



# HLMSW v7.2 Release Notes

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## Overview

This build of HLMSW introduces a number of significant new features including:

- A new (optional) Licensing Module
- A much improved system for the handling of customer addresses
- Coloured browses
- HLMSW to HLMSW B2B interface to send orders directly from one HLMSW system to another using Zinfonia
- Zinfonia Part Selection
- Updated Print/Browse/Transaction Selection screens

As well as a number of smaller changes and bug fixes, all of which are outlined below.

## New Licensing Module

The optional licensing module provides 6 new user-defined date fields, a new address field and a check box field as well as a new user permission and transaction type. All of these options are designed assist in the management of the delivery and receipt of contracts and provide specialist reports.

### Getting started...

To use the licensing module you must do the following:

- 1) **Add Licence Fields** – Click on the Licence Configuration button on the *Maintenance* tab of the HLMSW Configuration Editor.

Enter the names of the new Licensing fields and check box options you require (you can leave fields empty if they are not required).

### BTM Innovation Pty Ltd

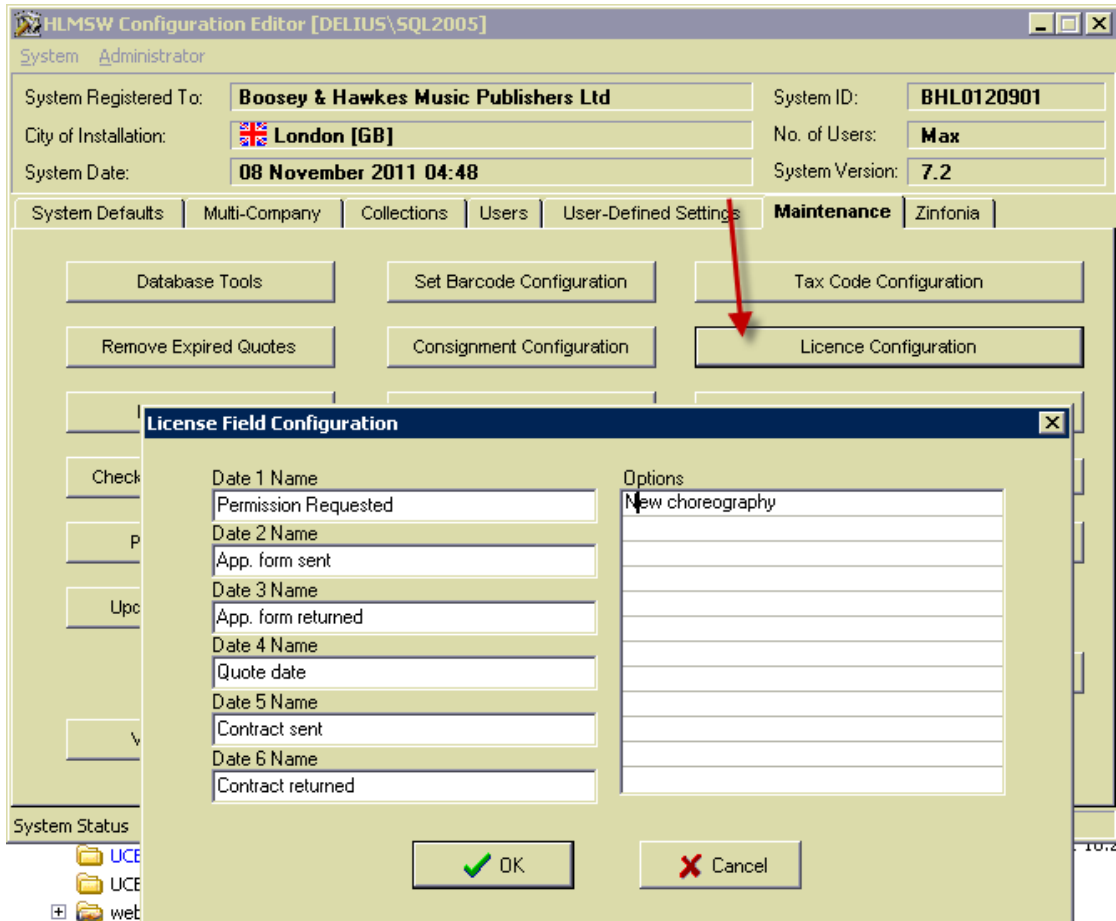
ACN 090 385 176 • ABN 71 090 385 176

8 Finnis Street • North Adelaide • SOUTH AUSTRALIA • 5006

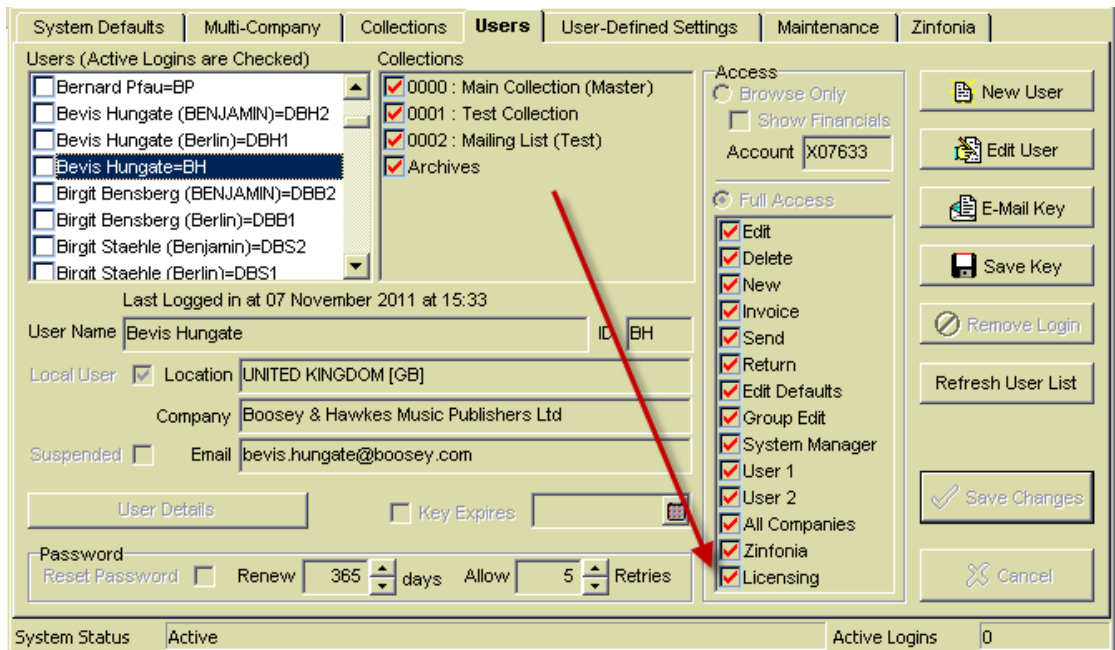
PO Box 3054 • Melbourne Street • North Adelaide • SOUTH AUSTRALIA • 5006

Tel/Fax +61 (0)8 8239 1737 • Mobile +61 (0) 409 286 400

info@btmi.com.au • <http://www.btmi.com.au>

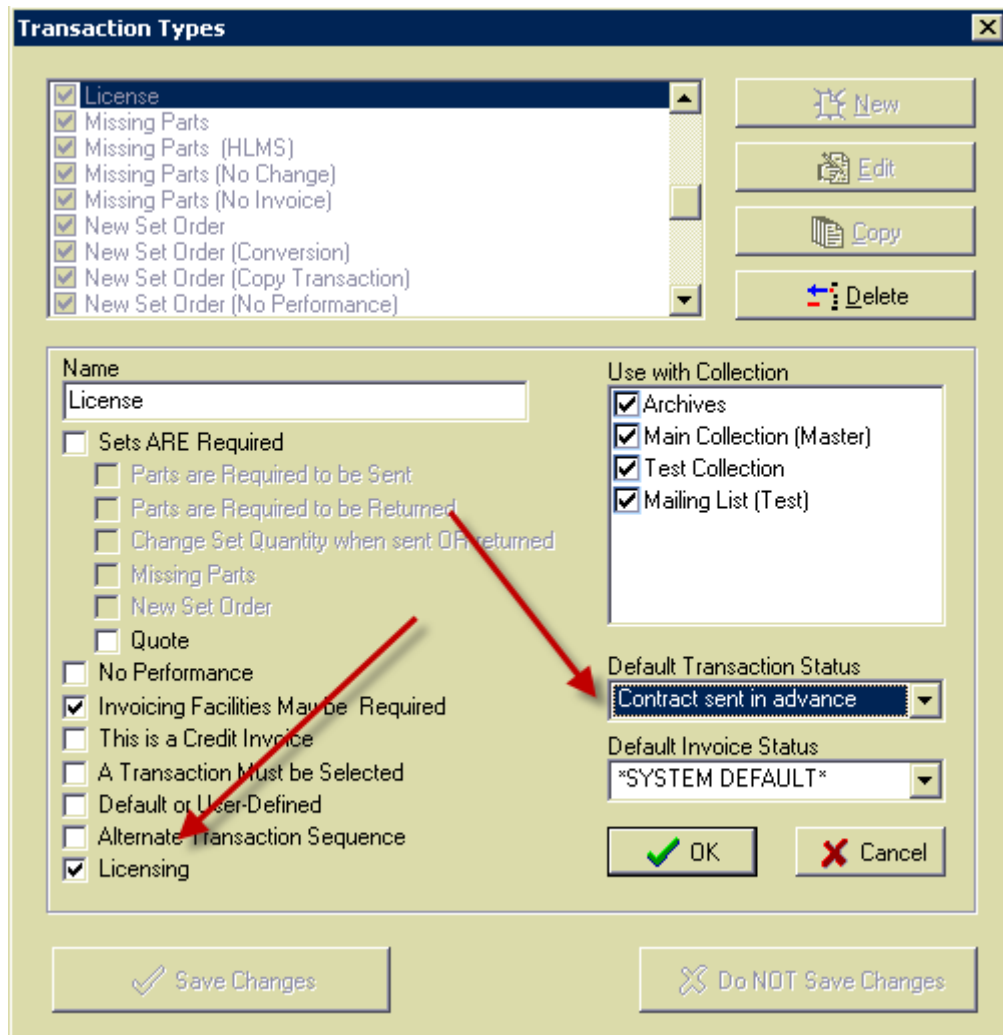


2) **Add Licensing Permissions** – On the *Users* tab, add the licensing permission to those users that would like to use this facility




3) **Create New Licensing Transaction Type** – using the Transaction Types button on the *System Defaults* tab, create some new transaction types that include the **Licensing**

option. You can also use this screen to set Default Transaction and Default Invoice status options for each transaction type which override the system settings.

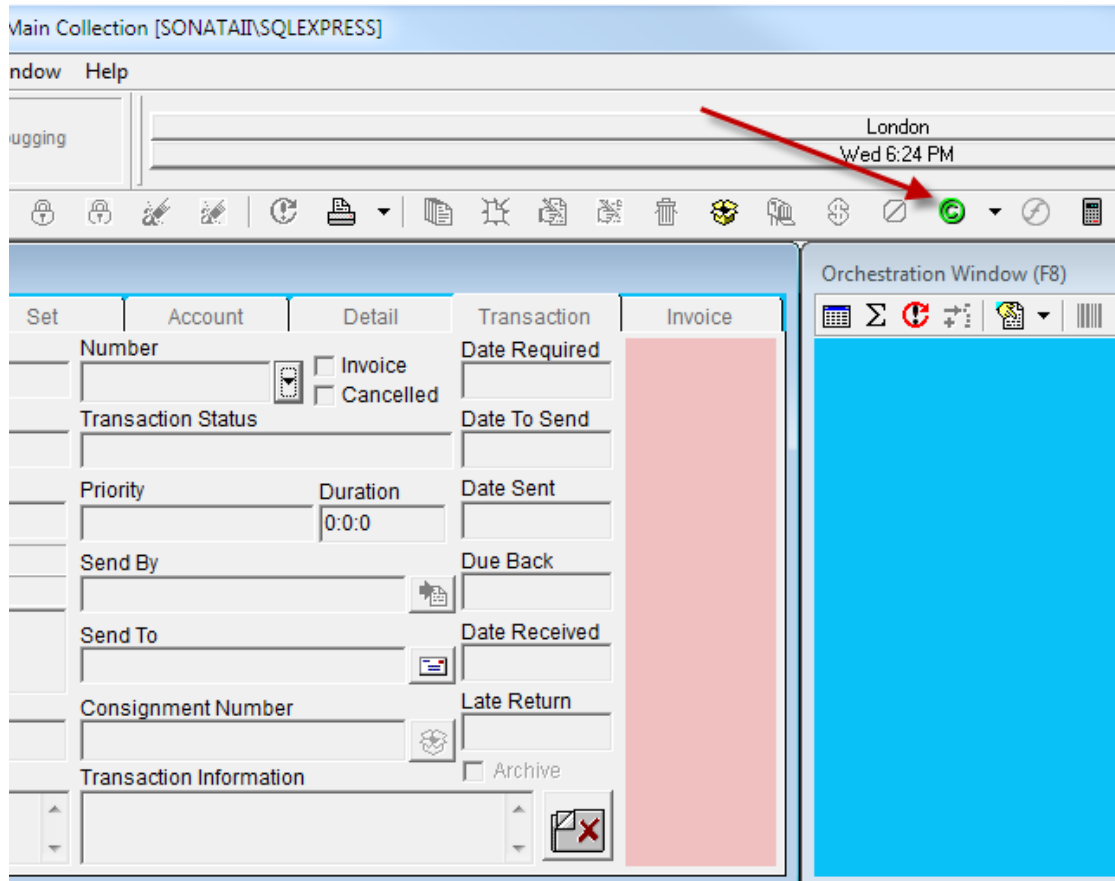


Now when you start HLMSW, and log into HLMSW using one of these logins with the Licensing option displayed, you will notice a few things have changed.

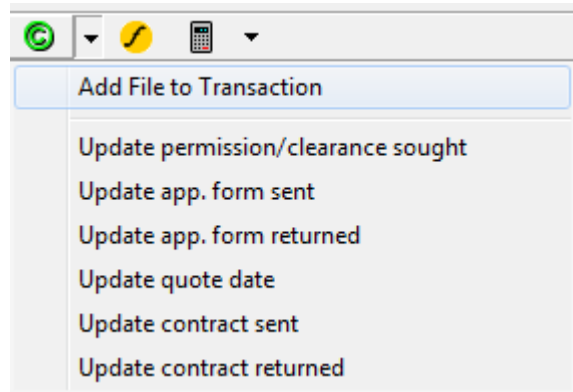
Firstly, the Edit Screen is a little wider than it was previously. The new fields are displayed to the right of the Dates in the Transaction tab (in the pink section below). If you have a large-format screen you may like to make the Edit Window a little wider, and you will also need to click on the *Window/Arrange* option to resize the remaining windows accordingly.

In the Tool Bar is a new green  symbol which has a number of new options that will that will be available. If you click on the symbol itself, 2 different things will happen depending whether or not the transaction is locked.

When it not locked, the Browse window is displayed (and filtered to only display Browsers with the Licensing permissions set). When locked, the Print window is displayed (again with the same filter). *Note: the new filter options are described in greater detail below.*



Click on the drop-down arrow to the right to show some other quick-entry options:  
**Add File to Transaction** allows you to quickly add a file to a transaction either as an Embedded file or as a File Link reference (available when you have added at least 1 Extra Database External File field).



The remaining **Update** options allow you to quickly insert or remove a date in any of the License fields without even editing the the title.

The new fields (TSENDTO, TDTL1, TDTL2, TDTL3, TDTL4, TDTL5, TDTL6 and TLOPT) are available for searching and printing and it is recommended that if you create any browses or forms with these option, you include the **LICENSING** permission in the browse or form so that it is selected when clicking on the new licensing tool button.

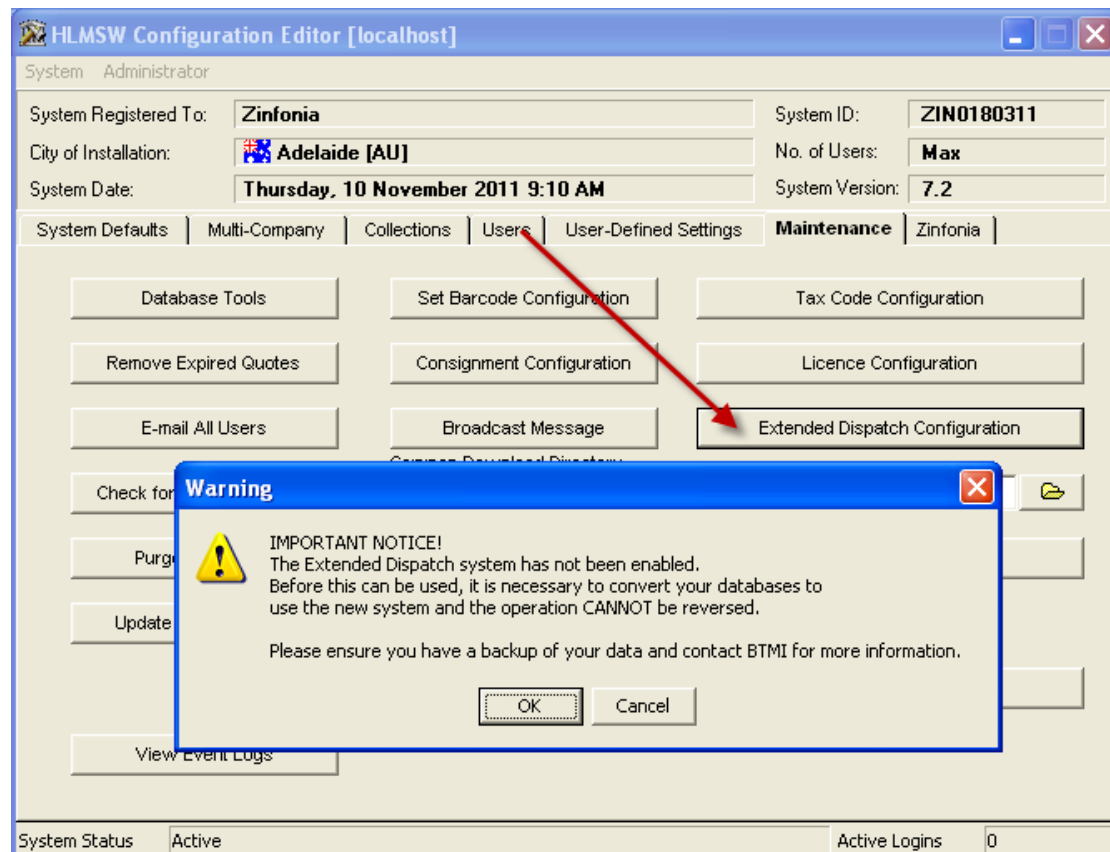
At the conclusion of this document, I will provide an example of suggested work flow to get the best out of the licensing module and to demonstrate some of the new features in this release.

## Improved Address Handling

This version of HLMSW has the option to use a new system, to manage customer addresses with these advantages:

- Unlimited addresses attached to every account
- Complete control of the display with different configurations based on the use, the company and the destination country
- Complete control of the dispatch addresses that are displayed in the drop down lists
- One-off addresses
- Visual Address Status

To install this feature, you click on the Extended Dispatch Configuration button in the *Maintenance* tab of the HLMSW Configuration Editor. The first time you do this the prompt below is displayed:



Depending on the size of your HLMSW system, this conversion process can take some hours to complete but only needs to be done once.

When the Extended Dispatch Address Configuration Screen is displayed, you can then enter specific address configurations for the following 4 addresses:

- 1) The **Dispatch** (delivery) Address
- 2) The **Consignment** Address ( this uses the same field as the Dispatch address, but is used when creating the address for the Consignment itself)

- 3) The **License** Address (only used when the Licensing module is used)
- 4) The **Contract** Address

**Extended Dispatch Address Configuration**

Default Address Formats:  
 ALL: Default  
 US/UK Style (City/State/Postcode) Reset to Default  
 European Style (Postcode/City/State)

Max Width: 60 Max Height: 8

Do NOT include Country if same as Userf  
 Use Country Name as entered (no translation)  
 Do not remove blank lines (unless required)  
 Include Title (Mr/Mrs) when Invoice Address  
 Exclude City Line from Max Width  
 Convert to UPPERCASE  
 Strip Extended Characters

**N, P**  
 @  
 1  
 2  
 3  
**C-S-Z**  
 #

**N** Name (#3)  
**P** Position (#1)  
**@** Company (#4)  
**1** Address Line 1  
**2** Address Line 2 (#5)  
**3** Address Line 3 (#2)  
**C** City  
**S** State  
**Z** Zip/Postcode  
**#** Country (#6)  
**%** Country Code

**NOTE:**  
 When the height exceeds the Max Height, the items will be dropped in order of their priority [#]

Sample  
 1 Mr Peter Grimshaw, Managing Director  
 2 BTM Innovation Pty Ltd  
 3 1st Floor  
 4 8 Finnis St  
 5 (PO Box 3054 Melbourne St)  
 6 NORTH ADELAIDE SA 5006  
 7  
 8  
 9  
 .... |...1|0... |...2|0... |...3|0... |...4|0... |...5|0

OK Cancel

Edit Window (F7)

Prokofieff S. (P... Ivan the Terrible... Set X08041 Detail T:11009576 Invoice

Transaction Type: Licensing Invoice  
 Number: 11009576  
 Transaction Status:  Invoice  Cancelled

Performance Type:  License Address  
 Permission/clearance sought

Performance Details:  
 Priority: Normal Duration: 0:0:0  
 app. form sent  
 app. form returned

Send To: Delivery Address  
 quote date  
 contract sent  
 contract returned

Transaction Notes:  Archive  
 new choreography

Red arrows point to 'License Address', 'Dispatch Address', and 'Consignment Address' fields.

Edit Window (F7)

Prokofieff S. (P... Ivan the Terrible... Set X08041 Detail T:11009576 Invoice

Invoice: 0 Credit: 0 Invoice Due: 9/11/2011 Invoice Date: [Not Specified] Status: [Not Specified]

Payment Terms: [Not Specified] Contract to: [Not Specified] Date Paid: [Not Specified] Printed:   
 Due on Date of Performance: [Not Specified] "Invoice Address\*" 9/11/2011 Pre-Pay:

Description	Type	Amount	Tax Code	Tax %	Tax Total	TOTAL
11009576 PROKOFIEFF S.						
<b>TOTALS</b>						

Red arrow points to 'Contract Address' in the table.

You can create a different layout for any of these types, and also on a Company by Company basis.

Every address has 2 forms: the US/UK style (with the Postcode/Zipcode at the END of the line) and the European Style (with the Postcode/Zipcode at the BEGINNING of the line). All countries in HLMSW have a setting with this value, but you can override the default address type on an individual address.

The address format editor (on the right hand side) consists of symbols to represent the fields that are required, and a sample of the address format is displayed below.

**Edit Country**

Name: Australia

Code: AU Dial Code (eg 49): 61 Currency (eg USD): AUD

3-Digit: AUS  State Required  Postcode Required

Address Format: US/UK Style (City/State/Postcode)

OK Cancel

Red arrow points to 'Postcode Required' checkbox.

Using the options on you change:

- Maximum width and height
- Whether or not the Country should be included if it is the same as the user
- Use Country Names as entered, and not translate them to the system default countries
- To retain empty lines if the address height is below the maximum
- Include the Mr/Mrs part of the name when Invoice Address is selected
- Exclude the City line from the Width calculations
- Convert the address to UPPERCASE
- Change all extended characters to their equivalent (ü to u).

Once the options are set here, you can see how the work in HLMSW.

In HLMSW the Dispatch fields are now visible with icons that display the status of the current address:



the address is OK



the address has not been Verified (all addresses when first imported into the new system are marked as unverified)



the address is missing some vital information (address, city or country).

Click on these buttons to add or edit the dispatch addresses. **Note: with this system you do NOT have to lock or edit the account to edit dispatch addresses, but you MUST save a new account first. If you hover your mouse above these buttons, they will briefly display the address in full**

Dispatch Address Editor

Albersen Verhuur v.o.f (Willem-Jan Keizer) M+

A30002 Show Addresses [F2]

Show All Hidden Addresses

**Delivery Address**

- Het Brabants Orkest
- Limburgs Symfonie Orkest
- MCO Muziekbibliotheek
- Peter Grimshaw**
- Rotterdam Philharmonic Orchestra

New Edit Copy

Search Text Search All Accounts

6 Addresses 16681 Added by TEST 7/11/2011 11:29 AM Last Edited by TEST 7/11/2011 1:57 PM

**Peter Grimshaw** Auto Name MR

Name: Peter Grimshaw Address: 8 Finnis St

Company:

Position:

Phone:

Email:

City: North Adelaide

State: SA Postcode: 5006

Country: AUSTRALIA

Dispatch Address:  Default  Hidden

Contract Address:  Default  Hidden

License Address:  Default  Hidden

Verified  Single Use  Hidden

Country Default (BOLD value)

US/UK Style (City/State/Postcode)

European Style (Postcode/City/State)

OK Cancel

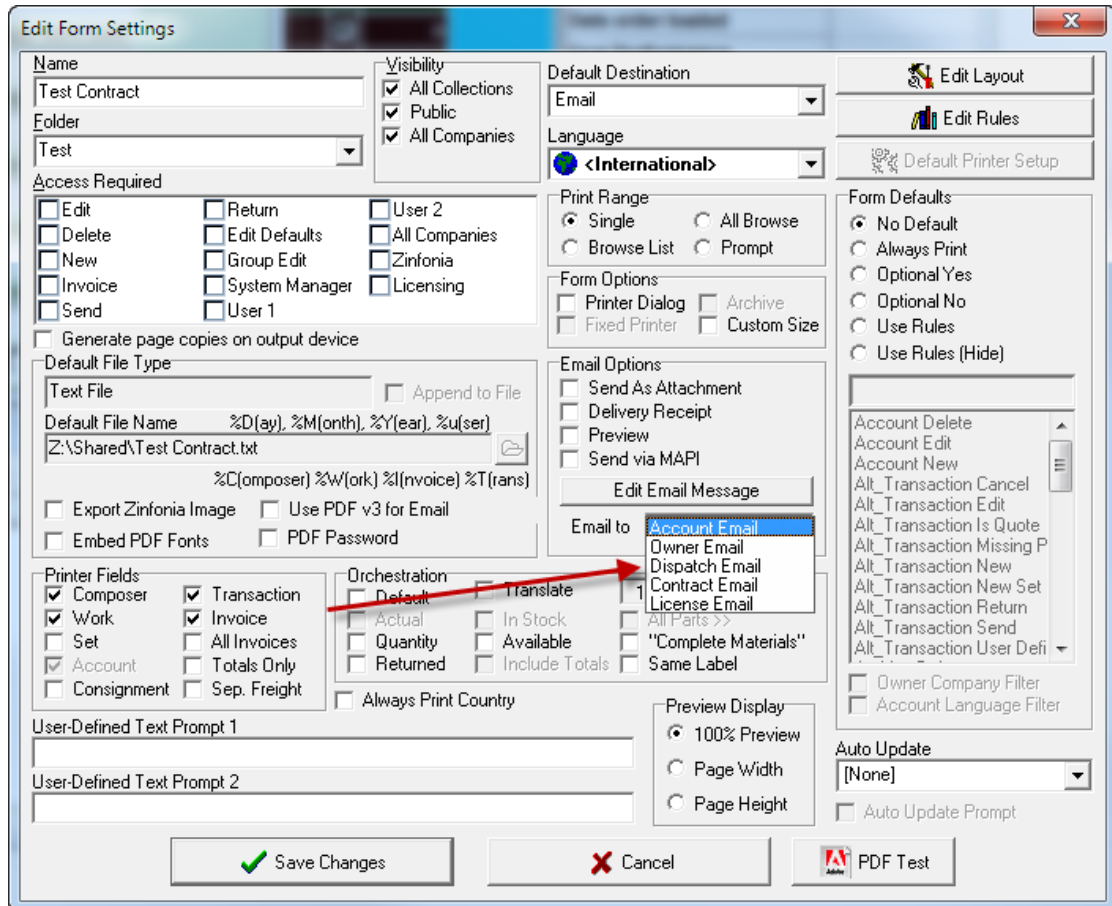
Close

From this screen you can search for addresses either via the account number or some text.

For every address if you can set the display options and if it is the first option displayed in the Dispatch, Contract or License drop down, or even if it should be displayed at all.

The **M+** and **MR** buttons work like Calculator buttons where you can save the address from one account and then place it in another.

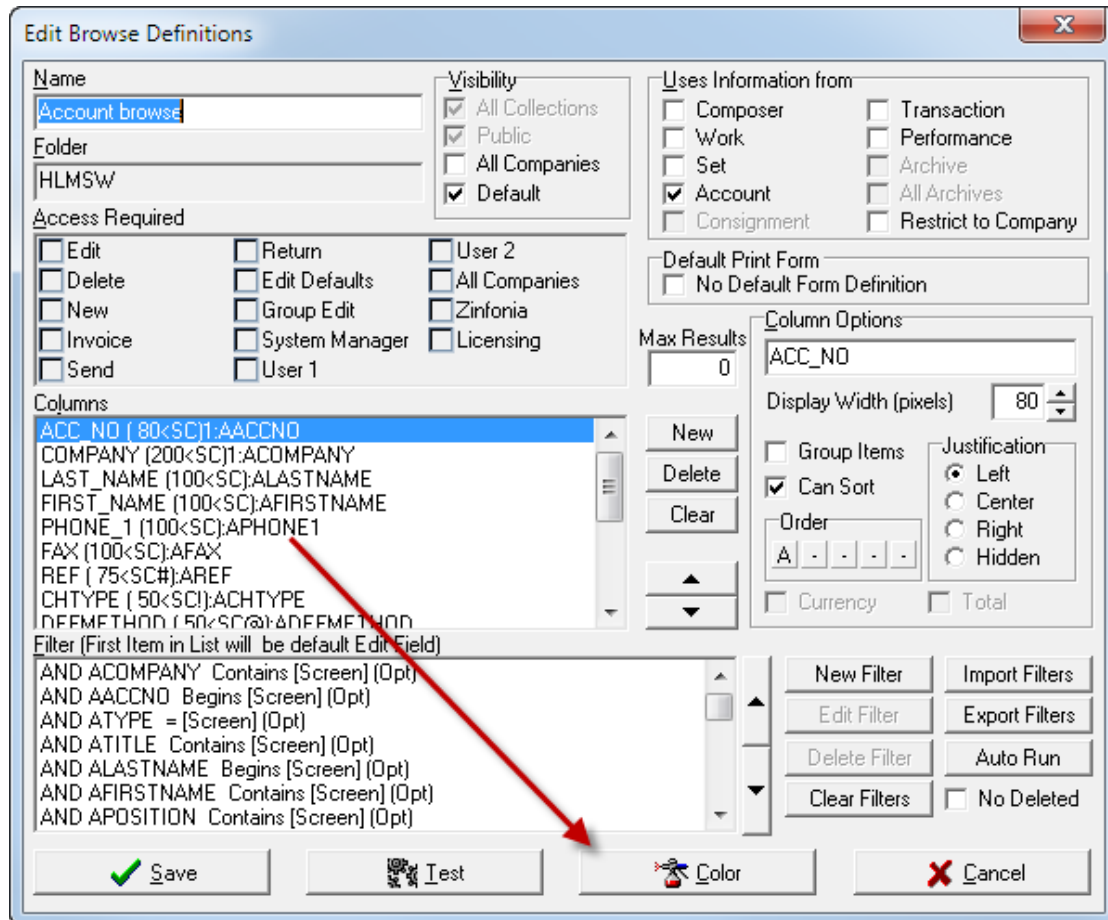
The dispatch address now includes a new Email option that you can use if forms that require an email address and through the new option in the Print Setup dialog:



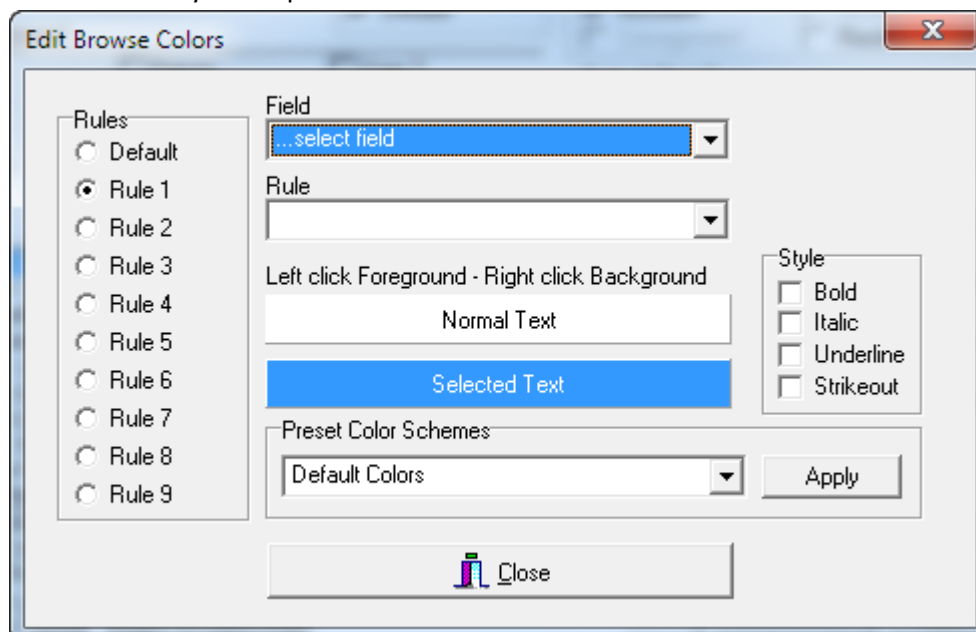


## Coloured Browsers

A new **Color** option has been added to the HLMSW Browse Editor to allow you to change the colors of individual rows in Browsers based on rules.



When selected you are presented with this window:



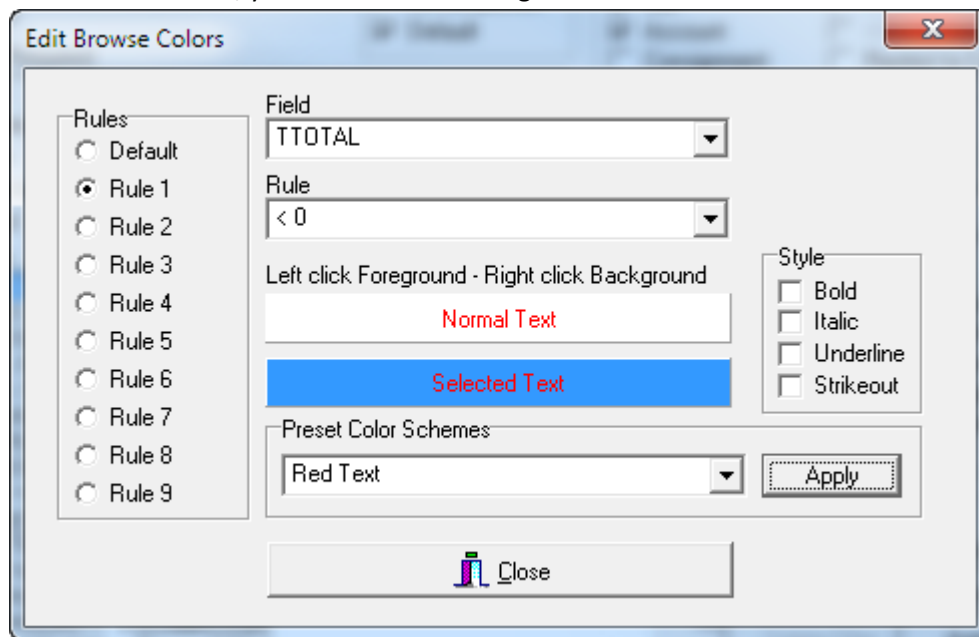
You can change the color of the entire browse by selecting the Default rule option. The remaining 9 options are free to meet rules based on the data in the browse. **Note: Only**

fields that are used in the browse itself may be used for rules, and the FIRST rule that is evaluated as true is used as the new color.

You can change the foreground/background of both selected and unselected items (although for best results, it is recommended you do not change the background color of selected items).

The Preset color schemes provide some quick color combinations that can be associated with any rule you create by clicking on the **Apply** button.

So if you wanted, for example to display credits in RED then you would select your transaction browse, you would use a setting like this:



Using this system you can create browses that are only limited by your imagination

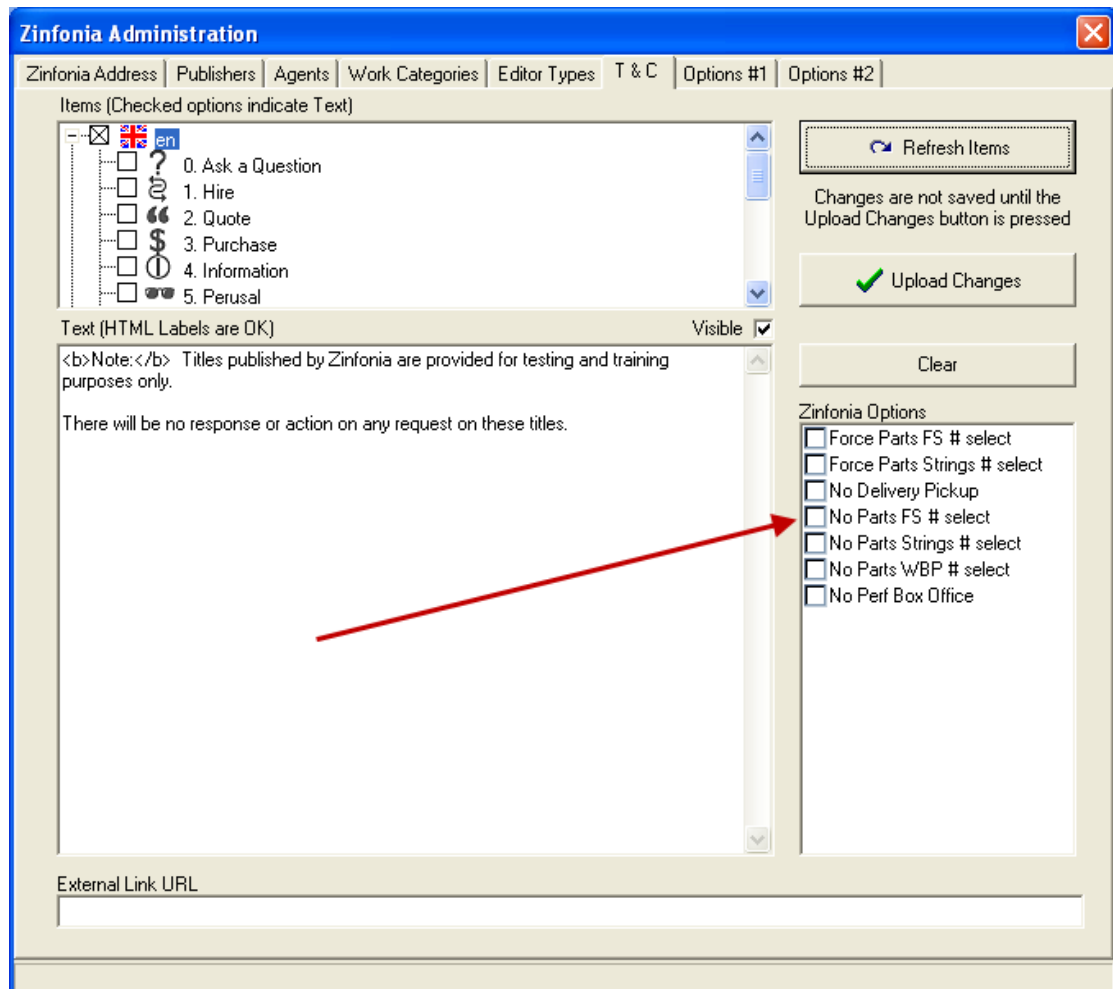
#	TRANS...	STATUS	COMPO...	WORK	Durat...	ACCOUNT1	FIRSTP...	LASTP...	COL2
1	10003123	Ready for De	Williams	Bugsy Maloni	01:35	Fairfield Prep	07/2011	07/2011	
2	10003127	Ready for De	Williams	Bugsy Maloni	01:35	Newcastle-un	08/06/2...	08/06/2...	
3	10004145	Ready for De	Williams	Bugsy Maloni	01:35	St Swithun's J	09/06/2...	09/06/2...	
4	1043555...	9999	Rachma...	Piano Concer...	00:25	Universität Ba...	23/07/2...	24/07/2...	ELV
5	1100108...		Moussar...	Pictures at an...	00:29	KMS (Korea ...	21/02/2...	21/02/2...	EM
6	11001303	Ready for De	Williams	Bugsy Maloni	01:35	Woodbridge	08/06/2...	08/06/2...	
7	11001425	Ready for De	Williams	Bugsy Maloni	01:35	Royal Gramm	07/06/2...	07/06/2...	
8	1100163	Ready for De	Williams	Bugsy Maloni	01:35	Th...	08/06/2...	08/06/2...	

**Note:** Colors are only displayed on-screen, they cannot be exported to external files.

## Zinfonia Part Selection

A number of changes have been made to the interface to provide you with more options how the **Parts Selection** page on Zinfonia works.

On the T&C (Terms and Conditions) tab of the Zinfonia admin window in the HLMSW Configuration editor are more options you can use to customise the user experience on Zinfonia for YOUR titles.

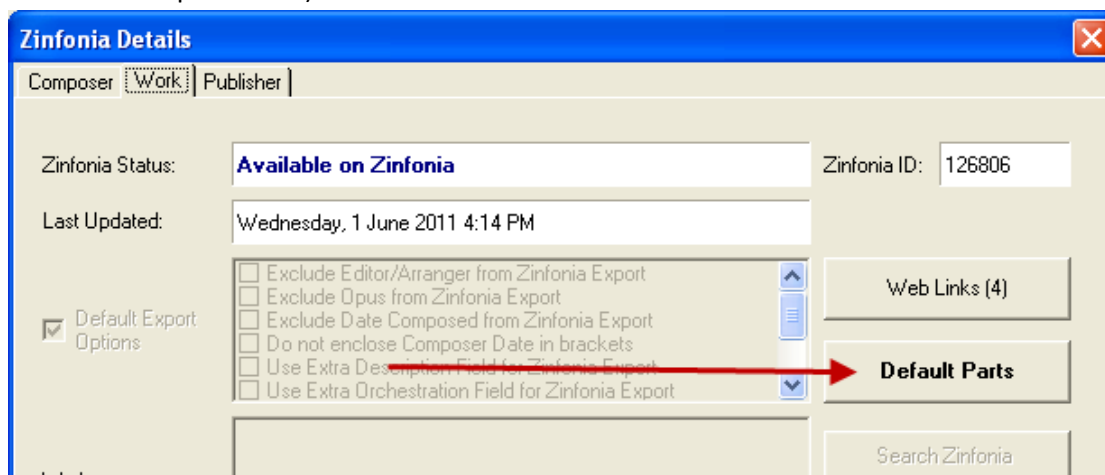


The options available are:

- **Force Parts FS # select** will require your clients to enter a number of scores for the order (the Standard Quantity option is disabled)
- **Force Parts Strings # select** will require your clients to enter a number of string parts for the order (the Standard Quantity option is disabled)
- **No Delivery Pickup** hides the Delivery Pickup option from the Dispatch menu
- **No Parts FS # select** disables the ability for client to enter the number of Full Scores
- **No Parts Strings # select** disables the ability for client to enter the string parts
- **No Parts WPB # select** disables the ability for client to select the option to NOT retrieve the Wind, Brass, Percussion set
- **No Perf Box Office** disables the requirement of the customer entering average ticket price and average seating information when entering a Grand Rights performance

Please note these settings are GLOBAL for all transactions of the type that is currently displayed. If you want them to apply to ALL transactions, make sure you enter the information at the top of the Items tree.

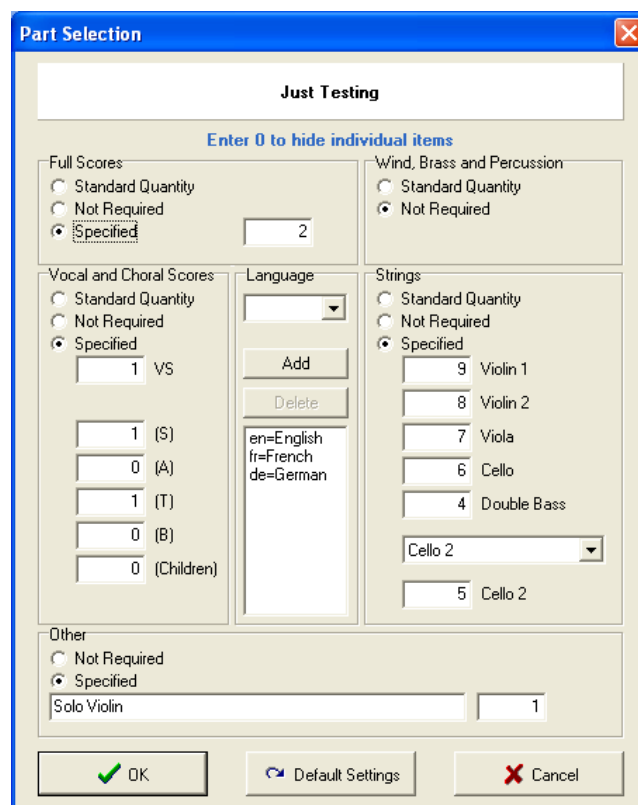
In HLMSW itself there is also a new option **Default Parts** in the Work tab of the Zinfonia Information screen. Here you can view and edit (if the Work is currently in Edit mode) what is actually displayed for this work in Zinfonia (when Bold, this indicates changes to the default requirements).



This button opens the parts selection dialog where you can enter default values for the number of scores, vocal and choral material WBP and strings. Most of these have 3 options:

- Standard Quantity** (the default) which allows the users to select what they require.
- Not Required** which will hide the category on the Part selection screen
- Specified** where you can enter the actual default numbers for each part (entering a negative number eg -1 will hide the individual items).

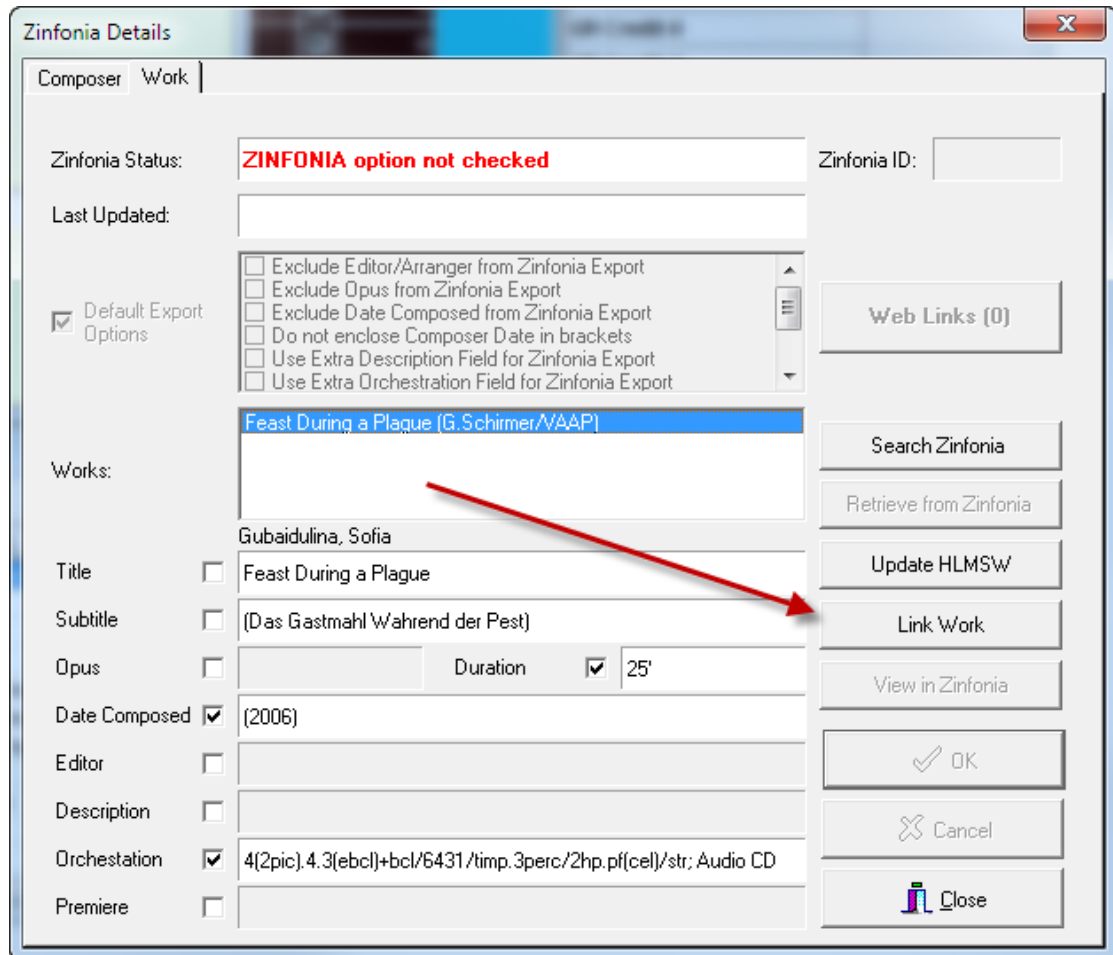
On this screen can add the available languages and you also have the option to access the special string option which provides an additional string type (either Violin 3, Viola 2, Cello 2 or Solo). There is also an "Other" instrument that you can define in any way you like (but this information will NOT be translated).



The Default Settings button returns all information to the default settings. Note: Remember to Save the Changes when on the Zinfonia Screen to commit the changes made here.

## HLMSW B2B Interface

HLMSW now provides a direct route to send orders from one HLMSW to another with Zinfonia. This is completely automatic, and so long as you have Linked the work via the Zinfonia screen BEFORE placing the order then the order will be send automatically by Zinfonia in addition to your usual methods.

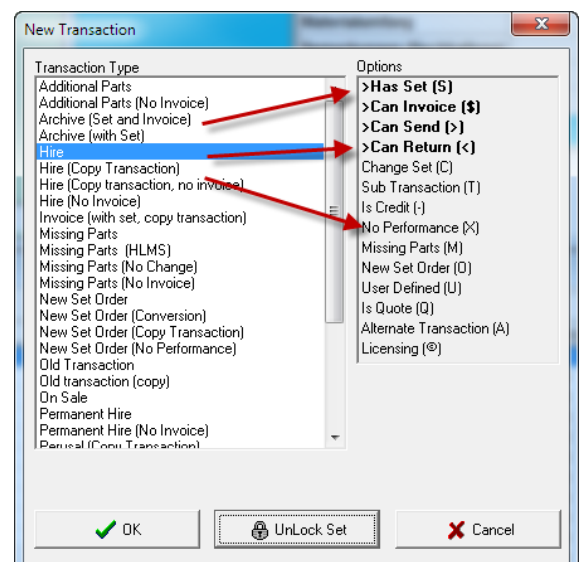


HLMSW also include some new options to which allow you to specify the default links that are supplied, and also the default field conversions when using the B2B Interface.

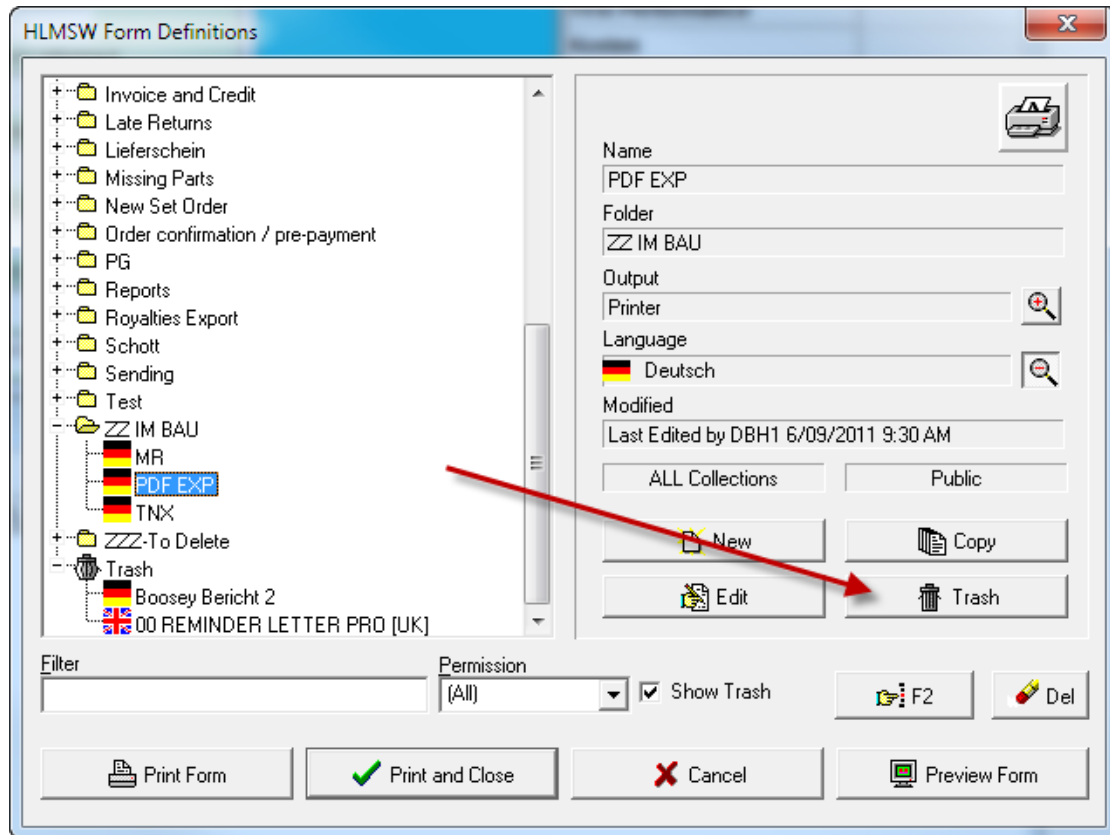
## Updated Print/Browse/Transaction Selection screens

In order to manage the increased number of transaction types, forms and browses, the selection screens have been improved.

The New Transaction screen allows you to click one or more Options to reduce the transaction types to those that match the selected items.



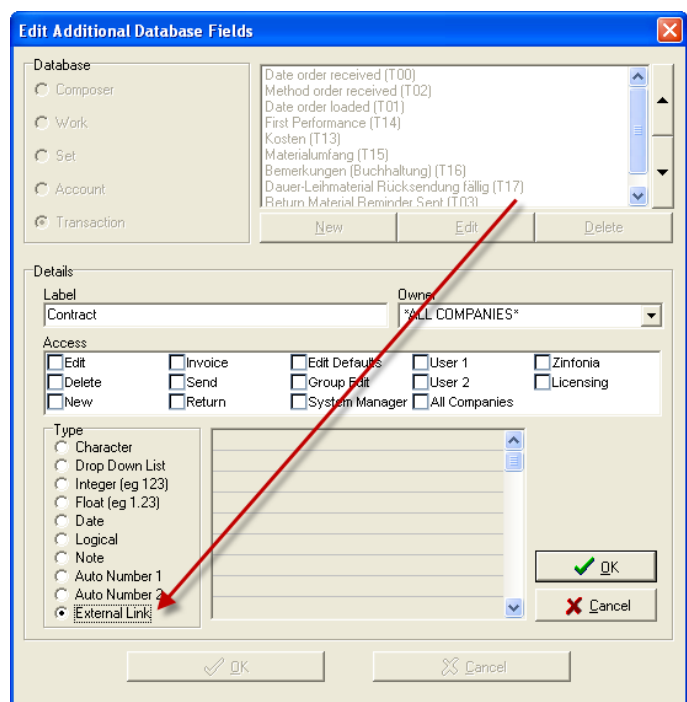
The print/browse screens have been substantially improved with new search text (F2) and permission filter items. In addition a new folder called Trash has been created and you can quickly move unwanted browses and forms to the trash by clicking the browse item. You can delete items permanently by clicking on the trash button on items actually in the trash.

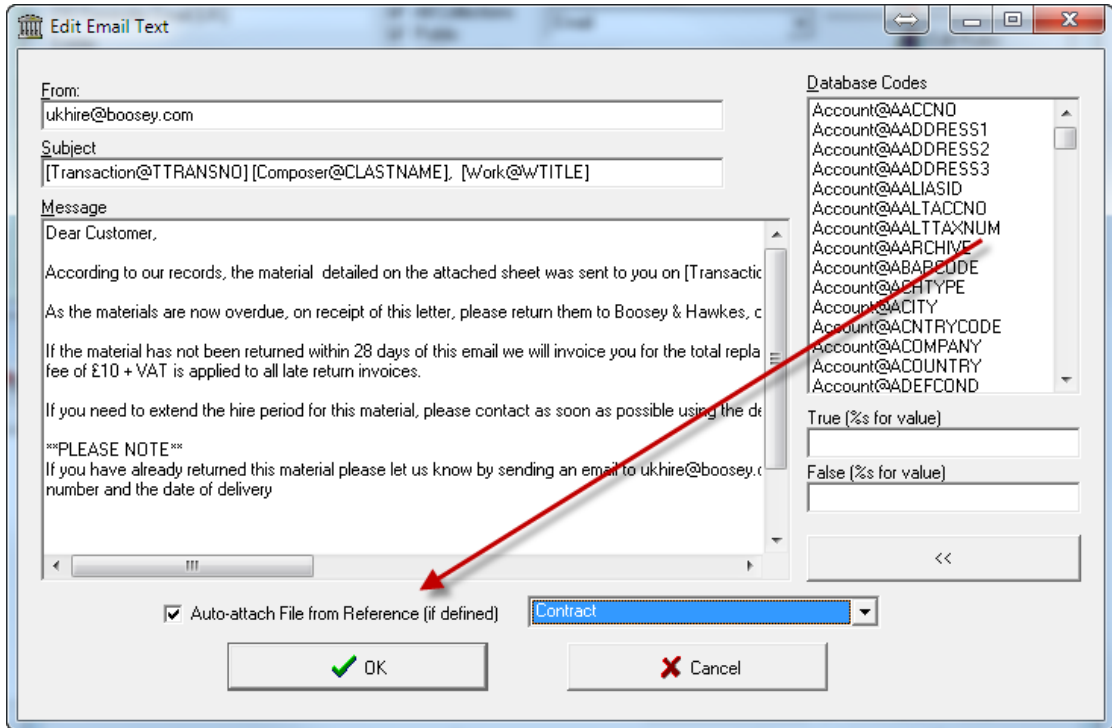


## Email Auto Attach Option

A new option in the Email creation screen allows you to automatically include linked documents (set via the external documents option in the Edit Additional Fields screen of the HLMSW Config Editor).

When an item is included here you can automatically append the file contents to an email by using the option in the Email content edit screen.

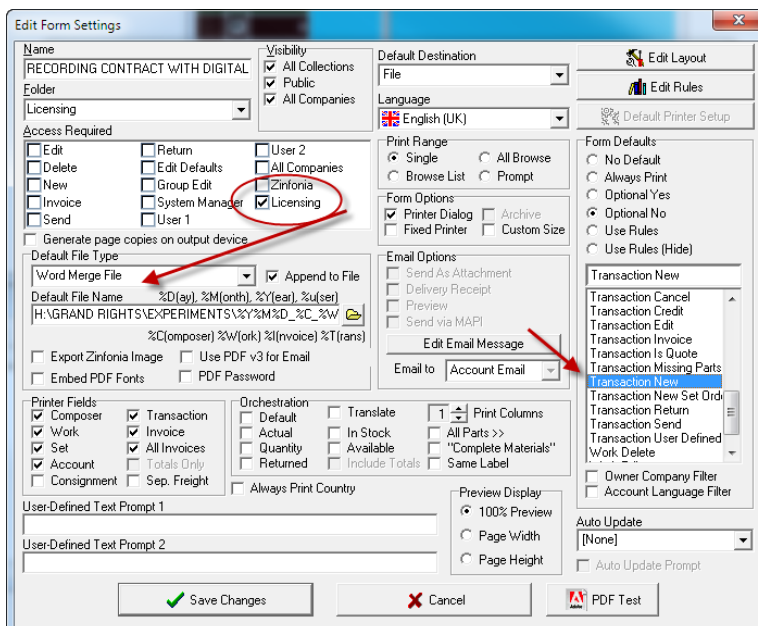




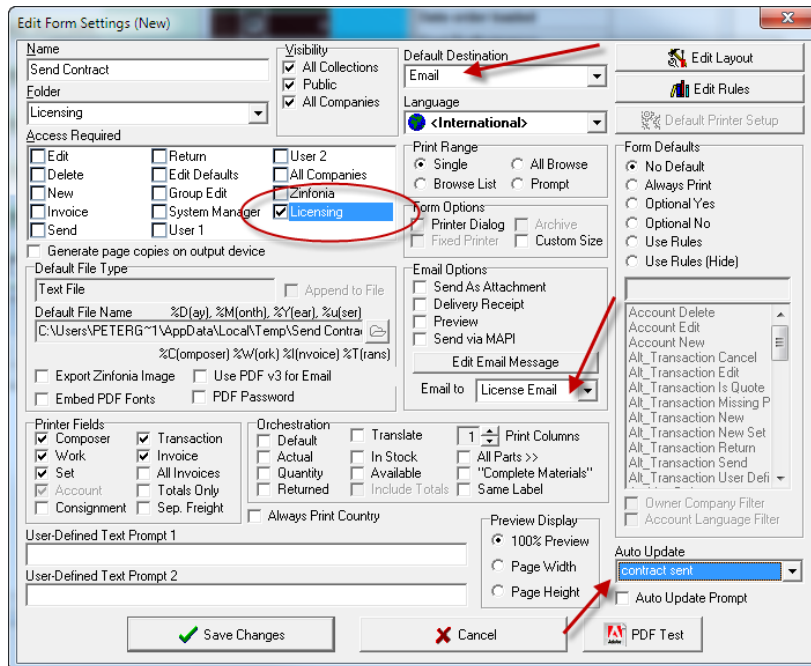
## Bringing it all together...a sample case how to use the new Licensing facilities

In this example, I will highlight the steps required to manage the sending and receipt of contracts using the new HLMSW features. This will assume you have 2 License Fields *Contract Sent/Contract Received* and an External Link field called *Contract*.

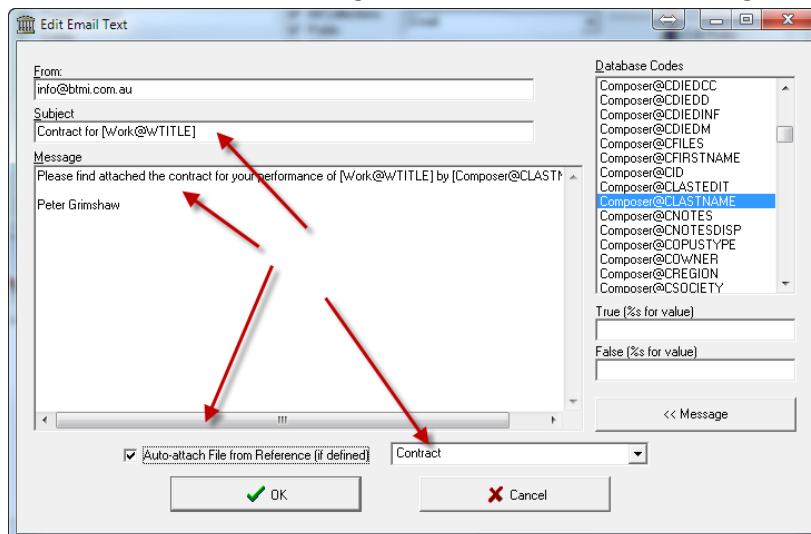
- 1) Create a Word Export document-** Create a new word merge file with the details of the contract you want to send and make sure the Licensing Access option and Transaction New items are selected.



- 2) **Create an Email to Send the Contract** - Now create the template for the email that is used to send the contact. Make sure that again the Licensing permission is selected, the destination is Email and the Auto Update option is set to

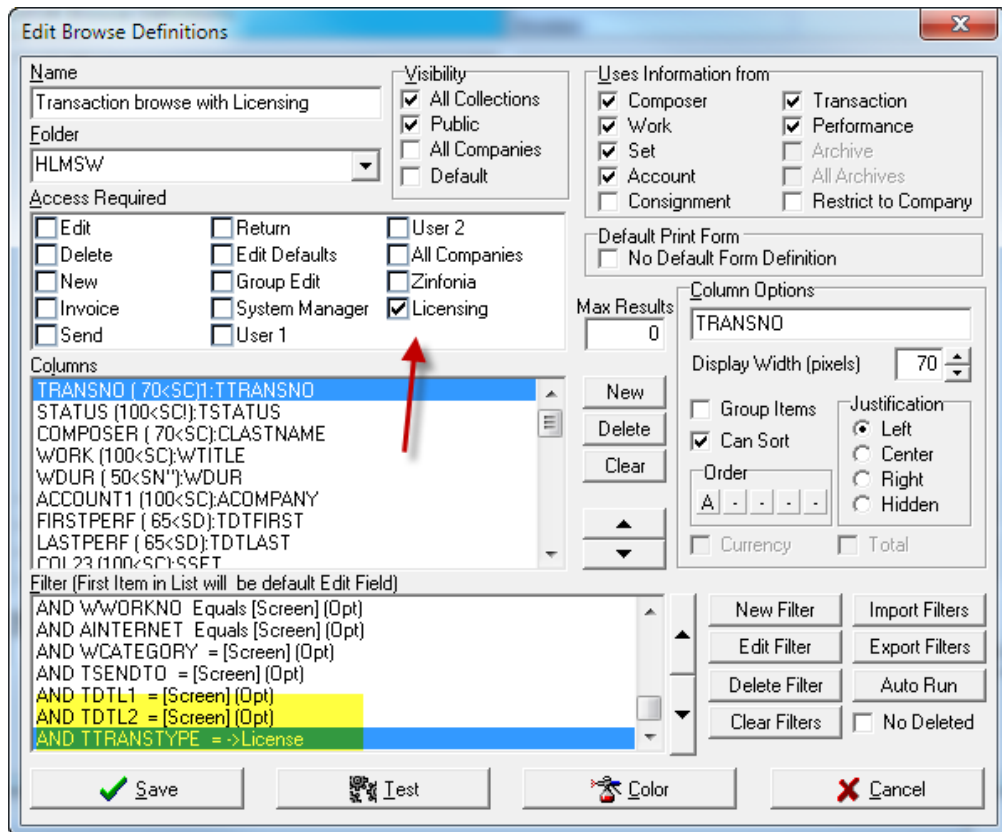


Click on the Edit Email Message button and enter the following:

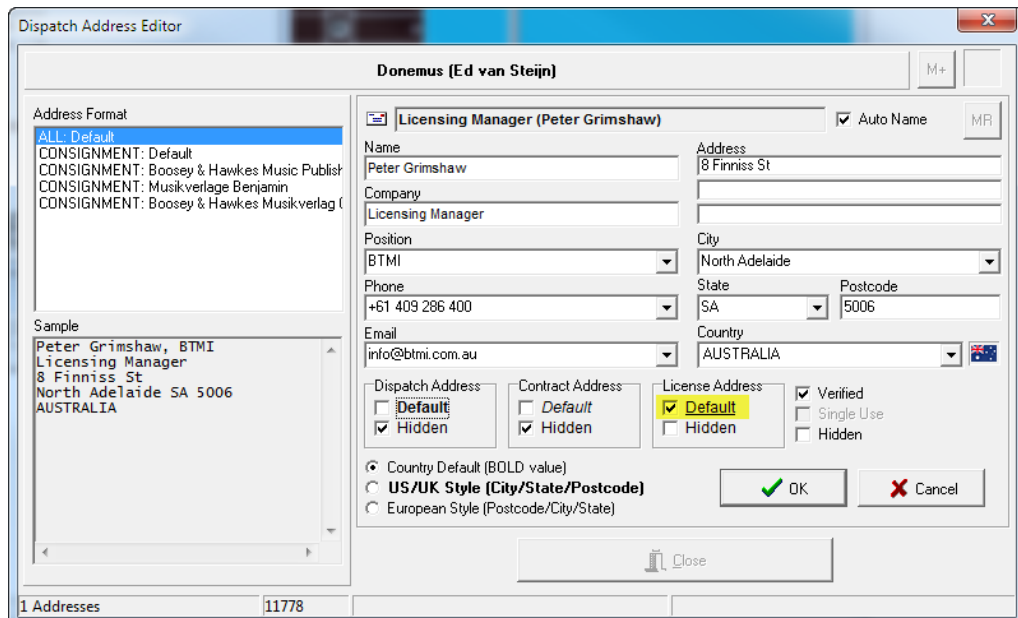


- 3) **Create a Browse for Licensing** – Using your default Transaction browse as the basis, create a new Browse for licensing and select the Licensing permission and add the new TDTL1-TDTL6 fields to the browse.

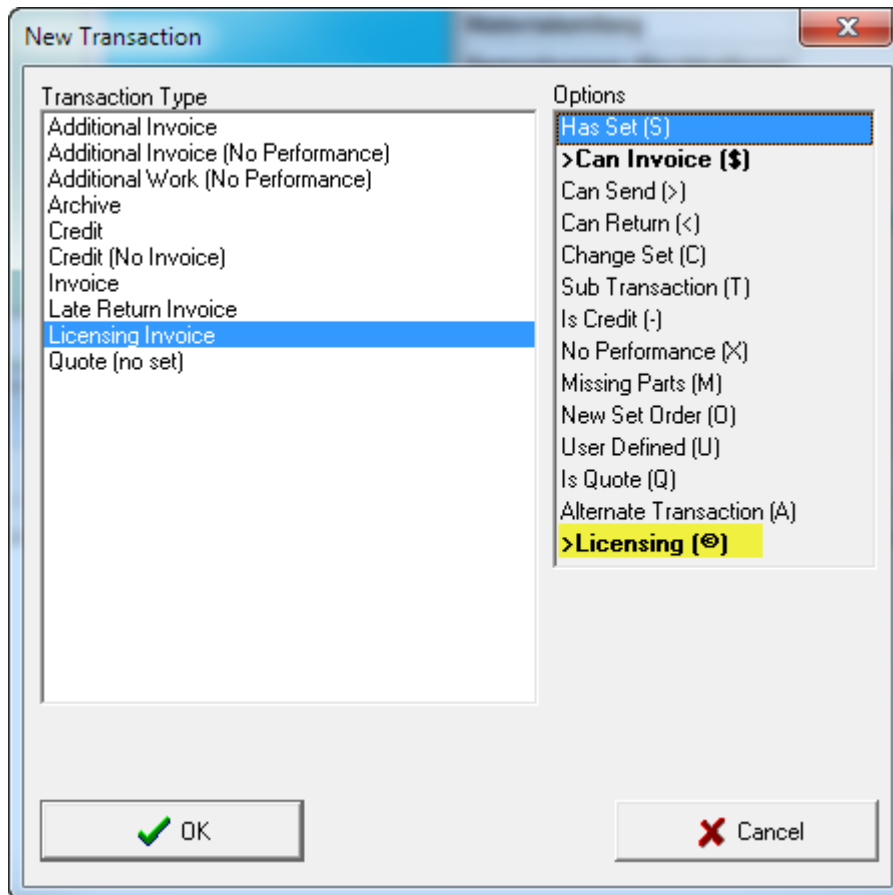




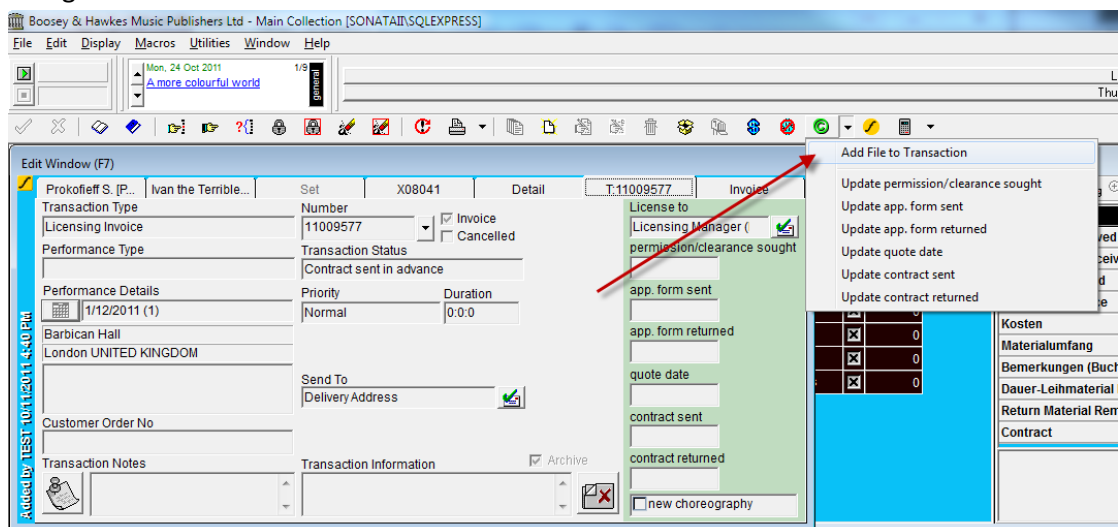
- 4) **Select an Account and create a new License Address** – Create a new address for the licence and make sure the Licence address is selected (you can hide it in the other fields). Make sure you have also included an email address.



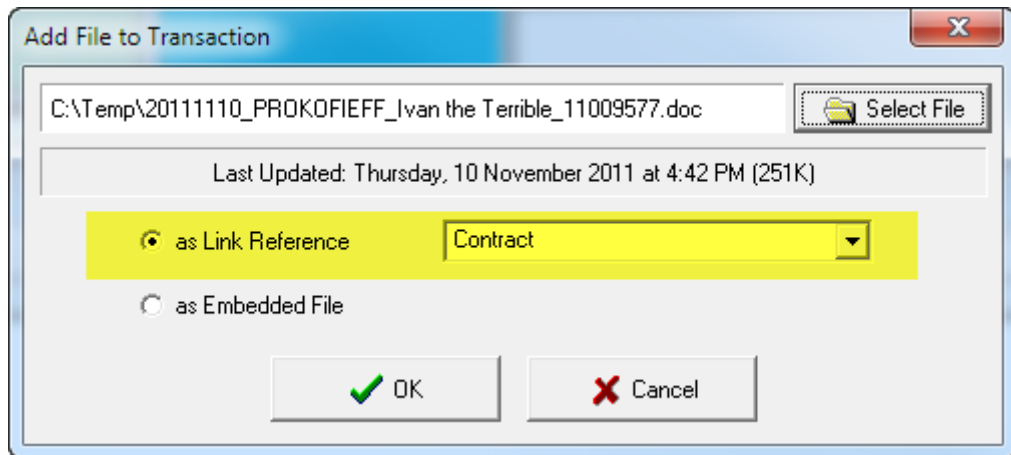
- 5) **Create a NEW Transaction with the Licensing option selected** – select a composer, work and account and press NEW on the transaction tab to create a NEW Transaction and enter the details and Save the Transaction (Make sure you PRINT the Contract we created earlier).



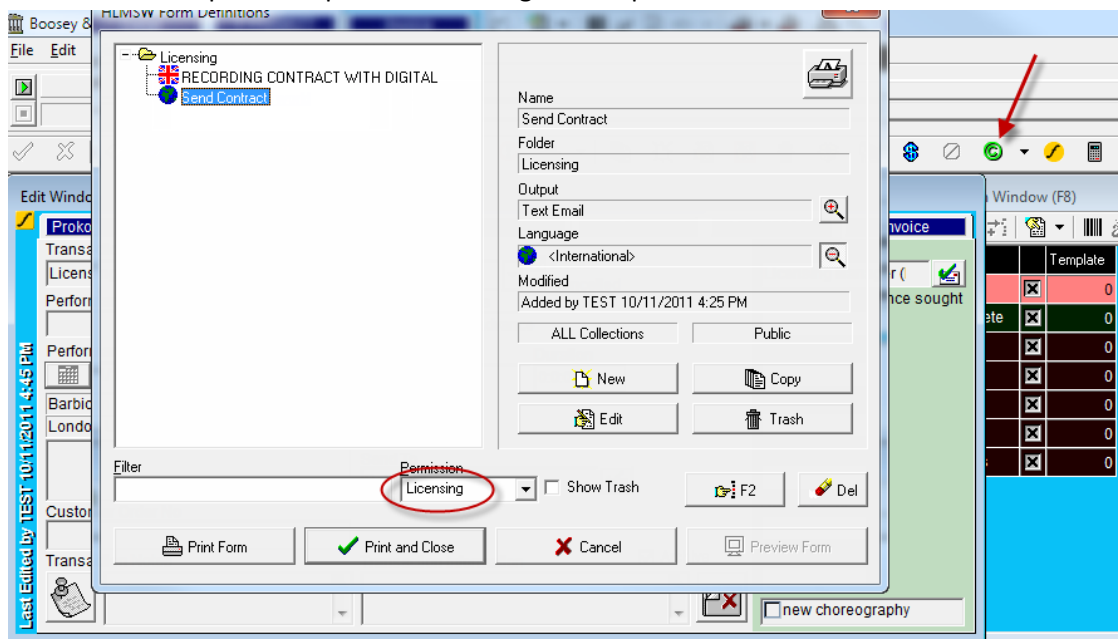
- 6) **Save the Word Document to HLMSW** – Make changes to the contract, save the changes and exit work and then click on the *Add File to Transaction*



Make sure you select the *As Link Reference* option

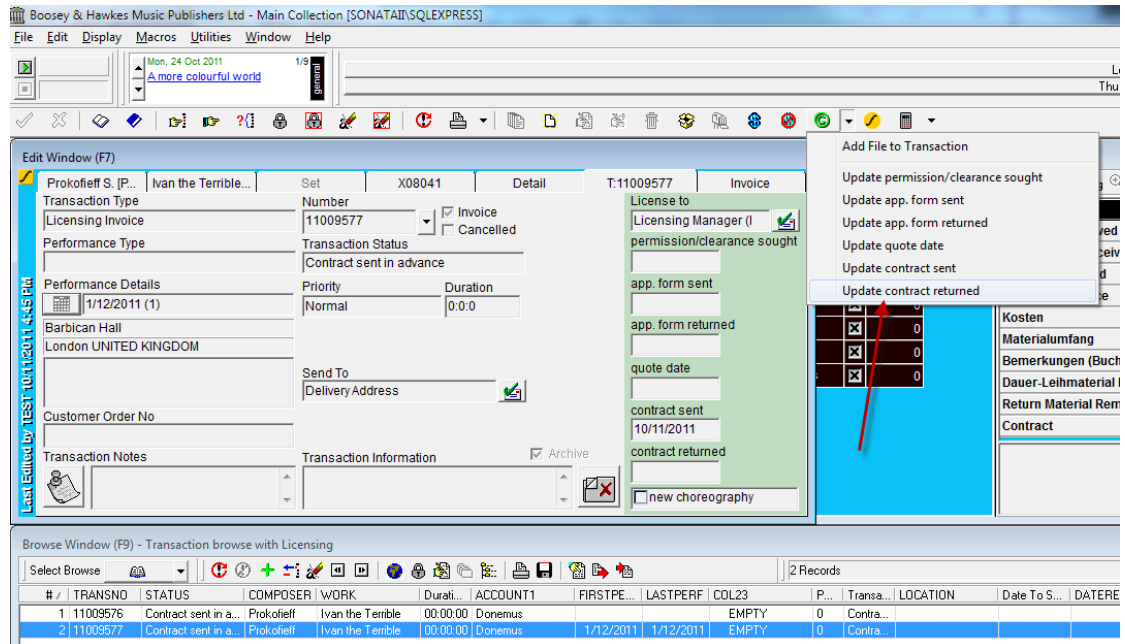


- 7) **Send Email to Client** – Now Lock the transaction, and click on the main part of the License toolbar option to open the Licensing forms option



When the email is printed, the Contact Sent Date will be automatically updated.

- 8) **When the signed contract is returned** – Click on the main part of the License Tool button again with NO transaction locked to search for all browses with Licence permissions, locate the transaction we created earlier and use the menu returned option to set the returned date.



Peter Grimshaw

Last updated: Monday, 2 January 2012