

Word Processing with IMA

Introduction

As outlined in the Access and Navigation Chapter, it is possible to edit within data fields and in memo boxes or word processing screens with the built in IMA editors. The In-line Editor provides basic editing functions while in both data fields and free form text screens, whereas the IMA Document Editor provides the user with a number of tools to customize and simplify the word processing functions. These tools are identified and explained throughout this chapter.

IMA word processing formats include memo boxes, letter writing, editing of stock or form letters, free form word processing and even creating and editing control files. Each of these functions has available the features as outlined in the tables below. Additionally, IMA offers an option for creating and combining a letter template with either a selected client list or Rolodex list for a mass mailing distribution.

The Editor Guide

The IMA In-Line Editor

The In-line editor is available in data entry screens. This editor supports a small set of basic editing functions and can be operated with the combination keystroke commands shown on the table below.

The In-Line editor is automatically invoked in new data entry and word processing screens/boxes. However, when changing data in an existing data field/screen, the <home> key must be pressed to invoke the In-line Editor. By pressing the <home> key and invoking the Editor, the user does not have to retype the entire field, but can make the appropriate changes, per character or word, as needed.

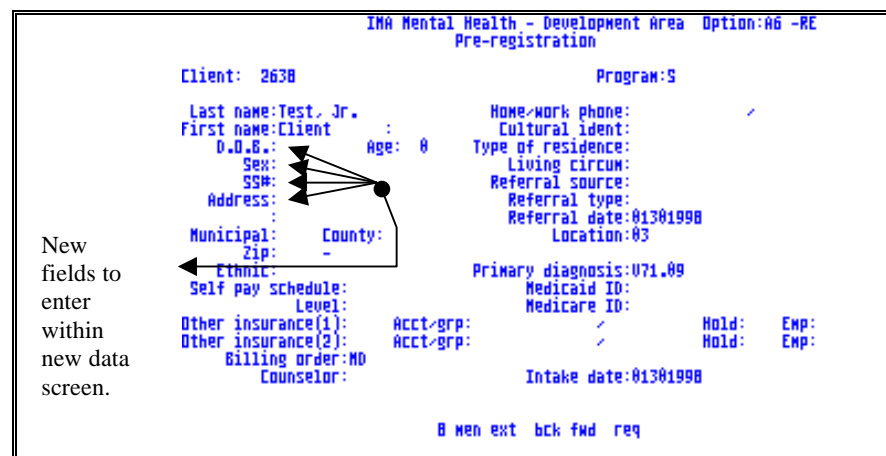
The In-Line Editor Keystroke Commands

Function	Strokes	Key
Move a position to the right	CTRL + L	arrow right
Move a position to the left	CTRL + H	arrow left
Go to the next word	CTRL + W	

Go to the end of the line	CTRL + N	
Insert blank character	CTRL + F	
Toggles over type/insert mode	CTRL + Q	<Insert>
Delete character	CTRL + D	<Delete>
Delete word	CTRL + V	
Delete till the end of the line	CTRL + Y	
Delete line	CTRL + Z	

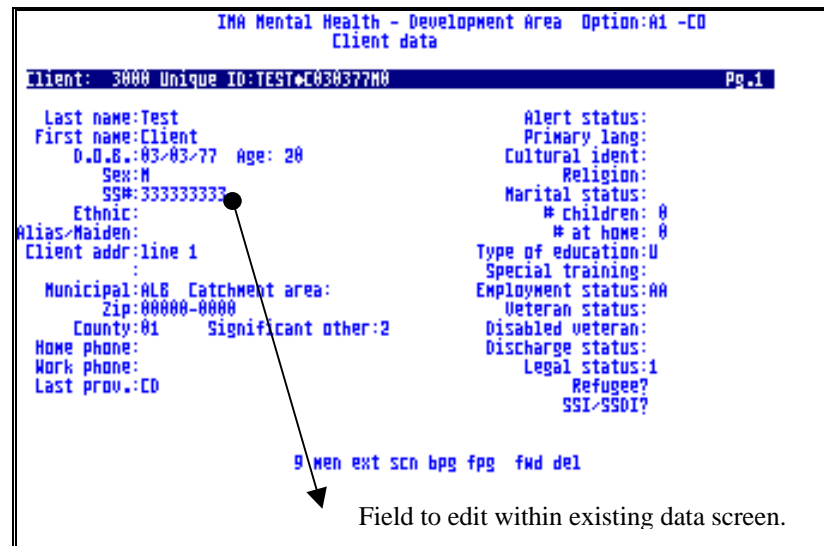
Note: When two keys are combined by "+", hold down the first key while pressing the second.

This view shows an entirely new screen with new fields of data to be entered. Therefore, the In-Line Editor is automatically active and data can be edited as it is entered using the keystroke combinations if changes are necessary.



The Reception Pre-Registration screen: The In-Line Editor is automatically active in new data screens.

This view shows an existing screen of data that needs to be corrected. The <home> key must first be pressed to activate the In-Line Editor in each field of data to change.



The Client Data screen – Correct option: The <home> key will activate the In-Line Editor to correct or change the necessary characters in each field.

The IMA Document Editor

The IMA Document Editor is automatically available within all word processing formats. These include any memo box, letter, document or control file in which free form text may be entered. This editor includes the In-Line features as well as a number of more advanced editing functions.

Note: Anytime the cursor is advanced to a rectangular box, the user is in a word processing area and free form text may be entered and edited as described.

The most commonly used editing functions of the Document Editor are executed by special keys as labeled or by a combination of keys. Other functions are only available via special keystroke combinations. The combination keystroke commands governing the operation of this editor are tabled below.

The IMA Document Editor Keystroke Command

Note: Any key marked with an * denotes VT terminal type application only.

Function	Keys Strokes	Keys
Move a position to the right	CTRL + L	arrow right
Move a position to the left	CTRL + H	arrow left
Move up a line	CTRL + K	arrow up
Move down a line	CTRL + J	arrow down
Go to the next word	CTRL + W	
Go to the end of the line	CTRL + N	
Go to the next line	CTRL + M	Enter
Jump to next fill position		<Tab>
Breaks the line to a new line	CTRL + B	
Joins current line with the next one	CTRL + O	
Move a page up		<Page Up>
Move a page down	CTRL + T	<Page Down>
Insert blank character	CTRL + F	
Toggles over type/insert mode	CTRL + Q	<Insert>
Delete character	CTRL + D	<Delete>
Delete word	CTRL + V	
Delete till the end of the line	CTRL + Y	
Delete line	CTRL + Z	
Expansion Macros	CRTL + X + <code>	
Cut/Export Text		<Pst/Cut> or <Cut>*
Paste/Insert Text	SHIFT + <Pst/Cut>	<Paste>*
Selects lines of text	CTRL + P	
Auto Reformat	CRTL +]	

Spell Checker	CTRL + R	
Save and exit memo box	CTRL + [<Esc> or <Save>*

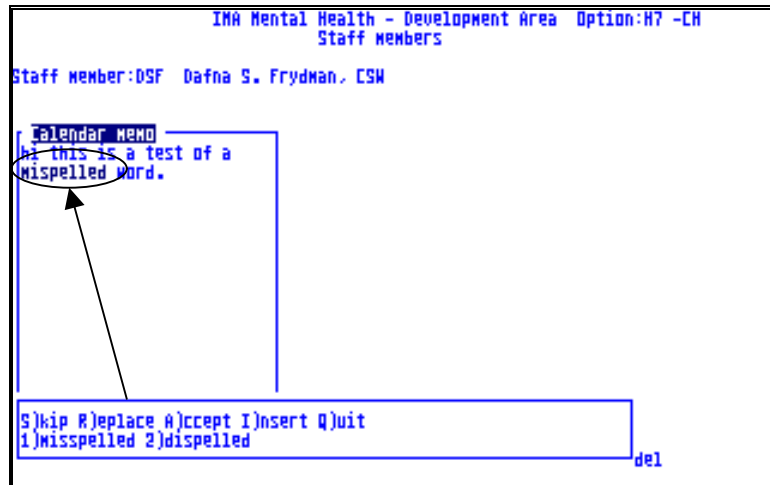
Note: When two keys are combined by "+", hold down the first key while pressing the second.

Special Features

Spell Checker

The Spell Checker can be activated within a memo box by the keystrokes <CTRL> + <R>. It will stop and highlight each misspelled word. The user then has six choices of action.

- Skip – Skip over this misspelled work and move to next word.
- Replace – Replace this word. The user will then be prompted to type the word that will replace the misspelled word.
- Accept – This tells the spell checker to accept all occurrences of this misspelled word within the given memo area.
- Insert – Here the user has the option to enter this misspelled word as a new word into his/her own private dictionary. This will cause the spell checker to recognize this word on all future occasions.
- Quit – Quit will cancel out this session of the spell checker.
- Enter a number – The last line of the popup box shows suggestions for the misspelled word. Entering any number will replace the misspelled word with the chosen corresponding word.

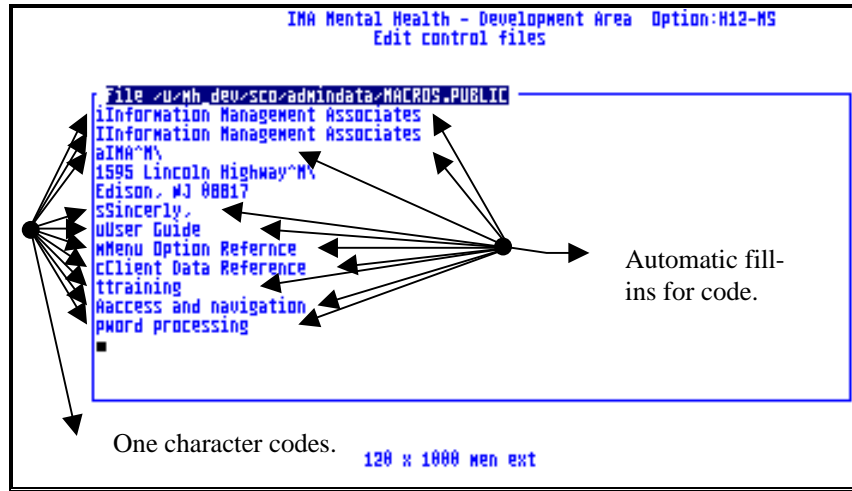


This screen shows the Spell Checker highlighting the word "misspelled". Here the user has the choices shown in the Spell Checker popup box: S)kip, R)eplace, A)cccept, I)nsert, Q)uit and the suggested word replacements, 1)misspelled and 2)dispelled.

Expansion Macros

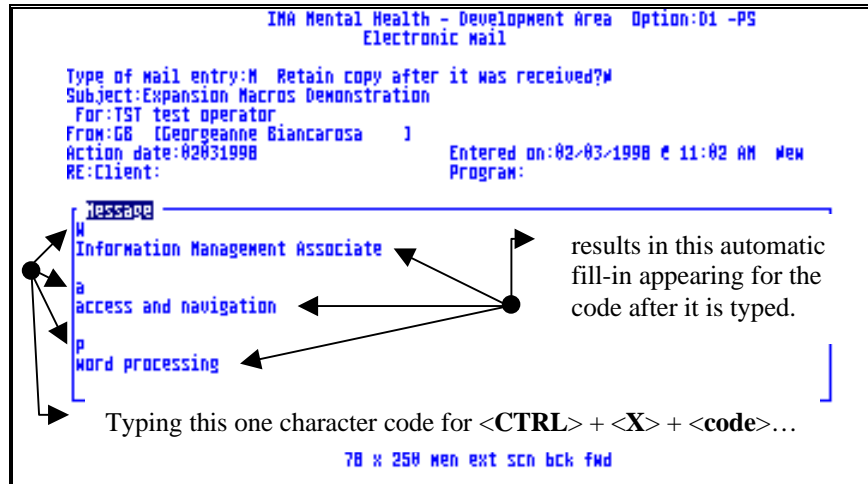
Expansion macros offer the capability of entering a single character within a memo box and having a series of text line fill automatically. This is used typically to insert frequently used terms, phrases or names. These single character codes require special setup for agency-wide access.

This setup is accomplished in **H-12 MS** by the system administrator. The public library is called **MACROS.PUBLIC** and would contain codes for word and phrases for agency wide access. A private library can also be set up for each user by the system administrator in **H-12 MS**, identified by the file name **MACROS.USERLOGIN**, such as **MACROS.MIKE**.



An example of the set-up file for the public expansion macro library showing both the one character code and the automatic fill-in corresponding to the code.

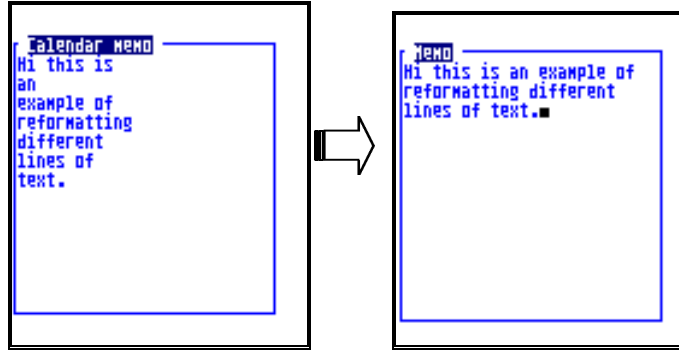
Once the set-up is completed, the expansion macros can be utilized in any word processing format by typing **<CTRL> + <X> + <single character code>**.



An example of the expansion macros shown in the public library above.

Auto Reformatting

Auto reformatting will reformat any selection of text by combining broken lines. The text is first selected by <CTRL> + <P> and using the arrow keys to highlight a group of lines. Once this is done, <CTRL> + <J> will activate the reformatting function on the selected text.

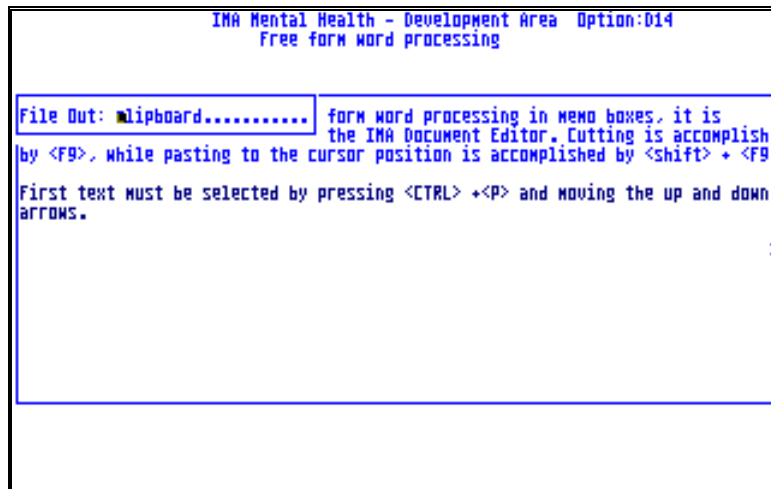


These pictures show the before and after effects of the Auto Reformatting function.

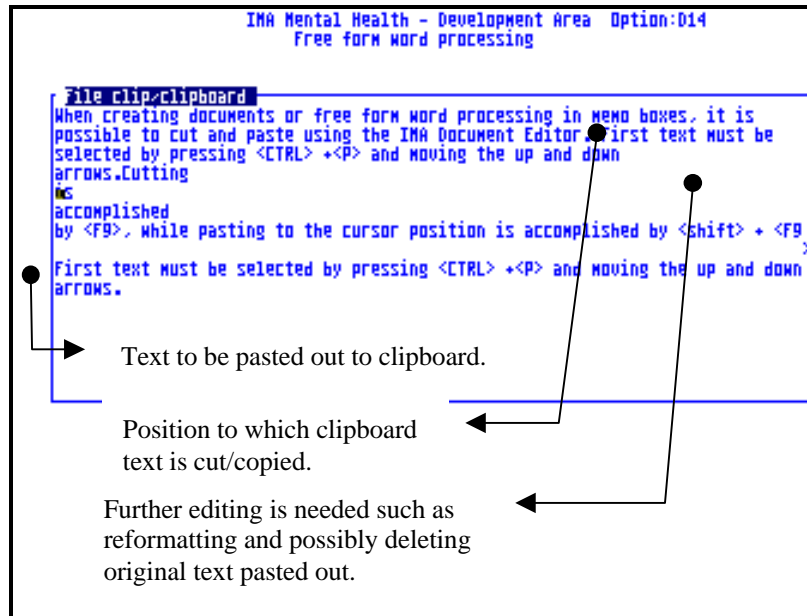
Clipboard

A powerful and creative function of the Editor is the ability to select and move text within and between documents. Sections of text may be copied from one section of a screen to another or from one document to another via the clipboard function. This is accomplished by pasting selections of text in and out by using the <Pst/Cut> function key.

After typing within a document or memo box and changes are desired, sections of text can be moved by first selecting the text that is to be moved by highlighting it, pressing <CTRL> + <P> and moving the up and down arrows. Once the desired text is highlighted, it can be pasted out with <Pst/Cut>. At the '**File Out: clipboard.....**' prompt, press <enter>. The cursor can then be moved to the position where the selected text is desired and pasted/copied there with <SHIFT> + <Pst/Cut>. Press <enter> at the prompt for '**File In: clipboard.....**' and the selected text will be pasted/copied to the selected spot.



A view of a file in free form word processing with text selected and cut to the clipboard to be pasted elsewhere in the document.

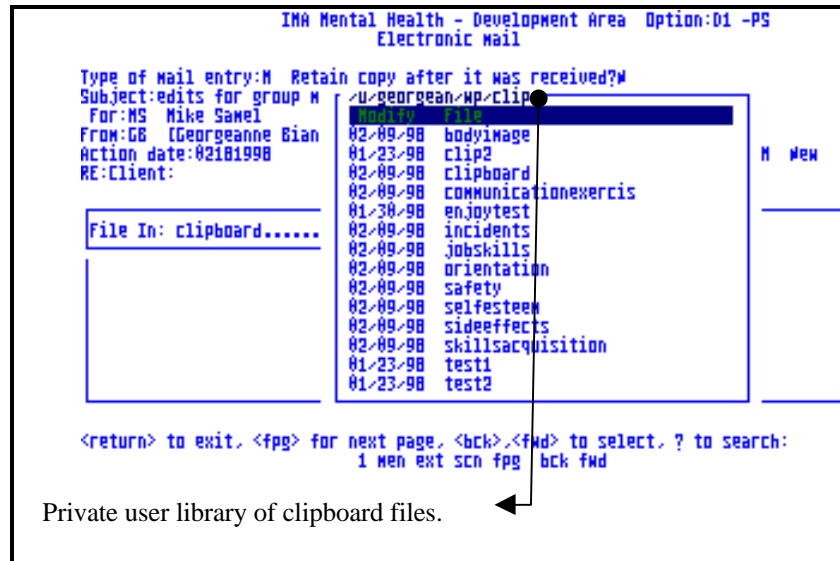


A view of the same document after pasting/copying the desired text to a different position within the document.

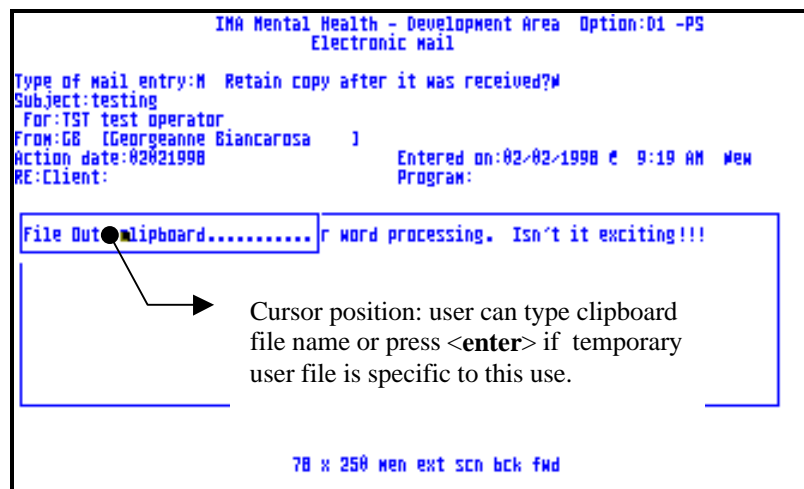
Some further editing will be required. Auto Reformatting, as covered in the previous section, will format the document to be in line again. The text that was pasted/copied from its original position may be deleted or left to incorporate into the following lines.

Additionally, each user can have a private library of text notes. These text notes are created from within a memo box and can be filed in a private library per user. Once the desired text has been typed, it is pasted out by **<Pst/Cut>**. The user may then name this clipboard item for filing in the user's private library and then pressing **<enter>**. The user can also insert a text note into a memo box by pasting it in from the clipboard. This is accomplished by using the **<shift> + <Pst/Cut>** keystroke combination, providing the name of the text note from the clipboard to insert and pressing **<enter>**. This text note can be selected from the user's private library located in the /wp/clip directory, which is presented for selection when pressing **<hlp>**. The agency may also have a public library that can be accessed by all users. The system administrator can provide a list of those files for public use.

Note: VT terminal types have separate function keys for **<Paste>** and **<Cut>** and **<Shift>** is not used in combination. See the IMA Document Editor Table.



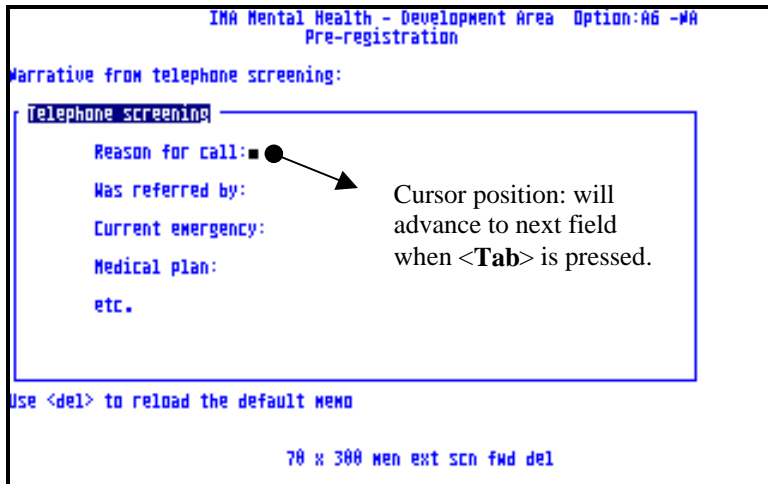
A view of a help screen to determine which file to paste in from the Clipboard using the <Shift> + <Pst/Cut> keystroke command.



This is a view of the clipboard at keystroke command <Pst/Cut> to paste out the text to the clipboard. The highlight is in the prompt at 'File out:' on Clipboard. The user can press <enter> and accept 'Clipboard' as a filename for a temporary paste out. If the paste out is something that is enduring or to be used more than one time, a filename can be typed in over 'Clipboard' at the prompt.

Form Navigation in Memo Boxes

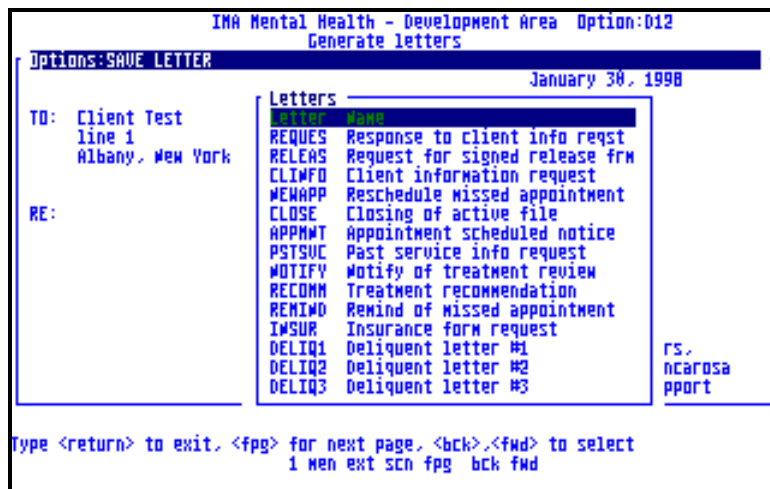
Within some memo boxes, a form may be loaded in to collect specific information or script particular questions for users. This form will contain headers followed by colons where specific data is required within the defined fields. These forms can be navigated by using the <Tab> key, causing the cursor to move to the next fill position within the form.



This is a view of a memo box with a form loaded in it. The cursor is at the first fill position. The cursor can be advanced from this fill position to the next by using the <Tab> key.

Writing and Editing Letters

Within menu option **D-12**, there are two options related to creating correspondence within the system. A letter may be generated related directly to one of the databases within the system or in a general letter format for those issues that are external to the system. The library of stock form letters is maintained by the system administrator in **H-12 LT**. It is also possible to create special letter/document templates with specific header and footer layouts in **H-12 LT**.

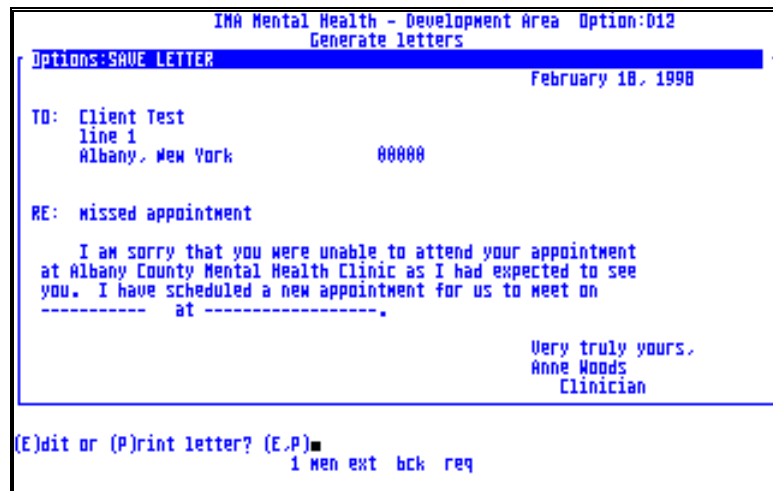


This is a view of the Help screen at the 'Letter to use:' prompt.

The process of creating letters is as follows:

1. Select the database from which the Addressee is to be selected: Rolodex, Physicians, Insurance, Client, Type in or S-Collaterals.
2. Search the appropriate database for the desired recipient and select it.

3. Select either Client or Type-in for the 'Re:' line in the letter and determine the appropriate client from the database or type in the reference.
4. Select a letter from the library of letters displayed in <hlp>. All of the previously selected information will merge into the letter selected.
5. Choose the appropriate staff for the signature at the salutation from <hlp> or press <enter> to accept the user for the signature.
6. The merged document is now presented on the screen for further editing, if necessary. Choose Edit to make any changes or Print to post to the appropriate file and print for sending to the intended recipient.
7. When final editing is complete, it is sent to the printer and filed in the Staff/Client correspondence database indexed by date, author, recipient, referenced account, and type of letter.



A view of a form letter ready for editing and customization by the user. The letter can also be accepted as is by the user and printed. If a letter is related to a client or other database within the system, it is posted to that file and available for look up.

Free Form Word Processing

Within menu option **D-14**, the user utilizes free form word processing to create documents, letters, notes, etc. that are not specifically related to clients or any of the other databases within the system. This is a direct entry to the IMA Document Editor and is not linked to other parts of the IMA Workbench.

Once a new file is named and generated or a file to edit is chosen, the user creates the desired document in the opened file. The IMA Editors customize and correct documents in the same fashion as described above in the features sections.

Creating and Opening Existing Files

To create a new file in your word processing directory (or "wp" directory), type a name for the new file and press <enter> at the 'File to Edit:Create New Folder' prompt. The system will then ask if that file should be created. Type <Y> to create

or <N> to return to prompt. Another new file name can be typed at this time or a file to edit can be designated.

```
IMA Mental Health - Development Area Option:D14
Free form word processing

file to edit:Create new folder
30 men hlp fwd def req
```

The initial screen upon entering Free Form Word Processing in D-14.

```
IMA Mental Health - Development Area Option:D14
Free form word processing

File monthlyreport does not exist
Create the file? (Y.N)■
1 men ext bck req
```

The 'Create the File?' prompt in D-14 after naming a file that does not yet exist within the user's directory.

If the user wishes to edit an existing file, the file name and <enter> can be typed at the 'File to Edit:Create New Folder' prompt or <hlp> can be selected for a display of files that have been created previously by that user. Once a file is created or selected, the document/file is opened and displayed for editing.

```

IMA Mental Health - Development Area Option:D14
Free form word processing

U:\georgean\WP
File
02/09/98 alcoholsurvey
      ^clip
02/09/98 drugsurvey
02/09/98 graduation
02/09/98 groupchange
02/09/98 homeworkcouples
02/09/98 homeworkdepression
02/09/98 homeworkfeelings
02/09/98 homeworkmessages
02/09/98 medicinechange
02/09/98 moveup
02/09/98 newprocedures
02/09/98 outcomes
02/09/98 riskfactors

<return> to exit, <bck>,<fwd> to select, ? to search:
1 Men ext bck fwd

```

A view of the Free Form Word Processing screen with a Help screen list of files to edit. All files created for that user are listed here.

```

IMA Mental Health - Development Area Option:D14
Free form word processing

File monthlyreport
■

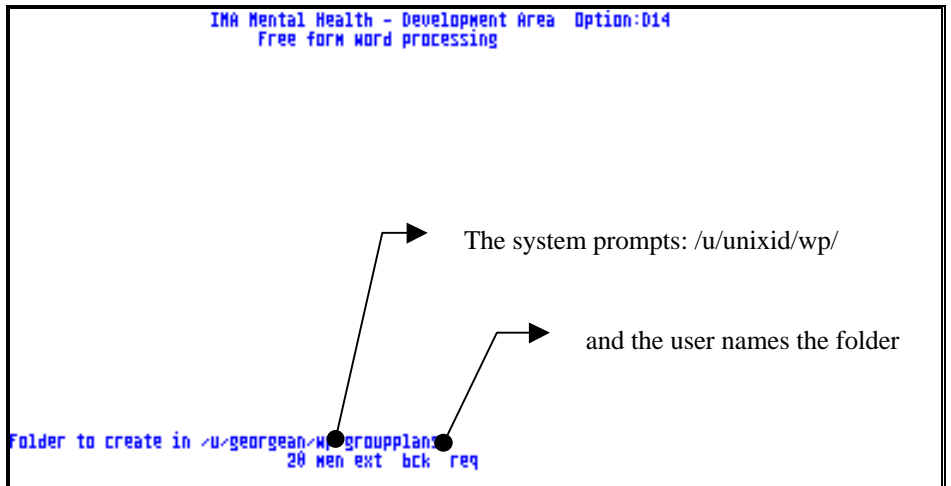
80 x 1000 Men ext

```

A new file created and opened in D-14. If an existing file had been chosen, the previously typed and saved text would appear in the file.

Creating a New Folder/Directory

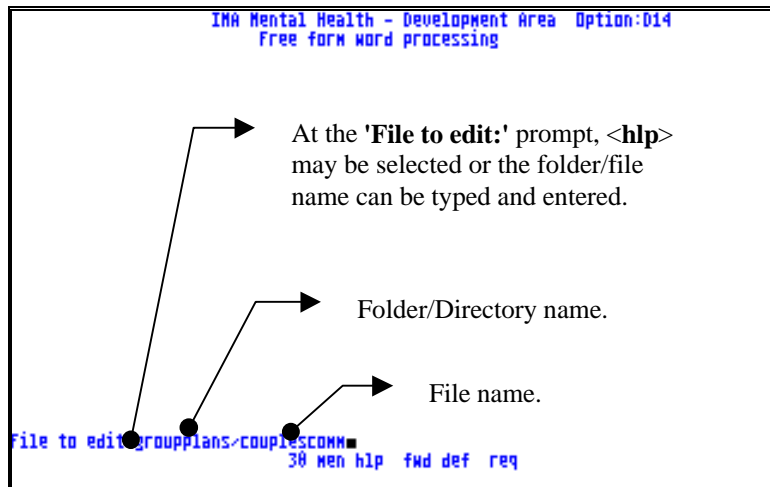
To create a new folder, press <enter> at the 'File to Edit:Create new Folder' prompt. This advances to the next screen in which the system requests a name be typed and entered for the folder to be created.



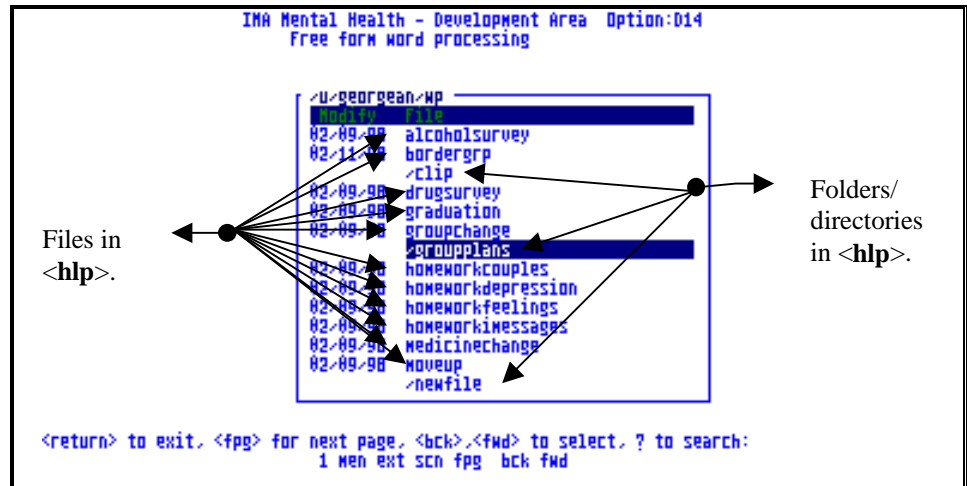
The next screen in D-14 if the user chooses to create a new folder named groupplan.

The new folder is essentially a new directory for storing files. Just as the /clip folder/directory is listed in the <hlp> menu, the new folder/directory will be listed as well. Choosing the folder/directory within the menu will make available a <hlp> for the files created in it. Selecting a file will open it for editing.

To locate an existing file or create a new file in the directory, the directoryname/file must be typed and entered. The screen will then display a document to edit or create a new one with that name.



Creating a file or editing an existing file named 'couplescomm' in the 'groupplan' directory in D-14.



The <hlp> menu at the 'File to Edit:' prompt showing all of the previously created files and folders/directories.

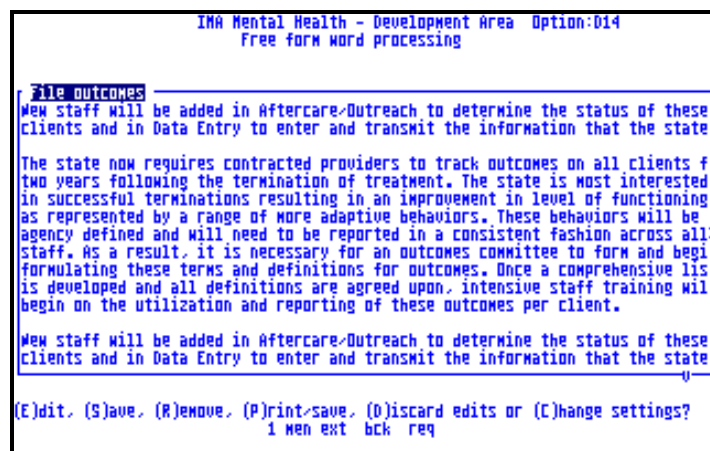
The control files in **H-12** are similar to free form word processing documents/files in that they are open for user construction and definition. The In-Line Editor and Document Editor features are available and active within these screens.

Saving New Documents and Edits

Once word processing is completed within a document, press<Esc> to save the new document or changes made to an existing one. The system will then present a list of options: **Edit**, **Save**, **Remove**, **Print & Save**, **Discard edits** or **Change settings**. Select one of those options by typing the corresponding code and pressing <enter>.

Remove discards the entire file. Change settings presents options for resetting the top and left margins. Discard edits leaves the file as it was before any changes were made to an existing file.

The system will perform the requested function and close the document. Choices will be repeated if **Edit** is chosen when <Esc> is pressed to save the additional changes. Once the document is closed, the system returns to the '**File to Edit:Create New Folder**' prompt. The user can then choose another document or return to the menu for more options.



An open document in D-14 at the save options prompt.

Note: On VT terminal types, <Save> or <Esc> can be used to save documents and proceed to the next prompt.

Copying Files to and from IMA

H-45 CF

A copy of a designated file is created and placed in a designated location while the original remains in its initial locale. File copy can be done into or out of the IMA system to or from a floppy disk in the server or PC with any file type. Within Menu option **H-45**, there is a user utility **CF** for copying a file from or into the IMA Workbench.

```
IMA Mental Health - Development Area Option:H45
User Utilities

CF - Copy files from/to IMA system
CS - Characteristics Survey
MH - Manage MHUPD database
PW - Change your password
QC - Check your Quick Messages from other IMA users
QS - Send a Quick Message to another IMA user
RR - Reprint Generated Reports
SC - Swipe Client
SM - Swipe Maintenance
GR - Group attendance display

Option:CF

2 men
```

The User Utilities Sub-menu at H-45.

After selecting and entering **CF**, the system will ask three questions. '**Is floppy in your PC or server?**', '**Copy Out of or Into IMA?**' and '**Copy a WP file , DIF file, Statistics dump or Other file?**'. The defaults are set to **PC**, **Out of IMA** and **WP** file, but can be changed at the field by typing over the default and pressing <enter>. Otherwise, the defaults can be accepted by pressing <enter> at each field.

```
IMA Mental Health - Development Area Option:H45-CF
Copy Files

Is floppy in your PC or the Server?(P,S)P
Copy Out of IMA or Into IMA?(O,I)O
Copy a WP file, DIF file, Statistics dump, or Other file?(W,O,S,O)O

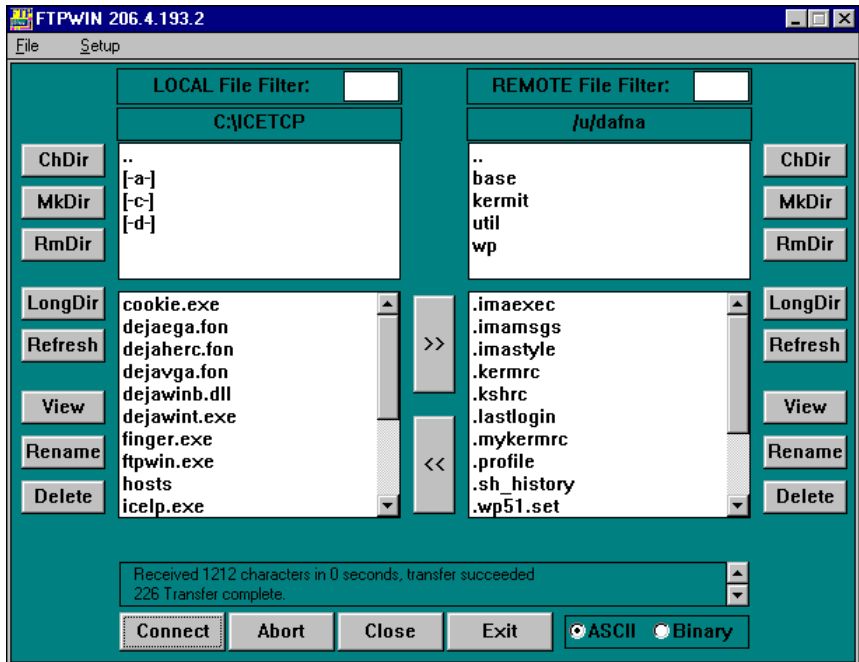
1 men ext scn bck fwd def req
```

The first screen in H-45 CF.

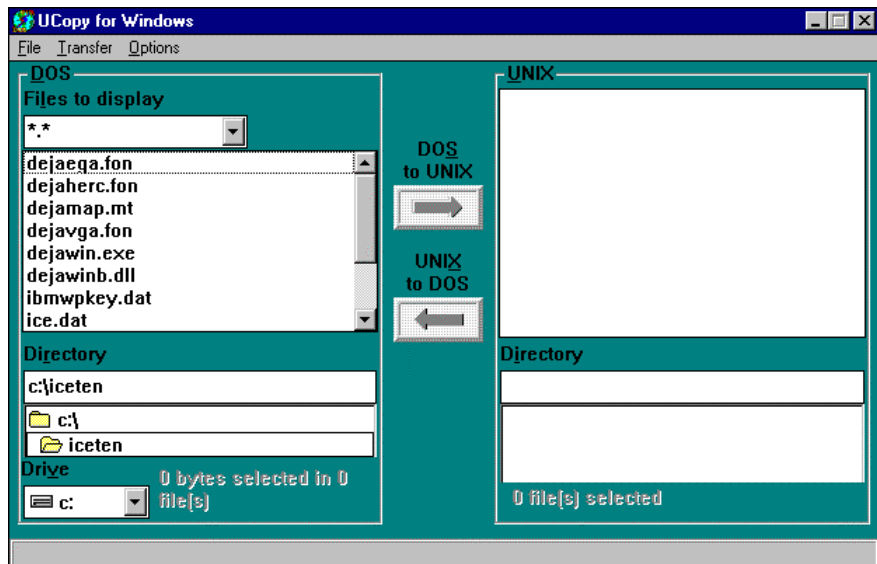
Directions for file copy between a PC and another device will differ based on the emulator type on which the IMA system is running. Different emulators can be specified for use based on terminal name and users. The data file **EMULS.DAT** in **H-12 MS** will match the first finding of either terminal or user name for which to set up the terminal emulation to use for file copy. The following sections explain the process of copying a file based on the type of emulator used.

ICETCP & ICETEN

For ICETCP, begin by clicking the **FTP** button on your toolbar and entering your UNIX password. For ICETEN click the button with the lightening bolt icon. The respective screens below will be displayed. Locate the file to transfer whether on the UNIX side or on the PC side by navigating through the directories. This is accomplished by clicking on the directory name on the upper white boxes of the screen and the files available will appear in the lower boxes. Once the file to transfer has been located, find its new desired destination by the same technique. Then click on the arrow button that is in the correct direction for this transfer. When the file has been transferred, exit this screen and return to the IMA system by either pressing **<enter>** or typing "exit." The new file can be accessed by going to its specified location outside of the IMA application.



ICETCP File Copy.



ICETEN File Copy.

Kermit

Into IMA

Enter the name you want to call the file after it is copied to the UNIX side, or enter a UNIX directory name, and the file will be placed in that directory with its original name.

- Press <enter> for your home directory.

- Enter a file name only (with no directory path) to copy the file into your home directory with a new name.
- Use <hlp> to navigate the UNIX directory structure to find a filename or directory name to use as the new destination.

After some time, the following instructions will appear at the bottom of your screen:

"Return to your local Kermit and give a SEND command.

KERMIT READY TO RECEIVE..."

At this time, flip back to the PC side by typing <Alt> +<X> and at the prompt type: "send <filename>". If you are unsure as to the exact location of your file, commands such as "cd" (change directory) and "dir" (list files in current directory) may be useful for navigation. When the file transfer is complete, you will be returned to the IMA Menu.

Out of IMA

Enter the name of the UNIX source file you wish to copy, or use <hlp> to navigate the UNIX directory structure to find the file. As the file is being transferred, take note of the File name and the Current path which are shown on the top three lines of Kermit's display. When the file transfer is complete, you will be returned to the IMA Menu.

The Windows Explorer or File Manager can locate the new file which will be found in the directory whose name appeared as the Current path during the transfer.

SMARTERM

Into IMA

Enter the name you want to call the file after it is copied to the UNIX side, or enter a UNIX directory name, and the file will be placed in that directory with its original name.

- Press <enter> for your home directory.
- Enter a file name (with no directory path) to copy the file into your home directory with a new name.
- Use <hlp> to navigate the UNIX directory structure to find a filename or directory name to use as the new destination.

After some time, the following instructions will appear at the bottom of your screen:

"Return to your local Kermit and give a SEND command.

KERMIT READY TO RECEIVE..."

Then, click Send Files from the SmarTerm 420 Transfer menu toolbar. Navigate your Windows directory structure to open the folder containing the source file. This may also be a formatted floppy disk (normally A:). You must enter a file name in the Local File Name box. When the file copy is complete, you will be returned to the IMA Menu. Use your Windows Explorer or File Manager to locate the file.

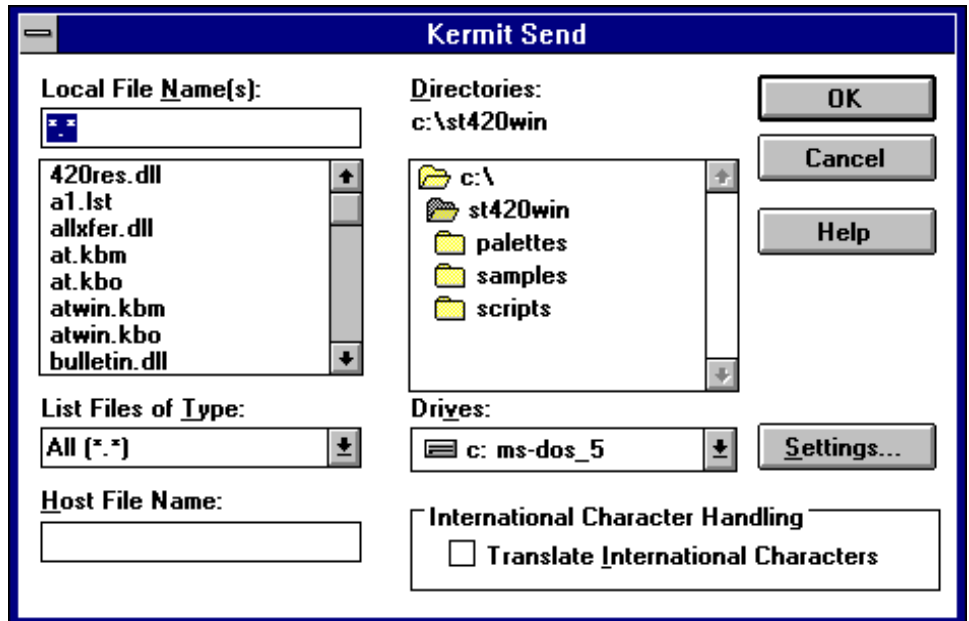
Out of IMA

Enter the name of the UNIX source file to copy, or use <hlp> to navigate the UNIX directory structure to find the file. You will see the following instructions at the bottom of your screen:

"Return to your local Kermit and give a RECEIVE command.

KERMIT READY TO SEND..."

Then click Receive Files from the SmarTerm 420 Transfer toolbar. Navigate your Windows directory structure to open the destination folder into which the file will be transferred. This destination may optionally be a formatted floppy disk (normally A:). Enter a file name in the Local File Name box. The new name can be the same as that of the source file. When the file transfer is complete, you will be returned to the IMA Menu. Use Windows Explorer or File Manager to locate and view the file.



SmarTerm File Copy.

Letter Merge

D-15 provides the utility to create a letter template with editable text with which to merge a user defined list from either the client database or from the Rolodex. This provides the user with a function for creating letters for mass distribution.

The following is a listing of the letter merge options:

- AD – add letter merge template
- CH – change text of letter merge template
- EL – add/edit client list
- ML – merge letter with list

```
IMA Mental Health - Development Area  Option:D15
Letter Merge

AD - add letter merge template
CH - change text of letter merge template
EL - add/edit client list
ML - merge letter with list

Option:                               2 men
```

D-15 Menu for letter merge

Letter Template

The letter templates for the merge feature are created in option **AD**. Either the Rolodex database or the client database fields are available for insertion with a selection screen similar to those found in ad-hoc reports.

Use the following steps to create a letter template in AD.

- Select to use either the Client or Rolodex file.
- Type "S" and press <Enter> and then type the corresponding field number and press <Enter> for each numbered field desired for selection in the letter template.
- To clear a selected field made in error, type "C" and press <Enter> then type the corresponding field number and press <Enter> for the field to clear.
- Once field selection is complete, press <scn>.
- Answer "Y" to '**Ready to start the letter?**'
- Name the letter with up to ten characters.
- Type the letter text, using "%#" to include the selected designated fields as shown in the top portion of the screen.

Note: All word processing editing features are active within the letter text boxes in options **AD** (described here) and **CH** (described later).

- Once the letter text is completed, press <Esc> to leave the word processing box.

```
IMA Mental Health - Development Area Option:D15
Letter Merge
Enter fields in your letter by typing % followed by the field number
%1 Today's date (10 chars)      %2 Last name (16 chars)
%3 First name (12 chars)       %4 Sex ( 1 chars)
%5 Program ( 2 chars)
```

```
File 10CHARTEST.MLC
%1
Dear Ms. %2.
Our agency is starting a women's group on interpersonal
relations for women in the %5 Program.
```

```
(E)dit, (S)ave, (R)emove, (P)rint/save or (D)iscard edits?
1 men ext bck req
```