The OLR System®

Release 3.0

Release Notes

Contents

Welcome

Welcome to The OLR System, Release 3.0, the information delivery system for CICS. Release 3.0 adds many new features to help you manage and share online information:

- **Hypertext Pop-ups** give you the ability to add pop-up links to help windows, reference and note topics. Now you can add pop-up definitions to topics, add decision trees to help windows, and provide menus which bring dynamic data from external sources to your help and reference topics.
- **A COPY command** has been added to the online editor. Now you can copy a topic, its keywords and jumps into a new topic. Copying topics can save time when you only need to make minimal changes from one topic to another. Copying is also useful when you have standard templates for topics, since you can copy the template into each new topic before you begin writing.
- The Outliner has been enhanced to allow you to **include books in outlines**. Now you can create a Book or outline that contains other books or ‘booklets’. You can subdivide large online books into smaller booklets on the Select Book list.
- An **UNMARK** command has been added. Now you can clear the bookmark at any time during a session.
- **Note priorities** have been added. With note priorities, you can control the order that notes display in note lists. Higher priority notes appear above lower priority notes in the list. Within a priority, notes display in date order with most recent note first. You can set up to 9 different priorities.
- **Note Forms** have been added to the OnLine Notepad. Now you can design custom forms for collecting information. Forms can include data fields and free form text. Information from completed forms is stored in a multi-dimensional DB2 database, searchable using SQL queries.
- **Search enhancements** allow you to search within a date range and to print directly from the Search Results window. We’ve also improved the performance of search operations.
- Help and Notepad **intercept criteria** can now include wild card characters. A new 'Automatic' intercept automatically detects BMS and non-BMS map intercept criteria when wildcards are used.
- **Count fields** have been expanded to handle topic and note databases with up to 99 million items.
- **CICS 4.1** is supported with this release.
- **Data access routines** in the OLR System have been updated to reduce the number of time-outs caused by DB2 delays.
- **Sticky cursor** behavior can be controlled at installation time to force the cursor to the leftmost character in a table before selecting a value.
- **Help behavior** can be controlled to bypass the “No help available” message when there is no help topic linked to a field.
- A new **Word macro** is now available. With the new macro, you can import topics from Microsoft Word 6 documents and build outlines for them within Word.

What's New in OLR System Release 3.0?

Here's a brief summary of each new feature in OLR System Release 3.0:

Feature	Description
Hypertext Pop-ups	OLR 3.0 now supports hypertext pop-ups within help windows, reference and note topics. You can create links within your online documents to provide definitions, options menus, or links to live data sources. With hypertext pop-ups, you can add decision trees to your applications, leading the user through a series of steps to make a decision. Complex error handling rules can be reduced to a series of simple choices. Hypertext pop-ups can also be used to re-engineer applications to handle customer service calls. Menus can be linked as help windows to bring dynamic information to the desktop (for example, credit status), to display information from other files (for example, customer contact information), or to display questions and answers.
Copy Command	Writers can copy an existing topic, its keywords and hypertext links into a new topic for editing. The copy command saves time when you are writing a topic which is similar to an existing topic. It also enables you to provide writing templates with standard information.
UNMARK command	The MARK command sets a bookmark on a topic. That bookmark remains until it is replaced by another bookmark. The UNMARK command gives the reader the ability to clear the active bookmark.
Include Books in Outlines	OLR has restricted writers from including books in outlines. This restriction has been removed. Now a writer can create a series of 'booklets' which appear individually in the Select Book list, and can combine them into a larger book. Help writers can link multiple books or "booklets" directly to a help window to provide quick access to relevant information without leaving the application.
Note Priorities	OnLine Notepad lists notes for a topic in order by age, with the most recent note appearing at the top of the list. Customers have requested the ability to control the order of notes based on priority settings, so that high priority notes always appear at the top of the list, for example. Writers can now assign a priority (1-9) to a note so that high priority notes appear above lower priority notes on the list.

Feature	Description
Note Forms	The OnLine Notepad has been enhanced to support the design and use of note forms. A note form can have an unlimited number of data fields and free-form text fields. Forms can be designed using the online form editor. When a user adds a note, the OnLine Notepad prompts for the name of the form to be used for the note and presents a list of note forms. OnLine Notepad Forms manage data in fields. A field can be alphabetic, numeric, or text. Text fields can be of any length. Fields can be edited for valid values, can have default values, and can have specified lengths. You can use SQL to query completed forms by any combination of field value criteria. (For example, find all Renewal Quotes with amounts over $1,000 in pending status.) You can use Note Forms with any CICS application by assigning a Notepad or Notelist function key to the transaction.
Search in Date Range	You can now specify both from and to dates in a search by date range in order to select topics or notes created or changed during a specified time period.
Help and Notepad Intercept Enhancements	You can now use wildcard characters when registering transactions for OLR's help and notepad intercepts. You can also specify automatic interception of BMS and non-BMS maps for a given TRANID or wildcard TRANID.

Hypertext Pop-ups

Introduction

Hypertext pop-ups give the documentation writer a way to create links within documents by marking a word or phrase as the source of the link, then defining an action to be taken when the reader selects the link and presses the JUMP key.

Hypertext pop-ups can be included in help windows, reference topics, note topics and notes.

- You can use hypertext pop-ups to display definitions or explanations about a word or phrase.
- You can use hypertext pop-ups to display a menu of options. When the reader selects a link, you can display the information for that link in a second pop-up window. In fact, you can have up to seven levels of pop-ups.
- You can use hypertext pop-ups to display dynamic information. When the reader selects a link, the linked topic can run a program to bring information to the pop-up window from external sources like databases, data dictionaries, or any resource available to your CICS system.

Creating Hypertext Links

Writers can add hypertext links to topics using the online editor, or topics with links can be imported using the Import/Export Facility.

A link marker defines the word or phrase used to activate the pop-up and the topic to be displayed when the reader selects the link and presses the JUMP key.

A link marker consists of:

Link Start Marker	A ‘greater than’ sign (>) marks the beginning of a link. *When a link begins at the first character of a line, the link start marker is should be placed in the ACT command column..*
Link Tag	The link tag is a two character tag identifier, followed by a period (.). Link tags are always entered in UPPERCASE (for example T1.). *If the link tag is not upper case, or is not followed by a period, it will not be recognized as a link tag.*
Link	This is the word or phrase that will activate the pop-up. *The link should start immediately after the link tag (for example >T1.jump<).*
Link End Marker	A ‘less than’ sign (<) marks the end of a link. *When a link ends in the last character of a line, the link end marker is not required.*

Example

In this sentence, **>T1.the hightlighted area<** is a link marker.

Associating a Link with a Topic

Once you have added links to a topic, you associate these links with topics in OLR. To associate a link with a topic while using the online editor, you can either:

1. type TAGS at the command prompt (➔), or
2. type ADDTAG at the command prompt (➔),
3. place the cursor on a link tag and press F2 (Addtag)

then press <ENTER>.

The TAGS command displays a list of tags and their associated topics:

```
 Tag List
 List Next ➔

Tag      Title                                                    Qualifier
T1       Part Number Coding Scheme
T2       Part Number Inventory Status

F1=Help          F3=End           F5=Edit  F7=
F2=Delete        F4=Addtag        F6=Read  F8=
```

From this window, you can:

- TAB to select a tag, then press F2 to delete it, F5 to edit the topic, or F6 to read the topic
- Press F4 to add a tag using the ADDTAG dialog (described below)
- Press F7 or F8 to scroll the list of tags for this topic
- Type the starting character or characters of a tag at the List Next ➔ prompt to scroll the list to the first matching tag.

The ADDTAG command displays the Define Hypertext Link window for the selected tag:

```
 Define Hypertext Link
                                                                 Uplow

Tag:             T1
Title:   _
Qualifier:

  Press <ENTER> to add.
F1=Help  F3=End   F5=Uplow        F7=              F11=Addtop
F2=      F4=      F6=Topics       F8=
```

From this window, you can:

1. Type the title and qualifier of topic to associate it with the tag
2. Press F6 to select the topic from a list
3. Press F11 to add a new topic

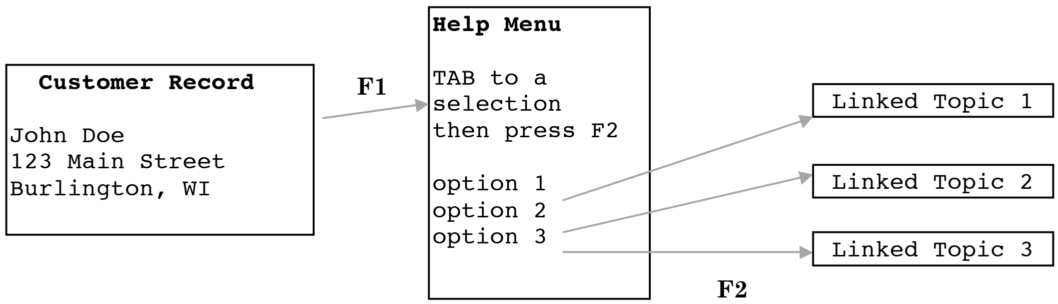
then press <ENTER> to add the link definition.

You can also: Press F1 for Help, press F3 to close this window, or press F5 to toggle the terminal between upper case and mixed upper/lower case characters.

Reading Linked Topics

Readers see hypertext links as highlighted words or phrases in topics. Readers can use the TAB key to move directly to a link. To display a pop-up, the reader places the cursor on a link, then presses the (F2) JUMP key to display the linked topic.

Example



If the pop-up window itself has hypertext links, the reader can TAB to them and press F2 to read them.

Pop-up topics can have multiple pages. When more pages are available, a paging field displays in the upper right corner of the pop-up topic with a plus (+) sign. The reader can TAB to the paging field and press ENTER, or press the F8 key to scroll forward.

When the reader is past the first page of a multi-page topic, the paging field displays a minus (-) sign. The reader can TAB to the minus sign or press the F7 key to scroll to the previous page.

Readers can press the (F6) Options key to display the Options window. The Options window displays the function keys and their associated commands, and provides a command prompt (➔). Readers can type FIND followed by a word or string at the command prompt to find a word or string in an active topic. To find additional occurrences of the word or string, the reader can press the F6 (Find Next) key.

Some Uses of Hypertext Pop-ups

Hypertext pop-ups can be very useful when you're improving your applications for customer service and other front office uses. You can provide menus listing frequently needed information. You can bring information from external sources to the desktop. You can use hypertext pop-ups to lead users through a series of steps to handle a problem. This is called 'case based reasoning'.

Each of these uses of hypertext pop-ups is briefly discussed below:

Providing Menus

You can attach menus to the fields on your CICS application screens to bring information to the user without leaving the transaction.

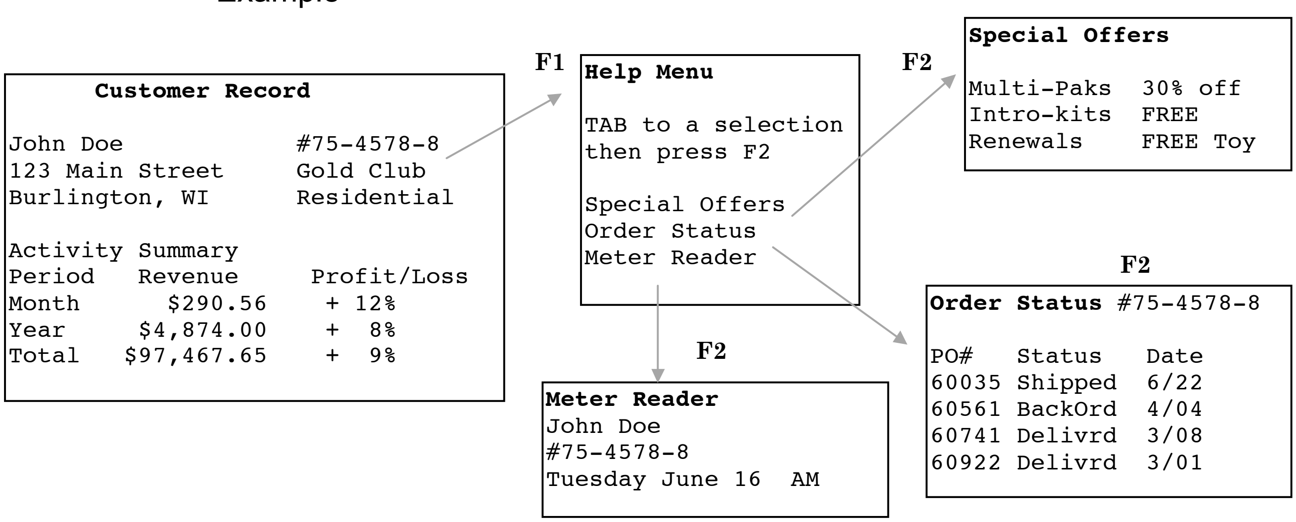
For example, consider the following:

The Customer Service Representative handles calls on a variety of topics. The primary screen is the Customer Record. Frequently asked questions include:

- What is the status of my open orders?
- When is the meter reader scheduled for my residence?
- What special offers are available now?

The information needed to handle these questions can be linked to the customer record as a menu.

Example



In this example, each pop-ups topic reads an external file to create the pop-up.

- The Special Offers topic reads information from the Merchandise catalog
- The Order Status topic queries the customer account in the Order Entry system
- The Meter Reader topic reads the meter reader schedule for the address.

Decision Trees

Complex decisions can be broken down into a series of simple questions, and the branching from one answer to the next question can be handled automatically using hypertext pop-ups.

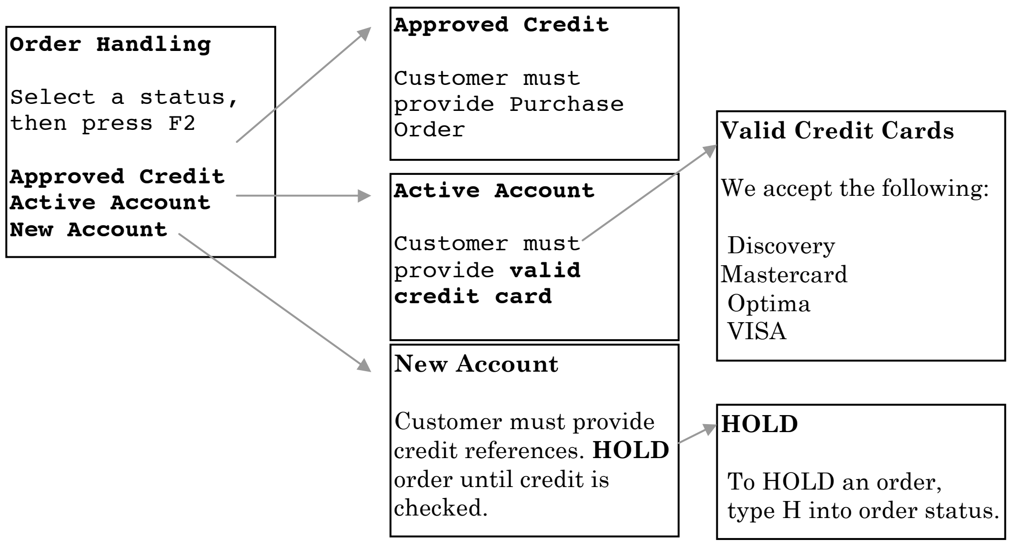
For example, consider the following:

Customers with approved credit can order products using purchase orders.

Customers with active accounts can order products using credit cards

Customers without accounts must provide credit references. Their orders will hold until credit checking is complete.

This simple decision tree can be provided as a series of hypertext pop-ups:



This is a simple example. With the OLR System, you can develop decision trees with up to 7 levels. Once you have developed a decision tree, you can create links to it at any level, and all lower levels will automatically be linked.

For example, when you create a link to the Order Handling Procedure topic, all of its links and the links from its links are automatically included.

Copy Command

Introduction

The COPY command gives the writer the ability to copy the text, hypertext pop-ups and keywords of an existing topic into the edit session for a new topic.

When you are writing topics that are similar to other topics, when you are using a template with standard information, or when you are including 'boilerplate' text in a new topic, the COPY command can save you time.

Using the COPY command

To use the COPY command,

1. Add a topic using the ADDTOP command
2. Start an edit session for the topic using the EDIT command
3. Type COPY at the command prompt
4. The COPY FROM window displays:

```
 Copy From

Title:
Qualifier:

        with Keywords:   Y (Y/N)
        with Tags        Y (Y/N)

Press <ENTER> to copy.
F1=Help  F3=END   F5=              F11=
F2=      F4=      F6=Topics        F12=
```

1. Type the Title and Qualifier of the topic you want to copy, or Press F6 for a list of topics, then select a topic from the list
2. Type Y at 'with keywords' to copy keywords to the new topic
3. Type Y at 'with tags' to copy hypertext pop-ups to the new topic
4. Press <ENTER> to copy the named topic.

OLR copies the topic into the edit session and displays the following message:

`OR0560 Copied Successfully - Text:` *nn* `Tags:` *nn* `Keywords` *nn*

replacing *nn* with the number of text lines, tags and keywords copied.

Notes

You cannot copy into a topic that already contains text.

You cannot copy a topic into a note.

Unmark Command

Introduction

While using the OLR System. you can set a bookmark on a topic using the MARK command. When a topic is bookmarked, you can jump directly to it using the SWITCH command.

When you type SWITCH at the command prompt, the topic you are working with becomes the marked topic.

Once you have marked a topic, the bookmark stays active until you leave the OLR System. While the bookmark is active, the title of the marked topic displays on screens in the OLR System.

You can now use the UNMARK command to clear the bookmark.

Using the Unmark command

To use the UNMARK command:

1. Place the cursor at the command prompt
2. Type UNMARK.

The bookmark will be cleared.

Including Books in Outlines

Introduction

With the OLR System, you can create topic outlines for any help topic, reference topic, or note topic.

The outline of a topic can include any number of subtopics. Each subtopic can itself have subtopics. With the OLR System, there is no limit to the number of levels in a topic outline. You can create or change the outline of a topic by selecting it, then typing MODOUT at the command prompt.

The highest level topic in an outline can be published in the Select Book list for a group by setting its BOOK property to Y (Yes). You can set or change the properties of a topic by selecting it, then typing MODPROF (Modify Profile) at the command prompt.

With Release 3.0, you can include any topic and its subtopics in the Select Book list. Similarly you can include topics that are in the Select Book list within the outline of other topics.

Examples

```
===>                          Select Book                        FYI
   List Next ===>

      Title
      Company Policy Manual
      Employee Directory
      Product Information
      Quality Program










 To view by Group, TYPE the Group ID at the command ===> and press <ENTER>.
 OR8000  Please make a selection.
 F1=Help      F3=End       F5=Outline   F7=          F9=Profile    F11=Groups
 F2=Mark      F4=          F6=Read      F8=Fwd       F10=Notes     F12=List
```

In this example, the group named FYI has four books.

All company policies are in a single manual.

The entire employee directory is in a single manual.

Product information is in a single manual.

```
===>                          Select Book                        FYI
   List Next ===>

      Title
      Company Policy Manual
      Company Policy on Promotions
      Company Policy on Service
      Employee Directory
      Employee Directory - Europe
      Employee Directory - US
      Product Information
      Product Information - New Products
      Quality Program


 To view by Group, TYPE the Group ID at the command ===> and press <ENTER>.
 OR8000  Please make a selection.
 F1=Help      F3=End       F5=Outline   F7=          F9=Profile    F11=Groups
 F2=Mark      F4=          F6=Read      F8=Fwd       F10=Notes     F12=List
```

In this example, the group named FYI has nine books.

Two frequently used sections of the Company Policy manual are available from the book list or by reading the Policy Manual

The Employee Directory is segmented into Europe and US..

Product Information about new products is available in a separate book or in the main book.

Note Priorities

Introduction

The OnLine Notepad displays notes in reverse date order, with the most recent note at the top of the note list. When notes are linked to a customer record, it is sometimes important to bring the attention of the customer service representative to one or more notes without regard to the date they were written. With Release 3.0, you can now set a note priority for each note. Within each priority, notes display in reverse date order.

Example

```
                          SDAI - Policy Management System
                            Policyholder Information

                                                          Policy No: B0748365
Last name . . . . . . BROCK
First name  . . . . . ANITA

--- Note List - B0748365 ------------------------------------------ POLICIES --
===>
    Date      Time   Title                                          Added By
 1  08/03/95  07:14  Policy Alert                                   SUSAND
 3  04/22/96  13:17  Delinquent payment                             DAVIDR
 3  01/13/96  16:30  Mr. Brock Traffic School                       PKANE
 5  06/07/96  10:29  Call back Brock                                MGARDNER
 5  05/05/96  08:30  Premium increase - call back                   MGARDNER



F1=Help   F3=End   F6=Read   F7=       F8=      F9=NoteProf   F11=Groups
```

In this example, the Policy Alert note displays at the top of the notelist even though more recent notes are linked to the policy. Priority 3 notes also display above priority 5 notes on the list. Note priority defaults to 5 when a note is added.

Setting Note Priority

When you type Addnote at the command line, the Note editor displays with the Add Note dialog window:

```
===>                                                                   Uplow
 Act                        Edit Note - Untitled                       Page    1
 ..
 ..  .- Add Note ---------------------------------------------------------------.
 ..  |                                                                  Uplow   |
 ..  |     RE: B0748365                                                         |
 ..  |                                                                          |
 ..  |   Title ......                                                           |
 ..  |   Qualifier ..                                                           |
 ..  |   Group ...... POLICIES                                                  |
 ..  |                                                                          |
 ..  |   Form .......                                                           |
 ..  |   Qualifier ..                                                           |
 ..  |                                                                          |
 ..  |     Note List Priority ... 5  (1-9)                                      |
 ..  |     Permanent ............ N  (Y/N)                                      |
 ..  |                                                                          |
 ..  |   Press <ENTER> to add.                                                  |
 ..  |   F1=Help     F3=End      F5=Upper    F11=Groups   F12=Forms             |
 ..  '--------------------------------------------------------------------------'
 **   ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

 F1=Help      F3=End       F5=          F7=          F9=Wordwrap   F11=Join
 F2=AddLink   F4=Save      F6=          F8=Fwd       F10=Line-Ed   F12=Split
```

To change the note priority, type over the Note List Priority field.
Priority 1 is the highest. Priority 9 is the lowest.

Changing the priority of a note

You can change the priority of an existing note from the Note Profile window.

From the Note List, select a Note, then press <F9> NoteProf.

```
                        SDAI - Policy Management System
                           Policyholder Information

                                                           Policy No: B0748365
Last name . . . . . . BROCK
First name  . . . . . ANITA

--- Note List - B0748365 ------------------------------------------ POLICIES --
===>
    Date      Time   Title                                          Added By
1   08/03/95  07:14  Policy Alert                                   SUSAND
3   04/22/96  13:17  Delinquent payment                             DAVIDR
3   01/13/96  16:30  Mr. Brock Traffic School                       PKANE
5   06/07/96  10:29  Call back Brock                                MGARDNER
5   05/05/96  08:30  Premium increase - call back                   MGARDNER








F1=Help   F3=End   F6=Read   F7=       F8=      F9=NoteProf   F11=Groups
```

The Note Profile displays for the selected note:

```
                        SDAI - Policy Management System
                           Policyholder Information

                                                           Policy No: B0748365
Last name . . . . . . BROCK
First n .- OnLine Notepad -------------------------------------------------.
    .- Note Profile ---------------------------------------------------------.
- N |                                                                         |
=== |    RE: B0748365                                                         |
    |                                                                         |
    |  Title ......Delinquent payment                                         |
    |  Qualifier ..                                                           |
    |  Group ...... POLICIES                                                  |
    |                                                                         |
    |    Permanent ........... N  (Y/N)                                       |
    |    Note List Priority.... 3  (1-9)                                      |
    |                                                                         |
    |                                                                         |
    |  F1=Help     F3=End      F5=         F11=Groups                         |
    '-------------------------------------------------------------------------'

OR0514  Added: 04/22/96 13:17  SUSAND.
F1=Help      F3=End      F5=         F7=         F9=NoteProf   F11=Groups
F2=          F4=         F6=Read     F8=         F10=          F12=
```

Change the note priority by typing a value from 1-9 into the Note List Priority field.

Notes

The note priorities feature can be turned off using a System Parameter setting. If note priorities are turned off, notes will appear in note lists in date order, with the most recent note at the top of the list.

Note Forms

Introduction

With the OnLine Notepad, you can now use note forms to collect information. Note forms can include display and data entry fields along with text fields. Data entry fields can have edit rules associated with them, and can have pop-up information windows to help users complete them.

Note forms can be used to collect information that is not currently managed in your business applications. Most business applications are unable to manage information that involves unstructured text, or combines data fields with text.

- Note forms can be used to provide scripts for managing customer service calls.
- Note forms can also be used to manage inter-office communications such as vacation time requests.
- Note forms can be used to script telemarketing calls and market surveys.

Creating Note Forms

You create Note Forms using the OLR System's online editor. Blank forms are stored as topics in the OLR Server. Note forms are stored in a Forms group. The name of that group can be set by the System Administrator during installation.

To create a Note Form:

1. Add a topic with the Form identifier set to "Y", then start an edit session for that topic
2. Type the form as you want it to appear

When you want to place a display or data entry field on the form, type a field name. *A field name consists of a Field Start marker (a greater than sign [>] followed by a field name. Field names always start with an ampersand (&) followed by a name of up to 32 characters.*

When you want to place a text line on the form, type &text at column 1 of a line. To place multiple text lines, type &text at the start of a series of lines.

Example

```
                          Edit - Free Shirts

01    ***************************************************************
02    *                  Order a Free T-Shirt                       *
03    ***************************************************************
04
05               >&ORMDY                   >&ORUSER
06
07     Please fill out this form for a free T-shirt
08
09     Name:    >&Name
10     Address: >&Address
11     City:    >&City              State: >&State
12                                  Zip:   >&Zipcode
13
14     Size:    >T1.&Size
15
16     What wording would you like on the back of the shirt?
17
18     &Text
19     &Text

F1=Help    F3=Save    F5= Outline     F7=        F9=Wordwrap    F11=Join
F2=AddLink F4=Save    F6=             F8=        F10=Line-Ed    F12=Split
```

In this example, &ORMDY displays the date the form is completed and &ORUSER displays the user-id of the person completing the form. These are built-in fields in the OnLine Notepad. There are also built-in fields for terminal id (&ORTERM), current time (&ORHMS), julian date (&ORYDDD) and other date formats (&ORYMD, &ORDMY).

&Name, &Address, &City, &State, &Zipcode and &Size are fields you define using the Field Table. The &Text entries allow for 2 lines of text. The &Size field is preceded by a Tag (T1.) which defines a pop-up window for that field.

Defining Fields

The OnLine Notepad manages field definitions in the database. Once a field has been defined, it can be used in any form. As you design forms, you can add field definitions to the database.

The Field List

To see a list of fields in the database, bring up the edit screen for a form, then type FIELDS at the command prompt. The Field List displays:

```
Field List
  List Next ➔

   City
   State
   Zip



F1=Help    F3=End    F5=Addfld  F7=
F2=Delete  F4=Modfld F6=Reset   F8=Fwd
```

The field list displays all fields.

1. Select a field and press F2 to delete it
2. Select a field and press F4 to change it
3. Press F5 to add a new field.
4. Press F7 or F8 to scroll the list
5. Type one or more characters at List Next to scroll to field names starting with those characters.
6. Press F3 to close the field list.

Adding a Field

To add a field, press the F5 (AddFld) from the Field List window.

```
 Add Field Definition

 Field
 Field Type:       (E=Entry, D=Display)

 Entry Field Definition
  Required: N (Y/N)
  Length  :
  Program :
  Default :



Press (ENTER) to add the field.
F1=Help    F3=End    F5=Upper    F7=
F2=Delete  F4=       F6=Fields   F8=Fwd
```

To add a field:

1. Type a field name (up to 32 characters)
2. Designate the field as Entry or Display

For entry fields:

1. Choose Required or Optional
2. Provide a length
3. Optionally, name an edit program
4. Optionally, provide a default value.
5. Press ENTER to add the field.

When a user completes a form, all required fields must be entered and all field edits must be valid before the form can be saved.

For more information about custom edit programs, see the OLR System Installation Guide.

Adding a Pop-up Tag to a Field

In the example above, the field &Size is declared as >T1.&Size. The T1 tag adds a pop-up jump to the form field. Pop-ups can be added to form fields to document the form or to provide a pick list of values.

When you place a pop-up jump tag on a form field, you must associate the tag with a topic in the OLR Server. To do this, place the cursor at the tag and press F2 (AddLink). The Define Hypertext Tag window displays. Complete this window as described earlier in the section titled “Hypertext Pop-ups”.

Importing Field Definitions

You can add fields to the field table using Import/Export commands. The import/export commands for the field table are described in the OLR System Import/Export Guide.

Using Forms

Completing a form while using a CICS application

To complete a form while using OnLine Help or a CICS application,

1. press the Notepad function key from a help window, or
2. press the Notepad function key from a CICS application screen which has Notepad attached,
3. type ADDNOTE at the command prompt, or
4. select Add a Note from the Notepad Options window.

The Add Note window displays:

```
===>                                                                      Uplow
 Act                      Edit Note - Untitled                            Page    1
 ..
 ..  .- Add Note -------------------------------------------------------------.
 ..  |                                                                     Uplow  |
 ..  |    RE: B0748365                                                            |
 ..  |                                                                            |
 ..  |  Title ......                                                              |
 ..  |  Qualifier ..                                                              |
 ..  |  Group ...... POLICIES                                                     |
 ..  |                                                                            |
 ..  |  Form .......                                                              |
 ..  |  Qualifier ..                                                              |
 ..  |                                                                            |
 ..  |    Note List Priority ... 1  (1-9)                                         |
 ..  |    Permanent ............ N  (Y/N)                                         |
 ..  |                                                                            |
 ..  |  Press <ENTER> to add.                                                     |
 ..  |  F1=Help     F3=End      F5=Upper    F11=Groups   F12=Forms                |
 ..  '----------------------------------------------------------------------------'
 **   ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

 F1=Help      F3=End       F5=          F7=          F9=Wordwrap   F11=Join
 F2=AddLink   F4=Save      F6=          F8=Fwd       F10=Line-Ed   F12=Split
```

Selecting a Form

To add a note, type a Title, then TAB to the Form field and either:

1. Type the name of a form, or
2. Press F12 for a list of Forms, then select a form from the list.

```
===>                                                                      Uplow
 Act                      Edit Note - Untitled                            Page    1
 ..         .- Form - FORMGRP -------------------------------------------------.
 ..  .- Add |  List Next ===>                                                  |
 ..  |      |   Title                                               :Qualifier  |
 ..  |    R |   Address Change                                                  |
 ..  |      |   Policy Change                                                   |
 ..  |  Tit |   Satisfaction Survey                                             |
 ..  |  Qua |                                                                   |
 ..  |  Gro |                                                                   |
 ..  |      |                                                                   |
 ..  |  For |                                                                   |
 ..  |  Qua |                                                                   |
 ..  |      |                                                                   |
 ..  |    N |                                                                   |
 ..  |    P |                                                                   |
 ..  |      |  Select form, then press <F3> to end.                             |
 ..  |  Pre |  F1=Help     F3=End      F5=Edit   F7=         F11=Groups         |
 ..  |  F1= |  F2=Mark     F4=Reset    F6=Read   F8=         F12=Addtop         |
 ..  '----- '-------------------------------------------------------------------'
 F1=Help      F3=End       F5=          F7=          F9=Wordwrap   F11=Join
 F2=AddLink   F4=Save      F6=          F8=Fwd       F10=Line-Ed   F12=Split
```

From the Form List window, a reader can display the form (F6).
A writer can edit the form (F5).

Completing a form

If you do not select a form, the Notepad will provide a blank page.

Press <ENTER> to add the Note.

The OnLine Notepad edit screen displays:

```
===>                                                              Uplow
 Act                  Edit Note - Address Change                  Page    1
01     ***************************************************************
02     *                Change of Address Form                        *
03     ***************************************************************
04
05              06/03/96                       JDOE
06
07      Please fill out this form for a change of address
08
09      Name:     _________________________________
10      Address:  _________________________________
11      City:     ___________________  State: __
12                                     Zip:   _____ ____
13
14      Effective Date:    __ / __ / __
15
16      Add any notes about the address change below:
17
18
19

 OR2107  Form 'Address Change' loaded.  Fill it out.
 F1=Help      F3=End       F5=          F7=          F9=Wordwrap   F11=Join
 F2=Info      F4=Save      F6=          F8=Fwd       F10=Line-Ed   F12=Split
```

TAB to each field on the form to complete it.

Using pop-up information windows

If a field has a pop-up information window, it will be highlighted.

To see the information window:

1. TAB to the field
2. Press <F2> Info to see the window.
3. If the window has a list of values for the field, you can TAB to a value, then press <F4> Pick to select it.
4. If you select a value, it will automatically be entered into the form field when you close the Information window.
5. Press <ENTER> to close the information window.

Increasing the size of a text field

A note writer can expand the number of lines in a text field.

To increase the number of lines in a text field:

1. Press F10 Line-Ed for Line-edit mode
2. TAB the cursor into the line number field
3. Type I to insert a single line, or IP to insert a page of blank lines.

Inserting text within a text field

A note writer can insert text within a paragraph.

To insert text within a paragraph:

1. Place the cursor at the location where the text will be inserted
2. Press <F12> Split to open the line for inserted text
3. Type the text you want to insert
4. Press <F11> Join to remove any extra spaces in the inserted text.

Word wrapping the contents of a text field

A note writer can word wrap text.

To word wrap text for a paragraph:

1. Press <F9> Wordwrap with the cursor in the paragraph

(Note that a blank line of text indicates the end of a paragraph. Text separated by a blank line is considered a different paragraph by the word wrap command.)

Saving a completed form

After completing a form, the writer saves it by pressing <F4> Save.

If any required fields are not completed, or an invalid value was entered in a field, an error message displays.

Search in Date Range

Introduction

The search command provides quick access to topics and notes which include a certain word or phrase in the title, are linked to one or more keywords, or are written by a given author on a given date.

Using Search

From a topic list or a note list, type Search at the command prompt. The search window displays:

```
                        SDAI - Policy Management System
                            Policyholder Information
                  .- Search - POLICIES Notes ----------------------------.
                  |                                           More: +   |  65
Last name . . .   |  Type the word(s) or phrase(s) to search for below: |
First n .- OnLin  |                                                      |
        |         |  ___________________________________________________ |
- Note List - B0  |                                                      |  S --
===> search       |  Separate words or phrases with ... ,               |
    Date      Ti  |  Match any/all words or phrases ... any   (any/all) |  y
    01/21/93  12  |                                                      |
                  |  Search type .... 1  1) Keyword     3) Author/Date  |
                  |                      2) Title                        |
                  |                                                      |
                  |  Page forward for more choices.                      |
                  |  To start the search, press ENTER.                   |
                  |                                                      |
                  |  F1=Help     F3=End      F5=KwdList  F8=Fwd          |
                  '------------------------------------------------------'



F1=Help      F3=End       F5=          F7=          F9=NoteProf   F11=Groups
F2=          F4=          F6=Read      F8=          F10=          F12=
```

To search by date, type 3 at the Search type field, then press <F8> Fwd, or TAB to the More: + field and press <ENTER>. The second page of the search dialog window displays:

```
                        SDAI - Policy Management System
                            Policyholder Information
                  .- Search - POLICIES Notes ----------------------------.
                  |                                           More:   - |  65
Last name . . .   |  To search in a different Group, type it below.     |
First n .- OnLin  |       Group ...... POLICIES                          |
        |         |                                                      |
- Note List - BR  |  Added/Changed                                       |  S --
===> search       |       by .........                                   |
    Date      Ti  |       from ....... mm / dd / yy                      |  y
    01/21/93  12  |       to    ....   mm / dd / yy                      |
                  |  Search notes .... 1   1) for this topic only        |
                  |                        2) all notes in Group         |
                  |                                                      |
                  |                                                      |
                  |  To start the search, press ENTER.                   |
                  |                                                      |
                  |  F1=Help     F3=End      F7=Bkwd     F11=Groups      |
                  '------------------------------------------------------'



F1=Help      F3=End       F5=          F7=          F9=NoteProf   F11=Groups
F2=          F4=          F6=Read      F8=          F10=          F12=
```

Now you can provide from and to dates to search for topics or notes written in a given date range.

This example shows the Note search window. You can search for notes in a given topic, or you can search all notes in a group by typing a value into the Search notes field.

To perform the search, type the search criteria, then press <ENTER>.

The Search Results window displays

```
                        SDAI - Policy Management System
                           Policyholder Information
                 .- Search - DEMOGRP1 Notes ----------------------------.
                 |                                          More: +   |  65
Last name . . .  |  Type the word(s) or phrase(s) to search for below:  |
First name  . .  |                                                    |  .
--- Search Results ------------------------------------------------- DEMOGRP1 --
===>                                          Notes 1 to 3 of 3   Page    1
    Date      Time   Title                                        Added By
1   08/03/93  07:14  Assigned Risk                                DBAOLR
3   04/22/93  13:17  Delinquent payment                           DBAGPE
5   01/05/93  08:30  Premium increase - call back                 MGARDNER









OR8000  Please make a selection.
F1=Help   F3=End   F6=Read   F7=       F8=      F9=NoteProf
```

With Release 3.0, you can now print directly from the Search Results window. To print a note, select it, then type Print at the command prompt. The Print window will display the available print options.

During the installation of the OLR System, your installer selected which print options would be available using the Print command. Contact your System Administrator for information about the print capabilities installed at your site.

OLR Intercept Enhancements

Introduction

A new Automatic intercept has also been added to the OLR System Intercept facility. When you specify an Automatic intercept, OLR automatically detects the map type. With automatic intercepts, you can use wildcard characters to register all or a group of TRANIDs with a single entry

Using Wildcard Characters

You can intercept all TRANIDs on a function key by using the asterisk (*) wildcard as the TRANID, or you can intercept all TRANIDs with the same leftmost character(s) by typing the significant characters followed by the wildcard (for example, AB*). If an incoming message matches on more than one intercept entry, the one with the most specific match will apply.

Using the Automatic Intercept

You can now specify an Automatic intercept for a TRANID or a TRANID defined using a wild card character. When you specify an automatic intercept, the OLR System automatically detects BMS and non-BMS maps, and activates the specified function (Help, Notepad, Notelist) when the assigned PFKey is pressed.

Examples

The following intercept criteria will activate help for any TRANID when the PF1 key is pressed:

TranID	PFKey	Function	Explanation
*****	**PF1**	**Help**	Activate OnLine Help whenever PF1 is pressed
AB*	**PF2**	**Notepad**	Activate OnLine Notepad at the Notepad Options window whenever PF2 is pressed from any TRANID starting with AB.
ABC*	**PF2**	**Notelist**	Activate OnLine Notepad at the Notelist window whenever PF2 is pressed from a TRANID starting with ABC.

If more than one intercept criteria applies to an incoming screen, the OLR System uses the criterion with the closest match. In the example above, an incoming screen with TRANID 'ABCD' would be handled by the ABC* definition since it is a more detailed match than the 'AB*' definition for the PF2 key.

Additional Enhancements

In addition to the new features described above, release 3.0 adds the following enhancements:

1. **Count fields** have been expanded to handle topic and note databases with up to 99 million items. In prior releases, count fields have been limited to 999,999 topics or notes. Customers with more than 999,999 topics or notes received inaccurate counts in OLR display screens.
2. **CICS 4.1** is supported with this release. Previous releases have supported versions of CICS up to 3.3.
3. **Data access routines** in the OLR System have been updated to reduce the number of time-outs caused by DB2 delays. Prior releases experienced resource time-outs in the data access routines when DB2 performance was slow. With Release 3.0, the number of time-out related abends will decrease. When DB2 is not available, the CICS transaction will terminate with a message and no DB2 task will remain running after the CICS transaction ends.
4. **Sticky cursor** behavior can be controlled at installation time to force the cursor to the leftmost character in a table before selecting a value. In prior releases, the sticky cursor took the value at the cursor as the data entry value. With Release 3.0, you can force the cursor to column 1 of the pick list.
5. **Help behavior** can be controlled to bypass the “No help available” message when there is no help topic linked to a field. In prior releases, OnLine Help displayed a message box with the message “Help is not available”. With Release 3.0, you can set OnLine Help to ignore any help requests for fields where no help is available. The user will immediately see the application screen and the help key will be ignored.
6. Note behavior can be controlled to disable the ability to update completed notes or note forms. The **APPEND ONLY** Sysparms setting locks the contents of completed notes or forms and provides an Append screen. Writers can append comments, but cannot change information on the original note or note form.
7. System Administrators can now maintain **multiple intercept files** using the OLRI transaction. This is useful when a single administrator manages multiple TORs with separate intercept criteria.
8. You can now define **multiple system administrators** in the Sysparms table.
9. A system administrator can now **NEWCOPY the Sysparms table**. This is useful when you want to change settings or add authorization codes without cycling the CICS region.
10. The **import/export file** can now contain more than 32,000 command lines. There is no limit to the size of the import/export file.
11. A new Word macro is now available. With the new macro, you can import topics from Microsoft Word 6 documents and build outlines for them within Word. Prior versions of the Word macro support Word 5. The new macro supports Word 6 and adds the ability to organize topics into outlines while using the macro. Contact our Technical Support staff if you need an updated Word macro.