

The OLR System®

OnLine Reference®

OnLine Notepad™

OnLine Help®

Release 3.0

February 2011

Training Guide



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02/02/11

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Preface

About This Class

This class explains the features of the OLR System and its components: OnLine Reference, OnLine Help, and OnLine Notepad.

This class provides an overview of the OLR System and its features, explains the user interface, and provides hands on lessons for using OnLine Reference, OnLine Help and OnLine Notepad.

System administration, security, and import/export services are also discussed.

Lesson 1 provides a System Overview which introduces concepts behind the OLR System and provides an overview of the features and functions of the individual applications.

Lesson 2 explains the User Interface. The OLR System uses the popular windows style of user interface design, which is already familiar to many users of personal computers.

Lesson 3 uses the OnLine Reference Guided Tour to explain the use of OnLine Reference as a document database. During this lesson, you will learn how to search for information, browse topics, add and update documents, and navigate hypertext outlines and pop-ups.

Lesson 4 uses the OnLine Help Guided Tour to explain the use of OnLine Help to document online application screens. During this lesson, you'll learn how to use help screens, pick lists, hypertext pop-ups and direct links to topics in OnLine Reference. You'll also learn how to create help windows and link them to applications.

Lesson 5 uses the OnLine Notepad Guided Tour to explain how you can use the OnLine Notepad to attach notepads to business records. During this lesson, you'll learn how to access notepads from business records, create notes, search for notes, and create note forms.

Intended Audience

This class is intended to introduce the OLR System to those who will use the product to:

- develop online reference manuals
- develop help screens and performance support applications, or
- develop note forms and implement notes applications.

The OLR System is designed to be self teaching for readers. Most readers can use the system effectively after seeing a system overview or using the Guided Tours and the help screens to gain experience.

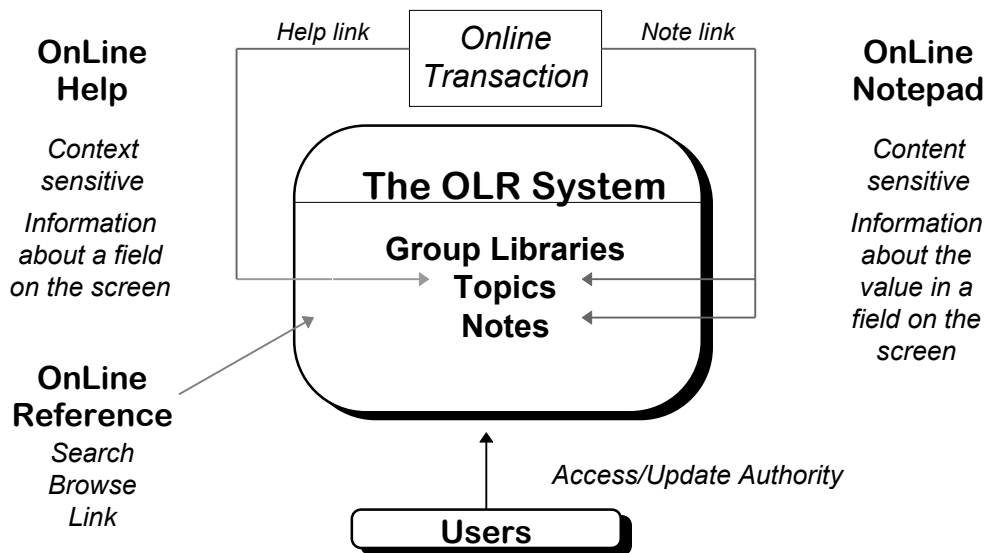
Lesson 1 System Overview

This lesson introduces the OLR System and the components: OnLine Reference, OnLine Help, and OnLine Notepad. It describes the system architecture and provides an overview of its features and capabilities. Basic system concepts are introduced and explained.

About the OLR System

The OLR System is an integrated product for managing and delivering online information in CICS environments. Information from the OLR Server can also be delivered to IMS applications and VM sessions using the OLR API and third party products.

The OLR System includes three components: OnLine Reference, OnLine Help, and OnLine Notepad. It provides tools for organizing and writing documents, and tools for linking topics, manuals and notepads to your online transactions. An optional component, the OLR API, provides application development tools for integrating OLR System functions with your business applications.



OnLine Reference

OnLine Reference includes:

- an **outliner** for creating and organizing topics
- a **full screen text editor** for writing topics
- a **note feature** which enables readers to attach notes to topics
- a **search facility** for finding topics by title, keyword, author, or date or for finding occurrences of a text string within a book, outline or topic
- an **import/export** facility for loading external documents into the OLR Server and moving data between OLR Servers
- a batch and online **print** facility for producing hard copy output

OnLine Help

OnLine Help includes:

- **Help Links** for attaching help screens and reference manuals to your online transactions
- a full screen **text editor** for writing and sizing help windows
- a **help presentation system** with hypertext pop-ups, full text search, and direct links to topics in OnLine Reference
- a **search facility** for finding topics by title, keyword, author, or date or for finding occurrences of a text string within a help topic or a linked reference manual
- a **note** feature which enables readers to attach notes to help topics
- an **import/export facility** for moving help topics from external text editors into the OLR System, or migrating from test to production
- a batch and online **print facility** for producing hard copy output

OnLine Notepad

OnLine Notepad includes:

- **Note Links** for attaching notepads and reference topics to your online transactions
- a Note **form editor** for creating Note forms
- a Note Form **text editor** for collecting data on forms
- a **multi-dimensional database** of information from completed forms
- a **search facility** for finding notes by author, date, title or keyword, or for finding occurrences of a text string within a note
- an **import/export facility** for adding notes to the OLR Server from an external source, or for migrating notes from one place to another
- a batch and online **print facility** for producing hard copy output.

The OLR API

The OLR API is an optional application programming interface for the OLR System.

The OLR API includes:

- an generalized hot key intercept facility for adding concurrent processes to your applications without changing any programs
- a CALL level interface to OnLine Help and OnLine Notepad for integrating business rules with pop-up information display and collection windows
- a set of OLR Server objects for managing and analyzing information on the OLR Server.

Concepts

Topics are the building blocks

In the OLR System, topics are building blocks for information. You can organize topics in many ways to deliver information:

- Topics can be linked together in an **outline**, then published as a **book**.
- Topics can be linked to fields in your online screens as **help windows** delivering help about a field, a screen or an application.
- Topic outlines can be used as **virtual manuals**, linked to help windows.
- Topics can be used as hypertext pop-ups, linked to words or phrases in help windows or reference topics.
- Topics are used to attach notes in **OnLine Notepad** to business records (customers, products, and others). These topics can provide background information about customers and products to users of business applications.

Topics can be shared

The OLR System makes it easy to share topics.

- A topic, or an outline containing several topics, can be included in as many documents as needed. Instead of referring a reader to a different document for information, you can include a topic or outline in each book that needs the information.
- A topic can appear as a hypertext pop-up within a different topic. Instead of referring the reader to a Glossary of Terms, you can provide definitions in hypertext pop-ups.

When you change a topic, all references to it are automatically updated. Readers are always working with the latest information.

The characteristics of a Topic

A topic has three characteristics:

- The **content** of a topic is its text. You can write this text using the built-in full screen editor, or you can import existing documents.

The OLR System includes an Import/Export facility for transferring documents into and out of the OLR System. Microsoft Word and Corel WordPerfect macros are provided to automatically format documents for import.

- The **structure** of a topic is its outline. A simple topic is one with no subtopics, and therefore no outline. A compound topic “owns” the other topics in its outline.

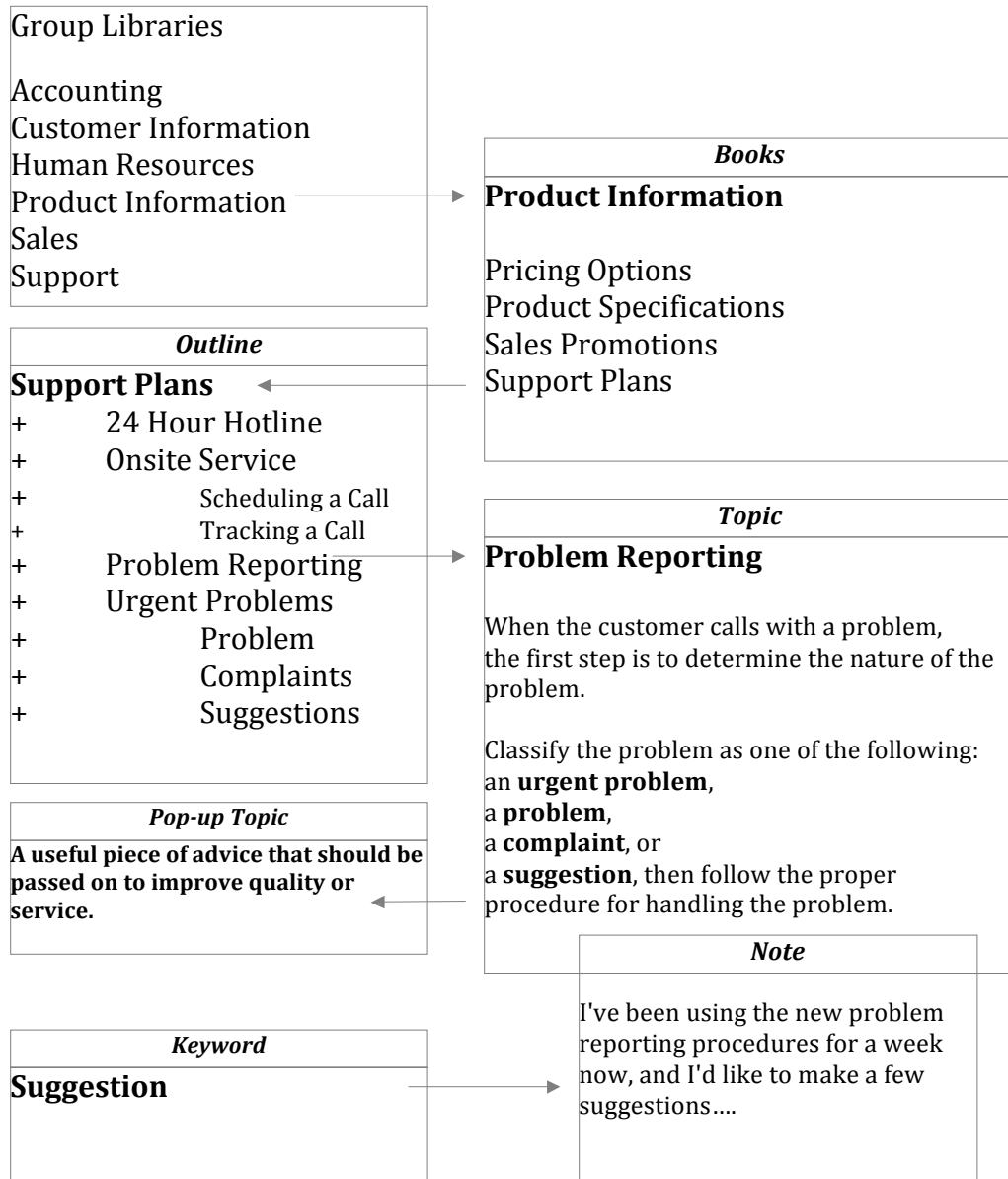
The outliner lets you use simple and compound topics in as many books or manuals as you need. When a topic is included in an outline, its entire structure is automatically included as well. When a topic changes, all references to it are automatically updated.

- The **profile** of a topic defines its attributes. Through the profile, you can change the name of a topic, publish it and its outline as a book, and see how it is used.

How Information is Organized

You can think of the OLR System as an electronic library.

- Inside the library are many sections, each with its own intended audience. In the OLR System, these sections are called **Group libraries, or Groups**.
- Each group library contains many **Books** and **topics**.
- Each Book has an **Outline**, which organizes its **Topics** into a table of contents.
- Topics can include **hypertext links** which display other topics.
- Topics can have **Notes** attached. Notes can be collected on **Note Forms**, which include data fields and text fields.
- Topics can be linked to **Keywords** to classify them for searching purposes



About Group Libraries

Each topic and note is in a Group library. Group libraries organize information according to subject matter and audience. Think of a group library as a section in a library. Each Group library has a list of members and their access privileges.

The Public User

In each Group Library, there is a Public user. The access privileges of the Public user are available to any user who is not registered by name. If the Public user can read the topics and notes in a library, then only the people who can update the information (authors, editors, managers) need to be registered by name.

Registering Users

You can register users by their user-id. This is the identifier they use when they sign on to CICS. There is no separate sign-on required to use the OLR System. You can register users by generic user-id. A generic user-id is a partial identifier that applies to a group of users. For example, if all users in the Marketing Department have user-ids starting with MKTG, and you want them to have the ability to read in the Marketing group library, you can register them all using the MKTG generic user-id.

User Access Levels

You can manage the activities of a writing team using four levels of authority:

- **Authors** in a group library can create books, and write topics. You can authorize a user to write notes, but not topics.
- **Editors** have all the privileges of authors, plus the ability to change the topics written by writers.
- **Managers** have the privileges of editors, and can also build outlines and publish books.
- **Readers** can read books, topics and notes, and may be authorized to add notes to topics.

Using Group Libraries

You can create a Group library for use by a department, a project team, a functional area, or any combination of users who need to share access to a collection of information.

A user can have access to many Group libraries. A given user could be a Reader in one Group library, an Editor in another, and have no access to a third.

User access privileges are defined using the User Registration and Group Administration screens. For more information about User Registration and Group Administration, see the OLR Administrator's Guide.

Using the OLR System

Using OnLine Reference

You can use OnLine Reference as a standalone document library. When you type the CICS TRANID for OnLine Reference (usually OLRX, unless your site changed the TRANID during system installation), you'll see a list all books in your assigned Default Group library.

You can switch to another group library by typing its name at the command prompt and pressing [ENTER], by pressing [F11] then selecting a group from the Group List window, or by typing the **groups** command, then selecting from a list of groups you have authority to access.

You can search a library by topic title, author, date or keyword. You can select a book or topic from an alphabetic list.

Once you open a book, you can search its text for a word or phrase.

You can read a book starting with its first topic, open a book's outline and select a topic, or find a word or phrase.

While reading, you can scroll backward and forward, bookmark a topic, browse further, then return directly to the marked topic. You can add notes to topics, or read notes for a topic.

Authors, editors and managers in a Group are considered writers. As a writer, you can create new books, create outlines using new and existing topics, write text online, or import text from personal computer files. You can also review any notes directed to the writer by readers of a topic.

Using OnLine Help and OnLine Notepad

OnLine Help and OnLine Notepad are available while using OnLine Reference. When you press the [F1] Help key from a screen in OnLine Reference, a pop-up help window displays. When you press the Notepad function key, the OnLine Notepad displays.

The OnLine Help and OnLine Notepad can be linked to your CICS applications using function keys you specify using the OLR System Intercept Facility:

- **OnLine Help** uses **Help Links**, which are "context sensitive" links.

Help links provide help about a field on a screen, about a screen, or about an application.

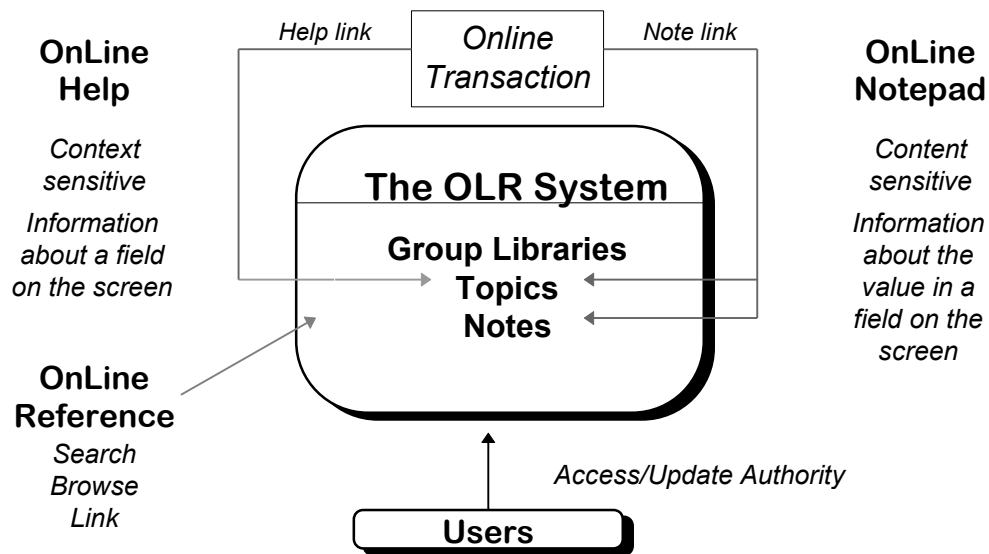
When a user presses the help function key, OnLine Help displays the topic linked to the cursor location. If no help topic is available for that location, OnLine Help can be configured to display the Screen Help topic, display a message, or ignore the function key.

When a writer presses the help function key, OnLine Help displays the topic linked to the cursor location. If no help topic is available for that location, OnLine Help can be configured to display the Add Help Link window. From this window, the writer can link a help topic or create and link a new topic.

- **OnLine Notepad** uses **Note Links**, which are "content sensitive" links.

Notepad links provide pop-up notepads based on the content of the field at the cursor when the user pressed the NOTE key. OnLine Notepad can be configured to display the Notepad Options window or a Note List window. You can customize the note link to create the note topic key from other information on the screen, or from information you determine at the time the user presses the Notepad function key.

Context and Content Links



Help Options for the Reader

A Help link provides an application user with hot key access to information about a field or screen. From the initial help window, the user can:

- TAB to a hypertext link and view a pop-up topic
- Press a function key to read screen or application level help
- Press a function key to see an outline of relevant topics in OnLine Reference
- Select a value from a list and automatically update the application screen
- Write a note, or read shared notes about a topic
- Search for topics by title, keyword, author, date or text string
- Print a help screen or topic.

Notepad Options for the Reader

A Note link allows a user to read or add notes that are linked to the value in a field on a screen. For example, customer notes may be linked to the customer screens in an application. Note links can provide the user with hot key access to a Notepad Options window or a Note List window. From the initial screen, the user can:

- Read or write notes about the subject from one or more group libraries
- Select and complete a Note Form about the subject
- Search for notes by title, author, date, keyword or text string
- Print a note
- Read topics in OnLine Reference about the subject.

Using Help and Notepad Links

Help Links bring information to the desktop to help the user complete business processes or enter data into a business system.

Note Links bring information to the desktop to help the user manage business relationships and gather information which is outside the scope of the record based business application.

Used together, they allow you to improve quality by providing a consistent response, tailored to the specific needs of the individual customer.

Developing Integrated Information with the OLR System

In the OLR System, all topics and notes are managed in a relational database. All three components of the OLR System share a common windows based user interface.

The power of the relational database combines with the ease of use of the interface to give your users quick access to information without leaving their business application. Once your users are familiar with the look and feel of the OLR System, they will be able to use all three components.

Quick access to the right information is the key to responsiveness in customer service. The OLR System brings up to date information to the desktop. With the OLR System, you can re-engineer CICS applications to integrate Performance Support and Customer Service operations with your existing record based applications.

Performance Support

With online information, you can support on the job learning. Learning is most effective when it occurs in a meaningful context. Performance support systems improve training effectiveness by making the learning process a part of performing the business process.

The OLR System enables performance support with pop-up help windows and direct links from OnLine Help topics to related information in OnLine Reference. Help and reference topics can include hypertext pop-ups. Pop-ups can be used to provide a menu of choices, a decision tree, or to define business terms. Pop-up topics can include hypertext links to other topics, so you can simplify complex problems into a series of simple decisions.

As business changes, its important to keep performance support content up to date. The OnLine Notepad gives readers a way to make suggestions to writers to improve the quality of content. It also provides a writing team with the ability to exchange comments as information is being developed.

Customer Service

Online information can save time and improve quality in customer service operations. With OnLine Help, you can add menus to your applications to handle frequently asked questions, or to publish information for quick access. With OnLine Reference, you can provide online access to customer and product information, corporate directories, bulletins and special offers.

The OnLine Notepad gives customer service staff the ability to collect useful information as they handle calls. You can add Note Forms to customer records to handle service requests, to conduct satisfaction surveys, or to handle open problems. You can display Note Lists when the customer record displays to alert or inform the customer service representative about customer needs or past problems.

Note forms also carry valuable information about activity patterns in customer service. You can query the OnLine Notepad to analyze activities or to watch for exceptions requiring special handling.

Information about a customer and prior customer contacts can be just as important as policy and procedure information. The OnLine Notepad gives you the ability to collect, manage and share information that falls outside the scope of most record-based business applications.

The OLR System combines hypertext document management with powerful search and query tools to help you save time as you service customers and make business decisions.

Lesson 2 User Interface Basics

Getting started on the OLR System is easy. The system has a consistent look and feel which will be familiar to users of personal computer software. In this chapter, you'll learn about:

- Getting Started
- Getting Around in the OLR System
- Common Screen Elements
- Common Window Elements
- Processing Conventions
- Confirmation Window
- Help about the OLR System
- If Your Terminal doesn't have Function Keys
- Upper and Lower Case

If you signed on to OnLine Reference (OLRX) you will see the Select Book Screen for your primary group library. See “Selecting a Book” in Chapter 3 of this Guide for information on the options available from this screen.

If you signed on to OnLine Help (OLHX) you will see the Select Help Link Screen. See “Selecting a Help Link” in Chapter 7 of this Guide for information on the options available from this screen.

Getting to the OLR System from a CICS Application

If you have OnLine Help and/or OnLine Notepad installed at your site, you will be able to use Program Function keys (PFKeys) to access help screens and notepads from your applications.

Your OLR System Administrator registers screens to access OnLine Help and OnLine Notepad using the OLR System Intercept Facility. Once a screen is registered, the assigned PFKey provides direct access to OnLine Help or OnLine Notepad.

For more information about the OLR System Intercept Facility, see the OLR System Administrator’s Guide.

When you install the OLR System, you can also install a demonstration application. This demonstration application is used with the Guided Tours to demonstrate the features of the OLR System. This application’s TRANID is DEM1, unless it has been changed during installation.

The demonstration application is configured to run OnLine Help when you press the [F1] key, and OnLine Notepad when you press the [F5] key.

For help about a field place the cursor on the field and press the HELP key. If a help topic is linked to the field, a pop-up window will display:

```

SDAI - Policy Management System
Policyholder Information

Policy No: B0748365
Last name ..... BROCK
First name .....- Help -----
|                MORE: + |
Address 1 ..... |
2 ..... | Type the policyholder's Last |
3 ..... | Name in this field.      |
|                |
Telephone number .. | Last Name must be entered and |
|                | may contain 1 to 15 alpha |
DOB ..... | characters in upper and lower |
Sex ..... | case.                |
|                |
Driver's license no. | F1=MoreHelp      |
Driver rating .... '------'

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

```

If help is not available, a reader will see a message, or Screen help, depending on your system configuration. A writer will see a message, screen help, or the Add Help Link window, depending on your system configuration. The OLR System Installation Guide and the OLR System Administrators Guide describe your steps for changing your system configuration.

To access the notepad place the cursor on the field you want to see notes about, then press the assigned NOTE key. The Notepad Options window, or a Note List will appear, depending on how your system is configured. The Notepad Options window is shown below:

```

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   5. 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

```

For information about your options from this window, see “The Notepad Options Window” in Chapter 8 of this Guide.

Getting around in the OLR System

You can use function keys or commands to bring up screens in the OLR System. The active functions keys for each screen or window are displayed at the bottom of the screen. A list of the valid commands for each screen is available in the help window [F1] for the command field (è)

Some of the commands in the OLR System have *command aliases*. For example, an **S** can be used in place of the **SEARCH** command. Your System Administrator can add command aliases. Appendix B provides a list of commands with their corresponding aliases.

If your copy of the OLR System is set up for users who speak languages other than English or if your site has customized the OLR System user interface, the active OLR commands or command aliases, the function key literals or the messages on your OLR screens may differ from those appearing in this Guide. Consult your OLR System Administrator for a list of changed commands or aliases.

For a description of each screen and its processing options, see Chapters 3 through 9 of this Guide.

In general:

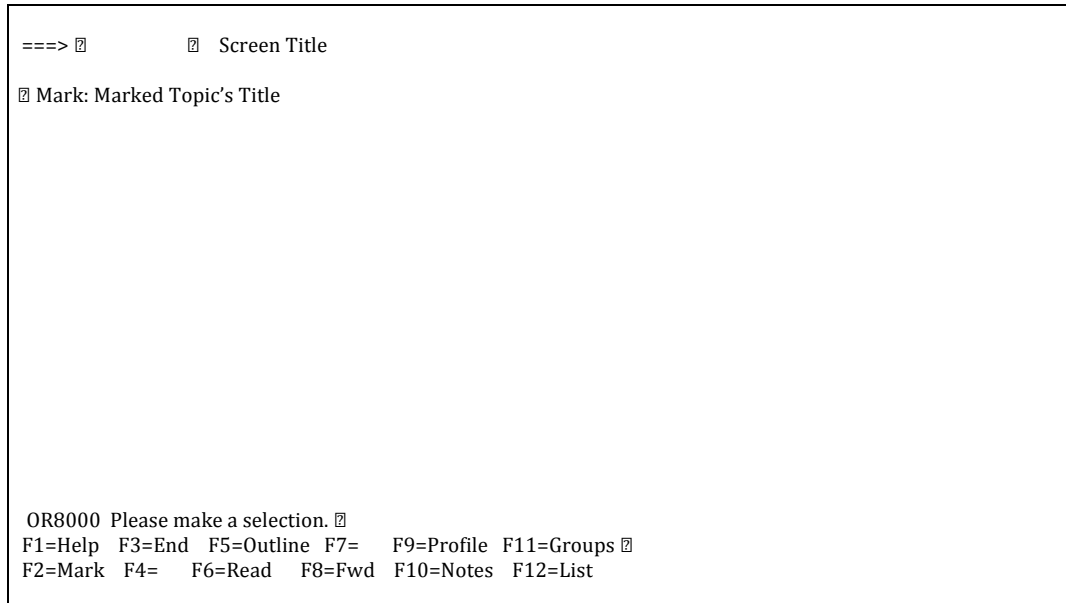
- Outlines, reference topics and note forms are presented as full screen displays.
- Help topics, pick lists and pull-down menus appear as windows.
- Dialog box windows appear when information is needed to complete an action.
- Confirmation windows appear when the system needs you to confirm whether or not an action should be taken.

The OLR System leads you through the steps needed to perform a task.

- When the OLR System needs information from you, it will present a dialog box.
- When you need to provide a topic name or a field name to complete an action, the OLR System will provide a selection list.

The remaining topics in this section describe the common look and feel of the screens in the OLR System.

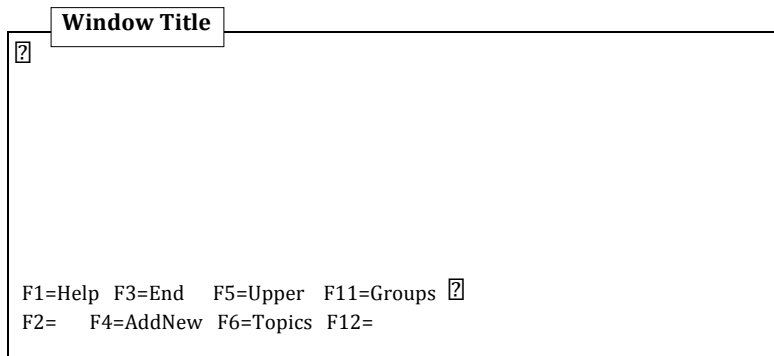
Common Screen Elements



Each full screen in the OLR System includes the following elements:

- ? **===>** This is the command prompt. Type commands here. Any function key command from the bottom of the screen can be typed into the command field. Just type the command for the PF key (shown next to each key) into the command field and press [ENTER].
 To see a pull-down menu of commands, place the cursor on the command field and press [F1]. To invoke a command from a pull-down menu, place the cursor on it and press [ENTER].
- ? **Title** The title for each screen is centered on the top line.
- ? **Marked Topic** If a topic has been marked, its title will be displayed near the top of the screen, centered beneath the title line.
- ? **Message** Messages are displayed on this line. When an error message is displayed, the field in error will be highlighted, and the cursor placed on it.
- ? **Function Keys** Valid function keys and the commands associated with them are displayed on the last two lines of each screen.

Common Window Elements

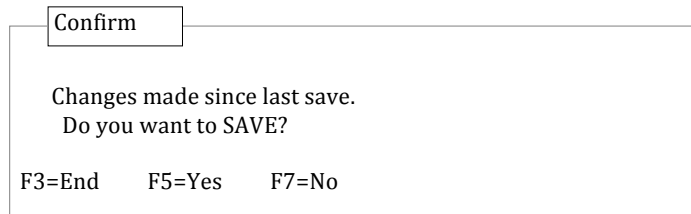


Each window displayed by the OLR System includes the following elements:

- ❓ **Title** This is the title of the window.
- ❓ **Function Keys** Valid function keys and the commands associated with them are displayed on the last line of the window.

Function keys also function as “buttons”. Instead of pressing a function key, you can tab to its description and press [ENTER]. This is useful if your terminal does not support function keys.

Confirmation Windows



The **Confirmation** window appears when the OLR System wants you to confirm whether an action should be taken. A question will be phrased in the window. You respond to the question by answering **YES**, **NO**, or **END**.

- Press **[F3]** to answer **END**. The action will **not** be taken. The confirmation window will be removed.
- Press **[F5]** to answer **YES**. The action will be taken. Processing will continue with the function you had requested that prompted the confirmation window .
- Press **[F7]** to answer **NO**. The action will **not** be taken. Processing will continue with the function you had requested that prompted the confirmation window.

If your terminal does not support function keys, you can tab to the desired function key description and press [ENTER] instead of pressing the function key.

Processing Conventions

The following processing conventions are used in the OLR System:

- If you type text into a topic or an outline, your input will be processed when you press the [ENTER] key. If you get an error message, your changes will not be applied until the error is corrected.
- If you type a command and press a function key at the same time, the function key will take precedence over the command.
- When you make changes to an outline or to text, your changes will be stored when you issue a SAVE command. If you do not issue a SAVE command and you attempt to exit, a **Confirmation** window will appear to ask if you want to save your changes.

Help about the OLR System

Help windows are available for the command field and each entry field on each the OLR System screens. For field level help, place the cursor on a field and press the HELP key. From field level help, you can access application and screen level help using function keys.

To see a list of function keys for a help window, press [F6]. The options window will appear across the bottom of your screen with a command field and a list of function keys.

To remove the help window, just press [F3]. To return directly to your application from any help screen, press [CLEAR].

Using Terminals without Function Keys

If you use the OLR System from a terminal which does not have function keys, you can type any command assigned to a function key into the command field.

If the command you want to submit requires that you first select a topic, you can either:

1. Select the topic by typing any non-blank value into its select field, then move the cursor to the command field and type the command. OR...
2. Move the cursor to the select field for a topic, press [ENTER] to select it, then type the command at the command prompt and press [ENTER].

For windows where there is no command prompt, just tab to the PF key description at the bottom of the window and press [ENTER] to invoke the desired function.

Upper and Lower Case

The OLR System allows you to choose between two terminal modes when entering topic titles or text. With your terminal in UPPER mode, all characters you type will be "folded" to uppercase. In UpLow mode, lowercase characters you type as part of a topic title or text will be preserved.

Your current terminal mode will always be displayed in the upper right hand corner of any screen or window where it is relevant. Toggle between UPPER and UpLow using a function key or command.

The default terminal mode is set up at the time of installation. Your ability to change your terminal mode may be limited by the System Parameter settings chosen when the OLR System was installed.