

## IBM Planning Assistant Functions

1. Design/Edit
  - Create or edit spreadsheets on the screen
2. Get
  - Read a spreadsheet, Filing Assistant data, SYLK or DIF files from disk
  - Consolidate spreadsheets
3. Save
  - Store a spreadsheet on disk
  - Save as DIF or SYLK file
4. Remove
  - Erase a spreadsheet from disk
5. Print
  - Print spreadsheets with or without formulas and variables
  - Print to printer or a disk file
  - Define page size
6. Clear
  - Clear the entire working copy
  - Clear the values only
9. Exit

## Starting Planning Assistant

If the computer is switched off:

1. Insert the DOS diskette in drive A and switch the computer on.
2. Enter the date and time when requested to do so, and press the Enter key.
3. When the DOS prompt **A>** appears, replace the DOS diskette with the Planning Assistant diskette.
4. Type **G** and press the Enter key. The Planning Assistant program starts.

If the computer is on:

1. Exit from whatever program you are using and insert the Planning Assistant diskette.
2. When the DOS prompt **A>** appears, type **G** and press the Enter key. The Planning Assistant program starts.

## Cursor Control Keys

- |                  |   |
|------------------|---|
| ↑                | Moves the cursor up one line.                                   |
| ↓                | Moves the cursor down one line.                                 |
| →                | Moves the cursor to the right one space.                        |
| ←                | Moves the cursor to the left one space.                         |
| <b>Ctrl-Home</b> | Moves the cursor to the upper left corner of the values region. |

- |                  |  |
|------------------|--|
| <b>Ctrl-End</b>  | Moves the cursor to the lower right corner of the values region.               |
| <b>PgUp</b>      | Displays the previous screen of data.  |
| <b>PgDn</b>      | Displays the next screen of data.  |
| ↵                | Moves the cursor to the next row of the same column.                           |
| <b>Ctrl-PgUp</b> | Moves the cursor to the top of the same column.                                |
| <b>Ctrl-PgDn</b> | Moves the cursor to the bottom of the same column.                             |
| <b>End</b>       | Moves the cursor to the right end of the same row.                             |
| <b>Home</b>      | Moves the cursor to the left end of the same row.                              |
| <b>Tab</b>       | Moves the cursor to the beginning of the next column. (Ctrl-→ also works.)     |
| <b>Shift-Tab</b> | Moves the cursor to the beginning of the previous column. (Ctrl-← also works.) |

## Special Function Keys

- |            |   |
|------------|---|
| ↵          | <b>Enter.</b> On a menu, tells Planning Assistant to begin or continue a function.                |
| <b>PF1</b> | <b>Help.</b> Displays quick reference information appropriate to the function you are performing. |
| <b>PF2</b> | <b>Quick Entry.</b> Enters headings automatically, sequencing months and                          |

whole numbers and duplicating other headings. Duplicates values in values region.

- Shift-PF2** **Format.** Displays regions used to change the format for rows and columns.
- PF3** **Views.** Displays regions used to define views.
- Shift-PF3** **Change Colors.** Cycles through color combinations on monitor.
- PF4** **Calculator.** Activates Planning Assistant's four-function calculator.
- Shift-PF4** **Target.** Finds value needed to arrive at target value that you want to achieve.
- PF5** **Recalculate.** Recalculates spreadsheet.
- PF6** **Erase Entry.** Erases complete entry (heading, formula, value, etc.) at cursor position.
- PF7** **Insert Row/Col.** Inserts blank row or column.
- Shift-PF7** **Delete Row/Col.** Deletes row or column at cursor position.
- PF8** **Copy Row/Col.** Copies row or column at cursor position.
- Shift-PF8** **Reuse Row/Col.** Reuses row or column most recently copied or deleted.
- PF9** **Formulas.** Displays regions used to enter and edit formulas for rows and

columns (and Recalculate Automatically item).

- Shift-PF9** **Variables.** Displays region used to define variables for use in formulas.
- PF10** **Continue.** In the spreadsheet, tells Planning Assistant to continue special function controlled by function keys.
- Esc** **Escape.** Cancels the current operation and returns you to the previous operation. Press Esc again, as many times as necessary, to return to the Main Menu.

### Editing Keys

- ←** **Backspace.** Erases characters as the cursor moves to the left.
- Ins** **Insert/Replace.** Switches between insert and replace modes.
- Del** **Delete.** Deletes character at cursor position.
- PF6** **Erase Entry.** Erases complete entry (heading, formula, value, etc.) at cursor position.

### Entering Headings (Chapter 3)

- Type headings in special regions below and to the right of word "Headings".
- Use any characters (up to 25).
- Group row headings by indenting group members under group name.
- Group column headings by stacking group names over group members.

- Insert up to 2 additional rows in column headings region for group headings.
- Begin group heading with several dashes and use enough dashes after heading to move into last column in group.

### Entering Values (Chapter 3)

- Values can include the digits 0 through 9, a decimal point, and a leading minus sign.
- Planning Assistant stores up to 14 digits for each value entered, including decimal places.
- To display numbers with dollar signs, percent signs, and decimal places, use Format (Shift-F2).
- Enter comments in the values region without affecting the width of your columns.

### Using Quick Entry (Chapter 3)

- Press PF2, type heading or value (or vice versa), and move cursor to adjoining row or column.
- Press PF2 to cancel operation.
- In headings, Quick Entry automatically:
  - enters months in correct sequence
  - duplicates other text
  - increases whole numbers by one.
- In the values region, Quick Entry duplicates values.

### Entering Formulas (Chapters 3, 6)

- Press PF9 to have formulas regions appear.
- Create formulas in the formulas regions above and to the left of the headings using headings, keywords, numbers, variables, and the mathematical operators +, -, \*, /, and ().
- A formula usually uses an entire row or column in its calculation.
- Use "for" or "except" followed by row or column headings (or group headings) at the end of a

formula to refer to only specified values in a row or column. Use a comma to separate multiple headings in the "for" or "except" phrase.

- To refer to a single value cell, type the row (or column) heading for the cell, the word "in", and then the column (or row) heading for the cell.
- Use a semi-colon (;) to separate multiple formulas (including keyword formulas).
- A single formula region can contain a maximum of 10 lines or 250 characters, including spaces.
- To recalculate spreadsheet manually, change Recalculate Automatically item on formula screen to N and use PF5.
- Press PF9 again to have formulas regions disappear.

### Using Keywords (Chapters 3, 6, and 7)

- Use keywords to replace or simplify formulas.
- @Total, @Avg, @Min, and @Max work with groups of rows or columns, rows or columns sharing the same heading, or the entire spreadsheet.
- @Cum and @Grow work with individual rows or columns.
- @Prev looks back in the spreadsheet for a previous value needed for a current calculation.
- @Start provides starting values for @Cum, @Grow, @Prev, and @FV.
- Planning Assistant's 3 financial keywords are @FV (Future Value), @NPV (Net Present Value), and @Payment (Chapter 7).

### Retrieving a Spreadsheet (Chapter 4)

- Get Spreadsheet retrieves copy of Planning Assistant spreadsheet from disk into working copy.
- Retrieve spreadsheets saved as SYLK files, if:
  - the first three rows are blank.
  - the first column contains row headings.

- List files by typing only a drive name in Directory or File Name and pressing Enter.

### Consolidating Spreadsheets (Chapter 4)

- Planning Assistant combines values from spreadsheet on disk with values in spreadsheet in working copy when row and columns headings match exactly.
- When Planning Assistant finds two rows or columns with the same heading, it looks for a group name.

### Getting Data from a Filing Assistant File (Chapter 9)

- Start with a spreadsheet in the working copy.
- Choose forms from which Planning Assistant is to get data by using the same retrieve specifications used in Filing Assistant.
- Use the letters R (for row), C (for column), and V (for value) in the plan spec to tell Planning Assistant how to organize the Filing Assistant file data into rows and columns.
- Combine V with R or C when the Filing Assistant file item name matches a row or column heading and the data in the item contains the values. (You can use one R or C, but multiple RVs and CVs.)
- When the item name and spreadsheet heading don't match, type the spreadsheet heading after the RV or CV in the plan spec.
- Use the letter Y (for year), M (for month), or D (for day) with dashes to tell Planning Assistant how to read the dates in the Filing Assistant file.
- For special cases involving spreadsheet groups, see Chapter 9.

### Using the Calculator (Chapter 5)

1. Position the cursor where the result of the calculation should appear.
2. Press PF4 to activate the calculator.
3. Type the calculation using numbers and the mathematical operators +, -, \*, /, and ().
4. Press Enter to complete the calculation.

#### Notes

- The calculator works only with values typed into the spreadsheet, not with calculated values.
- Press PF4 again to cancel the operation.

### Using Variables (Chapter 7)

1. Press Shift-PF9 to have variables region appear.
2. Move cursor into variables region.
3. Type name for variable in a name section.
4. Press Enter.
5. Type value for variable.
6. Press Shift-PF9 again to have variables region disappear.

#### Notes

- Use variable name in formula and Planning Assistant uses variable value in formula calculation.
- Change variable value to see results of different options on spreadsheet.
- Create up to 20 variables per spreadsheet.

## Changing the Format (Chapter 5)

1. Press Shift-PF2.
2. Type over Global Format default or type instructions into individual format regions using these symbols:
  - , displays numbers with commas
  - \$ displays numbers with dollar signs
  - % displays numbers with percent signs
  - n round to n decimal places (n = any number 0 through 7)
3. Type over Minimum Column Width default using any number from 3 to 25.
4. Press Shift-PF2.

### Notes

- Individual format instructions override Global Format.
- Numbers displayed with % signs are divided by 100 when used in formula calculations.
- Individual column width is determined by Minimum Column Width setting or widest entry in column.

## Moving Rows and Columns (Chapter 5)

1. Use Shift-PF7 to delete row or column.
2. Move cursor to position where you want to reuse row or column.
3. Press Shift-PF8

## Using the Target Function (Chapter 7)

1. Place cursor where you want to enter target value.
2. Press Shift-PF4 and follow directions in message region.

### Notes

- With Target you can find the value that lets you achieve a target value.
- Use Target only with related values.
- Press any key to cancel function when targeting is in process; at other times press Shift-PF4 again.



Business Series

Program No.5601-SAP (Version 1.00)

# IBM Planning Assistant Quick Guide

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**IBM·JX**  
personal computer

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