



HLMSW v7.3 Installation Notes

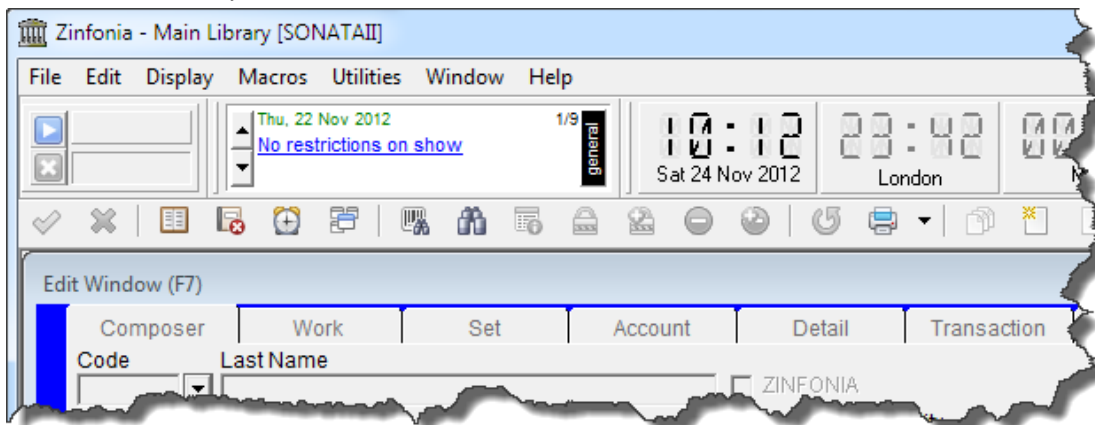
This version of HLMSW has a number of significant changes including:

- An updated and more consistent interface
- New messaging functionality
- New work restrictions functionality
- New statistics module
- New PDF Merge facility
- Unicode Zinfonia Titles
- Zinfonia Group Messaging

And many other change and improvements that are outlined in this document

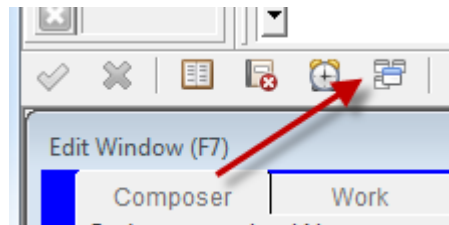
Updated Interface

The HLMSW interface has been updated with new icons to make the screens and functionality more consistent and easy to use.



Apart from the new look some specific new features of the interface include:

- New Auto Arrange Icon (Shift-F7) or *Window/Auto Arrange* Menu Option that will automatically reset your display to your saved layout
- Right-clicking items on the Edit Screen with the SHIFT depressed will automatically copy the content of that field to the clipboard
- The right-click options now work on the Extra Database fields screen as well



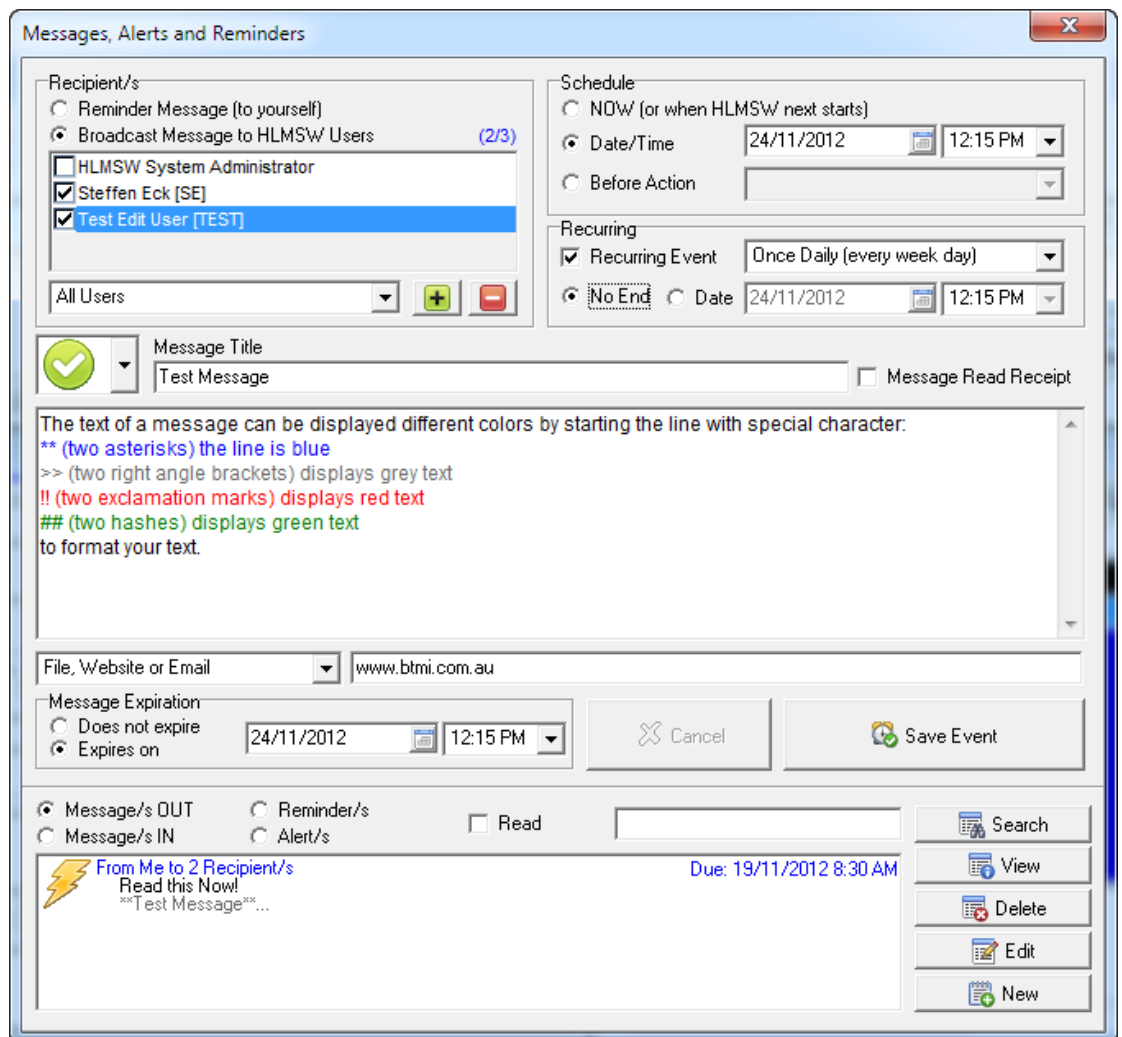
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HLMSW Messaging

HLMSW includes a new messaging facility that allows you to send messages to other HLMSW users and reminders to yourself at designated dates and times. This new facility is also used by HLMSW to deliver certain alerts and system messages (such as the welcome note that should be displayed when you start this version of HLMSW for the first time).



Note: Messages are ONLY displayed when HLMSW is running, and so unless they are set to expire, any past messages will be displayed when the user starts a session.

Creating HLMSW Messages

You can create a HLMSW message in two ways:

1. **Important Notes:** When the *important notes* option in the Edit screen of composer, works, sets, accounts, performances and transactions is red, the note will be displayed whenever it is locked.




Note: in this version of HLMSW, these informational messages are only displayed ONCE every 12 hours

2. **Messages Alerts and Reminders Screen:** Select the alerts and reminders icon (Shift-F8) or the *Utilities/Alerts and Reminders* Menu Option to display the screen and then enter your message using the options described below and press the *Save Event* button.



The Messages, Alerts and Reminders Screen

A description of the available components of the messages, alerts and reminders screen is below (not all options are available at all times).

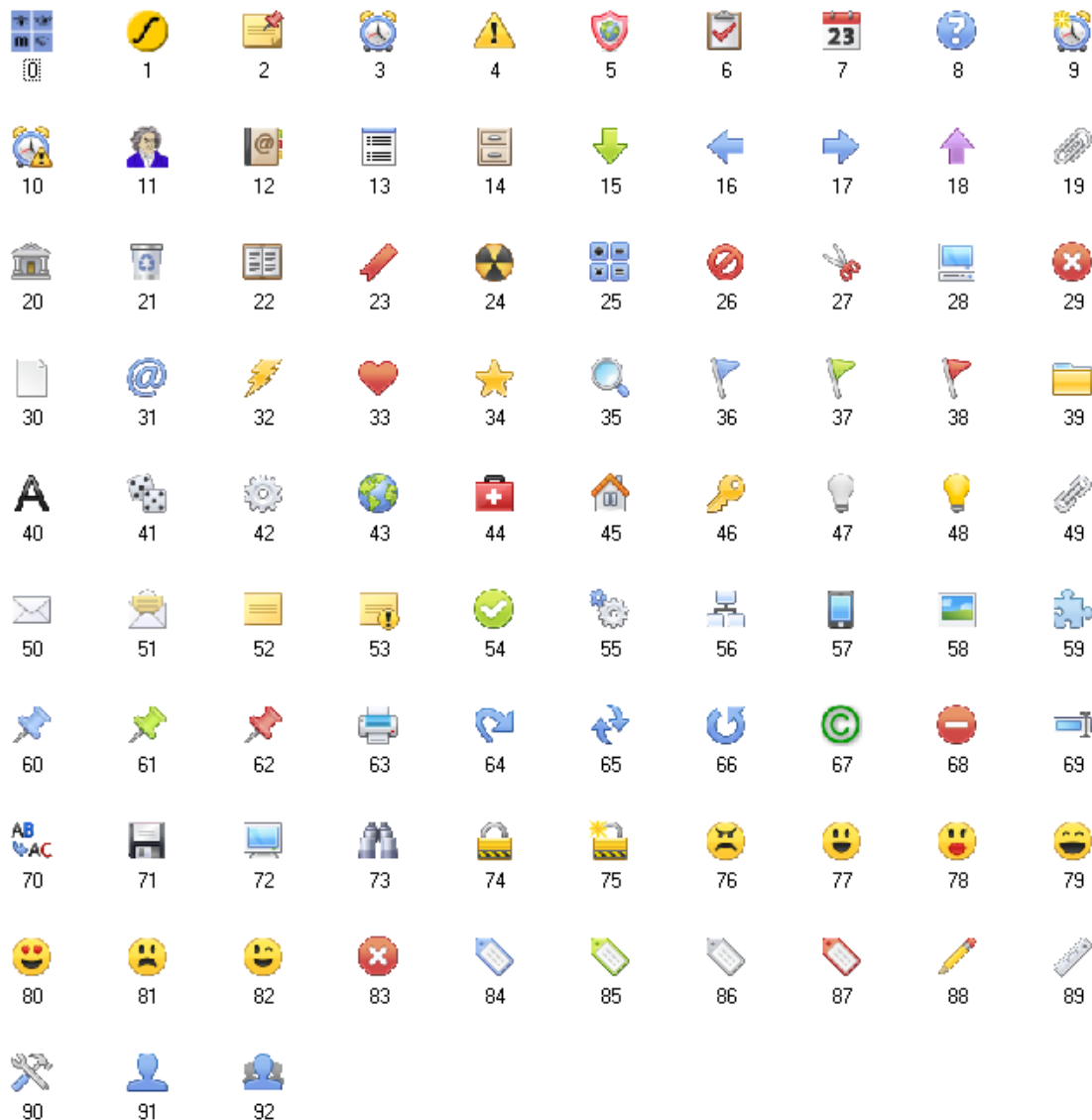
Recipient/s: This section allows you to select the destination of the message which can be either to yourself (a reminder) or to another HLMSW user (a message). When the broadcast option is selected you must select the recipients from the list. The HLMSW Administrator option is a special user (or users) that will be available to all HLMSW Administrators. Use the drop down selection below the list of names and the icons  to add or remove names from specific groups.

Schedule: This section allows you to nominate the timing of the delivery of the message which can be either:

- Now (or when the next HLMSW session begins)
- A specific Date and Time
- When HLMSW starts or finishes

Recurring: Allows you to specify if the event occurs more than once based on a daily, weekly, monthly, quarterly, half year or annual anniversary with an option end date.

Icon: You can select an icon for your message from this list



Message Title: The title of the message

Message Read Receipt: Allows you to receive a notification when your recipients read your messages

Message Text: The text of a message can be displayed different colors by starting the line with special character:

** (two asterisks) the line is blue

>> (two right angle brackets) displays grey text

!! (two exclamation marks) displays red text

(two hashes) displays green text

to format your text.

Note: These colours also work in the Notes text fields as well.

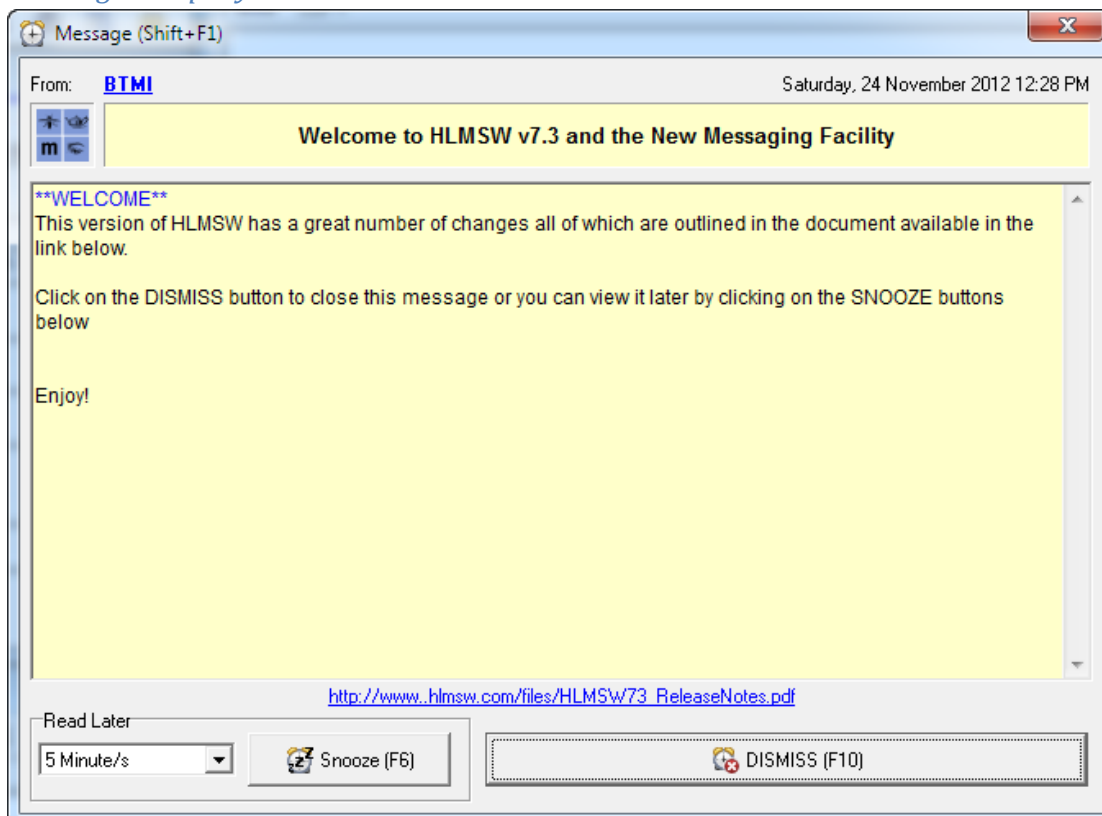
Link to: allows you to reference the current composer, work, set, account, transaction or a specific file or website.

Note: File information are only sent by reference and so must be available to all recipients.

Message Expiration: You can set an optional date/time where the message expires after which it will NOT be displayed to the recipients.

Message History: The message history section allows you to search, view, delete, edit and create new messages.

Message Display



Messages are displayed on top of the normal HLMSW screen and you can continue working while it is displayed. To interact with the Message Window, select Shift-F1 key.

Messages can be immediately dismissed (F10) or you can press the Snooze button (F6) to remove the message to display again when the time selected has elapsed. If more messages are waiting to be displayed, they will be displayed at this time.

You can respond to a user by Email by clicking their name in the From section, or with HLMSW messaging using the **Quick Reply** button when visible. When this option is displayed you can also select text in the message sent, and press the *Quote Message Text* button to include excerpts from the text in the response.

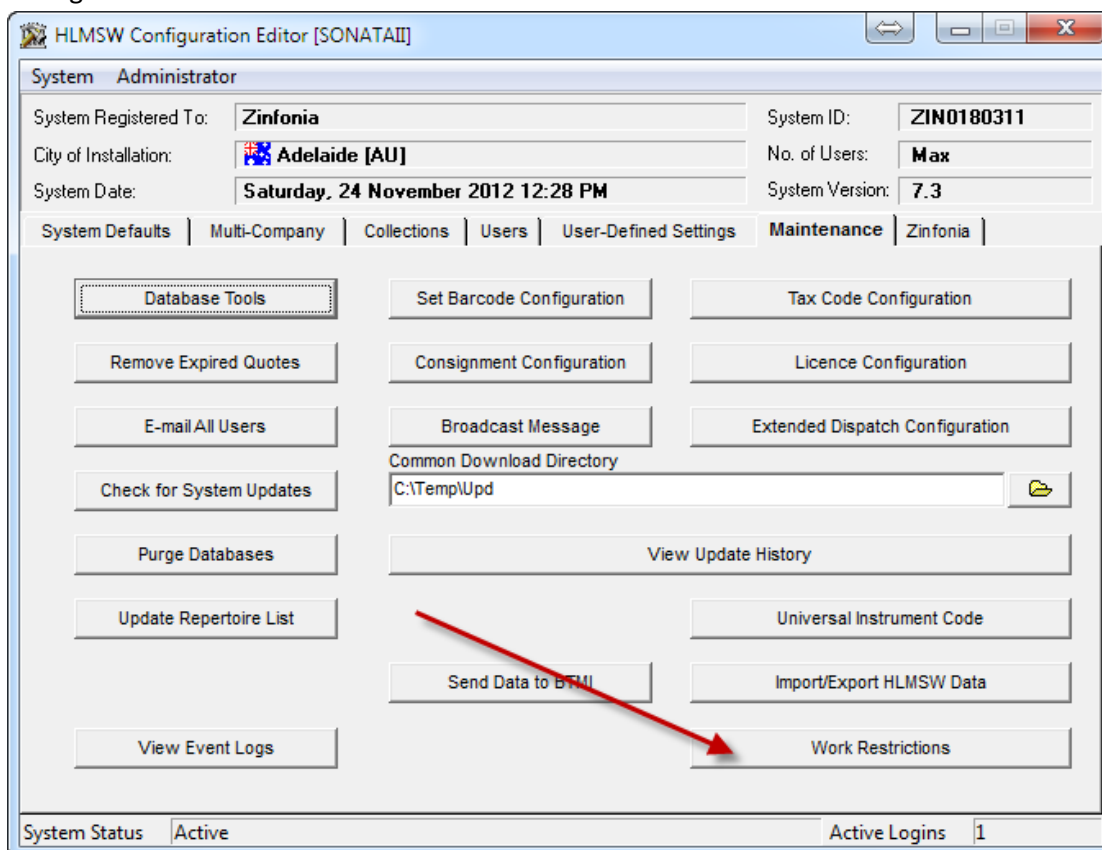
HLMSW Restrictions

The new HLMSW Restriction module allows you to add, edit, delete and view user-defined restrictions using a variety of options to assist you in the control of title-based restrictions and exclusivities.

When create HLMSW Restrictions will automatically expire when the period of exclusivity ends, and users are only notified about restrictions when entering a NEW transaction for a work with current restrictions.

Setting up the HLMSW Restriction module

This feature must be enabled by using the *Work Restrictions* button on the Maintenance tab of the HLMSW Configuration Editor.



When displayed, the Work Restriction Settings screen is displayed. To enable this option, you must select the check-mark against the HLMSW Collection.

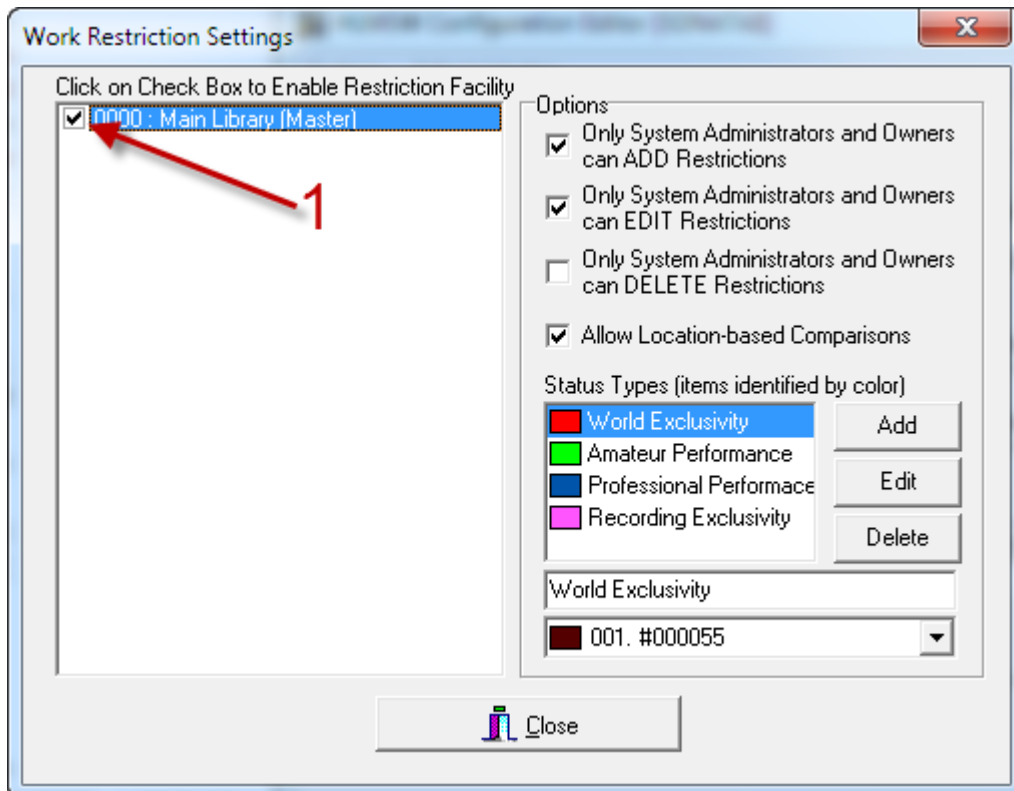
Note: Once selected you CANNOT remove this option

You may then enter whether the restriction facility is available to all users or those with System Administrator access for adding, editing and deleting.

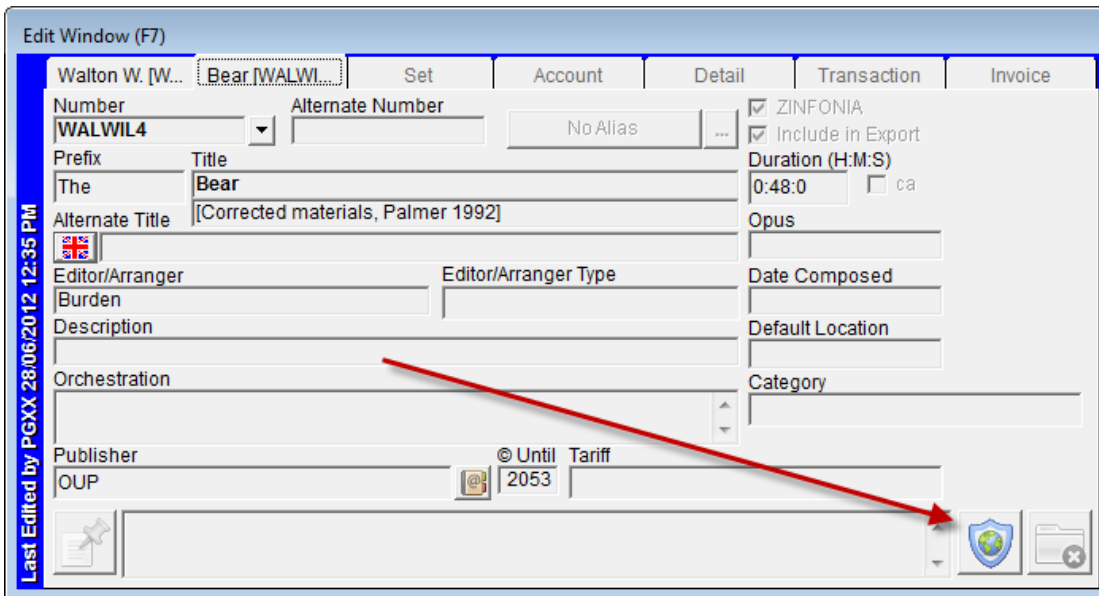
The Status Type list is very important because you must create a separate Status Type for EVERY type of restriction you need to control. Every Status Type is assigned a specific color to assist in the quick identification.

The *Allow Location-based Comparisons* provides access to the Google Restriction Map options described below.

Note: The order of the colors in the list is significant with the result always displayed in the SAME orders as the colours in the list. Therefore, when selecting colors it is recommended you select colours that are widely spaced so that you can later add new restriction types in the order you require.



Once this process is complete, the next time your HLMSW users start, they will notice a new Shield icon displayed in the Work screen



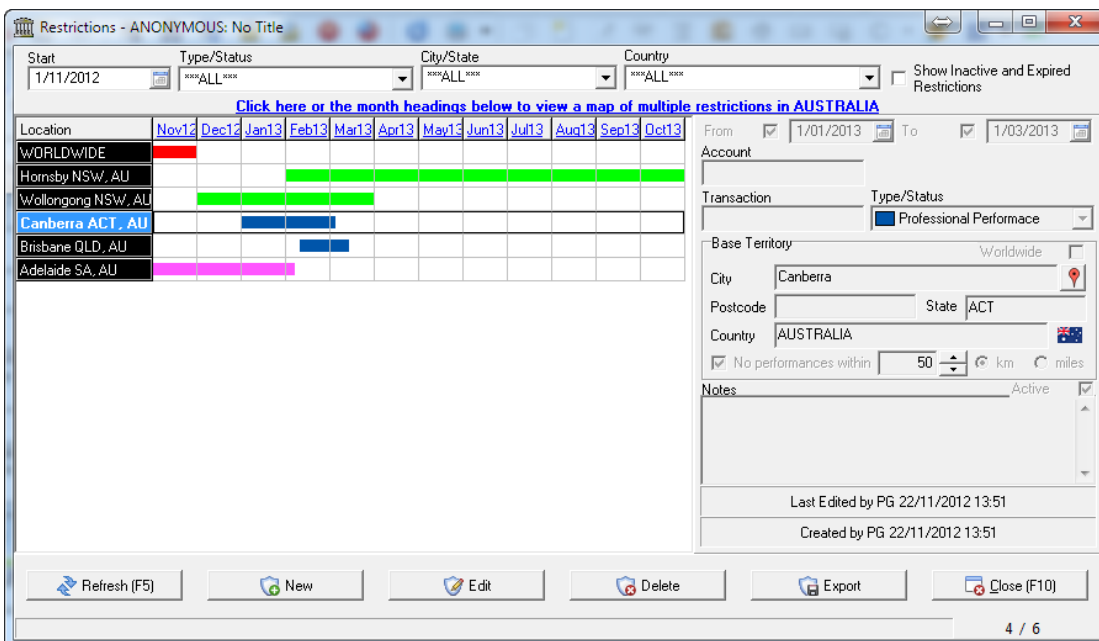
When BLUE this means there are no active restrictions.



When RED there are active restrictions.

Click on the button review or edit the restrictions

Note: (you only need a work selected, you do NOT need to lock the work)



In this window, you have the following options:

Start: allows you to set the start date for the year of restrictions visible

Type/Status: allows you to filter the list based on a specific type/status

City/State: allows you to filter the list based on a specific city or state

Country: allows you to filter based on a specific country

Show Inactive and Expired Restrictions: allows you to toggle the view inactive and expired transactions in the list.

The buttons along the bottom provide the following options:

Refresh (F5): Refreshes the displayed list

New/Edit/Delete: Adds, Edits or Deletes a restriction

Export: Allows you to export the displayed restrictions to a CSV file

Close (F10): Closes the screen.

Restriction Options

You can add or edit a restriction from this screen or from the Performance Editor window.

When adding or editing a restriction, the following options are available:

From: when selected allows you specify a date from which the exclusion commences

To: when selected allows you specify a date which the exclusion concludes

Account: Allows you to specify an account that is linked to this restriction


Transaction: Allows you to specify a Transaction on which this restriction is based.

Type/Status: is use to select the type and order of restriction defined in the HLMSW Configuration Editor (this MUST be selected)

Primary Territory: Allows you to define the primary territory associated with this restriction which may be Worldwide or any combination of City, Postcode, State and Country.

Note: a City and Country is required for mapping

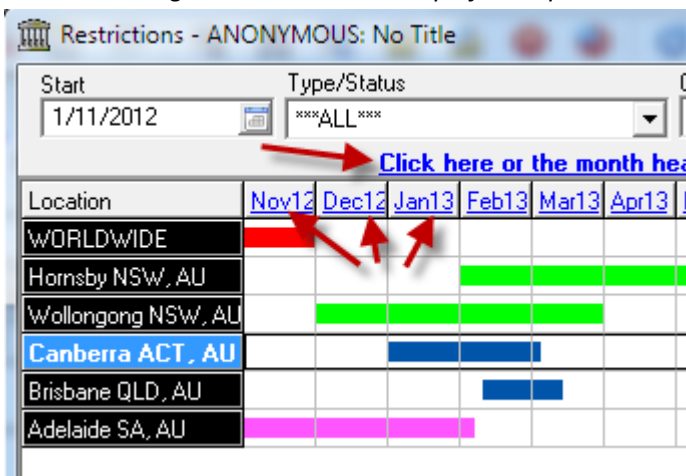
The **No performances within** checkbox allows you to specify a radius that is displayed on the Restrictions Map described below. The first time this is selected, the address is sent to Google maps to retrieve the co-ordinates for display.

The  icon allow you to view an entered address in Google Maps.

Notes: allows you to enter more details information about the restriction.

Viewing a Google Restrictions Map

When the *Location-based Comparisons* option is enabled by the administrator, the text *Click here or the month headings below to view a map of multiple restrictions in Australia* is displayed.

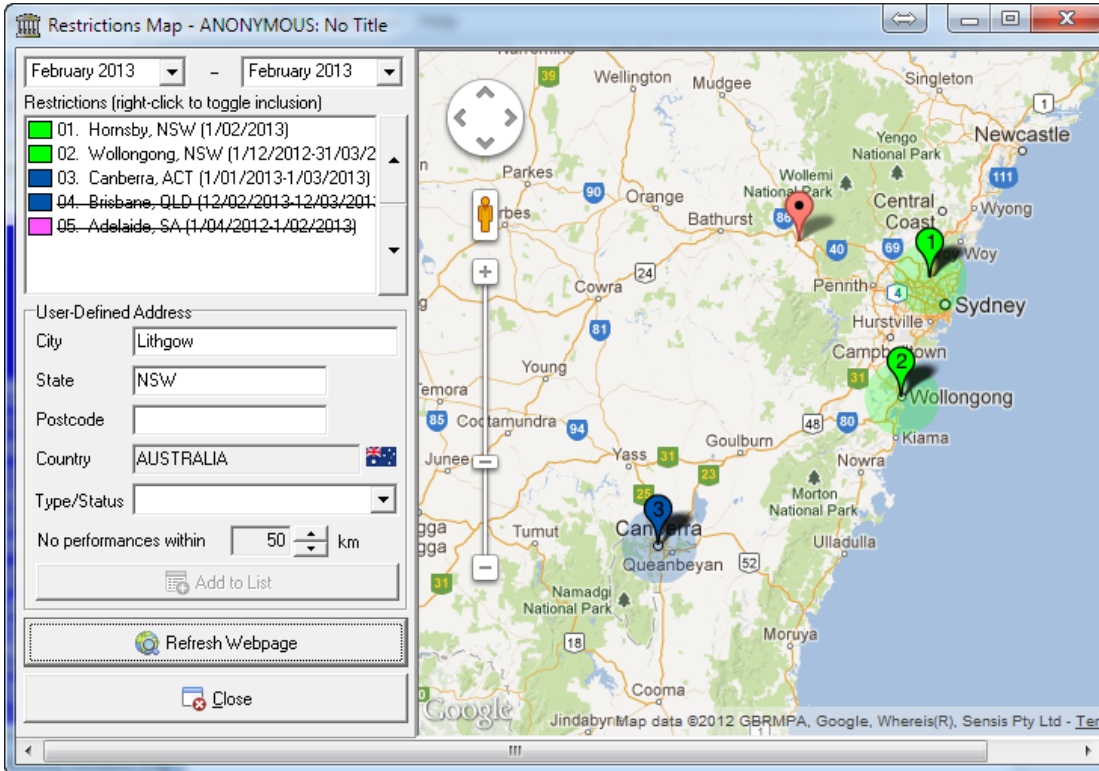


Location	Nov12	Dec12	Jan13	Feb13	Mar13	Apr13
WORLDWIDE	Red bar					
Hornsby NSW, AU			Green bar	Green bar	Green bar	Green bar
Wollongong NSW, AU		Green bar	Green bar	Green bar	Green bar	
Canberra ACT, AU			Blue bar	Blue bar	Blue bar	
Brisbane QLD, AU				Blue bar	Blue bar	
Adelaide SA, AU	Pink bar					

Clicking on this or any of the column headings will display the Restrictions Map screen using the starting date provided and the items displayed on this page (items with World Wide restrictions are not included).

On this screen you can select the date range of items, what items are displayed (with the Right-Button click), the order of the items, and you can insert additional pins using the User-Defined Address option. If you do not add the address to the list, it is displayed on the map using the default map icon.

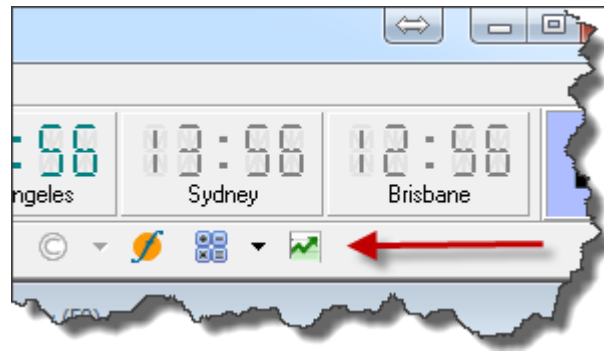
You **MUST** press the *Refresh Webpage* button to view the map and this may take some time to render depending on the number of pins. When rendered, the url of the webpage is also saved to the clipboard.



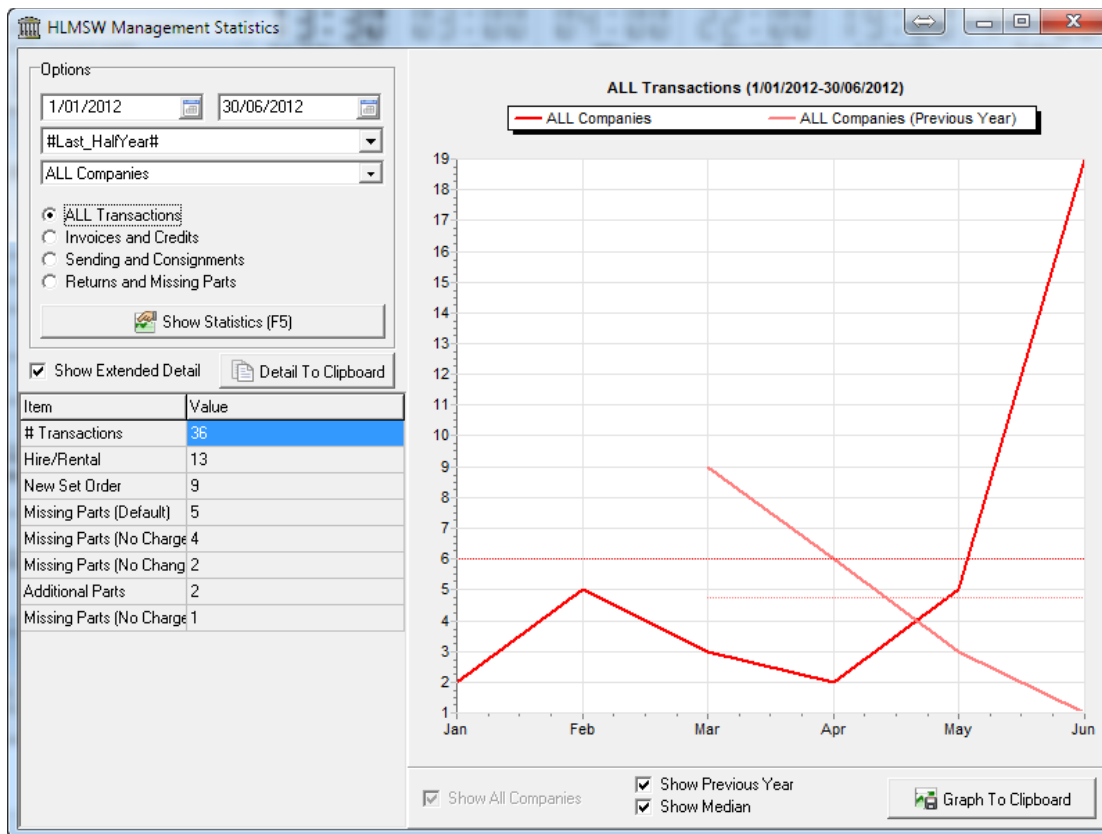
HLMSW Management Statistics

System administrators have a button which provides details statistical information of HLMSW Use.

When selected the HLMSW Management Statistics screen is displayed.



your



On this screen you can retrieve detailed statistics by selecting the options and pressing the *Show Statistics (F5)* button about your HLMSW use based on specific ranges of dates and types of use. When multiple companies are used, you can view side-by-side comparisons of Company use.

The **Show Extended Detail** option displays extended information about the data displayed in the graph which can be copied to the clipboard using the *Detail to Clipboard* button.

Show All Companies: toggles the display of the side-by-side company comparisons

Show Previous Year: toggles the display of the previous year's values in the graph

Show Median: Shows the average of the range of values.

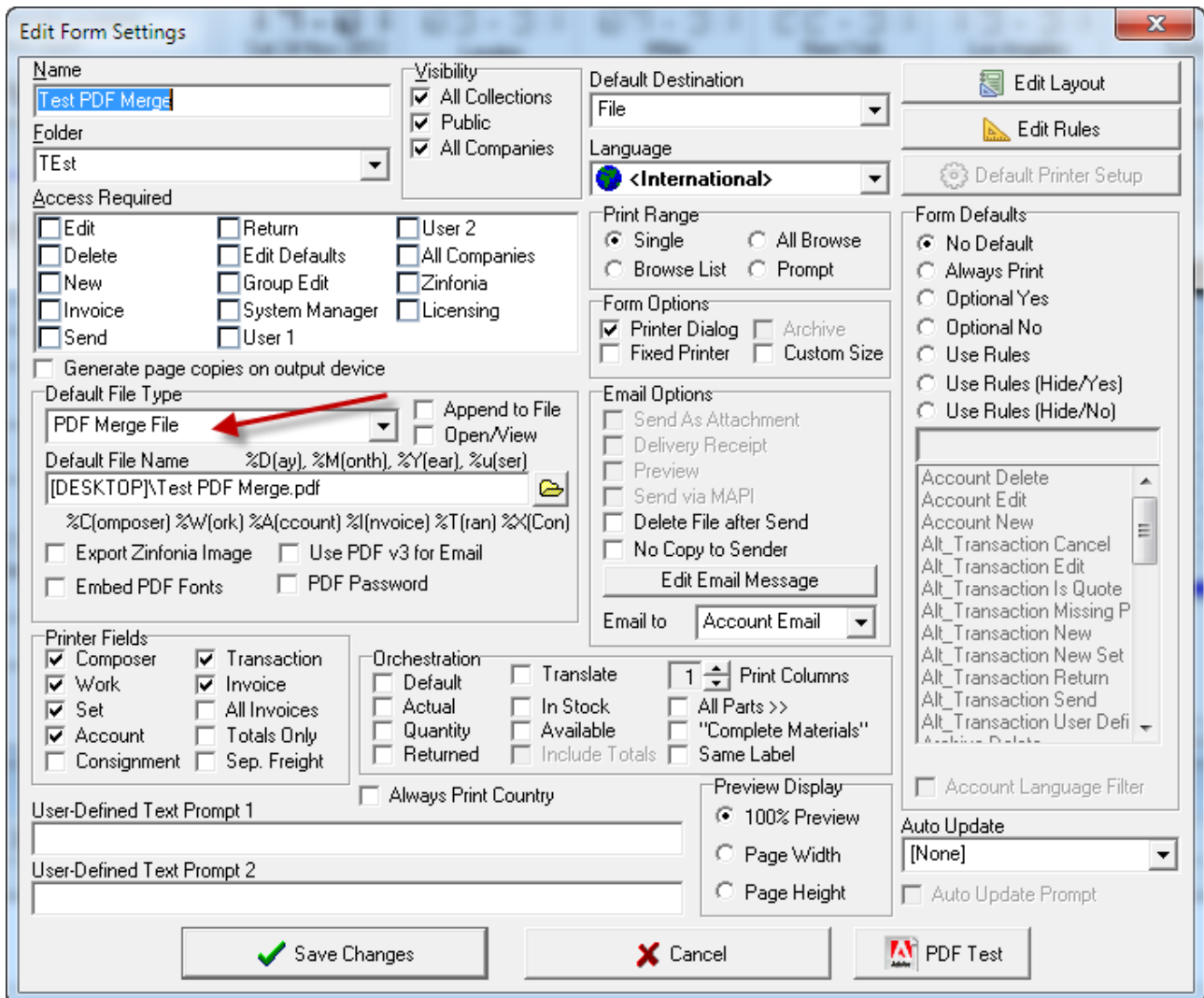
PDF Merge Facility

Like the Word Merge facility created previously, HLMSW can be set up to automatically populate PDF Form fields created using tools like the full version of Adobe Acrobat or LifeCycle. When set up correctly, the information required to be entered can be typed directly in PDF forms using any version of Acrobat. Unlike Word documents, these forms are generally of a fixed size but do have special features like digital signatures and email distribution.

Creating a PDF Merge File

To create a PDF Merge File, simply select the PDF Merge File option in the Default File type option in the Edit Form Specifications window.

Note: You should have already created your master PDF before creating the PDF Merge file.

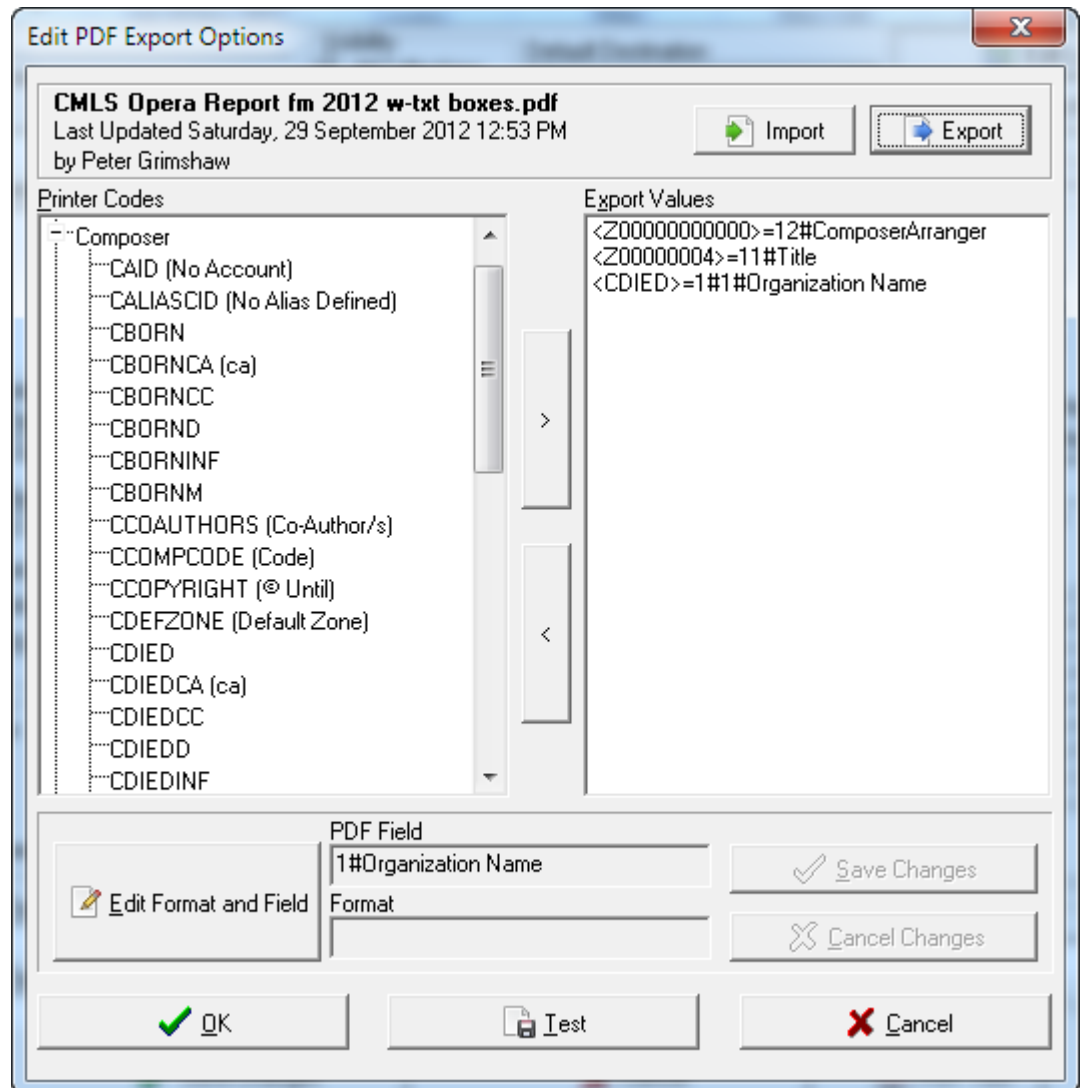


Edit PDF Export Options

First you should select the Import button to add the Master PDF File you want to use as the basis of the PDF Merge facility. At this time, HLMSW will read the file to populate the PDF Field drop down list.

Then all that is required to insert HLMSW data into a PDF is to select the Printer Code (on the left-hand side) and then assign it to a PDF field and optionally a format as well.

Once fields are added you can use the *Test* button to check the results.



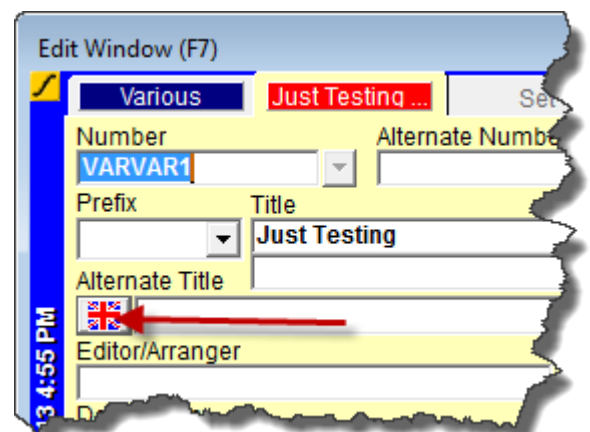
The *Export* button allows you to download a copy of the Master PDF file for editing.

Note: Do not forget to Import the PDF again to save any changes

Unicode Zinfonia Titles

In addition to the ability to store multiple titles in different languages for each work in HLMSW, it is now possible to use the Unicode character set which offers a full range of international characters in titles uploaded to Zinfonia. **Note: this feature cannot be used with HLMSW itself, only for titles uploaded to Zinfonia.**

When you left click on the Alternate Title button in Edit mode, the Additional Titles screen is displayed. **Note: the right mouse button will display the context menu.**



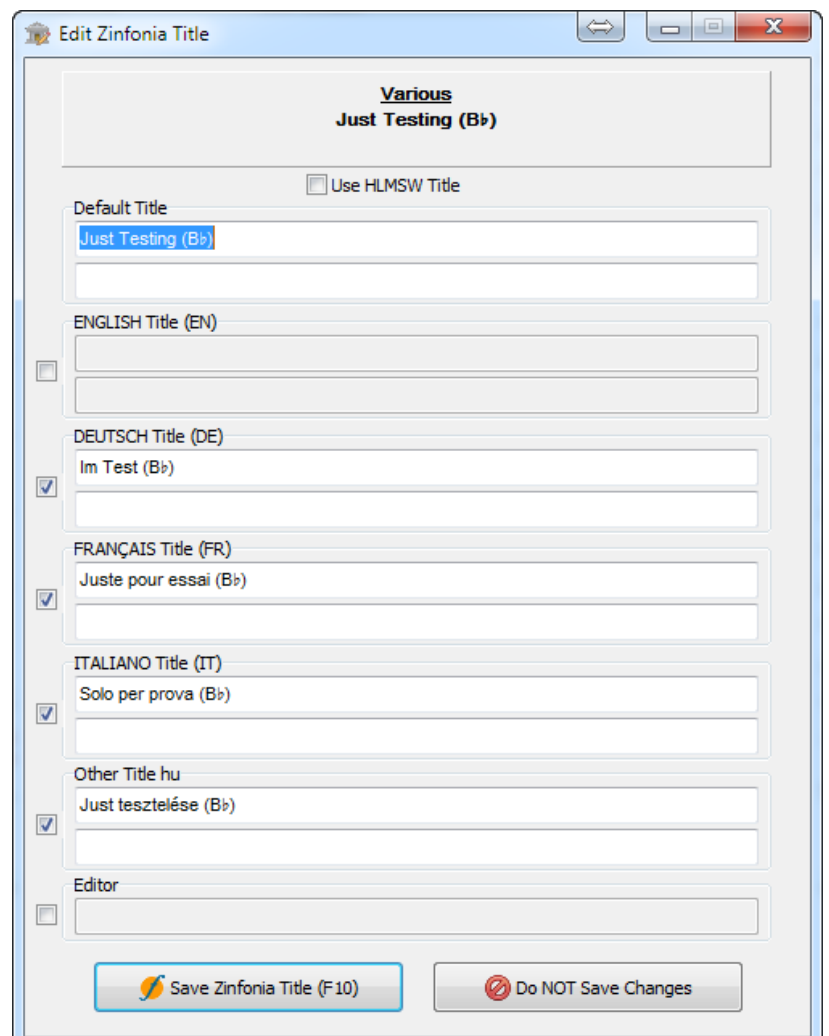


The options available may be different on your screen and the Zinfonia box is ONLY visible if the title is available in Zinfonia.

If you click on the *Edit Unicode Zinfonia Titles* button, a new Edit Zinfonia Title window is displayed which can allow you to specify precisely the text used by Zinfonia to display and search for titles in English, German, French, Italian and one other language. **Note: The Default Title is ALWAYS displayed in Zinfonia and the translations are only visible if the user's language settings match the available translation.**

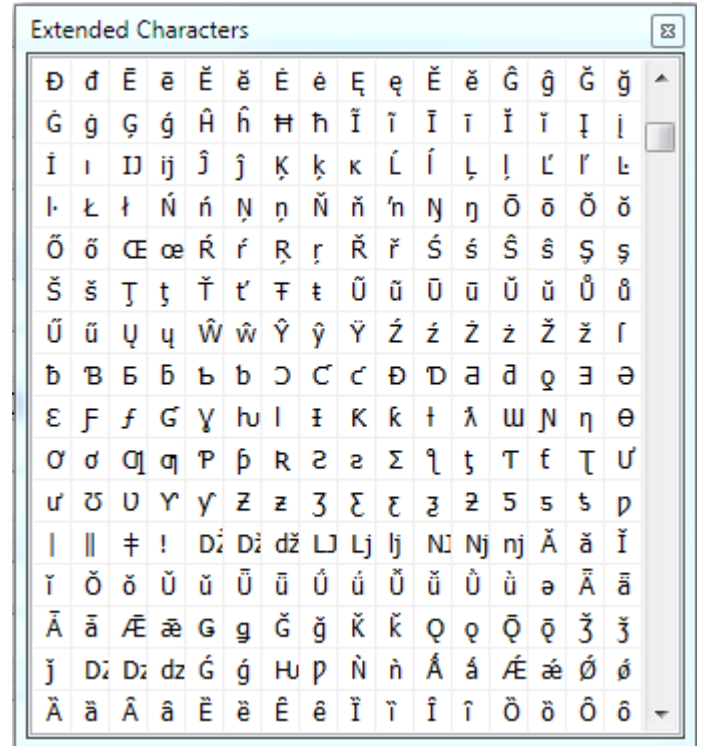
In this example the flat symbol (*b*) is a special character that is not normally available in HLMSW.

This option can also allow you to replace the Editor name with other details.



To assist you accessing the non-standard character sets, if you right-click and select the *Special...* menu option you can select the special characters using the Extended Characters grid.

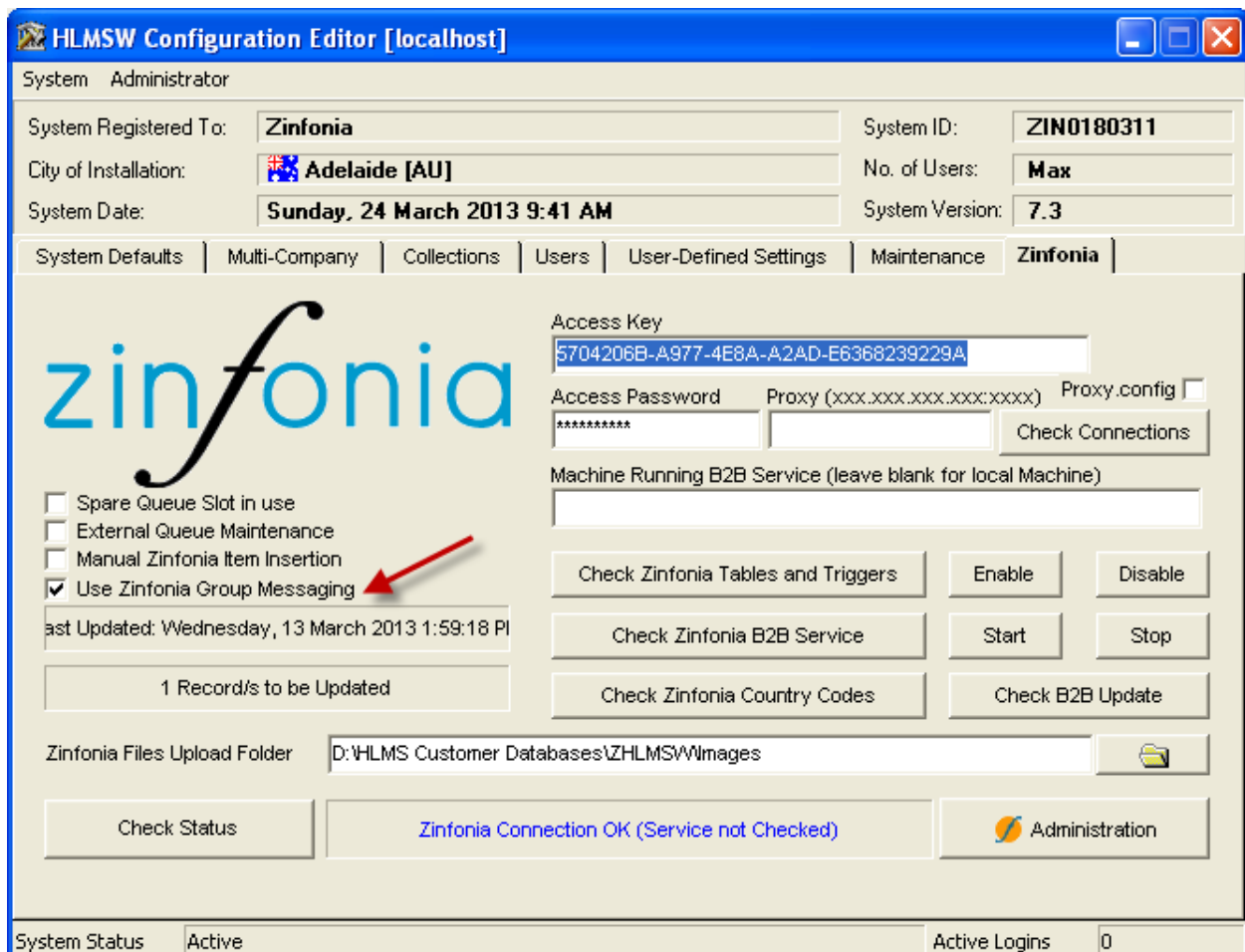
Note: when using this feature it is recommended that you check the results in Zinfonia afterwards to make sure the titles are correctly displayed.



Zinfonia Group Messaging

For systems where a large number of Zinfonia messages are received and need to be distributed to specific users in HLMSW for handling, a new facility called Zinfonia Group Messaging has been created.

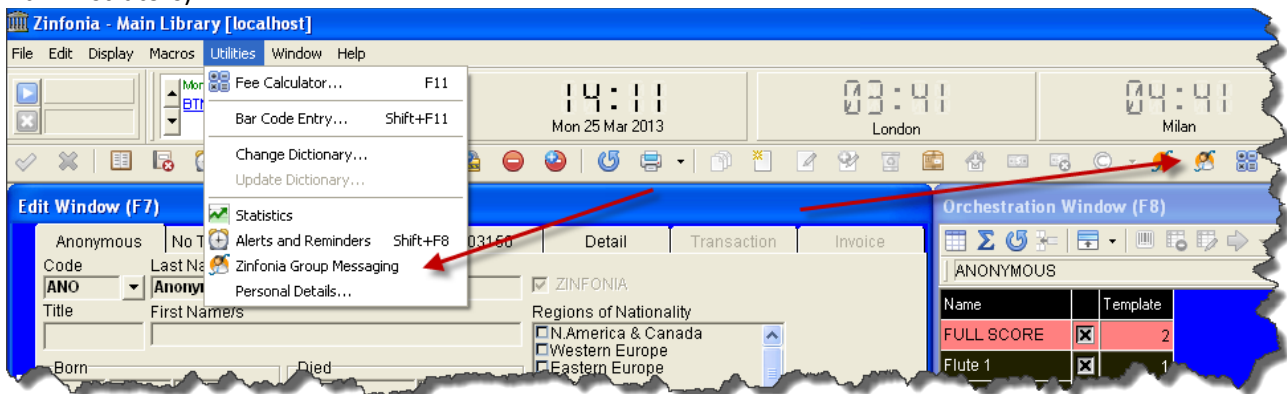
To Enabled/Disable Group messaging, use the option on the Zinfonia tab of the HLMSW Configuration Editor.



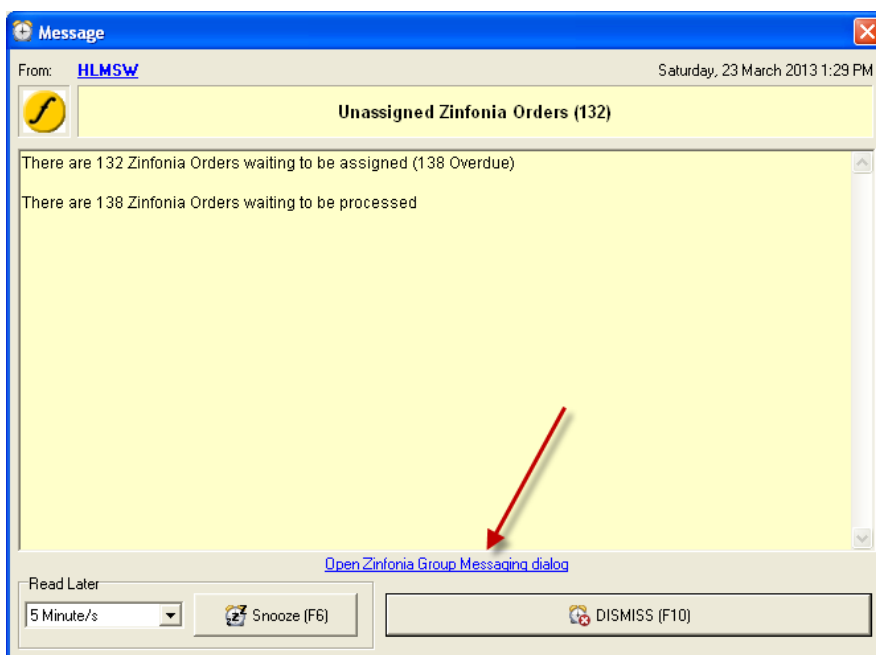
When checked, the system will change the way that Zinfonia messages are handled in the following ways:

- 1) New Zinfonia orders are placed in a holding queue until they have been processed by the HLMSW Systems Administrator, or if they are overdue for processing (3 days since submission).
- 2) If a message has already been assigned or responded to, it will automatically be placed in the same users queue.
- 3) Every 2 hours or so, System Administrators will be alerted via a popup if there are new Zinfonia messages
- 4) Every day ALL users when starting HLMSW will be alerted via a popup if there are Zinfonia messages which have not been processed
- 5) Messages in the Zinfonia Group Message queue are edited using the new
- 6) When orders are processed, you can select a bunch of orders and as a group either send a message direct to the customer, or assign specific messages to any of your colleagues.
- 7) Only colleagues which are assigned a transaction will see them in their HLMSW session UNLESS there is an order has not been assigned for 3 days in which case it will be visible to everyone (these are coloured with **MAROON** text

Administrator can easily assign Zinfonia messages using the NEW Zinfonia Group Messaging dialog which is opened via the icon or Zinfonia Group Messaging option in the Utilities menu (this is only visible to System Administrators)



or by clicking on the link in the alert message (the alerts are displayed when you start HLMSW and every 2 hours if there are messages waiting to be assigned) :





In the Group Messaging Dialog are displayed all of the messages to be processed (these are Zinfonia transactions which are NOT being worked or completed). When the *Assigned Messages* checkbox is not checked (the default state), only those transactions not assigned are displayed. Clicking on the transaction will display the actual Zinfonia order.

To process order, simply double-click the orders (or press <Enter>) to place them in the yellow section below.

Once you have an order or orders, you can EITHER

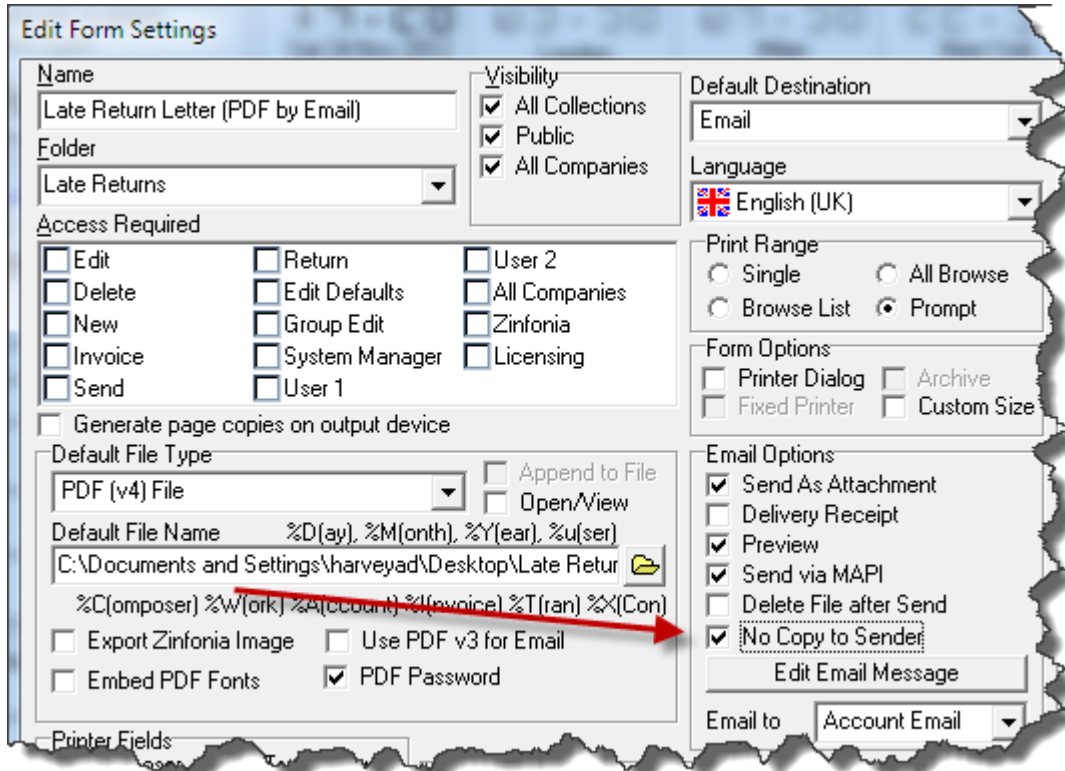
- send a message via Zinfonia which will mark the transaction as complete (this is commonly used when you need to send them a request for more information)
- assign the Zinfonia transaction to person or persons in your organisation. Using the drop down menu you can select various groups of people based on their Company or permissions. Press the PLUS button to select the users, and the MINUS button to remove the checkmarks from the names. When name have been checked, you can press the Assign Message button to assign the selected messages to the nominated people and the messages will appear in their Zinfonia queues.

You can change the assignment of messages at any time by selecting the *Assigned Messages* checkbox, placing the transactions into the yellow selected section and then using the check boxes as discussed previously.

Other Changes

There have been numerous other changes including:

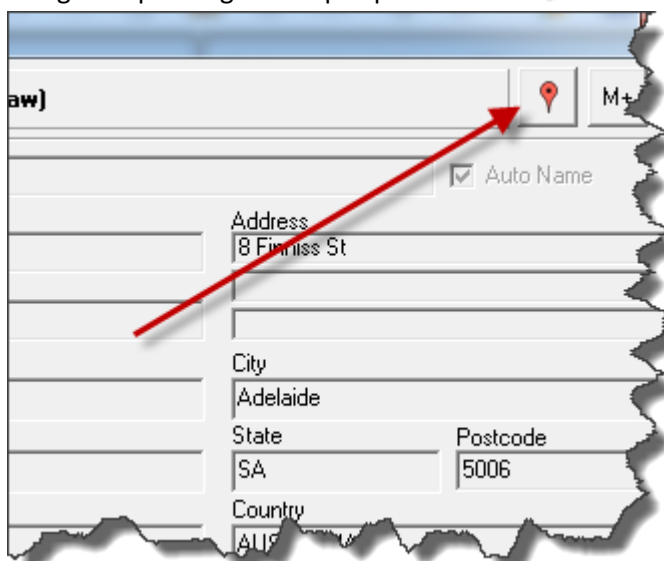
1. The ability to specify whether or not to Copy an Email to the Sender



2. The order of Sets in the Set Status window has been changed so that **Set 1A** would be displayed AFTER Set 1 and before Set 2

Set	Nov 2012	Dec 2012	Jan 2013	Feb 2013
1	[Progress bar]			
1A	[Progress bar]			
2	[Progress bar]			

3. You can check if any address is OK in Google Maps using the maps option



Last Updated 26 March 2013