered which is Form #5. By pressing the PF10 key you can review all of the other forms that you entered and then get a count of all forms that were found. Pressing the Enter key will return you to the Main Menu.
12. Type a **4** in "Selection number:" and press the Enter key.
13. While on the Search spec screen, press the Tab key three (3) times and enter **OH** in the "STATE:" item. Press the PF10 key and the record containing the information on the person living in Ohio will come up on the screen. This is called a full item search. It can be done on any of the item names that are on the Search spec.

This is a sample of how to design a file, and just one way to search through it.

Function Keys



Help screens

Help text is available whenever you are in a forms screen mode. That is when a menu or options screen is not being shown.



Derived columns

When pressed in the Report spec screen the form for generating a derived column will appear.



Erase item

Erases any information from the current cursor position to the beginning of the next item.



The Shift-PF8 will delete all the information that you have entered from a page. The item names will not be deleted.



Erase

When the PF8 key is pressed in the search/update mode, the data is erased from the cursor to the next item name.



Shift key-PF8

When these two keys are pressed in the search/update mode the information on the current page is deleted. Item names are not affected.



Delete form

When the PF9 key is pressed in the search/update mode the current form will be deleted from the file.



Continue

When this key is pressed the program stores the information entered for all the pages of the current form.



Escape

This key can be pressed at any point during the operation of the program to cancel the operation and return to the Main Menu.

Additional Features

Design a form

- Add, delete or move items

Option #2 from the Design Menu under "Design a form" allows you to go into the forms design mode and add additional items to the form. To move lines apart, press the Insert key and then press the Enter key. All lines below the current line will move down one line. An entire line can be removed by pressing the Shift-PF6 keys.

- Change item names

Option #3 from the Design Menu under "Design a form" allows you to change item names.

Add forms

- Quick entry specs

Selection "2" on the Add Menu allows you to fill in certain items on a form that will share common information over a number of records.

Copy

- Copy design only

Selection "1" on the Copy Menu, allows you to make a copy of the design or blank form only. This is useful in starting a new file or splitting a present file.

- Copy selected forms

Selection "2" on the Copy Menu allows you, through a search spec, to designate exactly which records you want copied to a new file.

Remove

Allows you to remove selected forms from a file through a search spec, or delete all forms by leaving the spec blank.

IBM Reporting Assistant

Introducing IBM Reporting Assistant

This Quick Look introduces you to IBM Reporting Assistant, the report generator that gives you the ability to design and store custom reports easily and quickly. You can also perform calculations on the data that you have retrieved and generate new data from it. The IBM Reporting Assistant Quick Look has been designed for fast learning and usage so you can be using your information productively within 20 minutes. Plus you have the availability of help at the touch of a key.

IBM Reporting Assistant is designed to let you create meaningful reports quickly. All you do is provide a title and set up the columns. If calculations are needed, the setup is fast and simple. IBM Reporting Assistant works with IBM Filing Assistant data and integrates with other members of the Assistant Series. Software integration is one of many keys to personal and business productivity.

DEPARTMENT BONUS REPORT		
<u>DEPT.</u>	<u>EMP #</u>	<u>BONUS</u>
Admin.	A0139	70.00
	A0765	84.00
	A1265	224.00
	A3476	350.00
Mftg.	M0934	147.00
	M3245	227.50
	M5524	77.00
	M8877	252.00
Total:		1,431.50
page 1		

Experimenting with IBM Reporting Assistant

This section will take you through some of the basic steps required to design and display a report with IBM Reporting Assistant.

1. Type a **2** in the “Selection number:” item on the Main Menu.
2. Press the Tab [⇐] key.
3. Type **STAFF** into the “Directory or file name:” item. This is the name of the file that we will be using to generate a report on the screen.
4. Press the Enter [↵] key.
5. You now see the Predefined reports screen. Type **BONUS** and press the Enter key.
6. You now see a screen labeled, Report “**BONUS**,” where we will format the report. Type a **2** where the cursor is positioned to make “Employee #” the second column of the report. Press the Tab key seven (7) times.
7. Type a **1** at the “Dept” item to make it the first column of the report. Press the Tab key three (3) times.
8. Type **3i** at the “Monthly Salary” item. This defines “Monthly Salary” as the third column. The “i” instructs the program to use this information but not print it out. This allows you to do calculations on confidential data but have it remain invisible on the report. In order to do a calculation on the monthly salary data we now need to generate a derived column. Press the PF2 key.
9. The Derived Columns screen is where you enter a formula for generating a new column of information. We first need to give the new column a name. Type **MONTHLY BONUS** where the cursor is positioned. Press the Tab key.

10. Type **#3*.07** to enter the formula that will do the calculating for each of the employees bonus in the STAFF file. This instructs the calculation to take the data in column 3 and multiply it by 7%. Press the Tab key. Enter **#4T** in the “Report Spec:” item to instruct the program to print the answer in the fourth column and to total all the bonuses for the company at the bottom of the report.
11. To save the Predefined report along with the derived columns press the PF10 key.
12. To print the report type a **1** in the “Selection number:” item on the Main Menu and press the Enter key.
13. You are now looking at the Search spec screen. We are going to include all the records in the STAFF file, so leave this screen blank and press the PF10 key to continue to the next page.
14. You are now looking at the Print Options screen. This screen sets up how your report will look on the page. Enter the following information after the appropriate items and press the Tab key.

Title:	DEPARTMENT BONUS REPORT	[Tab]
Predefined report name:	BONUS	[Tab]
Print totals only (y/n):	n	[Tab]
Print to:	SCREEN	[Tab]
Pause between pages (y/n):	n	[Tab]
Lines per page:	66	[Tab]
Page width:	80	

15. Press the Enter key to start the report generation. You will see the program select the records to be printed.
16. The report will appear on the screen. Press the Enter key to return to the Main Menu.

Function Keys

PF1

Help screens

Help text is available whenever you are in a forms screen mode. That is when a menu or options screen is not being shown.

PF2

Derived columns

When pressed in the Report spec screen the form for generating a derived column will appear.

PF8

Erase item

Erases any information from the current cursor position to the beginning of the next item.

↑

PF8

The Shift-PF8 will delete all the information that you have entered from a page. The item names will not be deleted.

PF9

Remove form

Will remove an entire report form design, new headings designs, or derived columns designs, from a file.

PF10

Continue

Continues the operation. Used to continue from a forms screen and to store the derived column information.

Esc

Escape

At any time during the operation of the program if the Escape key is pressed the program will cancel its present operations and return to the Main Menu.

Additional Features

Set new headings

Type **3** in “Selection number:” on the Main Menu, type the name of the file to be used in the “Directory or file name:” and press the Enter key. A blank form of the file will display. By tabbing to the item names you can enter new headings for columns on the report. The ability to shorten item names allows you to get as many columns as possible (up to 20) on a page.

Column calculations

Indicate column calculations by entering the following commands beside the column number on the Report spec form.

- T Total. Treats column as numeric and creates a total at end of report.
- ST Subtotal. Produces a total on a numeric column every time a new item appears in column 1.
- A Average. Prints the average of a numeric column at end of report.
- SA Subaverage. Produces an average on a numeric column every time a new item appears in column 1.
- C Count. Counts all the entries in a column, alphabetic or numeric.
- SC Subcount. Produces a count on a column every time a new item appears in column 1.

IBM Writing Assistant

Introducing IBM Writing Assistant

This Quick Look introduces you to IBM Writing Assistant, the word processing software package that gives you the ease of use of a typewriter combined with extensive editing, merging, and automatic spell checking capabilities. IBM Writing Assistant has been designed for fast learning and easy usage so you can be writing on-screen very quickly. And IBM Writing Assistant takes the guesswork out of what will be printed because the screen is designed to resemble a standard sheet of paper. So what you type on the screen is exactly what you get when you print.

IBM Writing Assistant can perform sophisticated merging quickly and easily. It allows you to turn your data files from IBM Filing Assistant into personalized form letters or to include reports from IBM Reporting Assistant directly into your document. You can even build a document around your graphs from IBM Graphing Assistant. That's because the IBM Assistant Series is completely integrated so it works together.

April 3, 1984

Mr. John Baker
2366 West Avenue
Smithsfield, FL 33330

Dear Mr. Baker,

This has been a very good year for the company, therefore we are initiating an Employee Bonus plan. Following are the statistics for each department.

DEPARTMENT BONUS REPORT

<u>DEPT.</u>	<u>EMP #</u>	<u>BONUS</u>
Admin.	A0139	70.00
	A0765	84.00
	A1265	224.00
	A3476	350.00
Mtg.	M0934	147.00
	M3245	227.50
	M5524	77.00
	M8877	252.00
Total		1,431.50

The employees have contributed to the overall success of the company and we are pleased to start the Bonus plan.

Sincerely,
David Martin
President

Experimenting with IBM Writing Assistant

This section steps you through some of the basic functions of IBM Writing Assistant.

1. Type a **1** in the "Selection number:" item on the Main Menu and press the Enter [↵] key. A blank screen, similar to a blank sheet of paper, will appear.
2. Now try moving the cursor right, left, down, and up. This can be done by using the four arrow keys found to the right-hand side of your keyboard. You can also move the cursor by pressing the space bar, the Backspace key [←] or the Enter key. Note that the Enter key allows you to move down a line at a time, similar to a typewriter carriage return.
3. Type the following sentence, using the keyboard just as you would a typewriter. Don't worry about making typographical errors, we will show you how to correct them.
















IBM Writing Assistant is so easy to use that you will be amazed how quickly you can be producing letters, documents, and memos on your computer.

4. Next change “letters” to “reports.” To do this simply position your cursor at the “l” in letters and type reports. It is as simple as that.
5. Now let’s delete one of the “wills.” First position the cursor at the “w” of the first will. Then press the Delete key five times. Notice that the sentence wordwraps to accommodate this change.
6. Now position the cursor right under the “u” in use. Press the Insert key. You are now in insert mode and the word “inserting” should appear at the bottom of the screen. The cursor should appear large and blinking. Type in the words “learn and”. Your sentence should wordwrap again as you type. Pressing the Insert key again turns off the inserting function.

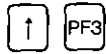
That’s all there is to simple editing. The more advanced editing functions IBM Writing Assistant can perform are explained throughout the rest of this guide. Also, on-line help is available by pressing the PF1 key while you are in the Type/Edit option.

Moving the Cursor

To move the cursor while in the Type/Edit option, use the following keys.

	Up
	Down
	Left
	Right
	Beginning of the current line
	End of the current line
	Beginning of the next line
	Next screen
	Previous screen
	Next Tab stop
	Previous Tab stop
	Next word
	Previous word
	Beginning of the document
	End of the document

Function Keys



Change colors

When these keys are pressed the text and background colors change.



Remove a word

The word where the cursor is positioned is deleted when this key is pressed.



Remove a line

The line where the cursor is positioned is deleted when these keys are pressed.

Additional Features

- Type/Edit

IBM Writing Assistant's editing functions are available any time you have selected the Type/Edit option from the Main Menu. To select Type/Edit type 1 in "Selection number:" on the Main Menu and press the Enter key.

- Type a new document

Type the document, letting IBM Writing Assistant wordwrap for you.

- Check a document for misspellings

Place the cursor at the top of document by pressing the [Ctrl] and [Home] keys. Then press the PF2 key. The cursor will stop on the first unrecognized word and display a menu of options.

Option 1 will provide a list of possible spellings for the word that has been misspelled. You can then select one of the words from the list and it will automatically replace the misspelled word.

Option 2 will allow you to ignore the word where the cursor has stopped and continue spell checking the remainder of the document.

Writing Assistant provides a dictionary with 125,000 words. Because you will use words that are not contained in this dictionary such as a proper name or an abbreviation, there are two more options:

Option 3 will allow you to add a word to your own personal dictionary and then continue spell checking the remainder of the document.

Option 4 will allow you to add a word to your personal dictionary and then return to editing your document.

- Adjust a line

Position the cursor on the line you want to adjust and press the PF3 key. A prompt will appear at the bottom of the screen. Type **L** to left justify, **C** to center, or **R** to right justify the line.

- Set tabs


Press the PF4 key and move the cursor to the location where you want the Tab. Type **T** for a typewriter tab or **D** for a decimal tab. Press the Enter key.


- Emphasize Text



Press the PF5 key and the screen will prompt you for function you desire (Underline, Highlight, etc.). Simply press the letter corresponding to the function you want. Follow the screen prompts.



- Block Operations

To perform Block operations, press the appropriate key and follow the prompts that appear.

 To move a block of text

 To copy a block of text

  To delete a block of text

  To reuse block of text that has been deleted. Position the cursor where you want the text to appear and press the Shift-PF8 keys.

- Search for a word or phrase

Press the PF9 key and type the word or phrase you want to search for in the “Search for:” field of the prompt. Press the Enter key and IBM Writing Assistant will search for the word from the cursor position to the end of the document, stop at the first occurrence and return you to normal editing.

- Replace a word or phrase (after verification)

Press the PF9 key and type the original word or phrase in the “Search for:” field of the prompt. Tab to the “Replace with:” field and type the replacement word or phrase. Press the Enter key and a prompt will appear when the word or phrase is located. Type **Y** to replace, **N** to search for the next occurrence, or **Q** to quit this function.

- Replace a word or phrase (without verification)

Follow the same steps as described above, except after typing in the replacement word or phrase, Tab to the “Manual/Auto:” field. Type **A** then press the Enter key and every occurrence of the word or phrase will be replaced.

- Insert a blank line

Move the cursor to the end of the line after which you want the blank line to appear and press the Insert key. Press Enter and the blank line will insert. Press Insert again to return to normal typing.

- Define a Page

You can change the layout of your document with the Define Page function. To select Define Page type a 2 in “Selection number:” on the Main Menu and press the Enter key. The changes you make to the Define Page Menu affect all of the pages of your document.

Tab to the “Left margin” or “Right margin” field and type the column number where you want the margin.

Tab to the “Top margin” or “Bottom margin” field and type the number of lines you want for a margin.

Tab to the “Page length” field and type the number of lines you want for each page, including the top and bottom margins (66 for $8\frac{1}{2} \times 11$) (0 for one continuous page) (102 for 11×17).

Tab to the “Heading Line 1:” field and type a heading (up to 2 lines).

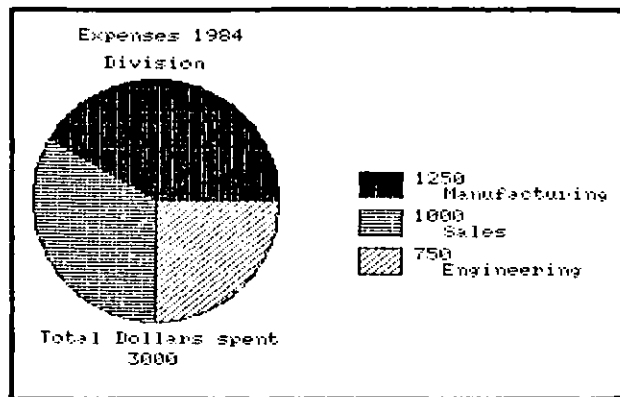
Tab to the “Footing Line 1:” field and type a footing (up to 2 lines). To activate automatic page numbering, type a starting page number in one of the “Footing” lines.

IBM Graphing Assistant

Introducing IBM Graphing Assistant

This Quick Look introduces you to IBM Graphing Assistant, the graphics software package that gives you powerful business graphics without sacrificing ease-of-use. IBM Graphing Assistant Quick Look has been designed for fast learning and usage so that you can be making charts within 20 minutes. IBM Graphing Assistant takes the guesswork out of designing graphic displays because you can see, on the screen, the graph that will be printed or plotted. Plus, help screens are available with a keystroke.

IBM Graphing Assistant displays data in pie, bar, line, and area charts. IBM Graphing Assistant charts can be highlighted with color using both the IBM Color Printer and many popular plotters. Integration with the rest of the IBM Assistant Series gives you a broad range of capabilities. IBM Graphing Assistant also allows you to input data directly from your Multiplan spreadsheets.



Experimenting with IBM Graphing Assistant

This section steps you through some of the basic functions of IBM Graphing Assistant and produces a simple bar chart.

1. Enter a **1** in the “Selection Number:” item on the Main Menu and press the Enter [↵] key.
2. Type **i** where the cursor is positioned at the “X Data Format” item.
3. Press the Tab [⇨] key to position the cursor in the first line of the X Data column and type **Sales**. Press the Tab key and type **1000** in the Graph A column.
4. Press the Enter key to position the cursor one line below the “Sales” entry in the X Data column and type **Engineering**. Press the Tab key and type **750** in the Graph A column.
5. Press the Enter key to position the cursor one line below the “Engineering” entry in the X Data column and type **Manufacturing**. Press the Tab key and type **1250** in the Graph A column.
6. Press the PF10 key to return to the Main Menu. Type **3** in “Selection number” and press the Enter key. The graph for the data you entered will display.
7. Press the Enter key to return to the Main Menu.

That’s all there is to creating a simple graph. Some other functions IBM Graphing Assistant can perform are explained throughout the rest of this guide.

Function Keys



Help screens

At any point during the program where you need help and there is the F1-help symbol at the lower left corner of the screen, pressing the PF1 key will bring up the help text.



Change color

When these keys are pressed the text and background colors for the menus change.



Erase Page

When the Shift-PF8 keys are pressed the data you have entered is removed from the screen.



Continue

When this key is pressed the program will continue its function from the current screen.



Escape

This key can be pressed at any point in the operation of the program to cancel the operation and return to the Main Menu.

Additional Features

- Clear Chart of Data

To clear the chart whenever you want to enter a new set of data, select Option #7 on the Main Menu. Press the Enter key in response to the Warning and the data will be removed from the chart.

- Enter/edit data

To specify X data, clear the chart of data, then select option #1 on the Main Menu. Follow the examples below to enter various X data formats.

To set X Data Format for Text (Identifier) data, type i in the "X data format" item, then type

Sales	[Tab]	100	[←]
Engineering	[Tab]	150	[←]
Manufacturing	[Tab]	75	

Press PF10 to return to the Main Menu and select Option #3 to display the graph. Press the Enter key to return to the Main Menu.

- Enter/edit data

To set X Data Format for Numeric data, type **N** in the “X data format” item, then type

10	[Tab]	100	[↵]
20	[Tab]	150	[↵]
30	[Tab]	75	

Press PF10 to return to the Main Menu and select option #3 to display the graph. Press the Enter key to return to the Main Menu.

Note: Bar and pie charts cannot be made using Numeric data.

To set X Data Format for Quarter and Year Date Format, type **QY** in the “X data format” item, then type

3/83	[Tab]	50	[↵]
4/83	[Tab]	100	[↵]
1/84	[Tab]	150	[↵]
2/84	[Tab]	75	

Press PF10 to return to the Main Menu and select option #3 to display the graph. Press the Enter key to return to the Main Menu.

- Define Chart

Type **2** in the “Selection number:” item on the Main Menu. The Define Chart Menu will display with the default values filled in. To change the default values, follow the instructions below.

To change the chart to a line chart, type **line** in the Type column.

To change the chart to a pie chart, type **pie** in the Type column. Pie charts must have Identifier as the data format.

To change the chart to an area chart, type **line** in the Type column, Tab to “Stack” and enter a **y**.

To change the chart back to a bar chart, type **bar** in the Type column. Bar charts must have Identifier or Date as data format.

To specify a legend for a chart, Tab to the Legend column and enter up to 17 characters.

To cumulate your Y axis data from left to right across the X axis, Tab to the Cum column and enter a **y**.

To specify X or Y axis titles on the chart, Tab to the Titles columns and enter up to 30 characters.

- Retrieve a Chart

The Quick Look diskette contains several graphs that you can retrieve and display. They illustrate some of the more advanced functions of IBM Graphing Assistant. To display the graphs, select option #4 on the Main Menu. When the Get/Save/Remove Menu displays, type 1 in "Selection number:" and enter the name of one of the graphs listed below. Press the Enter key and the graph appears on the screen. Press the Enter key to return to the Main Menu.

Quick Look Graphs:

Sales.gra
Forecast.gra
Growth.gra
Product.gra
83orders.gra
Intro.gra

IBM Planning Assistant

Introducing IBM Planning Assistant

This Quick Look introduces you to IBM Planning Assistant, a spreadsheet program that serves most planning needs, yet is easy to learn and use. IBM Planning Assistant uses plain English, making it easy to type your spreadsheet and to understand it after you've typed it.

	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>Total Qtr1</u>
Sales	1,000	1,500	2,000	4,500
Expenses				
Rent	550	550	550	1,650
Utilities	450	425	400	1,275
Misc	200	175	225	600
Total Expenses	1,200	1,150	1,175	3,525
Income	-200	350	825	975

You can create and print or plot presentation-quality graphs from the data in your Planning Assistant spreadsheets using IBM Graphing Assistant. You can also print a copy of your spreadsheet in a document that you produce with IBM Writing Assistant. In addition, IBM Planning Assistant can read data directly from a file created with IBM Filing Assistant and place that information in the designated locations in your spreadsheet. You are able to do all of this and more because the programs in the IBM Assistant Series work together.

Possible Applications

Following are a few of the applications for which IBM Planning Assistant could be used.

- For professionals in business and finance to perform financial and statistical analyses
- For small businesses to follow sales and cash flow projections
- For business and individual tax estimation models
- For creation of depreciation schedules
- For individuals to analyze investment opportunities
- For home users to plan home budgets and depreciation schedules
- And for many others. . .

Moving the Cursor

To move the cursor while in the Design/Edit option, use the following keys.

Ctrl	→	Next column
Ctrl	←	Previous column
	Home	Beginning of row
	End	End of row
Ctrl	PgUp	Top row
Ctrl	PgDn	Bottom row
	PgUp	Previous screen
	PgDn	Next screen

Experimenting with IBM Planning Assistant

This section steps you through some of the basic capabilities of IBM Planning Assistant, such as designing a spreadsheet and using IBM Planning Assistant's keywords for special functions and calculations.

1. **DESIGN.** Type a **1** (for Design/Edit) in the Selection number field on the Main Menu and press the Enter [↵] key.

A blank spreadsheet appears on your display with the blinking cursor under the **H** in the world **Headings**.

2. **ROWS.** To create the first row heading for your spreadsheet, type **Sales**. Then press the Cursor Up [↑] key.
3. **COLUMN HEADINGS.** Press the **PF2** key, then type **JAN**.

Press the Tab key [⇨] two times, then press the **Esc** key.

IBM Planning Assistant automatically inserted and centered **FEB** and **MAR** column headings for you with the Quick Entry functions.

(For further function key information, refer to the next section, "Function keys.")

4. Press the **Tab** key, and type **Total Qtr1** in the fourth column.

Notice how the width of the column expanded!

5. **FORMULAS.** Press the **PF9** key. Planning Assistant's formulas region appears.

Formulas are used to tell the program how to calculate the values in a row or column. They are typed in two special regions, one for columns and one for rows.

6. Press the **Cursor Up** key, and type **@Total** in the region that appears above Total Qtr1.

@Total is one of Planning Assistant's keywords, and it's used to calculate totals on a spreadsheet.

7. While holding down the **[Ctrl]** key, press the **[Home]** key.
8. Press the **Cursor Left** [←] key. Then press the **Enter** key [↵] two times.
9. Type **Expenses**, and press the **Enter** key.

Press the **Spacebar** twice to position the cursor under the **p** in the word **Expenses**.

10. Now, type the following words and press the **Enter** key after each word. (Notice the automatic indent!)

Rent	[↵]
Utilities	[↵]
Misc	[↵]

11. Press the **Backspace** key [←] two times, and type **Total Expenses**.

Press the **Enter** key two times, and type **Income**.

12. While holding down the **Shift** key, press the **Tab** key.
You are now in the formulas region for rows.

Type **Sales — Total Expenses**.

Press the **Cursor Up** key two times, and type **@Total Expenses**.

Next, press **Enter**.

Your spreadsheet should look like this:

Formulas	>					@Total
↓		Headings	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>Total Qtr1</u>
		Sales				
		Expenses				
		Rent				
		Utilities				
		Misc				
@Total Expenses		Total Expenses				
Sales - Total Expenses		Income				

13. Press the **PF9** key. The formulas regions are removed.

14. Now, let's use the cursor movement keys you have learned, and enter the following values in the Sales and Expenses groups for JAN, FEB, and MAR.

Do not enter values for Total Expenses, Income, or Total Qtr1. IBM Planning Assistant will perform those calculations for you.

Position the cursor in the column under JAN (with [Ctrl] [Home]), and enter the following numbers

	JAN	FEB	MAR
Sales	1000 [TAB]	1500 [TAB]	2000 [↓] [↓] [↓] [Home]
Rent	550 [TAB]	550 [TAB]	550 [↓] [Home]
Utilities	450 [TAB]	425 [TAB]	400 [↓] [Home]
Misc	200 [TAB]	175 [TAB]	225 [↓]


Notice how the commas were automatically added and how your totals were automatically calculated for you!

This is how your spreadsheet should now look. Leave the data in this sample, since we'll be using it again later in this exercise.


Headings	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>Total Qtr1</u>
Sales	1,000	1,500	2,000	4,500
Rent	550	550	550	1,650
Utilities	450	425	400	1,275
Misc	200	175	225	600
Total Expenses	1,200	1,150	1,175	3,525
Income	-200	350	825	975

This is an example of how easy it is to design a spreadsheet using Planning Assistant's keywords and formulas. Additional keywords, formulas, and functions are explained throughout the rest of this booklet.



Function Keys

 Help screens

At any point during the program when you need help and the F1-Help symbol appears in the lower left corner of the screen, press the PF1 key to bring up the help text.

 Quick entry



This key repeats numbers and increments sequential data and dates.

  Format


When the Shift-PF2 keys are pressed the format regions appear. With this function a spreadsheet can be formatted so that no column is ever narrower than a size you specify.

 View



Use the View key to define up to 4 subsets of the spreadsheet. With this function you can divide a large spreadsheet up after you have created it.

  Change colors

When these keys are pressed the text and background colors change.

 Calculator

This key allows you to use Planning Assistant's four-function calculator.

  Target

With these keys you can set a numerical goal and then have Planning Assistant calculate the circumstance that allows you to achieve your goal.



Recalculate

The Recalculate function saves time for you by allowing you to recalculate changes to your spreadsheet at one time.



Erase Entry

This key erases the contents of an individual cell.



Insert Row/Col

This key inserts a row or column.



Delete Row/Col

These keys delete a row or column.



Copy Row/Col

This key copies a row or column.



Reuse Row/Col

These keys duplicate the last row or column that was either deleted or copied.



Formulas

This key displays the formulas region. Formulas tell Planning Assistant how to calculate the values in a row or column.



Variables

Variables consist of a name and a value. Whenever the name appears in a formula, Planning Assistant uses the value associated with the name.



Continue

In a spreadsheet, tells Planning Assistant to continue the special function controlled by the function keys.



Escape

Cancels the current operation and returns you to the previous operation.

Additional Features

Calculator

Suppose in our previous sample spreadsheet, an additional miscellaneous expense of \$50 is discovered.

1. Move the cursor to the JAN column of the Misc row.
2. Press **PF4**, and the following message appears:

200__	Type a calculation, then press	←
-------	--------------------------------	---

3. Type **+50** and press **Enter**:

+50 [←]

Notice how Planning Assistant added 50 to the original value of 200 and placed the result, 250, in the spreadsheet. Planning Assistant also recalculated the values for Total Expenses, Income, and Total Qtr1. The Calculator function can also be used for subtraction, multiplication, and division.

4. Press the **Esc** key to return to the **Main Menu**.
5. Type **9** (for Exit) to complete this demonstration.

Writing a Simple Formula

You can write your own formulas by combining row and column headings, keywords, numbers, variables, and the following mathematical operators:

+ add

– subtract

* multiply

/ divide

() perform this part of calculation first (parentheses can be nested up to five sets)

Using Keywords

A keyword is a special word that instructs IBM Planning Assistant to perform a specific, frequently used calculation. A keyword looks like a common word or abbreviation preceded by an at sign (@). Here is a list of Planning Assistant's keywords and what they can do:

Keyword	What it Can Do
@Total	Calculate a variety of totals.
@Avg	Calculate a variety of averages.
@Min	Find smallest value in a spreadsheet or in different portions of a spreadsheet.
@Max	Find largest value in a spreadsheet or in different portions of a spreadsheet.
@Cum	Calculate a cumulative total.
@Grow	Increase values by specified amounts.
@Prev	Look back to find previous values needed for current calculation.
@Start	Provide start values for @Cum, @Prev, @Grow, @NPV, and @FV.
@NPV	Calculate net present value.
@FV	Calculate future value.
@Payment	Calculate amount of loan payment.

Row and column formulas are written in the same way and entered in the same way. When writing a formula, follow these guidelines:

- Type row and column headings exactly as they appear in the headings region (except for use of capitalization).
- Space between the operators and the headings if you desire (spaces are optional).
- Enclose headings containing mathematical operators in quotation marks.
- Enclose headings consisting of only numbers in quotation marks.

Here are some simple formulas that you might create using Planning Assistant:

Total Income – Total Expenses = Gross Profit
Number of Units *Price per Unit = Revenue
.48 *(Sales – Expenses) = Income Tax

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