HLMSW User Guide: Part I

In Part 1, we will introduce the basics of the HLMSW system including searching, adding and editing information.

I. Getting Started

Click on the HLMSW icon on the desktop to start the system.

At the “log-on” screen, you should select your log-in from the Available Keys drop-down, and enter the password. The default password (ABCD9999) should be entered when an account is created or the password reset.

Note: passwords are CASE sensitive. Typing the wrong password too many times will disable the account.

Demonstration systems usually have a password of test

After entering the password, you may press enter, or click on the “log-on” button.
After successfully logging on, you will be presented with the main HLMSW screen.

The screen is divided into four key areas:

a. **Control window** (at the top of the screen) where are the icons and menu options to operate HLMSW as well as a macro bar and world clock.

b. **Edit window** - directly beneath and to the left of the control window. This is the most important window in HLMSW as it is the main entry point for all data. In this window there are 7 tabs which display all of the information HLMSW was to offer. These are:
   i. Composer Tab
   ii. Work (Title) Tab
   iii. Set (Stock) Tab
   iv. Account (Client) Tab
   v. Account Detail Tab
   vi. Transaction Tab
   vii. Invoice Tab

c. **Orchestration Window** (to the right of the edit window). This window displays the itemized stock of the item shown in the edit window, as well as any extra information about the particular item.

d. **Browse window** (displayed below) where the results of all searches are displayed for selection.
II. Search Functions of HLMSW

Before demonstrating the navigational possibilities in HLMSW, you should be aware that commands may be executed directly from the keyboard OR by clicking the mouse. For the purposes of this demonstration, I will ONLY be discussing keyboard command (as this is the most efficient) but I will include the associated icon image where possible.

A full list of keyboard commands and their mouse equivalents is available in the help file (F1).

1. Searching For a Composer:

   a. Press the **F7** key to bring the edit window into focus.

   b. If the composer tab is not in front, press the **F12** key repeatedly until this tab is in front.

   c. Press **F3** and the computer will go into search mode which is **GREEN** in color.

   d. Type in **BACH** in the last name section and **press F10**.

   ![Search Window](image)

   **Note:** The F10 key is the equivalent of pressing the green check-mark button in the upper left hand corner of the HLMSW screen. F10 is used throughout the HLMSW program similarly to how the “enter” key would be used in word processing. It is the “Go” command.
e. A list of all composers with BACH in the name will now be displayed in the browse window. Use the **Up** and **Down** arrow keys to select Johann Sebastian Bach, and press the enter key to display the full record details in the edit window.

![Edit Window (F7) - Composer information](image)

![Browse Window (F9) - Composer browse](image)

f. Now that we have found and displayed the composer, we shall "LOCK" the record by pressing the **F4** key. You'll notice that the composer tab is now **BLUE**. Once locked this composer cannot be changed and will be used for all future functions until unlocked. (you can turn the lock status OFF by pressing the F4 key again).

2. Searching for a Work.

a. Press **F12** to move to the Work Tab.

b. Press **F3** to search (turns screen **GREEN**).

c. Press **F10** to display all of the works by BACH in the system (only BACH records are displayed because the composer tabbed is locked). You can also insert information into any of the fields in the work screen to reduce the number of works displayed in the browse window.
d. Use the Up and Down arrows to select the work by BACH that you are seeking and hit the enter key to display it in the work tab of the edit window.

e. Press **F4** to lock.

a. Press **F12** to move to the Set Tab.

![Set Status Screen](image1.png)

b. Now, simply press the enter key which is the same as pressing the “set status” button located on the “set window”. If the work you’ve selected has stock, the set status screen will be displayed. If it doesn’t, a dialogue box will appear indicating that the work has no sets.

![Set Status Screen](image2.png)

c. The set status screen is designed to give you a quick over-view of the availability of sets for the selected work. Using the Up and Down arrow keys, select a set and press enter to return to the edit window.

d. Press **F4** to lock.
4. Selecting and Account.

   a. Press **F12** to move to the account tab.

   b. Press **F3** to search (**GREEN** screen).

   c. Enter a name in the COMPANY section that you know to be in your database.

   d. Use the Up and Down arrow keys to select the correct account. Press the enter key to display it in the edit window.

   e. You'll notice that the account information is displayed over two tabs, with the first tab containing the invoice address and contact telephone information. The second tab, (always called DETAIL tab) showing such information as: delivery address, email/web address, tax code, category.
f. Press **F4** to lock.

5. **Searching for a Transaction.**

Searching for transactions works in exactly the same way as the previously described, with **F3** to search and **F10** to execute. **F4** to lock.

What is important to note however, the status of the LOCKED items plays a very important role in the Transaction search.

If you have locked a composer, a work, a set and an account; then the system will search and display only transactions which reflect all of the marked/locked criteria.

If only the composer tab was locked, then the transaction tab will only display transactions with that composer.

If the composer tab AND the account tab are locked, then a transaction search will only display hits which include BOTH the composer and account that are locked.

You can mix and match these search items and you can also enter in new search information in any of the available positions on the edit screen.

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Note - All searches in HLMSW may be configured to your own specifications
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6. **Searching for an Invoice**

*Note* searching for invoices works in exactly the same way as the previously described, with F3 to search and F10 to execute. F4 to lock.
III. Add Functions of HLMSW

In this section, we will demonstrate how to add items to the HLMSW system.

1. Adding a Composer.
   a. Make sure that the edit window is clear by first moving to the composer tab using the \texttt{F12} key, and then removing all locks (\texttt{Shift + F4}) and clearing the display using \texttt{Shift + F5}.
   b. To add a new composer, press \texttt{CTRL + N}. The Edit screen will turn \texttt{YELLOW}.
   c. Enter \texttt{SMITH} in the last name and \texttt{JOHN} in the first name (all other information is optional).
   d. Press \texttt{F10}.
e. The save changes screen is now displayed.

This dialogue is divided into four main areas:

i. Notifications Section- displays information about the operation such as: composer code, work number, invoice number.

ii. Warnings Section- (BLUE in color) which alerts you when non-critical information is missing or incorrect.

iii. Errors Section- (RED in color) which tells when essential information is missing or incorrect. A transaction cannot be saved if there are critical errors that have not been addressed.

iv. Prompt E-mails and Default Forms Section- which lists items to be printed or emailed at the conclusion of the process.

f. To continue to save changes, press F10.

g. The work has now been committed to the database.
2. Adding a Work.
   
   a. Before moving on to the work tab, LOCK The composer by pressing **F4** on the composer tab.
   
   b. Press **F12** to move to the work tab.
   
   c. Press **CNTRL + N** to add a new work.
   
   d. You will now be presented with the HLMSW orchestration templates window. Orchestration Templates are pre-defined listings of instruments to speed up data-entry. For the purpose of this demonstration, we will NOT use a template, and so please press “Cancel” at this point (located at the bottom of window).

![Orchestration Templates Window](image)

   e. You may now enter information in the **YELLOW** work screen. The minimum information you should enter for any work is:

   i. title
   ii. duration
   iii. publisher
f. With the tab key, move to the “title” section and enter **SYMPONY NO. 1**

g. Press tab to move to the “duration” window and enter **45** (duration entry defaults to minutes but is displayed in Hours, Minutes and Seconds).

h. Tab down to the publisher. With the down arrow key, or using the drop-down button, please select a publisher from the available list.
i. Press **F10** to save. And **F10 AGAIN** at the “Save Changes” screen.
3. Adding a Set.
   
a. Before leaving the work window, press **F4** to lock the work.

b. Press **F12** to move to the set tab.

c. Press **CNTRL + N** to add a new record.

d. The most important thing to enter here is the actual STOCK values, i.e. the number of parts. To do this, we will use the orchestration window.

e. Press **F8** to move to the Orchestration window, and the “Insert” key on your keyboard to open the Orchestral Templates Screen.

![Orchestral Templates Screen](image)

f. With the “full score” item in the instruments section selected, press the enter key to copy this name into the “items” list on the right hand side of the screen.

g. Now move to the bottom of the list and locate the violin section in the instruments column.

h. In the extension column, locate the line which reads “I = I” and press enter to include violin I in the items column.

i. Now look for the “II = II” item in the extension column, select it, and press enter.

j. Locate Viola in the instruments section, select it, and press enter.

k. Do the same for cello and double bass.
The items sections should now look like this:

m. Press **F10** and the instruments you entered will now be displayed in the orchestration window.

n. Click on the “Set Qty” column alongside “full score” and enter the value “1” (if the set has two scores, enter the value of “2”).

o. Press the down key and enter the value “8” (followed by the down arrow key) for Violin I, “7” and down for Violin II, “6” and down for viola and so on and so forth.
p. Now save the changes by pressing **F10**. And **F10 again** to commit the changes to the data-base.

4. **Adding an Account**

a. Press **F12** to move to the account tab. It is NOT necessary to LOCK any of the previous tabs to create a new account.

b. Press **CNTRL + N** to add a new item.

c. Enter the “**Oxford Symphony Orchestra**” in “company”.

d. Enter a fictitious address, city and country.

e. Press **F12** to move to the detail tab.

f. Press the tab key until the button with the ellipsis (...) alongside the “internet (notification checked)” box is highlighted.

g. Press the space bar.
h. In the “edit internet addresses” screen, type a YOUR email address (for use in a later demonstration) and enter to accept the changes and F10 to close the window.

![Edit Internet Addresses Window]

i. Now we can save the changes to the account by pressing F10. And F10 again to commit the changes to the database.

5. Adding a Transaction

a. Before leaving the account screen, we must lock ALL of the preceding tabs. This is accomplished by pressing **SHIFT + F4**.

b. Press F12 to move to the transaction tab.

c. Press **CNTRL + N** to create a new transaction.
d. Before a transaction is created, you must tell HLMSW what KIND of transaction it is you wish to create. It is at this “NEW TRANSACTION” window where you select this. Unless you specify otherwise, HLMSW will automatically choose the default selection, which is a standard rental order with invoice. For the purposes of this demonstration, we will accept this transaction type.

![Edit Internet Addresses Window]

- Press the **F10** key to close the window and the transaction tab is now **YELLOW** and ready for editing.

![Edit Window (F7)]
f. For a transaction, the minimum information to enter is usually:
   i. performance details
   ii. dates and method of dispatch and return
   iii. number of parts to send.

h. With the mouse, select a date in the calendar and with the tab key move to the venue section and enter a venue, city and country where the performance will take place.

i. You may also at this time enter a performer, conductor and soloist.

j. Once complete, press enter to display this information in the details list.
k. To enter a SECOND performance, click on a different date in the calendar. If the performer details and venue are the same, press enter to insert this date. If they are not, enter new details, and then press enter.

l. Press F10 to close the performance details section.

m. A review of this information is now displayed on the transaction screen.

n. Now with the tab key, move to the “send by” drop-down menu and select a method of shipping.
o. Now finally enter dates in both the “date to send” and “due back” boxes.

p. By default, HLMSW will send ALL available parts when a new transaction is created. You are able though, to change this quantity at this time. To ONLY send a full score and no other parts (for example) press **F8** to move to the orchestration window, and in the “ordered column” enter a 0 alongside all parts other than the full score.

<table>
<thead>
<tr>
<th>Name</th>
<th>Template</th>
<th>Sel Qty</th>
<th>In Stock</th>
<th>Available</th>
<th>Ordered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Score</td>
<td></td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Violin I</td>
<td></td>
<td>0</td>
<td>8</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>Violin II</td>
<td></td>
<td>0</td>
<td>7</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Viola</td>
<td></td>
<td>0</td>
<td>6</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Cello</td>
<td></td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Double Bass</td>
<td></td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>0</td>
</tr>
</tbody>
</table>

q. Hit **F10** to save this transaction. Hit **F10 again** to save the changes to the database.

In the coming guides we will describe the processes to send, return and invoice transactions as well as more advanced techniques for system use and customisation.

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