

OnLine Notepad™

Release 3.0

Guided Tour



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About this Guide

This Guided Tour is intended to get you started with OnLine Notepad.

It presents a series of tutorials covering the most-used features of the Online Notepad product.

To keep the tutorials simple, some of the system's functions have been omitted.

You will learn how to use the features of Online Notepad to:

- Design OnLine Forms
- Use forms to add notes while using a business application
- Read notes
- Search for notes by title, keyword, author or date
- View background documents stored in OnLine Reference.

For more detailed information about the Online Notepad, please see the OLR System User Guide.

OnLine Notepad Guided Tour

Overview

The OnLine Notepad is a shared database of notes, linked to your CICS screens. You can design forms to collect notes, and you can link shared notepads to the screens in your applications using PFKeys (program function keys).

With OnLine Notepad, you can capture information that falls outside the scope of business application screens. You can share that information across a workgroup, a department or an enterprise, and you can analyze the information to improve quality and service in your business.

The OnLine Notepad gives you the ability to manage business events more effectively. All the people who have contact with a customer have quick access to relevant information. With better information, customer calls can be handled in less time, with fewer mistakes.

Notes can be collected online or can be imported from external sources. Applications can write notes to log actions taken. People can write notes as they handle business events. Notes can be used to keep a diary of customer contacts, to store comments or information that doesn't fit any field on your screen, to post reminders, to follow up on customer-related problems, or to keep an audit trail of critical activities.

Notes are attached to a field on an application screen. Each time a note is created about a new subject or record, OnLine Notepad generates a background topic whose title is the field content. Examples of topics would be customer name, policy number, account number, product code, company name, etc.

In this guided tour, we'll show you how to create Note Forms. We'll show you how to create notes and search a Notepad for information. We'll also show you how to read background information topics from the OnLine Notepad.

For additional information about the OnLine Notepad, see the OLR System User Guide, the OLR System Import/Export Guide, or the OLR System Administrators Guide.

Getting Started

This tour uses a demonstration application provided with Online Notepad.
To use the demonstration application:

1. Before you start, ask your OLR System Administrator if you are registered in the OLR System.

If you have been registered, then your OLR user profile must specify 'DEMOGRP1' as your default group, and your group user profile for 'DEMOGRP1' must list 'DEMONOTE' as your default note group.

If you are not registered in OLR, no registration is needed.

2. From a clear screen, type the TRANID for the OLR demo application (usually DEM1). Press [ENTER].

The initial screen displays:

```
OLR System Demo Application
SAFE DRIVER AUTOMOBILE INSURANCE COMPANY
Policy Management System

Welcome to the demo application, Policy Management System.

Information about this application and instructions on how
to use it are provided in the application and screen level
help. You can access both application and screen level help
from any of the data entry screens in the Policy Management
System.

. To read application help, press <PF1>.
. To go to the first screen, Policyholder
  Information, press <ENTER>.
. To exit the demo application, press <PF3>.

F1=Help  F3=End
```

3. Press [ENTER] to continue.

The Policyholder Information screen displays:

```

                                SDAI - Policy Management System
                                Policyholder Information
                                Policy No: B0748365

Last name . . . . . BROCK
First name . . . . . ANITA

Address 1 . . . . . 111 PACIFIC AVE
        2 . . . . . WALNUT CREEK
        3 . . . . . CA 99598-3456

Telephone number . . ( 510 ) 555 - 3456

DOB . . . . . 08/15/61 (MM/DD/YY)
Sex . . . . . F (M)ale (F)emale

Driver's license no . B9947638
Driver rating . . . . A

F1=Help      F3=End      F5=NotePad   F7=Bkwd     F9=Policy
F2=          F4=Save     F6=AddNew   F8=Fwd     F10=Vehicle
    
```

The Notepad Options Window

4. [TAB] to the "Policy No" field, then press [F5] Notepad. The Notepad Options window displays. If an option is not available, an '*' will display instead of an option number.

Tip:
You can attach the OnLine Notepad to a transaction screen at the NoteList window instead of the Notepad Options window by setting the intercept type for the function key to Notelist.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                Policy No: B0748365

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ...
Telepho |
        | 1. Read latest Note      4. Read Topic
DOB . . | 2. View Note List      *. View Outline
Sex . . | 3. Add a Note
Driver' | F1=Help      F3=End      F6=Topics
Driver  | -----

F1=Help      F3=End      F5=NotePad   F7=Bkwd     F9=Policy
F2=          F4=Save     F6=AddNew   F8=Fwd     F10=Vehicle
    
```

Notice that the “Topic” field displays the content of the “Policy No” field, “B0748365”.

- Type '3' at the option prompt.
The Add Note window displays over the note edit screen.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Page                               1
..
..  .- Add Note -----
..  |                               Uplow                               |
..  | RE: B0748365                               |
..  |                               |
..  | Title .....                               |
..  | Qualifier ..                               |
..  | Group ..... DEMONOTE                               |
..  |                               |
..  | 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

```

Designing OnLine Forms

- Press [F12] Forms. The Forms List window displays.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Page                               1
..
..  .- Form - FORMGRP -----
..  | List Next ====>                               |
..  | Title                               :Qualifier   |
..  | R | Address Change                               :DEMONOTE   |
..  |                               |
..  | Tit |                               |
..  | 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=      F4=Reset   F6=Read   F8=Fwd   F12=Addtop   |
..  |-----|
..  |**   ****.****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

```

From here, an authorized writer can design a form.

Adding the Form Topic

7. Press [F12] Addtop. The Add Topic window displays.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Form - FORMGRP ----- Page 1
..  .- Add | List Next ==>
..  |     | Title :Qualifier
..  |     R |
..  |  .- Add Topic -----
..  |  |
..  |  | Title ..... Uplow
..  |  | Qualifier ..
..  |  | Group ..... FORMGRP
..  |  |
..  |  | Book ..... N (Y/N)  Alias of Mark Topic .. N (Y/N)
..  |  | Form ..... Y (Y/N)
..  |  |
..  |  | Press <ENTER> to add.
..  |  | F1=Help      F3=End      F5=Upper    F11=Groups
..  |  | F2=         F4=AddNew   F6=Topics   F12=
..  |  |
..  |  | -----
..  |  | *****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
    
```

8. Type 'Address Change Lesson' at the Title prompt, then press [ENTER].

Tip:

A form is a topic which has the form attribute set to 'Y' (yes).

When you add a topic from the Form List window, the Form attribute is automatically set to 'Y'.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Form - FORMGRP ----- Page 1
..  .- Add | List Next ==>
..  |     | Title :Qualifier
..  |     R |
..  |  .- Add Topic -----
..  |  |
..  |  | Title ..... Address Change Lesson Uplow
..  |  | Qualifier ..
..  |  | Group ..... FORMGRP
..  |  |
..  |  | Book ..... N (Y/N)  Alias of Mark Topic .. N (Y/N)
..  |  | Form ..... Y (Y/N)
..  |  |
..  |  | Press <ENTER> to add.
..  |  | F1=Help      F3=End      F5=Upper    F11=Groups
..  |  | F2=         F4=AddNew   F6=Topics   F12=
..  |  |
..  |  | -----
..  |  | *****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
    
```



```

..
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**
OR0501 No text.
F1=Help      F3=End      F5=Outline   F7=          F9=Wordwrap  F11=Join
F2=AddLink   F4=Save     F6=          F8=Fwd      F10=Line-Ed  F12=Split

```

To design a form, type the information you want to display with the form. You can place fields on the form using field markers.

Using Field Markers

Form fields are defined using field markers. A field marker includes:

Field Start Marker	The '>' sign identifies a mark-up code.
Field Tag	The '&' sign identifies the start of a data field
Field Name	The field name identifies the data field. A field name can be up to 32 characters long.

Defining Text Lines

You can include single or multi-line text areas on a form. To specify a text area, type '&text' on each line where text will be entered.

The &text marker always starts in column 1 and is not preceded by the '>' sign.

Using Built-in Fields

The OnLine Notepad includes built-in fields. These are pre-defined fields that you can use in your forms.

Field Name	Description
ORMDY	displays the current date in mm/dd/yy format
ORUSER	displays the user-id of the signed on user
ORTERM	displays the terminal id
ORHMS	displays the time in hours, minutes, seconds
ORDDD	displays the julian date
ORYMD	displays the current date in yy/mm/dd format

ORDMY displays the current date in dd/mm/yy format

To place a built-in field on a form, type the field start marker followed by the field tag, followed by the field name. For example, >&ORUSER.

10. Now let's design a form. Type the following information into the edit screen.

Note:

The Billing field has both a hypertext link and a field marker defined.

This field will have a pop-up window available to provide a pick list of valid entries.

```

====>
Act                               Edit - Address Change Lesson      Upper
01                               Page 1
02
03   Please update the customer file with this new address.
04
05       NAME:   >&customername
06       ADDRESS: >&address
07       CITY:   >&city
08       STATE:  >&state                Zip:   >&zip
09
10
11   Billing Instructions: >T1.&Billing
12
13   Add any notes about the address change below:
14
15   &text
16   &text
..
..
**   ****.****1****.****2****.****3****.****4****.****5****.****6****.****7**

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

```

Defining Form Fields

Now we'll define the fields on this form. The OnLine Notepad manages field definitions in a database. Once a field has been defined, it can be included on any form using its name.

There are three methods available for defining form fields:

- a. You can type 'FIELDS' at the command prompt or
- b. You can place the cursor at the start of a tag (the '&' sign), then press [F2] Addlink, or
- c. You can type 'ADDFLD' at the command prompt.


```

.. | Field Type: E      (E=Entry, D=Display)
.. |
.. | Entry field Definition
.. |   Required: N   (Y/N)
.. |   Length   :
.. |   Edit    :
.. |   Default  :
.. |
.. | Press <ENTER> to add the field.
.. | F1=Help      F3=End      F5=UpLow   F7=
.. | F2=         F4=         F6=Fields  F8=
** |-----|
F1=Help      F3=End      F5=Outline  F7=          F9=Wordwrap  F11=Join
F2=AddLink   F4=Save      F6=         F8=Fwd       F10=Line-Ed F12=Split

```

13. Type customername at the Field prompt.

You can designate a field as entry or display. Entry fields can be required or optional. You can also specify a length, a validation program, and a default value. If you do not specify a length, a one character field is created.

14. Type 'e' at the Field Type prompt to specify a data entry field
15. Type 'n' at Required, to designate Name as an optional field.
16. Type '40' at the length prompt to specify a field length of 40 characters.
17. Leave the program and default options blank.

```

===> fields      .- Field List -----|
Act             | List Next ===>      |
01              |                          |
02              |                          |
03  Please update the cu|          |
04              |                          |
05  .- Add Field Definition -----|
06  |                          |          |
07  | Field      : Customername      |          |
..  | Field Type: E      (E=Entry, D=Display) |          |
..  |                          |          |
..  | Entry field Definition          |          |
..  |   Required: N   (Y/N)          |          |
..  |   Length   : 40                |          |
..  |   Edit    :                    |          |
..  |   Default  :                    |          |
..  |                          |          |
..  | Press <ENTER> to add the field. |          |
..  | F1=Help      F3=End      F5=UpLow   F7= |          |
..  | F2=         F4=         F6=Fields  F8= |          |
**  |-----|                          |
F1=Help      F3=End      F5=Outline  F7=          F9=Wordwrap  F11=Join
F2=AddLink   F4=Save      F6=         F8=Fwd       F10=Line-Ed F12=Split

```

18. Press [ENTER] to add the field. The field list window will re-display with the Name field added.

```

===> fields                .- Field List -----
Act                          | List Next ===>
01                            |
02                            | Customername
03  Please update the cu    | ADDRESS
04                            | BILLING
05  NAME:  >&Cust          | CITY
06  ADDRESS: >&add         | NAME
07  CITY:   >&city         | STATE
..                            | ZIP
..                            |
..  STATE:  >&sta         |
..                            |
..  Billing Instruction    |
..                            |
..  Add any notes about   |
..                            |
..  &text                  |
..  &text                  | F1=Help    F3=End    F5=AddFld  F7=
..                            | F2=Delete  F4=ModFld  F6=Reset   F8=Fwd
..                            |
..                            |
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

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

19. Press [F3] End. The edit screen re-displays.

```

===>
Act                               Edit - Address Change Lesson      UUPLOW
01                               Page      1
02
03  Please update the customer file with this new address.
04
05  NAME:  >&Customername
06  ADDRESS: >&address1
07  CITY:   >&city1
08
09  STATE:  >&state1          Zip:  >&zipl
10
11  Billing Instructions:  >T1.&Billing
12
13  Add any notes about the address change below:
14
15  &text
16  &text
    
```

```

..
..
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

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

```

Another method for defining a field uses the [PF2] AddLink key.
Let's try the AddLink function key now.

20. Place the cursor on the '&' of the '>&address tag', then press [F2] AddLink. The Add Field Definition window displays.

```

====>
Act                               Edit - Address Change Lesson          UPLow
01                               Page 1
02
03   Please update the customer file with this new address.
04
05   .- Add Field Definition -----
06   |                               UPLow
07   | Field      : Address1
08   | Field Type: E      (E=Entry, D=Display)
09   |
10   | Entry field Definition
11   |   Required: N  (Y/N)
12   |   Length   :
13   |   Edit    :
..   |   Default :
..   |
..   | Press <ENTER> to add the field.
..   | F1=Help    F3=End    F5=UpLow   F7=
..   | F2=        F4=        F6=Fields  F8=
**   |-----

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

```

The Field name is filled in based on the cursor location.

21. Type '30' at the length prompt to specify a 30 character field.

```

====>
Act                               Edit - Address Change Lesson          UPLow
01                               Page 1
02
03   Please update the customer file with this new address.
04
05   .- Add Field Definition -----
06   |                               UPLow
07   | Field      : Address1
08   | Field Type: E      (E=Entry, D=Display)
09   |
10   | Entry field Definition

```

```

11 | Required: N (Y/N)
12 | Length : 30
13 | Edit :
.. | Default :
.. |
.. | Press <ENTER> to add the field.
.. | F1=Help      F3=End      F5=UpLow    F7=
.. | F2=         F4=         F6=Fields  F8=
** | -----
F1=Help      F3=End      F5=Outline  F7=         F9=Wordwrap  F11=Join
F2=AddLink   F4=Save     F6=         F8=Fwd      F10=Line-Ed  F12=Split
    
```

22. Press [ENTER]. The edit screen re-displays.

```

====>                                     UPLOW
Act                                         Page 1
01                                         Edit - Address Change Lesson
02
03 Please update the customer file with this new address.
04
05     NAME:  >&Customername
06     ADDRESS: >&address1
07     CITY:   >&city1
08
09     STATE: >&state1           Zip:  >&zip1
10
11 Billing Instructions: >T1.&Billing
12
13 Add any notes about the address change below:
14
15 &text
16 &text
..
..
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

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

The third method for adding a field uses the 'addfld' command. Now lets try the addfld (Add Field) command.

23. Type 'addfld' at the command prompt, then press ENTER.

```

====> addfld                                     UPLOW
Act                                         Page 1
01                                         Edit - Address Change Lesson
02
03 Please update the customer file with this new address.
04
05     NAME:  >&Customername
    
```

```

06 ADDRESS: >&address1
07 CITY: >&city1
08
09 STATE: >&state1 Zip: >&zip1
10
11 Billing Instructions: >T1.&Billing
12
13 Add any notes about the address change below:
14
15 &text
16 &text
..
..
** *****1*****2*****3*****4*****5*****6*****7**

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

```

The Add Field Definition window displays.

```

===> addfld                                UPLOW
Act                               Edit - Address Change Lesson      Page 1
01
02
03 PLEASE FILL OUT THIS FORM FOR A CHANGE OF ADDRESS
04
05  .- Add Field Definition -----
06  |                                     UPLOW
07  | Field      :
08  | Field Type: E      (E=Entry, D=Display)
09  |
10  | Entry field Definition
11  | Required: N (Y/N)
12  | Length   :
13  | Edit     :
..  | Default  :
..  |
..  | Press <ENTER> to add the field.
..  | F1=Help   F3=End   F5=UpLow  F7=
..  | F2=       F4=       F6=Fields F8=
**  |-----

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

```

24. Type 'City' at the Field prompt. Type '15' at the length prompt.

```

===> addfld                                UPLOW
Act                               Edit - Address Change Lesson      Page 1
01
02
03 Please update the customer file with this new address.

```

```

04
05  .- Add Field Definition -----
06  |                                     Upper
07  | Field      : City1
08  | Field Type: E      (E=Entry, D=Display)
09  |
10  | Entry field Definition
11  |   Required: N (Y/N)
12  |   Length  : 15
13  |   Edit    :
..  |   Default :
..  |
..  | Press <ENTER> to add the field.
..  | F1=Help   F3=End   F5=UpLow  F7=
..  | F2=       F4=       F6=Fields  F8=
**  |-----
F1=Help   F3=End   F5=Outline  F7=       F9=Wordwrap  F11=Join
F2=AddLink F4=Save   F6=       F8=Fwd    F10=Line-Ed F12=Split
    
```

25. Press [ENTER] to add the field. The edit screen re-displays.

```

===>
Act                               Edit - Address Change Lesson          UPLow
01                                     Page 1
02
03  Please update the customer file with this new address.
04
05  NAME:   >&Customername
06  ADDRESS: >&address1
07  CITY:   >&city1
08
09  STATE:  >&stater1           Zip:  >&zip1
10
11  Billing Instructions: >T1.&Billing
12
13  Add any notes about the address change below:
14
15  &text
16  &text
..
..
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

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

26. Add definitions for the fields 'STATE' and 'ZIP' using any of the above methods.

The State field should have a field length of 2.
The Zip field should have a field length of ten.

Linking a Pop-up Info Window to a Form Field

Now lets define the 'Billing Instructions' field. In addition to a field code, it has a hypertext tag (T1.). We can use the hypertext tag to link a pop-up topic to the field, and use this topic to provide a pick list of valid values.

27. [TAB] to the 'T' of '>T1.', then press [F2] AddLink.
The Define Hypertext Link window displays:

Tip:

If you place the cursor on a hypertext tag, the F2 key displays the Define Hypertext Link window.

If you place the cursor on a field tag, the AddLink key displays the Add Field Definition window.

```

====>
Act                               Edit - Address Change Lesson                               Uplow
01                                                                           Page 1
02
03   Please update the customer file with this new address.
04
05   .- Define Hypertext Link -----
06   |                                                                           Uplow |
07   | Tag: T1                                                                    |
08   | Title .....                                                                |
09   | Qualifier..                                                                |
10   |                                                                           |
11   B | Press <ENTER> to add.                                                    |
12   | F1=Help      F3=End      F5=Upper    F11=Addtop                            |
13   A | F2=        F4=        F6=Topics  F12=                                     |
14   |-----|
15   &text
16   &text
..
..
**   ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**
OR0551 Add new TAG.
F1=Help      F3=End      F5=Outline  F7=        F9=Wordwrap  F11=Join
F2=AddLink   F4=Save      F6=        F8=Fwd      F10=Line-Ed  F12=Split

```

28. Press [F6] Topics. The Topic List displays.

29. TAB] to the 'Billing Instructions' topic to select the topic.
30. Press [F3].
31. Press [ENTER] to link the tag to the topic. The edit screen re-displays.

```

====>
Act                               Edit - Address Change Lesson          UPLow
01                               Page 1
02
03   Please update the customer file with this new address.
04
05     NAME:   >&customername
06     ADDRESS: >&address1
07     CITY:   >&city1
08
09     STATE:  >&statel           Zip:   >&zip1
10
11   Billing Instructions: >T1.&Billing
12
13   Add any notes about the address change below:
14
15   &text
16   &text
..
..
**   ****.****1****.****2****.****3****.****4****.****5****.****6****.****7**
OR0551  Tag T1 added.
F1=Help   F3=End       F5=Outline  F7=         F9=Wordwrap  F11=Join
F2=AddLink F4=Save        F6=         F8=Fwd     F10=Line-Ed F12=Split

```

32. Now place the cursor on the '&' sign for the Billing field'. Press [F2] AddLink. The Add Field Definition window displays.

```

====>
Act                               Edit - Address Change Lesson          Uplow
01                               Page 1
02
03   Please update the customer file with this new address.
04
05   .- Add Field Definition -----
06   |                               Uplow
07   |   Field      : Billing
08   |   Field Type: E      (E=Entry, D=Display)
09   |
10   |   Entry field Definition
11   |   Required: N  (Y/N)
12   |   Length   :
13   |   Edit     :
14   |   Default  :
15   |
16   |   Press <ENTER> to add the field.
..   |   F1=Help   F3=End       F5=Upper   F7=
..   |   F2=       F4=         F6=Fields  F8=
**   |-----
F1=Help   F3=End       F5=Outline  F7=         F9=Wordwrap  F11=Join

```

F2=AddLink	F4=Save	F6=	F8=Fwd	F10=Line-Ed	F12=Split
------------	---------	-----	--------	-------------	-----------

33. Type '30' at the Length prompt.

Press [ENTER] to define the field. The edit screen re-displays.

```

====>
Act                               Edit - Address Change Lesson          UPLW
01                                     Page      1
02
03 Please update the customer file with this new address.
04
05     NAME:   >&customername
06     ADDRESS: >&address1
07     CITY:   >&city1
08
09     STATE:  >&stater1           Zip:   >&zipl
10
11 Billing Instructions: >T1.&Billing
12
13 Add any notes about the address change below:
14
15 &text
16 &text
..
..
**  ****:****1****:****2****:****3****:****4****:****5****:****6****:****7**

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

```

34. Press [F4] Save to save the form. The form is now ready to use.
35. Press [F3] End to return to the Form List window. Press [F3] again to return to the Add Note window.

This completes the exercise. To quit, press [CLEAR] to return to the demonstration application, then press [CLEAR] again to return to CICS.

Using OnLine Forms

In this exercise, we'll use the form we designed to add a note, and link that note to a policy in our demonstration application.

1. From a clear screen, type the TRANID for the OLR demo application (usually DEM1). Press [ENTER].

The initial welcome screen for the Policy Management System displays:

```

                                OLR System Demo Application
                                SAFE DRIVER AUTOMOBILE INSURANCE COMPANY
                                Policy Management System

Welcome to the demo application, Policy Management System.

Information about this application and instructions on how
to use it are provided in the application and screen level
help. You can access both application and screen level help
from any of the data entry screens in the Policy Management
System.

        . To read application help, press <PF1>.
        . To go to the first screen, Policyholder
          Information, press <ENTER>.
        . To exit the demo application, press <PF3>.

F1=Help  F3=End

```

2. Press [ENTER] to continue.

The Policyholder Information screen displays:

```

                                SDAI - Policy Management System
                                Policyholder Information

                                Policy No: B0748365

Last name . . . . . BROCK
First name . . . . . ANITA

Address 1 . . . . . 111 PACIFIC AVE
        2 . . . . . WALNUT CREEK
        3 . . . . . CA 99598-3456

Telephone number . . ( 510 ) 555 - 3456

DOB . . . . . 08/15/61 (MM/DD/YY)
Sex . . . . . F (M)ale (F)emale

Driver's license no . B9947638
Driver rating . . . . A

F1=Help  F3=End  F5=NotePad  F7=Bkwd  F9=Policy

```

```
F2=          F4=Save      F6=AddNew    F8=Fwd      F10=Vehicle
```

- [TAB] to the "Policy No" field, then press [F5] Notepad. The Notepad Options window displays.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                Policy No: B0748365

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ...
Telepho |
        | * Read latest Note      * Read Topic
DOB . . | * View Note List          * View Outline
Sex . . | * Add a Note
Driver' | F1=Help      F3=End      F6=Topics
Driver  |-----

F1=Help      F3=End      F5=Notepad  F7=Bkwd      F9=Policy
F2=          F4=Save      F6=AddNew  F8=Fwd      F10=Vehicle
    
```

Notice that the "Topic" field displays the content of the "Policy No" field, "B0748365".

- Type '3' at the option prompt. The Add Note window displays over the note edit screen.

Adding a Note

- Type 'Change of Address' at the Title prompt.

```

====>                                Uplow
Act                                Edit Note - Untitled                                Page 1
..
.. .- Add Note -----
.. | RE: B0748365                                Uplow |
.. | Title ..... Change of Address                |
.. | Qualifier ..                                |
.. | Group ..... DEMONOTE                        |
.. | 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

6. Press [F12] Forms. The Forms List window displays.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Page                               1
..  .- Form - FORMGRP -----
..  .- Add | List Next ===>
..  |     | Title
..  |     | Address Change
..  |     |
..  |     | Tit
..  |     | 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=       F4=Reset  F6=Read  F8=Fwd   F12=Addtop
..  |-----|-----|-----|-----|-----|-----|
..  |****:****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

```

7. [TAB] to Address Change, then press [F3].
The Add Note window displays with the 'Address Change' form selected.

```

====>
Act                               Edit Note - Untitled                               Uplow
..                               Page                               1
..  .- Add Note -----
..  |     | Uplow |
..  | RE: B0748365
..  |
..  | Title ..... Change of Address
..  | Qualifier ..
..  | Group ..... DEMONOTE
..  |
..  | Form ..... Address Change
..  | Qualifier .. DEMONOTE
..  |
..  | 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

```

8. Press [ENTER].

Filling out a Form

The Edit Note screen displays the selected form.

```

====>
Act          Edit Note - Change of Address          UFLOW
01                                                  Page    1
02
03   Please update the customer file with this new address.
04
05   NAME:
06   ADDRESS:
07   CITY:
08   STATE:                Zip:
09
10
11 Billing Instructions:
12
13 Add any notes about the address change below:
14
15
16
..
..

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

```

Now we're ready to fill out the form. You can [TAB] to each field, then type information into the form.

9. Type your name, address, and billing instructions into the fields on the form.

Entering text into a text field

10. Type the text shown on the screen below. Don't worry about text that flows off one line into the next.

Tip:

To add more lines to a text field,

1. press [F10] Line-Ed, then
2. [TAB] to a line number in the Act column, then
3. type 'I' to insert a line, or
4. type 'IP' to insert a page of lines, then
5. press [F10] Pwr-Type to return to Power typing

```

====>
Act          Edit Note - Change of Address          Page    1
01
02
03 Please Fill out this form for a change of address
04
05   NAME:      Jane Doe
06   ADDRESS:   2435 Birchwood Drive
07   CITY:     San Francisco
08
09   STATE:    CA                Zip:  94526
10
11 Billing Instructions:  Send bills to the old address.
12
13 Add any notes about the address change below:
14
15 For the first month I need to have my mail sent to my current address be
16 cause I have not yet moved into my new house.
..
..

```

```

OR8316 Form 'Moving' 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

```

11. Press [F9] Wordwrap.

The text will be formatted so that no words are split between lines.

```

====>
Act                               Edit Note - Change of Address          UPLOW
01                               Page 1
02
03 Please Fill out this form for a change of address
04
05     NAME:      Jane Doe
06     ADDRESS:   2435 Birchwood Drive
07     CITY:      San Francisco
08
09     STATE:     CA                Zip:  94526
10
11 Billing Instructions:  Send bills to the old address.
12
13 Add any notes about the address change below:
14
15 For the first month I need to have my mail sent to my current address
16 because I have not yet moved into my new house.
..
..

OR8316 Form 'Moving' 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

```

12. Press [F4] Save to save the Note.
13. Press [F3] End. The Note List window re-displays.

This ends the exercise.

If you want to continue, press [F3] to return to the Notepad Options window, then press [F3] again to return to the demonstration application.

Reading Notes

In this exercise, we'll list and read notes from an application screen.

Viewing a Note List

- From the Policyholder Information screen , [TAB] to the "Policy No" field. Then press [F5] Notepad. The Notepad Options window displays.

```

SDAI - Policy Management System
Policyholder Information

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ...
Telepho |
        | 1. Read latest Note      4. Read Topic
DOB . . | 2. View Note List      *. View Outline
Sex . . | 3. Add a Note
Driver' | F1=Help   F3=End   F6=Topics
Driver  | -----

F1=Help   F3=End   F5=Notepad  F7=Bkwd   F9=Policy
F2=       F4=Save  F6=AddNew  F8=Fwd   F10=Vehicle
    
```

The "Topic" field displays the content of the "Policy No" field, "B0748365".

- To see a list of notes for policy "B0748365", type '2' at the option prompt, then press [ENTER].

Tip:
If an option is not available, an asterisk displays in place of the option number.

```

SDAI - Policy Management System
Policyholder Information

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ... 2
Telepho |
        | 1. Read latest Note      4. Read Topic
DOB . . | 2. View Note List      *. View Outline
Sex . . | 3. Add a Note
Driver' | F1=Help   F3=End   F6=Topics
Driver  | -----
    
```

F1=Help	F3=End	F5=NotePad	F7=Bkwd	F9=Policy
F2=	F4=Save	F6=AddNew	F8=Fwd	F10=Vehicle

The Note List window displays a list of notes in group DEMONOTE for policy "B0748365". Notes appear by priority, then date, with the most recent note appearing first.

Priority '1' is the highest priority, while '9' is the lowest.

```

SDAI - Policy Management System
Policyholder Information

Last name . . . . . BROCK
First name . . . . . ANITA  .-- OnLine Notepad -----
|
--- Note List - B0748365 ----- DEMONOTE  --
===>
Date      Time    Title                               :Qualifier    Added By
08/03/93  07:14  Assigned Risk                       DBAOLR
04/22/93  13:17  Delinquent payment                  DBAGPE
01/13/93  16:30  Mr. Brock Traffic School            PKANE
01/07/93  10:29  Call back Brock                     MGARDNER
01/05/93  08:30  Premium increase - call back        MGARDNER

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

Selecting a Note

3. To select a note, [TAB] to the left of its title. Select the note with the title "Assigned Risk".

Tip:

To view notes in a different group,
 1. press [F11] to bring up the Group List, then select a group, or
 2. type a group name at the command prompt then press [ENTER].

```

SDAI - Policy Management System
Policyholder Information

Last name . . . . . BROCK
First name . . . . . ANITA  .-- OnLine Notepad -----
|
--- Note List - B0748365 ----- DEMONOTE  --
===>
Date      Time    Title                               :Qualifier    Added By
1  08/03/93  07:14  Assigned Risk                       DBAOLR
3  04/22/93  13:17  Delinquent payment                  DBAGPE
3  01/13/93  16:30  Mr. Brock Traffic School            PKANE
5  01/07/93  10:29  Call back Brock                     MGARDNER
5  01/05/93  08:30  Premium increase - call back        MGARDNER
    
```

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

Reading a Note

4. Press [F6] Read. The note displays.

Tip:

To find a word or phrase in a note, use the Find command.

To find the word client, type find client at the command prompt, then press [ENTER].

To find the phrase 'assigned risk', type find 'assigned risk' at the command prompt, then press [ENTER].

```

====>
                                Assigned Risk
RE:  B0748365                                Page  1

This client called and informed us he recently got a speeding ticket, he
was wondering if this would put him in jeopardy to be put in the as-
signed risk category.  I am currently reviewing his records and will
get back to him within 2 days.

OR0514  Added: 08/03/93 07:14  DBAOLR.
F1=Help      F3=End      F5=          F7=          F9=          F11=
F2=          F4=          F6=          F8=          F10=         F12=
    
```

5. Press [F3] End . The Note List window re-displays.

Tip:

You can return directly to the application by pressing [CLEAR] from any OnLine Notepad screen.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                Policy No: B0748365
Last name . . . . . BROCK
First name . . . . . ANITA  .-- OnLine Notepad -----
                                |
--- Note List - B0748365 ----- DEMONOTE ---
====>
Date      Time      Title                                     :Qualifier      Added By
1  10/11/96  07:14  Assigned Risk                             :                DBAOLR
3  04/22/93  13:17  Delinquent payment                         :                DBAGPE
3  01/13/93  16:30  Mr. Brock Traffic School                   :                PKANE
5  01/07/93  10:29  Call back Brock                            :                MGARDNER
5  01/05/93  08:30  Premium increase - call back                :                MGARDNER

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

6. Press [F3] End. The Notepad Options window displays.

Reading latest Note

7. To read the latest note about policy "B0748365", type '1' at the Options prompt, then press [ENTER].

```

                                SDAI - Policy Management System
                                Policyholder Information

                                Policy No: B0748365

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic . . . . . B0748365
        | Qualifier ..
        |
        | Choose an option and press <ENTER> ... 1
Telepho |
        | 1. Read latest Note      4. Read Topic
        | 2. View Note List      *. View Outline
        | 3. Add a Note
DOB . . |
Sex . . |
Driver' | Fl=Help   F3=End   F6=Topics
Driver  | -----

F1=Help   F3=End   F5=NotePad  F7=Bkwd   F9=Policy
F2=       F4=Save  F6=AddNew  F8=Fwd    F10=Vehicle

```

8. The note you created in the previous exercise displays.

```

====>
                                Change of Address
                                Page 1

RE:B0748365

Please Fill out this form for a change of address

NAME:      Jane Doe
ADDRESS:   2435 Birchwood Drive
CITY:      San Francisco

STATE:     CA           Zip: 94526

Billing Instructions: Send bills to the old address.

Add any notes about the address change below:

For the first month I need to have my mail sent to my current address
because I have not yet moved into my new home.

F1=Help   F3=End   F5=       F7=       F9=       F11=
F2=       F4=       F6=       F8=       F10=      F12=

```

9. Press [F3]. The Notepad Options window re-displays.

Reading Notes about another Topic

From the Notepad Options window, you can look at notes about a different topic or policy number by changing the value in the “Topic” field. Press [F6] from the Notepad Options window.

- The Topic List window displays:

Tip:

If the topic list contains multiple screens, you can type the first letter or letters of a Title at the Next prompt, then press [ENTER] to scroll the list to topics that start with the character(s) you typed.

```

      .- Topics - DEMONOTE -----
      | Next ==>
      | Title                               :Qualifier
      | B0748365
      | B0888888
      |
      | Last name . . . . . B
      | First name . . . . . A
      |
      | Address 1 . . . . . 1
      |           2 . . . . . W
      |           3 . . . . . C
      |
      | Telephone number . . (
      |
      | DOB . . . . . 0
      | Sex . . . . . F
      |
      | Driver's license no . B
      | Driver rating . . . . A
      |
      | Select a topic, then press F3.
      | F1=Help   F3=End   F7=      F11=Groups
      | F2=      F4=Reset  F8=Fwd  F12=Books
      |-----
      |
      | F1=Help   F3=End   F5=NotePad  F7=Bkwd   F9=Policy
      | F2=      F4=Save   F6=AddNew   F8=Fwd    F10=Vehicle
  
```

- Let's look at notes for policy “B0888888”. [TAB] to the Title 'B0888888, then press [F3].

15. Press [F3] again. The Policyholder Information screen re-displays.

Searching for Notes

You can search for Notes by Title, Keyword, Author or Date from the Note List window. You can also combine search criteria (for example, list notes with the keyword 'suggestion' written within the past 14 days').

In this exercise we'll use the search command to list notes written by a specific user in a specific date range.

Getting started

1. From the Policyholder Information screen, [TAB] to the "Policy No" field, then press [F5].

```

SDAI - Policy Management System
Policyholder Information

Last name . . . . . BROCK
First n .- OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ...
Telepho |
        | 1. Read latest Note      4. Read Topic
DOB . . | 2. View Note List        *. View Outline
Sex . . | 3. Add a Note
Driver' | F1=Help   F3=End   F6=Topics
Driver  | -----

F1=Help   F3=End   F5=NotePad  F7=Bkwd   F9=Policy
F2=       F4=Save  F6=AddNew  F8=Fwd    F10=Vehicle

```

- Type '2' at the options prompt, then press [ENTER].
The Note List window displays.

```

                                SDAI - Policy Management System
                                Policyholder Information

                                Policy No: B0748365
Last name . . . . . BROCK
First name . . . . . ANITA  .-- OnLine Notepad -----
                                |
--- Note List - B0748365 ----- DEMONOTE --
===>
Date      Time    Title                               :Qualifier    Added By
1  08/10/93  15:55  Sample Note                          :              DBAOLR
1  08/03/93  07:14  Assigned Risk                         :              DBAOLR
3  04/22/93  13:17  Delinquent payment                   :              DBAGPE
3  01/13/93  16:30  Mr. Brock Traffic School              :              PKANE
5  01/07/93  10:29  Call back Brock                       :              MGARDNER
5  01/05/93  08:30  Premium increase - call back          :              MGARDNER

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

Using the Search Command

- Type 'search' at the command prompt, then press [ENTER].

```

                                SDAI - Policy Management System
                                Policyholder Information

                                Policy No: B0748365
Last name . . . . . BROCK
First name . . . . . ANITA  .-- OnLine Notepad -----
                                |
--- Note List - B0748365 ----- DEMONOTE --
===> search
Date      Time    Title                               :Qualifier    Added By
1  08/10/93  15:55  Moving                                :              DBAOLR
1  08/03/93  07:14  Assigned Risk                         :              DBAOLR
3  04/22/93  13:17  Delinquent payment                   :              DBAGPE
3  01/13/93  16:30  Mr. Brock Traffic School              :              PKANE
5  01/07/93  10:29  Call back Brock                       :              MGARDNER
5  01/05/93  08:30  Premium increase - call back          :              MGARDNER

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

Using the Search Window

The Search window displays.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                .- Search - DEMONOTE Notes -----
Last name . . . | Type the word(s) or phrase(s) to search for below: | More: + | 65
First name . . | | | |
--- Note List - | | | | 1 --
==> search      | Separate words or phrases with ... , | R70
   Date      Ti | Match any/all words or phrases ... any (any/all) | y
1  08/10/93 16 | | | |
1  08/03/93 15 | Search type ..... 1 1) Keyword 3) Author/Date |
3  04/22/93 07 | | | | 2) Title
3  01/13/93 13 | | | |
5  01/07/93 16 | Page forward for more choices. | R
5  01/07/93 10 | To start the search, press ENTER. | R
                                | F1=Help  F3=End  F5=KwdList  F8=Fwd
                                |-----|

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

```

To search by Title or Keyword, type one or more titles or keywords, separated by commas, then select a Search Type at the prompt.

To select keywords from a list, press [F5], then select up to five keywords from the Keyword List window.

4. Type '3' at the Search type prompt to request an Author/Date search.

5. You enter Author and date search criteria on the second page of the Search window. Press [F8] Fwd. The Search window scrolls to page 2.

Tip:

You can search notes within a single topic, or you can search all notes in a group library.

To search all notes in a group library, type 2 at the Search Notes prompt.

```

SDAI - Policy Management System
Vehicle Information
.- Search - DEMONOTE Notes -----
Year . . . . . | To search in a different Group, type it below. | More: - | 65
Make . .- OnLin | Group ..... DEMONOTE |
Model . |
- Note List - B0 | Added/Changed | 1 --
==> search | by ..... |
Date Ti | from ..... mm / dd / yy | y
05/29/96 10 | 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=

Lets search for notes written by a user with the user-id DBAOLR between the dates 07/27/93 and 08/10/93.

6. Type 'DBAOLR' at the 'by' prompt.
7. Type '07/27/93' in the 'from' field.
8. Type '12/11/96' in the 'to' field.

Tip:

To search for notes in a different group library, press [F11] Groups, then select a group from the Group List window.

```

SDAI - Policy Management System
Vehicle Information
.- Search - DEMONOTE Notes -----
Year . . . . . | To search in a different Group, type it below. | More: - | 65
Make . .- OnLin | Group ..... DEMONOTE |
Model . |
- Note List - B0 | Added/Changed | 1 --
==> search | by ..... DBAOLR |
Date Ti | from ..... 07 / 27 / 93 | y
05/29/96 10 | to .... 12 / 11 / 96 |
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=

Press [ENTER] to begin the search. The Search Results window displays all notes matching the criteria.

The Search Results Window

9. [TAB] to the note "Assigned Risk", as shown below:

Tip:

To change the priority of a note you've written, press [F9] Noteprof, then change the priority on the Note Profile.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                .- Search - DEMONOTE Notes -----
                                |                                     |
                                |                                     | More: + | 65
Last name . . . | Type the word(s) or phrase(s) to search for below: |
First name . . . |
--- Search Results -----
===>
Date      Time   Title                                     Notes 1 to 3 of 3   DEMONOTE --
1 08/03/96 07:14 Assigned Risk                                     Page 1
                                                Added By
                                                DBAOLR

OR8000 Please make a selection.
F1=Help   F3=End   F6=       F7=       F9=Noteprof  F11=
F2=       F4=       F6=Read   F8=       F10=        F12=

```

10. Press [F6] Read. The selected note displays:

```

===>
                                Assigned Risk
RE: B0748365                                     Page 1
This client called and informed us he recently got a speeding ticket, he
was wondering if this would put him in jeopardy to be put in the as-
signed risk category. I am currently reviewing his records and will
get back to him within 2 days.

OR0514 Added: 08/03/93 07:14 DBAOLR.
F1=Help   F3=End   F5=       F7=       F9=       F11=
F2=       F4=       F6=       F8=       F10=      F12=

```

11. When you're done, press [CLEAR] to go directly back to the Policyholder Information screen. If you don't plan to continue at this time, press [CLEAR] to exit the demo.

Reading background information

With the OnLine Notepad, you can provide online documents about any topic. For example, you can make customer contracts available as online documents, then collect notes about customer activities related to the contract.

In this exercise, we'll read background documents.

Reading the Note Topic

1. From the Policyholder Information screen, [TAB] to the "Policy No" field, then press [F5].

The Notepad Options window displays.

2. Type '5' at the Options prompt to display an outline of documents linked to this policy, then press [ENTER].

Tip:

To read the topic without displaying the outline, type '4' at the Options prompt.

```

                                SDAI - Policy Management System
                                Policyholder Information
                                Policy No: B0748365
Last name . . . . . BROCK
First n  - OnLine Notepad -----
Address | Topic ..... B0748365
        | Qualifier ..
        | Choose an option and press <ENTER> ... 5
Telepho |
        | 1. Read latest Note      4. Read Topic
DOB . . | 2. View Note List          5. View Outline
Sex . . | 3. Add a Note
        |
Driver' | Fl=Help   F3=End   F6=Topics
Driver  |-----

F1=Help   F3=End   F5=NotePad  F7=Bkwd   F9=Policy
F2=       F4=Save  F6=AddNew  F8=Fwd    F10=Vehicle

```

Displaying the Topic Outline

3. The Outline screen displays for this topic.

```
====>
                                     Outline - B0748365
                                     Page    1
+ B0748365
+  Types of Coverage:DEMONOTE
    Bodily Injury:DEMONOTE
    Medical:DEMONOTE
    Property Damage:DEMONOTE

                                     (+ Text) (* Circular reference)
OR8000 Please make a selection.
F1=Help      F3=End      F5=      F7=      F9=Profile  F11=
F2=Mark      F4=      F6=Read  F8=      F10=Notes  F12=
```

Selecting a Topic

4. [TAB] to the topic "Types of Coverage", as shown below:

```
====>
                                     Outline - B0748365
                                     Page    1
+ B0748365
+  Types of Coverage:Qualifier
    Bodily Injury:Qualifier
    Medical:Qualifier
    Property Damage:Qualifier

                                     (+ Text) (* Circular reference)
F1=Help      F3=End      F5=      F7=      F9=Profile  F11=
F2=Mark      F4=      F6=Read  F8=      F10=Notes  F12=
```

Reading a Topic

5. Press [F6] Read. The selected topic displays:

Tip:

You can scroll back and forward through a topic or outline using the [F7] and [F8] keys.

```

===>
                                     Types of Coverage:Qualifier           Level  2
                                                                    Page  1
There are three (3) types of coverage under this policy. Please run the
compare policy program to confirm all are active when the policy is up
for renewal.

F1=Help      F3=End      F5=Outline  F7=Prev     F9=Profile  F11=
F2=Jump      F4=         F6=         F8=Next     F10=Notes   F12=

```

You can press [F10] to display the Note List for this topic.

If the topic has hypertext pop-ups, you can [TAB] to the linked field, then press [F2] to display the pop-up topic.

To find a word or phrase in a topic or outline, type the find command followed by the word or phrase. If you type a phrase, enclose it in quotes.

Examples:

find coverage

find 'up for renewal'

6. Press [F3] End. The Outline screen re-displays.
7. This is the end of the “Viewing Background Information” exercise. Press [CLEAR] to go back to the Policyholder Information screen.

Press [CLEAR] again to exit the OLR System demo application.

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Product Support

Comment Form

Please take a moment to tell us how we are doing with our documentation. Your comments will help us to serve you better.

Please indicate your opinion of the OnLine Notepad Guided Tour:

(circle one)

Great	•	•	•	Poor	
5	4	3	2	1	Completeness <i>(Have we covered the necessary topics?)</i>
5	4	3	2	1	Clarity <i>(Are the explanations and examples readable?)</i>
5	4	3	2	1	Organization <i>(Are related topics properly grouped?)</i>
5	4	3	2	1	Format <i>(Are the materials presented well?)</i>
5	4	3	2	1	Other: _____

You may use the back page for more specific comments.

Name (optional) _____ Position _____
 Company _____ Dept/Div _____
 Address _____
 City, State, Zip _____

Would you like us to call you to answer any questions? If so, please provide a daytime phone:

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