# DataViz Inc OneShot
## Data Format Converter

### ■ PROFILE

**Function** • converts data (tables and charts in text/print image format) into file formats for use in spreadsheets and database management programs such as Lotus, VisiCalc, dBase II, etc.

**Computers/Operating Systems Supported** • IBM PC, PC/XT, and compatibles • PC-DOS or MS-DOS.

**Configuration** • one diskette drive, 128K bytes of memory.

**Current Version/Version Reviewed** • Version 00.17/ Demonstration Version 00.15D.

**First Delivery** • February 1984.

**Number of Installations** • approximately 10.

**Comparable Products** • Peachtree PeachLink.

**Price** • $195 retail price.

**Vendor** • DataViz, Inc; P.O. Box 1319, Norwalk, CT 06856 • 203-847-7724.

**Canada** • currently no Canadian distributor.

### ■ ANALYSIS

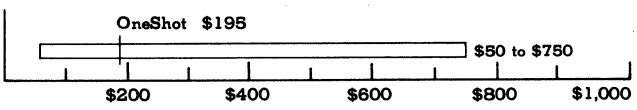
Products exist for converting data to and from specific programs. In most cases they cost thousands or tens of thousands of dollars. OneShot can easily be used to convert from a print image file into file formats used by the major spreadsheet and database vendors at a relatively insignificant cost.

Whenever there is information available in a tabular, print-image format from a mainframe, another computer or word processor, or any of the information utilities such as The Source, Dow Jones, etc, OneShot is able to perform the required conversion in a matter of minutes. The benefit to the corporate user in terms of accessibility of mainframe data on a microcomputer spreadsheet can be enormous.

In cases where information was not in tabular format, some initial editing is required. In some such situations it is more expedient to simply re-key the information.

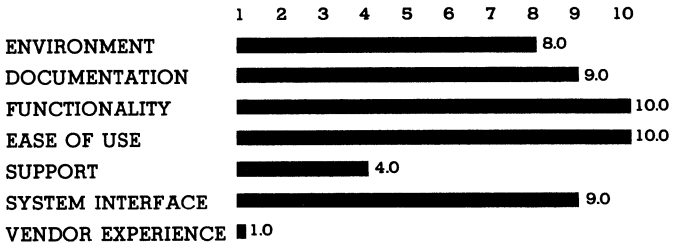
For instances where data is currently being re-keyed to get text into spreadsheet form, the product will find immediate and ongoing use. With the new-found ability to easily utilize as much data as is available, it would be extremely difficult to take this product away from an existing user.

**PURCHASE PRICE RANGE** Software Price Range




**DATAVIZ ONESHOT PRICING** • open bar shows the typical range of prices for **UTILITY** software used in a corporate environment • the vertical line within the bar graph indicates the price of **OneShot**, the evaluated product, relative to the price range of similar products.

**PRODUCT QUALITY RATINGS***




*For an explanation of rating criteria, please refer to the Software Evaluations (805) report. The Overall Package Average is 7.3.

### ☐ Strengths

For the people whose business is numbers, and the manipulation thereof, the product is a bargain at almost any price. If all else fails, one can usually acquire some form of print-image copy of the required data. Even if only a hard copy is available, merely passing it through an OCR scanner provides the necessary input file.

Great amounts of time and effort are saved by the product's ability to recognize the difference between data and non-data. Only a representative sampling of lines need to be identified—normally only about 10 to 12. If the sequence of columns needs to be rearranged, the product can automatically perform that function during processing.

Anyone can use the product. Beginners can be comfortably converting files in less than an hour from the time they are first handed the product. Once templates are made up for a particular data source, the conversion is completely trivial.

### ☐ Limitations

OneShot is copy protected. The PROLOK system is one of the more friendly ways of getting around this dilemma since it does allow the disk to be copied, but is still a problem. At the very least, it is inconvenient to require that a diskette drive be occupied simply to activate one program. In most cases this will add to the amount of disk swapping being done.

The current version will not fully utilize available memory. The effect is only noticed in dealing with very large files, and then only if one proceeds to process a file immediately after creating the template. To deal with this, one must exit to DOS and re-enter the program to proceed with the processing of the file.

If the default drive for data files is changed from A to B, the next time the program is loaded, it automatically looks for

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files on the disk in the B drive, even if there is no disk or drive matching the last used name.

## ■ HANDS-ON EVALUATION

Many of our staff members indicated more than the usual amount of curiosity when we started talking about the product. The packaging and literature was understated, to say the least. A simple black and white brochure, a straightforward cover letter, and a three-ring binder containing a copy of the introduction (which is also on disk), the tutorial, and report samples.

One individual in the accounting department was chosen to test the product. He had just acquired Lotus 1-2-3 and was not looking forward to the task of having to re-key a 10-year lost wages comparison chart. The information was supplied to him on disk, but as a WordStar text file. If this conversion worked, not only would he eliminate the loss of time, but also the possibility for introducing errors. Needless to say, the atmosphere was one of hopeful (or desperate) anticipation.

Less than 10 minutes after handing him the product everyone in the office heard him exclaim, "This is really neat!" as he worked his way through the tutorial. Shortly after that he was calling us into his office to show off what "he" had done. There for everyone to see was the WordStar text file sitting in Lotus 1-2-3.

Our experience with the product has been one of the most pleasant in recent memory. Not because it's on the leading edge of technology, and not because it stands up and does a dance. We like it because it promises to accomplish a very specific task with a minimal amount of effort, and lo and behold, it does!

### ☐ User Interface

OneShot is deceivingly simple. While not fancy, it is more than minimally functional. It is almost generic in its simplicity. Words like logical and practical seem most appropriate in describing it.

Menus: Context-oriented, complete, and easy to read. Available via the F1 function key. Brief, on-screen description of function at current cursor position eliminates most referrals to the Help menu.

Control Characters: None used.

Function/Special Keys: Standard cursor keys are used. F1 activates the Help menu system. F2 allows editing.

Command Language: None available.

Positive Feedback: Non-acceptable responses return the user to the previous main command menu.

Status Display: Processing function displays progress in terms of number and percentage of lines processed, number of lines output, and a bar graph depicting percentage complete.

Help Facilities: All information relative to the operation of the product is either displayed on the screen or available via the context-oriented Help menu system. No command guides or templates are provided or necessary.

### ☐ Environment

The vendor has been very cautious to maintain compatibility with as many computers and operating systems as possible. It appears very likely that if a particular system can run the programs for which OneShot can produce files, then one can, by default, run OneShot. On the IBM PC, it appears that 128K bytes of RAM and a single diskette drive are required, and that configuration should hold for the compatible systems as well.

The product is delivered on PROLOK diskettes, which means that while the disk can be copied to another floppy or hard disk, the original disk is needed for operation of the program. There is no restriction as to which drive the PROLOK diskette must be located in.

Source files cannot exceed 255 characters in length. If the template for a large file is created and the processing of that file is requested immediately thereafter, an error is produced at the processing menu. The remedy is to simply exit from the program to DOS, re-enter the program, and proceed to the processing menu. No damage is done to any information or files. While this may at times prove to be a minor inconvenience, in and of itself it does not represent cause to dismiss the product.

### ☐ Documentation

The tutorial is very aptly referred to as a demonstration "script." To state that if it were any more clear it would be transparent is very close to being literally true. Our copy was a pre-release version in an oversized format. It is our understanding that the production version will be a standard 5.5x8.5-inch format.

A complete page is devoted to each and every step of the "script." The binder is viewed sideways with the top half of the page devoted to a rectangular black-on-white representation of the screen, with the appropriate position of the cursor highlighted precisely as it appears on the screen. The bottom half of the page contains an explicit, yet simple, description of the action to take plus copious "Notes" explaining (from an operational point of view) what is going on, how and why, and what you might want to do in a later session.

So complete is the script that it continues in the same step-by-step, page-by-page manner, until the converted file is actually loaded into Lotus 1-2-3 (just the way OneShot is explained) and displayed on the screen! Everyone is our organization was impressed by the material, and no one who used it had any subsequent problems with the conversion process.

The first section of the manual contains the introduction, with a note explaining that one can proceed directly to the Demo (previously referred to as "script") since all the information is also contained in the program's online, context-oriented HELP feature.

The menus are OneShot's manual and reference guide. They are simple, easy to read, and thorough—in a word, functional. Even though this is a utility which may or may not be used on a regular basis, the menu screens are so well done that one may safely use the manual to fill that

  

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out-of-the-way storage space because there is little chance that it will ever be needed again. A "README" file on the disk even explains how to load the program and what the files contain.

A handy command reference, keyboard template, or any of those other little extras are noticeably absent from the documentation. They are not needed because everything is either on the screen or available via the Help key (F1).

### ☐ Functionality

The product, basically, does only one thing. It takes information appropriate for spreadsheet or database applications (anything requiring a WKS, DIF, or delimited file) that is in a print image, tabular format, and converts that information to the desired format. The process is controlled by a kind of conversion map which the vendor calls a template.

A template is created to specify what information will be converted and how it will be arranged. The first step is to indicate the difference between lines to be skipped and those that must be processed as data. This, for example, means telling the program how to recognize the difference between column headings and the columnar data. The characteristics of lines labeled to be skipped, as well as the data lines, are stored in the template, thus eliminating the need to go through the complete report on a line-by-line basis. An optional title command allows one line to be processed as the report title or column titles. One is then allowed to specify which columns will be included in the converted file and in what sequence they will be arranged.

Templates are saved for repeated use and may also be modified on an as-needed basis. We found that keeping a set of templates for each type of file to be converted was an easy bookkeeping task and one which saved a lot of time in developing duplicate templates. As strange as it seems, the task of locating a template has to be easy because the task of creating a new one is so easy in itself that anything even moderately inconvenient will be rejected by the user. People were absolutely eager to develop templates.

To convert a file, one then specifies the file, template to be used, either WKS, DIF, or delimited output format and output file name (the appropriate file name extension is automatically appended). As the file is being converted, a graphic as well as numerical representation of the status of the procedure is presented. This provides positive feedback that the process is taking place as expected, and that in turn increases user confidence in the entire procedure.

At the end of the conversion process the user has a file which can be used directly by the spreadsheet or database program. Lotus 1-2-3 could read the files directly and with no unexpected problems. The output designated for dBase II is in delimited ASCII text form and so must be imported to dBase. While this process in not quite as friendly as the spreadsheet procedure, the problem is in the dBase access and not with OneShot.

We tried OneShot on several different applications, including a communication file captured from a mainframe database program MIS report. In all cases, the conversion was reliable and the program features fully supported the exchange.

### ☐ Ease of Use

Word quickly spread around the office that there was a way to very easily convert files to spreadsheet and database formats. Staff members who used those types of programs found new applications because the problems of time and/or money related to data entry no longer existed.

The interesting effects were that people who were not previously doing spreadsheets and databases, even though they were equipped to do so, started to. And then there were those who began to realize that maybe a computer could help them better manage their information. We were surprised to find that many applications became feasible just because there was an easy way to capture historical data kept on another system or in another form.

The reason for all this new activity is that the door to data from most any source at all, whether residing inside the company or in an outside database, was flung open. Not that the conversion couldn't have been accomplished before, but because now anyone could do it at any time with informaton from almost any source. We converted a word processor system file, a mainframe file, 2 PC files, and even a spreadsheet file created on an Apple II and transmitted to the IBM PC. In fact, the capabilities had probably existed before for many of these applications, but never in a form where our organization could avail ourselves of them without technical support.

OneShot was, simply put, a joy to use.

### ☐ Support

DataViz provides direct support. In our conversations with their support staff we were impressed with their confidence of the product and intention to enhance it wherever possible.

In the event that a user manages to produce an unforeseen error, a message appears on the screen explaining that he should not have been able to do that and requests that he contact the vendor to resolve the situation.

Replacement diskettes will be available upon return of the damaged diskette. Pricing is yet to be determined.

### ☐ System Interface

OneShot works with any computer data formatted for visual use, such as ordinary reports or documents. There seems to be little technical restriction on document structure, only the question of whether the lines which should be processed can be distinguished from those which should not be.

The data may be output in either WKS, DIF, or delimited format and is compatible with programs such as Lotus 1-2-3, VisiCalc, SuperCalc, dBase II, or any other programs accepting those formats. We tried the output using several spreadsheet programs and experienced no difficulties with any of them.

  

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### ☐ Vendor Experience

DataViz, Inc is in its first year of operation. OneShot is its first product and was released in February of 1984. The principals in DataViz have long worked in microcomputer software, supplying operating system and language processor software to OEM equipment vendors and to end users.

## ■ PRODUCT OVERVIEW

### ☐ Terms & Support

**Terms** • OneShot is available from retail outlets on a license for purchase basis; volume pricing is available.

**Support** • provided on a hot-line basis from the vendor; replacement diskettes available upon return of damaged diskette.

### ☐ Component Summary

Software elements consist of the following files and programs: FIRST.RPT and SECOND.RPT are sample data; FIRST.TPL and SECOND.TPL are sample templates; FIRST.PRN and SECOND.PRN are sample results; and FIRST.WKS and SECOND.WKS are sample worksheets. Programs include ONESHOT.EXE, README, ONESHOT.DAT, README.BAT, and ONESHOT.HLP.

*LCNS: license fee.*

**OneShot** **$195 lcns**

### ☐ Computers/Operating Systems Supported

OneShot runs on the IBM PC and PC/XT under PC-DOS; it also supports IBM PC-compatible machines running MS-DOS.

### ☐ Minimum Operating Requirements

The package requires 128K bytes of memory and one floppy disk drive.

### ☐ Features

**Display Type** • full screen; display of Help files returns to current screen.

**Display Feature Utilization** • blinking, reverse video.

**Command Structure** • none available.

**Command Type** • pointing technique using cursor controls of typing first letter of desired command and function keys.

**Load/Save Facilities** • complete files are loaded; file not found permits retry; save does not recognize existing file of same name; file names relevant to the current function are displayed.

**• END**

# DAY ONE Software DAY ONE
## Data Management Package

### ■ PROFILE

**Function** • menu-driven database manager and applications generator.

**Computers/Operating Systems Supported** • IBM PC, IBM PC/XT, IBM PC compatibles, DEC, HP 150, NCR, Sony, TeleVideo, TRS-80 Model II, Osborne, Kaypro, Victor, Epson/PC-DOS, MS-DOS, CP/M-80, TRSDOS.

**Configuration** • 128K bytes of memory (Z80 requires 64K bytes), 2 diskettes, system printer; hard disks are supported.

**Current Version/Version Reviewed** • Version 3.0/DAY ONE Advanced (PC-DOS), Demo version was reviewed.

**First Delivery** • September 1983.

**Number of Installations** • 500 plus.

**Comparable Products** • Ashton-Tate dBase II; R:BASE 4000; Condor; Innovative Software TIM.

**Optional Associated Software** • none.

**Price** • $695 retail price.

**Vendor** • DAY ONE Software, Inc; 618 Shoemaker Road, Suite 201, King of Prussia, PA 19406 • 215-337-8255, 800-438-3291.

**Canada** • currently no distribution in Canada.

### ■ ANALYSIS

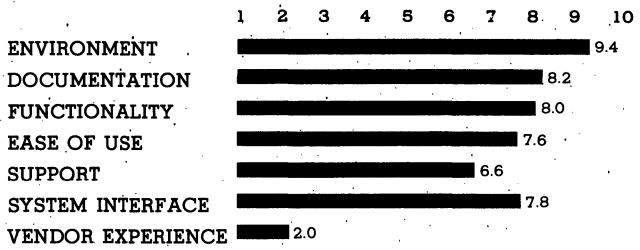
Database software is starting to get considerable attention, and utility templates are being introduced to facilitate the use of existing programs by non-programmers. DAY ONE integrates an easy-to-use interface with the database program, allowing novice users to create files, manipulate the data, and produce reports without a great deal of, if any, technical assistance.

The product will find considerable application in all areas where there is a need to provide users with the ability to quickly produce database-type systems without technical assistance. Elegant it is not—at least not without a disproportionate amount of effort. Functionality is what the product supplies.

For situations where a major application is to be developed and implemented, a more flexible if less friendly product should probably be used. In order to be easily utilized without programming ability, certain sacrifices must obviously be made. The time and effort required to overcome these sacrifices is better spent developing a more sophisticated application.

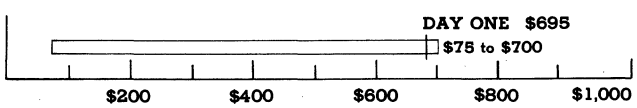
The product is a step in the direction of more flexible and easy-to-use software. If the ability to run on a wide variety of hardware and operating systems is of paramount importance, this is a good choice. In terms of fully utilizing the powers and capabilities of a specific system configuration, one might very well find something else more suitable.

**PRODUCT QUALITY RATINGS***




*For an explanation of rating criteria, please refer to the Data Management Features section in the Software Evaluations (805) report. The Overall Package Average is 7.1.

**PURCHASE PRICE RANGE** Software Price Range




**DAY ONE SOFTWARE DAY ONE** • open bar shows the typical range of prices for **DATA MANAGEMENT** software used in a corporate environment • the vertical line within the bar graph indicates the price of **DAY ONE**, the evaluated product, relative to the price range of similar products.

#### ☐ Strengths

The product appears to be able to operate on almost any system and configuration that is likely to be found anywhere in the organization. This includes IBM, Radio Shack, and any CP/M system. Small applications can even be implemented on a single drive.

Everything to allow the non-programmer to use the product is bound together in the system. There are no third-party applications generators or other kinds of utility add-ons needed as with other products. The added benefit is that there is only one source needed to provide support.

Virtually everything is menu-driven. One set of menus leads to another and the process is repeated as many times as necessary to walk the user through the system. The context-oriented Help system and the on-screen references to the documentation provide additional friendliness.

The overall application environment created is one which can reasonably be expected to successfully produce results with untrained personnel in a minimal amount of time. The avid user will continue to expand his familiarity with the product and further utilize the features available.

#### ☐ Limitations

The power and abilities of particular computers are sacrificed to maintain a standard user interface. The result

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## Data Management Package

is that on a system with ample function keys, not one is utilized.

Even with 2 320K-byte drives, frequent diskette swapping is necessary during initial application creation. Luckily, swapping is at a minimum thereafter.

The product is not dynamic—file size must be specified when the structure is first defined. If more records are to be added than are initially stated, they can be done so without damaging existing data. File size must be specified to prevent file fragmentation.

## ■ HANDS-ON EVALUATION

The product's packaging certainly was an attention-getter. But the labeling claiming that it was personal software for business applications did put us on our guard. There are about fifty different applications listed on the package—a fact which led us to expect some internal "template" support for each. We discovered from the vendor that solution type products are to be offered, such as, mail list, manufacturing, and others.

We very much desired a database manager that would be self-contained and powerful. By self-contained we mean with its own code generator, not an add-on from a third party. The target users for this type of product would be department and project managers without programming experience. Minimal technical assistance would be available to them, so they would be left to the documentation and tutorial for installation and training.

Our managers felt that the level of documentation and operation of DAY ONE seemed to be behind the times. Some of the difficulties are, no doubt, attributable to the attempt to produce one product for 3 different operating systems and many computers. The tutorial disk did serve as a non-threatening introduction to database applications in general, and this product in particular. For the most part, hands-on experience is left to the written tutorial.

After working with the package, we feel that most people in a small business or personal environment would find DAY ONE quite acceptable. However, overall, our staff felt that, relative to the current state of the art, the product does not take full advantage of the power available in the PC to implement ease of use while maintaining flexibility.

### ☐ User Interface

DAY ONE uses a combination of 2-letter command abbreviations and menus to permit relatively easy access to all package facilities. No function keys are utilized.

Menus: All selections are made from a series of menus. Creation of custom and sub-menus is also menu-driven. There is no way to bypass them.

Control characters: Not used.

Function/special keys: Not used.

Command language: 2-letter alphabetic abbreviation (FI=file, CO=copy, HE=help, etc) entered at instruction line.

Positive feedback: Incorrect responses result in opportunity to retry. There is no direct confirmation of correct entry, but the close menu context and field-by-field entry rules make incorrect entries so obvious that correct ones require little positive support.

Status display: None.

Help facilities: "HE" at instruction line produces context-oriented Help screens listing available commands and a short description of each. All screens are referenced to the manual.

### ☐ Environment

DAY ONE clearly is designed to run on almost anything. The documentation lists only one diskette drive of any size as a requirement.

One price of this configuration flexibility is the requirement to change diskettes often. The program set is supplied on 5 diskettes, and it is easy to find an application that needs 3 out of 5. We found that even with 2 320K-byte drives there was an inordinate amount of diskette changing required. For regular use a hard disk would be much more reasonable.

With only 128K bytes of memory required, systems with 256K bytes or more RAM can still utilize print spoolers and RAM disks or other programs operating concurrently.

No copy protection schemes or other operational restrictions were encountered.

### ☐ Documentation

The documentation is supplied in a glossy, but oversized (by IBM standards), 3-ring binder. Since we received a first run printing, the paper was thin, which caused the pages to tear as they were turned. The vendor claims future copies have thicker paper. Tabs are provided to separate functions.

The "Teacher" diskette serves primarily as an introduction to database management concepts and the capabilities of the product. Examples are given, but there is minimal interaction permitted. As an overview it is friendly and easy to comprehend. It does not teach one how to use the product. That is left to the printed tutorial.

The printed tutorial is divided into the fundamentals, and basic, intermediate, and advanced functions. Each lesson is self-contained and is keyed to the appropriate reference section of the manual. A grid system is utilized to present the steps to be taken in each lesson. The grid is composed of 3 vertical columns. The first makes reference to what is happening on the monitor. The second indicated what information or command is to be typed, and the third explains why. By itself the grid format is quite clear and easy to understand. Some of our staff did find it difficult switching their orientation back and forth between the screen and the grid due to the dissimilarity of the two.

The only command reference for normal operation is a foldout page in the back of the manual, printed on the same lightweight paper. It lists in alphabetical order the abbreviations of the instructions to be entered at the instruction line.

The reference is easy to use and includes examples and

  

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screen representations. An unusual coding system is implemented. Both the tutorial and the screen displays refer to the exact place in the reference manual where a topic is explained in greater detail. At first the numbering system was somewhat mystifying, but once understood it was of considerable assistance.

The manual is indexed by user-oriented topics sequenced in the order in which they would be performed. The index tabs also contain references to the coding system used by the tutorial and the active screen displays. The information contained in the reference manual is complete and generally easily understood. The cross-reference system considerably facilitates locating items in the reference, and the index is excellent in its "subject" orientation. We found little fault with the manual.

### ☐ Functionality

The "Teacher" diskette served as an adequate introduction to what is possible to accomplish with DAY ONE. Possibly of greater value, it served to explain the ease of use in a seemingly objective manner, which managed to eliminate some, but not all, fear of the unknown in our new users. Our clerical staff members gained a measure of confidence from the tutorial which was, realistically, out of proportion to the actual level of expertise which the manual imparted. We felt that the confidence was worth the effort.

The product's claim that no programming language is needed proved to be true. Menus lead the user through whatever step-by-step procedure is necessary to accomplish the desired task, within the limitations of the system. The menu system is so complete that anyone familiar with the basic terminology of the system can apply it; there is no programming in any traditional sense with DAY ONE.

A built-in security system controls access at sign on. Further control is available at the main menu, file selection, screen selection within a file menu, and at the report level. Examples and recommendations regarding the organization of a security system are provided.

File structure can be changed merely by selecting the appropriate menu entry and proceeding to make the changes. Fields may be added to an existing file merely by following the on-screen instructions. No copying of data back and forth is required as in other familiar database programs. File screens may be customized to suit specific needs. Line and column positions of field names and data can be changed to facilitate data entry. Headers may also be included to provide additional identifying information. If necessary, as many as 9 screens can be created to allow additional information to be input and increase legibility.

Special menus can be created to increase ease of use and allow for specific access restrictions. All programs relating to a specific function or group of functions can be put in one place. We found this useful to tailor the system to specific application areas, particularly where the level of skill of the users in an application was significantly lower than the organization average.

Arithmetic functions allow formulas based on field locations to do multiplication, division, addition, and subtraction. Literals may also be used in the formulas. The facility is not unlike the formula entry in spreadsheet programs in its entry, though the references to other data in the file are obviously more limited since all records do not reside in memory at the same time.

Reports may be generated from selected data from any file in the system. The report can qualify records in the selected files, sort the data, define the fields to be printed, create totals to be printed, and define arithmetic functions between fields. Page formatting, such as margins, lines per page, and selective positioning of information to fill in a pre-printed form is also permitted. Multiple report specifications can be maintained in separate files to automatically produce a variety of reports merely by selecting the appropriate menu number.

Up to 9 files may be manipulated simultaneously. Data from different files may be combined into new files, data may be transferred via arithmetic functions, and calculations may be performed on data in different files at the same time.

Labeling important fields as key fields allows for rapid access to information. The use of a key field eliminates the need to sort on that field since the product automatically maintains indexes on key fields.

Utilities are provided to interface with dBase II DBF files on an import basis. DIF files may be converted to or from DAY ONE format.

### ☐ Ease of Use

The installation process itself is menu-driven and rather easy. Only very basic and obvious information need be known: number of drives, whether or not you have a hard disk, and the width of your printer. Confusion can result from the fact that the instructions for the different operating systems are not separated. One must manage to filter out all the extraneous instructions and comments that do not pertain to the particular computer and operating system being used.

It is recommended that the program disks be placed in the B: drive and data disks in the A: drive, contrary to normal practice. This is an unorthodox approach which tended to confuse some of our staff; we could find no justification for this recommendation. Our technical specialist speculated that it might relate to operation of the product on systems other than the IBM PC but could not suggest its motivation even there. The vendor claims this approach results in a more efficient search and retrieval in looking for and creating data files and reports.

The product is supplied on 5 separate diskettes. With only a 2 drive system, staff members were constantly swapping disks. One of the most difficult situations involved the utilities. To check file size the utility disk must be inserted in place of the master disk. The file size is then checked and the master disk must be re-inserted to return to the menu to select the expand file function on the utility disk, which requires that the utility disk then be re-inserted.

If not configured to provide disk changing prompts, and function called is not on the current disk, a message requesting insertion of the proper diskette appears on the

  

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screen. The prompts may be added at any time, by re-initializing the system.

The Main Menu consists of selections which describe what function is to be performed, such as "Describe Your File." Then another menu appears, further describing the options available. In this case one is presented with a choice of defining fields, adding fields, etc. Normal and customary situations are covered in this manner. Even the type of data for each field is chosen from a menu: alpha, numeric, phone, social security number, date, or zip code, all of which are preformatted. Zip code, for instance, consists of a field of 5 character positions followed by a hyphen, followed by four additional character positions. This method, while tedious for an experienced user, is simple-minded enough for almost anyone to successfully deal with. An example of the type of limitations imposed is that a field defined as alpha will accept alpha or numeric entry. There is no option available to restrict a field to alphabetic entry only.

Another example of the restrictions imposed by the product is that a search distinguishes between upper- and lowercase letters. Upper- and lowercase letters are required during the Browse mode only. This requires that data be entered with conformity.

During data entry the field size is indicated by a series of underscores. Once the data has been entered, the command code FI for file must be typed. Otherwise, the entry will be rejected. We found this to be an inconvenient departure from the more traditional form of accepting a return as the representation of entering the information into the system.

A data file must be pre-allocated before use. The size of the file is set at this time, and if more records need to be entered than were originally specified in the file description process, you must go back and modify the file before the additional information can be entered. This is not an excessively difficult task, but it does cause some consternation during the entry of data. A benefit of the pre-allocation is that it requires that the user consider file size prior to building a file on a disk.

Reports are also set up from a series of menus. A printed copy of the specifications of the file containing the desired information, as well as a printer layout form, is necessary. A separate report format is defined for each report and is listed on the Report Menu screen. Information contained in up to 9 files may be included in each report. Any or all fields may be included in the report as well as whatever number of title lines are desired. Data fields may be selectively totaled and qualification parameters may be specified. Page formatting, such as margins, lines per page, and selective positioning of specific information to fill in a pre-printed form, is also permitted.

### ☐ Support

DAY ONE Software provides unlimited support via their toll-free number. Their staff was knowledgeable and anxious to be of assistance and indicated that the version we were using was still undergoing some minor refinements.

### ☐ System Interface

Data may be selected, formatted, and output in print image format as a standard ASCII text file, or in DIF format for use by other programs. Utilities are also provided to import files in both DIF and DBF file formats.

There is no provision to directly produce a file for merge-printing use by a word processor.

### ☐ Vendor Experience

DAY ONE Software has been in business for over 2 years. The product was first introduced on a regional basis in October 1983 and is the vendor's first product.

## ■ DETAILED PRODUCT DESCRIPTION

### ☐ Terms & Support

**Terms** • the product is available on purchase license basis from computer and software stores and other retail outlets • a basic version, for applications not requiring the simultaneous updating of multiple files, fast changes/alterations, or optimum productivity, is available; an advanced version for users requiring those features is also available; within 60 days from the date of purchase, the basic version may be upgraded to the advanced version for $200.

**Support** • telephone hot-line support provided by vendor's technical support group; toll-free number is provided.

### ☐ Component Summary

The product is supplied on five diskettes: Master, Master A (Reports), Master B (Advanced), Utility, Utility A/Teacher.

Basic Version: **$495 lcns**

Advanced Version: **695**

### ☐ Computers & Operating Systems Supported

DAY ONE runs on a wide variety of machines including: IBM PC and PC/XT, TeleVideo system, the Radio Shack TRS-80 Model II, the Osborne, Compaq, Columbia, Kaypro, Victor, Epson, and Apple. It supports PC-DOS, MS-DOS, CP/M, and TRS DOS operating systems.

### ☐ Minimum Operating Requirements

The package requires 128K bytes of memory (64K bytes for Z80 machines), 2 diskette drives, and a printer. The package will take advantage of systems equipped with a hard disk.

### ☐ Features

**Record Size Limitations** • up to 891 fields per record.

**File Size Limitations** • up to 65,534 records per file.

**Field Size Limitations** • up to 255 characters per field.

**Key Field Limitations** • none.

**Screen Format Definition** • menu-driven with full position control available; a letter code is used to identify the elements to be positioned, and a numbering scheme is used to indicate the actual screen position.

**Entry Edit Capabilities** • none.

**Report Format Definition** • menu driven with headers, footers, print formulas, arithmetic functions and totaling, control of margins, page length, page numbering and page breaks, multiple selection and sorting criteria.

**Sort Capabilities** • single or multiple fields, alphabetical or

*LCNS: license fee.*

# DAY ONE Software DAY ONE
## Data Management Package

numerical, ascending or descending; menu driven.

**Query/Selection Capabilities** • partial key, full key, multiple keys with sub-indexes; output to screen, printer, print image disk file, or DIF file.

**Programming & Batch Processing Capabilities** • menu driven at development and applications levels.

**• END**

# Digital Learning Systems Exploring the IBM Personal Computer

## PC Training Aid

### ■ PROFILE

**Function** • provides a basic introduction to the IBM PC, its keyboard, operating system, BASIC programming language, and peripheral devices.

**Computers/Operating Systems Supported** • IBM PC and PC/XT; a version for the PCjr is also available.

**Configuration** • special versions are used for systems with the monochrome display and the color graphics adapter; one disk drive is required, and memory requirements are not stated; a printer is helpful but not mandatory.

**Current Version/Version Reviewed** • Version 1.0/Version 1.0 for the IBM PC.

**First Delivery** • August 1983.

**Number of Installations** • information not available.

**Comparable Products** • Knowware.

**Optional Associated Software** • none.

**Price** • not available for retail sale.

**Vendor** • Digital Learning Systems, Inc; 168 East Main Street, Denville, NJ 07834 • 201-627-7917.

**Canada** • distributed with IBM PCs throughout Canada.

### ■ ANALYSIS

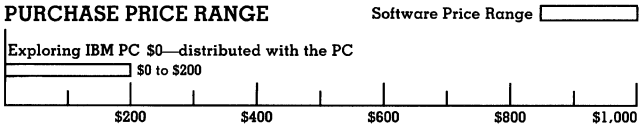
"Exploring the IBM Personal Computer" is a diskette-based self-teaching program for the IBM PC and PCjr, whose purpose is to acquaint new users with the basic characteristics of either system. It is distributed by IBM with new purchases.

In "Exploring," the user is taken through a sequence of displays which are organized like a training manual into pages and chapters. As with a book, the user can "turn back" a number of pages to review older material or skip forward around something not needed. Graphics, animation, sound effects, and even music are used to contribute to the learning experience.

Exploration, even in older and more exciting times, could still be boring in spots, and many professionals will find that the package carries on this early tradition. There is less operator interaction with the product than would be desirable, making it appear almost as a "video book" in places. Operator responses are not checked for correctness, so no reinforcement of correctly-acquired skills is present. The product also tends to address itself primarily to total novices.

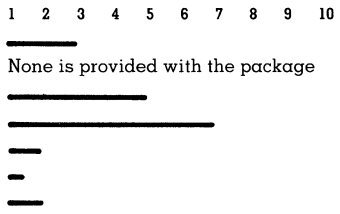
While "Exploring the IBM Personal Computer" is certainly a valuable vehicle for introducing a true novice to the world of the IBM PC, management and professional staff will probably be better off reading a book.

**PURCHASE PRICE RANGE**




**DIGITAL LEARNING SYSTEM EXPLORING THE IBM PERSONAL COMPUTER PRICING** • open bar shows the typical range of prices for **TRAINING** software used in a corporate environment • the vertical line within the bar graph indicates the price of **Exploring the IBM Personal Computer,** the evaluated product, relative to the price range of similar products.

**PRODUCT QUALITY RATINGS***




*For an explanation of rating criteria, please refer to the Software Evaluations (805) report.

#### ☐ Strengths

About the only thing which a user will need to know about computers to use "Exploring" is how to turn a system on. The package even assumes that the user is unfamiliar with the keyboard. Each control key and special function key is covered extensively, making this part of the material the most useful by far in the product.

The use of graphics and animation in "Exploring" provides an effective reinforcement to learning and a demonstration of the power of the PC-both very useful to a new user in a business environment. The quality of the graphics—readability and style—are uniformly excellent. Persons new to personal computers find the display captivating.

The use of a program aid to familiarize users with the system capitalizes on the natural human interest in computers. It is easier to get a beginner to watch (and interact slightly with) a computer display than to read a manual.

#### ☐ Limitations

The greatest problem with "Exploring" is that it does not explore enough. The product is designed simply to introduce the user to a certain few functions of the PC. Hopefully, after viewing the program displays, the user will gain confidence to go further, but the program will probably NOT take a user beyond basics.

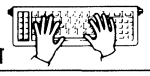
The displays and animation, while attractive, tend to resemble a book too closely. The user has little interaction

# Digital Learning Systems Exploring the IBM Personal Computer
## PC Training Aid

with most of the material, and thus less of a feeling of participation than would be expected with computer-aided instruction. In most cases where interaction is solicited, the program ignores the operator response. There is thus no indication that a skill has or has not been acquired.

The level of the material is somewhat below that which would appeal to a bright office worker. This, combined with the lack of participation, makes its use by anyone with any familiarity with computers, unchallenging to the point of boredom.



### ■ HANDS-ON EVALUATION

Everyone will love "Exploring" based on first impressions. It requires nothing to run except knowledge of the location of the power-on switch. The program loads upon power up and provides the user a flashy demonstration of the graphic power of the IBM PC. People are certain to stop and watch every time it is used.

As we progressed, however, the package regressed. The material does not grow with the user, and newly developed participatory skills are not reinforced. We expected the early sections of the material to be primarily "lecture," but that tone was continued throughout. The people who stopped by to watch wandered away, and the operators themselves complained that they had no chance to DO anything.

We also found a serious lack of positive feedback. There was no "Yes, that's right! Now do. . ." form of reinforcement, something which would have made the product more effective. Where the user is asked to perform a task, the program accepts any action whatever, even the incorrect one.

One of our staff gave the package the ultimate pan: "It got to be just like watching television". Others loved it and brought friends in just to show them the program. Those who liked it said it was useful, and those who did not like it felt it was demeaning. We never decided which was cause and which was effect.

### ☐ User Interface

"Exploring" uses a custom display which makes extensive use of computer graphics and animation. Sounds and music are also used to hold the interest of a novice user. But user interaction with the product is limited, and user responses are not validated.

Menus: None. The product generates on-screen text and solicits user responses in different ways depending on the particular lesson area.

Control characters: Not used, ignored by the product if keyed.

Function/special keys: The "PgUp" and "PgDn" keys, alone or in conjunction with the "Alt" key, are used to control movement forward and backward through the course material. Function keys are used for the word processing demonstration, based on an imaginary word processor called "Funwriter." No popular conventions of word processing function key usage are followed.

Command language: None.

Positive feedback: User responses, even where solicited, are not edited for correctness and no positive or negative comments are made based on the data entered by the operator during the tutorial.

Status display: None.

Help facilities: None.

### ☐ Environment

We could not determine the minimum configuration required to run "Exploring", but we suspect that 64K bytes of RAM would suffice. Either a monochrome display or a color graphics adapter are required, but our version of the software was an either/or; you could not use one copy of the program for both. You do not need a color monitor to use the product if you have a color graphics adapter—the color selection is made so that monochrome viewing of it will be practical.

The diskette on which the program is supplied is not copy protected, so a backup copy can be made. We installed it on a hard disk as a trial, and it will in fact copy to hard disk. It will run from hard disk because there is no way to invoke the program. In floppy disk loading, a special command interpreter is loaded from the "Exploring" disk. This is actually the program—what is on the rest of the files is interpretive data for the displays. When we copied it to our hard disk, our DOS command interpreter was destroyed and we could no longer use the hard disk for boot. This problem was cured only by booting the system from a floppy disk and copying the COMMAND.COM file onto hard disk again. Not to be defeated, we renamed the COMMAND.COM file on the "Exploring" disk "EXPLORE.COM" and put it on the hard disk. This time, it worked.

### ☐ Documentation

No written material is provided with "Exploring", and none is needed. The program generates screens which lead the user through the operation of the system.

The text material contained in the course, it if were collected as a single document, would take up little space. The displays of text are made in 40-column mode, and our estimate of the total volume of material placed it at only about six typed pages.

### ☐ Functionality

"Exploring" is designed to introduce the true computer novice to the IBM Personal Computer, and does this very effectively. The program is a limited form of computer-assisted instruction (CAI), with the material organized into five chapters; Instructions (on running the program), Keyboard, Disk Operating System (DOS), BASIC programming, and the printer. This structure is presented at the start of the actual tutorial in a form which looks like a menu but which cannot be used for selection of areas of interest (we tried!).

# Digital Learning Systems Exploring the IBM Personal Computer
## PC Training Aid

"Exploring" boots automatically on loading, so there is no need to understand IBM's PC-DOS even to the extent of being able to load a program. The initial set of screens, accompanied by appropriate sound effects, are guaranteed to stop all action in the office. In fact, we had to move the system to a conference room for use because we collected too much of a crowd.

The first "chapter" in "Exploring" covers the use of the program itself. Users may move forward or backward through the text using "PgUp" and "PgDn" for page-by-page motion, or the same keys in conjunction with ALT for chapter motion. These keys are understood throughout the program.

Following the operations orientation session, "Exploring" goes into the keyboard operation with a startlingly real picture of the keyboard as a model. The groups of keys are discussed one at a time, and at the end the user may press any key and receive an explanation of its use. The material was well presented and thorough, and everyone who didn't already know how to use the keyboard found it useful. Even novices got tired of this section quickly, however.

Keyboard drill is a part of any computer (or even typewriter) learning experience. "Exploring" handles that through what proved to be the most controversial part of the product a pseudo-word-processor called "Funwriter". The graphics and sound on this were very good, but since there isn't any Funwriter word processor, many of the users questioned the value of learning skills on it. Perhaps Funwriter is based on some real product, but if so it was one which we had never seen.

The Funwriter drill has some useful elements despite lacking a direct practical association with a real product. The use of the numeric lock, scroll lock, and shift lock keys are explained, and many of the word processing features, such as automatic word wrapping to the next line, are shown. Deletions, inserts, corrections, and line movement are all shown, mechanized through the use of function keys. The Funwriter concept is actually not a bad word processor, and one of the professional staff trying to master a more popular (and more complex) product remarked wistfully that this was more like it. But there is nothing like it, and function keys used by Funwriter are different than those used for similar functions in the EDLIN text editor supplied by IBM with DOS. Is there such a thing as generic word processor features and functions? Perhaps Funwriter demonstrates them, but it is not particularly useful in learning a REAL product.

The next chapter, dealing with storage and DOS, is probably the most worthwhile. The disk usage, characteristics, and labeling are all covered in enough detail to be useful, and concepts like disk directories are also mentioned. Care of the physical media is stressed with one of the best animated sequences in the entire product, one which many of our users "reviewed" several times for another laugh.

The best part of the disk/DOS presentation was that on the utility programs. Here the user is given an opportunity to "practice" several utility concepts without actually doing anything to live disks. Users could inquire as to the function of each command, but the list of valid commands scrolled off the screen quickly, so unless you knew the command name you could not inquire. We were not especially anxious for our office staff to understand the function of all the DOS commands in any case.

The chapter on BASIC programming was really basic. It allows a user to see what some lines of code look like, but does not in any way teach the language. We also noticed that if the user erased the entire program from the screen as a part of the exercise, it still ran and produced the expected result! Given the fact that ordinary programs often fail even when present, we felt that teaching a user that a program will work when absent defeated the purpose of teaching programming at all.

The printer section provides a fascinating view of a printer simulated on a screen, complete with perforations, pin holes, etc. Again, it was a marvel of graphics skill. The description of printer operation (which is printed on the pseudo-printer complete with quiet sound effects) is complete and informative, one of the only ones we have seen that covers all the switches and their applications. Unfortunately, the only way of printing which was discussed was the "PrtSc" key; no mention of the DOS PRINT command was provided here (it was in the prior section, before we had learned what a printer was).

In all, the material presented was attractive but tantalizing—it showed what could be accomplished through the use of a good computer tutorial without fully accomplishing it.

### ☐ Ease of Use

There is not question that "Exploring" is easy to use, only whether it may be too easy.

The boot-up of the program is automatic and does not rely on the traditional AUTOEXEC.BAT file which usually sets a program to run upon booting the system. Instead, the command interpreter (COMMAND.COM) is modified to do nothing but run the tutorial. This has a desirable effect in that it prevents a novice user from even issuing the DOS commands—you cannot even get a DOS prompt. This means that a total novice can be given the tutorial and a hard disk system without being able to delete valuable files. In fact, you cannot get out of "Exploring" by any means whatever short of seeing it through or turning the system off.

The displays used and the mode of instruction is very easy for even novices to follow, but the package is only slightly interactive, and where it requests user input it does not validate it. The only keystrokes which affect operation are those which move you back and forth in the "pages" of the display. We keyed errors, erased the wrong words, performed the wrong tasks, and even erased the entire program without even giving "Exploring" a pause. It very effectively told us what to do right, but never recognized success or failure.

The material also falls short of providing a real understanding of any particular function or feature of the PC.



# Digital Learning Systems Exploring the IBM Personal Computer
## PC Training Aid

You can learn the operation of an imaginary word processor, but not of the text editor supplied with the system. You can learn how to copy a file, but not how to create one. You can even learn what a BASIC command looks like, but not how to program. If the material referenced parts of the documentation for further reading, a novice-turned-beginner could take the information gathered through "Exploring" and carry it far enough to be useful, but there is no such reference.

### ☐ Support

Digital Learning Systems is obviously counting on IBM to support the package. Our call to them to determine how much memory was actually required to run the program elicited a considerable amount of surprise and confusion, which ended in the contact admitting that they had no idea. We helpfully suggested that maybe 64K bytes of RAM was about right, and they agreed that sounded reasonable.

In defense of the lack of direct support, the product needs virtually no support. A user unable to get "Exploring" started either has a hardware problem or would unquestionably be unable to successfully employ a telephone to contact the vendor.

### ☐ System Interface

You do not interface with "Exploring". The product is designed to be run from power-on bootstrap through completion, and no way short of pulling the plug or turning the system off will deter it. The command interpreter supplied with the product is NOT a standard product and absolutely should never be copied to anything. It can be, however, with the result that whatever disk it is copied TO can no longer be used unless the COMMAND.COM file is replaced from a valid source.

### ☐ Vendor Experience

Digital Learning Systems, Inc was founded in 1981 and has grown rapidly thanks to OEM contracts with IBM and Apple. It supplies tutorial/educational software to Fortune 500 companies and computer manufacturers. "Exploring" was first published in 1983. The company expects to enter the direct user market shortly.

## ■ PRODUCT OVERVIEW

### ☐ Terms & Support

**Terms** • "Exploring the IBM Personal Computer" will be supplied with new purchases of the IBM PC, PC/XT, or PCjr.

**Support** • vendor is counting on IBM's support; no support is needed to execute the program.

### ☐ Component Summary

The actual program which administers the tutorial is packaged as COMMAND.COM on the diskette.

Tutorial data is included in various data files also supplied on the distribution diskette, and the diskette must remain loaded during program execution.

The program is not currently available for retail purchase.

### ☐ Computers & Operating Systems Supported

The package is designed for use with the IBM PC, PC/XT, and the PCjr.

### ☐ Minimum Operating Requirements

Minimum memory requirements are not indicated, but the package will run with 64K bytes. One diskette drive and either a monochrome or a color graphics adapter are required. A printer is optional.

### ☐ Features

**Training Area** • general familiarization with the physical features, commands, and use of the IBM Personal Computer.

**Target Audience** • novice computer users or purchasers; individuals with even small amounts of PC exposure are unlikely to profit from use of the product.

**Method of Instruction** • computer-sequenced text and graphics present course material in a "chapter/page" structure within which the user can move in a manner similar to turning pages in a book; sounds are used for reinforcement.

**Degree of User Interaction** • users have only limited opportunities to interact with the package, and in those cases the accuracy of the entry is not verified.

**Average Time to Complete Course** • one hour or less.

**Course Value as a Reference** • minimal.

**• END**

# Dow Jones Market Manager
## Security Portfolio Management Package

### ■ PROFILE

**Function** • the creation and maintenance of one or more security portfolios, and the provision of accounting information for these portfolios, to provide access to the financial data, news, and pricing information provided by the Dow Jones News/Retrieval service.

**Computers/Operating Systems Supported** • IBM PC and PC-compatible systems using PC-DOS and MS-DOS.

**Configuration** • minimum memory configuration is 128K bytes of RAM; 2 floppy disk drives are required, they may be single or double sided; also required is an asynchronous communications adapter card and a Hayes Smartmodem with cable; no other modem is supported; a parallel printer is optional.

**Current Version/Version Reviewed** • Version 2.0/Version 1.01-2.

**First Delivery** • December 1982.

**Number of Installations** • information not available.

**Comparable Products** • no known products provide equivalent functions; NF Systems Stock Portfolio provides a recordkeeping system for stocks; Micro Investment Systems Stock Portfolio Reporter.

**Price** • $299.

**Vendor** • Dow Jones Software, Dow Jones & Company, Inc; P.O. Box 300, Princeton, NJ 08540 • 609-452-2000.

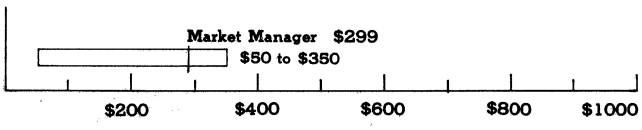
**Canada** • currently no distributors in Canada.

### ■ ANALYSIS

The Dow Jones Market Manager is a securities portfolio management package intended for both private and professional investors. It is intended to provide an accounting and control system for the management of one or more portfolios. Portfolios are created off-line, then updated either online automatically or off-line manually. The program seems to operate well and is quite easy to use.

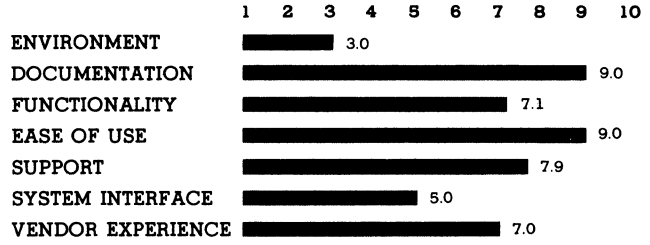
The package is in some ways contradictory. An investor with few stocks would have difficulty justifying the expense and aggravation of auto-updating. A large investor with many stocks or a professional with many portfolios might find the program more useful, except for the fact that it doesn't account for dividends or commissions. The package is too much for a small investor and not enough for a large one.

**PURCHASE PRICE RANGE** Software Price Range




**DOW JONES MARKET MANAGER PRICING** • open bar shows the typical range of prices for **FINANCIAL PLANNING** software used in a corporate environment • the vertical line within the bar graph indicates the price of **Market Manager**, the evaluated product, relative to the price range of similar products.

**PRODUCT QUALITY RATINGS***




*For an explanation of rating criteria, please refer to the Software Evaluations (805) report. The Overall Package Average is 6.9.

### ☐ Strengths

No one should have much of a problem using Market Manager. The package is very well documented. The manual is comprehensive and easy to understand, and even includes sample reports with explanations. Although the distribution diskette is copy protected, a backup copy is provided with the package. The package is easy to operate and is entirely menu-driven.

The reports created by the package are clear, well explained, and useful. Report formats are easily understood. Printer control is acceptable—the ability to specify printer setup strings allows the use of almost any parallel interface printer. The information obtainable from the Dow Jones News/Retrieval service may also be printed, which is a nice feature.

### ☐ Limitations

Market Manager is environmentally restrictive. The package lacks capability in the area of communications; only the Hayes Smartmodem is supported. Hard disk operation is not supported either, the distribution diskette is copy protected precluding installation of the program on a hard disk, and the data storage disk must also be floppy.

From an applications point of view, there are 2 areas that are lacking. The first is a problem with the program itself. There is no provision for recording commissions and dividends. Both of these are important factors in portfolio analysis and this lack is surprising. The other weakness lies with the services provided by the Dow Jones News/Retrieval service and accessed through the Market Manager. While some of the services provided are quite good, others are somewhat limited. Current stock quotes are 15 minutes late. The Historical services, the Historical Stock Reporter and the Historical Quotes, are limited in the amount of time they cover.

# Dow Jones Market Manager
## Security Portfolio Management Package

### ■ HANDS-ON EVALUATION

The Dow Jones Market Manager is designed for use by a particular segment of the microcomputer community, either the private or professional investor. Since many of the personnel we normally use to evaluate a software package do not fall into this category, we sought assistance from people whose primary area of interest is the stock market. These people were often less conversant with the computer itself, but were able to evaluate the Market Manager from the proper perspective.

The manual supplied with the Market Manager is easy to understand and provides step-by-step instructions for installation and startup in the first section, entitled "Getting Started." These instructions include directions for getting the configuration switches on the Hayes Smartmodem; these switches are set to non-standard settings. Also provided are instructions and phone numbers for obtaining a password for the Dow Jones News/Retrieval Service. No difficulties were reported with installation and startup when the package was used with the recommended hardware; one user attempted to operate the package with a different modem and was unsuccessful.

The features provided by this package may be divided into 2 different categories: those features provided as a part of the Market Manager program, and those features of the Dow Jones News/Retrieval Service which are made available by the program. We evaluated the package with both categories taken into account, since that is the way most users of the program would evaluate it. Some features of the package dealing with the Dow Jones News/Retrieval Service are available with other Dow Jones Software products.

### ☐ User Interface

Menus: Menus are used throughout the Market Manager program. All functions are accessed via menus, which are nested to 2 levels. Item selection is by numeric character followed by carriage return in all cases. The appropriate menu is displayed on screen whenever the current function does not preclude its presence.

Control Characters: None.

Function/Special Keys: Function keys are used during News/Retrieval service access. They are used to control news story and headline scrolling, and to print or save a story. Escape character sequences are used in terminal mode, to print or clear the terminal mode buffer, and to exit terminal mode.

Command Language: None.

Positive Feedback: All off-line commands require confirmation before they are performed. Prompts for potentially destructive commands indicate that data may be lost if the command is performed.

Status Display: None.

Help Facilities: None.

### ☐ Environment

The Dow Jones Market Manager package operates in a mildly restrictive environment. While the memory requirement is not excessive at 128K bytes of RAM, there is no apparent benefit to additional memory. Two floppy disk drives are needed. The distribution diskettes are copy protected, and the package cannot be installed on a hard disk. In addition, there is no way to use a hard disk as a data storage disk.

An asynchronous communications adapter card is required and no particular type of card is specified. However, the package does specify that the Hayes Smartmodem must be used, and configuration instructions are provided only for this modem. The modem must be configured to non-factory settings. One of our reviewers attempted to use the package with a different modem and was unsuccessful.

The package supports operation with either monochrome or color graphics adapters. Teleware, the creators of the package, managed to avoid the temptation to create cutesy color menus. A parallel printer is required for report generation, and printer setup strings may be provided if necessary.

### ☐ Documentation

The manual provided with the Dow Jones Market Manager is a combined installation, introduction, and reference manual. Also provided with the package is a Dow Jones News/Retrieval subscription/user agreement form, a reference card, and a warranty registration card. The reference card contains brief descriptions of the package's function key usage, which might be better served by a function key template. Also listed are the 3 commands accepted by the program in "terminal mode," or when the program is being used to access the News/Retrieval service.

The manual is divided into 4 main sections. The first section is an introduction and installation guide. In addition to a listing of program functions, this section details the features of the Dow Jones News Retrieval Service. Phone numbers for obtaining a temporary password for the service are supplied. Procedures for modem configuration, display alignment, data disk preparation, and system setup are all given in a step-by-step format. The system parameters that must be entered consist of the News/Retrieval service password, the primary and alternate telephone numbers, and an indication of the network (Tymnet or Telenet) used to access the service. The reviewer response to this section was very positive.

The next section provides an overview of program operation and a sample session detailing many of the program's functions. There is a section on each of the 3 main types of errors that may be encountered during operation: operator keyboard errors, disk errors, and communications errors. General corrective actions are suggested in each area, and reference is made to the appendixes, where 2 separate lists of error messages and corrections are located.

# Dow Jones Market Manager
## Security Portfolio Management Package

The third and largest section of the manual is a reference section outlining every system function. This section is functionally organized, and each function is separately listed in the table of contents, thus speeding access. Each description provides an illustration of the menu involved and also details the keys and commands that must be entered to perform the function on a step-by-step basis.

The final section is entitled Data Entry. This section supplies detailed descriptions of each data field used by the market manager program. The purpose of each field is explained, and if the field possesses a default value this is provided as a part of the description.

In addition to 2 separate error message listings, one dealing with disk errors and one dealing with communications errors, the appendixes contain a sample of each type of report generated by the Market Manager. Each sample report is accompanied by a page describing each data field contained in the report. At the back of the appendix is a 2 page fold-out menu map that may be removed from the manual and hung on the wall for reference. The manual does not contain a glossary, but does provide a reasonably comprehensive index.

Most of the reviewers found the documentation to be clear, easy to understand, and accurate. One or 2 staff members that examined the package felt that a glossary might have been helpful—these were people unfamiliar with the application. Our stock market experts were universal in praising the manual.

Included with the Dow Jones News/Retrieval service was a ream of documents describing the operating procedures and providing a list of services available. Most of this information was in the form of advertising brochures, but also supplied was a booklet entitled the "Dow Jones News/Retrieval Fact Finder." There was also a supplement to this manual, and a 30 page booklet introducing a new service. Three different reference guides and service summaries were also supplied.

The volume of all of this was a bit overwhelming, but investigation showed it to be clear and helpful for the most part. In addition to log on procedures and network phone numbers, the manuals provided instructions on accessing all of the different services and databases. There is also a list of all stocks, bonds, foreign bonds, and Canadian stocks listed by the service, and their symbols.

### ☐ Functionality

The features provided by the Market Manager package may be divided into 2 parts. One part is the functions provided by the Market Manager program. These include the ability to create portfolios of securities, manually enter transactions for these portfolios, and generate reports concerning them. The second part consists of the features provided by the Dow Jones News/Retrieval service which is accessed via the Market Manager program.

The functions provided by the Market Manager are primarily related to the creation and maintenance of a security portfolio. The program does have a terminal mode option wherein the services of the Dow Jones News/Retrieval service may be accessed. The online portion of the program also uses the Dow Jones service to obtain news and price quotes. All dial, connect, and sign on functions are performed automatically using information supplied to the system parameters' menu.

News obtained from the Dow Jones News/Retrieval service is normally displayed on the monitor. When the service is accessed, current headlines are displayed on the left side of the screen. When a story is requested it is displayed on the right. The 2 sides may be scrolled independently using the function keys on the left side of the IBM keyboard. The text is stored in memory as it is received, and may be printed or saved to disk.

Current price quotes for securities listed by Dow Jones News/Retrieval service may be obtained in a like fashion. Up to 5 different securities may be selected for viewing at any one time, each may be one of 5 different types: stock, bond, option, mutual fund, or treasury issue. Pricing data is displayed on the screen as it is received from the service. Also displayed is the change from the previous close, which is calculated by the Market Manager program. These price quotes are not saved to disk.

In the terminal mode, once the log-on procedure has been completed, the services of the Dow Jones News/Retrieval service may be accessed directly. These include SEC filings, or Comdisco, current stock quotes, historical stock reporter, historical quotes, corporate profiles, economic surveys, news, movie reviews, sports, weather, and a service called Comp-U-Store. The latter is a sort of online department store.

Many of these services met with less than overwhelming responses from our stock market experts, for reasons indicated below. The SEC filings are accurate and easily obtained, but not something most of our reviewers longed for. The current stock quotes, while also easily obtained, are 15 minutes behind current prices. While some of our less experienced amateurs felt this was not important, our real experts said that "15 minutes is forever." Both the historical stock reporter and the historical quotes are limited by the length of time maintained on file. The former only maintains one year, while the latter is maintained back to 1979. The last few items such as movie reviews and weather met with less than overwhelming enthusiasm. The overall option was that such services are "frivolous and expensive."

The heart of the Market Manager is its ability to create a portfolio of securities. This is done by entering buy and sell transactions via the keyboard. The program matches sell transactions with previously entered buys, and matches buy-to-cover transactions with previously entered sell-short transactions. In the event of an insufficient quantity to cover a transaction, an error message is generated. If there is sufficient quantity the program calculates the projected profit/loss and prompts if this is a closing transaction. If so, a gain/loss record is stored on disk.

When a closing transaction is made against a larger quantity of securities, the program adjusts the quantity and dollar amount in addition to generating a gain/loss record. When the closing transaction's quantity is greater than the existing position, the remaining quantity must be manually reentered as a short sell or buy.

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Holdings may be priced manually or automatically. When holdings are priced manually, each security in the portfolio is displayed along with the most recent price entered. This may be updated or left unaltered as desired. Prices are accepted in the standard form of notation, as fractions. Fractions up to 32nds may be entered. Prices may also be entered as decimals. When pricing is done automatically, the program logs onto the Dow Jones service in the same fashion as for the news and quotes displays. Prices are automatically retrieved, displayed, and stored. If there are any securities in the portfolio not listed by the Dow Jones News/Retrieval service, the program then switches to manual pricing mode to allow them to be updated.

The Market Manager has the ability to track the total worth of a portfolio, including a cash balance that is automatically updated every time a security is bought or sold. This cash balance may be adjusted for cash received and cash withdrawn. The mechanism for entering these cash transactions also allows the entry of a 16-character description of the transaction.

Four reports are provided by the Market Manager. Two of these reports may be used to determine the current holdings: one by portfolio and the other by symbol. The former lists all the securities in a single portfolio in alphabetical order by symbol. Each security is separately totaled, and an aggregate total is supplied as well. Also included in this report is the cash balance of the portfolio. The second report lists all occurrences of a given security in alphabetical order by portfolio identifier. A total is provided in this report as well, reflecting the total number of securities involved in all portfolios.

The other 2 reports generated by the Market Manager are the Realized Gains/Losses report and the Year-to-Date Transactions report. The former lists the gains or losses that occurred with each closing transaction, as well as the quantity involved, purchase and sale dates, average purchase and sale prices per share, the cost, and the proceeds. Gain/Loss records are listed alphabetically by security symbol and the report is generated on a portfolio basis. The latter report simply lists all the transactions occurring for a given portfolio, including cash transactions.

### ☐ Ease of Use

Due to the nature of the application dealt with by the Dow Jones Market Manager we were unable to utilize many of our regular test staff, but were forced to seek out some stock market experts to assist in evaluating the package. Many of these people were less than computer literate, but all of them were universal in their praise for Market Manager's ease of operation.

The Market Manager is operated almost entirely from menus, the only exception being the online functions that display the news and the current stock quotes, and the terminal mode function used to access the Dow Jones News/Retrieval databases. These are operated using the escape and function keys.

While operation of the package is straightforward, there are a few procedures related to portfolio management that can become somewhat tedious. If a large number of securities and portfolios are maintained, and a large number of transactions performed, disk space can become a problem. One solution is to use a built-in utility to condense the disk files, eliminating records for positions no longer held. The holdings file can contain a maximum of 500 records. Another solution is to maintain separate portfolios on separate disks.

Another tedious operation is the procedure for handling stock splits. A split requires that every transaction dealing with that security be manually updated to reflect the new quantity of stocks—this could be a time consuming process.

On the plus side, the procedure for opening a new year is handled very nicely. After the creation of a backup copy of the old disk for archival storage using the disk backup utility, it is a simple matter to erase the old Gain/Loss Year-to-Date Transaction files. The resulting disk is then used in the new year.

### ☐ Support

Primary support for the Dow Jones Market Manager program comes from the Dow Jones News/Retrieval Service's Customer Service department. A toll-free number is provided, which may be used to obtain a free introductory password into the service as well as information about the program. The people we talked to in the course of obtaining a password seemed helpful, but they were a little slow in getting back to us. Also provided in the documentation is the address of Teleware, the writers of the package. Users are asked to supply comments and suggestions to Teleware directly, and a user in desperation mode may find some assistance there as well.

Dow Jones provides product update and use information to users who have returned their warranty registration card. Also provided in the event that a change to the News/Retrieval service makes it necessary is information on the availability of revised versions of the program. Information on new online services may be obtained online while the program is in terminal mode.

### ☐ System Interface

The interface requirements of a package like this one may be divided into 2 parts: the communications interface to the database, and the program's interface with other packages on the same system. In both areas this package falls a little short.

The communications capabilities of the package are severely limited by the fact that the package will apparently only operate with one type of modem. While this may not be a handicap to users who are purchasing a system for use with this package, many will find it quite inconvenient, especially since this limitation is not clearly stated on the outside of the package.

A case could be made for using information created by this package in an electronic spreadsheet. Unfortunately this would not be an easy task, since there is no provision for creating headerless reports or DIF format files with the data. No information on file structure is supplied in the

  

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documentation either.

### ☐ Vendor Experience

Dow Jones and Company certainly need no introductions—they have been around longer than computers. As a software vendor, however, they are a relative newcomer, appearing on the scene around the third quarter of 1982. By and large they should be quite capable of dealing with the needs and desires of the corporate user.

## ■ DETAILED PRODUCT DESCRIPTION

### ☐ Terms & Support

**Terms** • the Dow Jones Market Manager is available for purchase only from Dow Jones and Company, IBM PC dealers, and software retailers nationwide.

**Support** • toll-free telephone hot-line to Dow Jones customer service department is provided to registered users; product update information provided; the address of the package developer, Teleware, is included with the software; Teleware also provides technical support.

### ☐ Component Summary

The Market Manager is distributed on 2 copy-protected floppy disks. The DIR command will not indicate the program and file names on the disks.

**Dow Jones Market Manager**:

**$299 lcns**

*LCNS: license fee.*

### ☐ Computers & Operating Systems Supported

The Dow Jones Market Manager runs on the IBM PC and PC-compatible machines supporting PC-DOS and MS-DOS.

### ☐ Minimum Operating Requirements

The package requires a minimm of 128K bytes of memory, 2 single- or double-sided floppy disk drives, an asynchronous communications adapter card, and a Hayes Smartmodem with cable. A parallel printer is optional.

### ☐ Features

**Automatic Communications Features** • the Market Manager provides automatic handling of all dialing and log-on procedures.

**Online Features** • automatic securities pricing, display of news and current quotes, and database access through a terminal emulation mode are all provided.

**Portfolio Maintenance Capabilities** • transactions include buy, sell, buy to cover, and sell short; transactions may be altered and deleted; cash balances may be maintained, and are automatically updated during buy and sell transactions • pricing may be done manually as well as automatically; no command exists for processing stock splits, they must be handled manually.

**Accounting Capabilities** • the total value of a portfolio, including a cash balance, is maintained automatically and updated to reflect the latest price information; no separate mechanism for commissions or dividends exists.

**Reports Provided** • four reports may be generated: Realized Gains/Losses, Holdings by Portfolio, Holdings by Symbol, and Year-to-Date Transactions.

**• END**