



## 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.

A screenshot of a Windows-style dialog box titled "Log on to HLMSW". It has a blue title bar with a close button (X) in the top right corner. The dialog contains a dropdown menu labeled "Available Keys" with the text "Peter Grimshaw [ZINI0Z-BTM12005\_BHMP]" selected. Below the dropdown is a text input field labeled "Password (Default: ABCD9999)" with the text "test" entered. There is a checkbox labeled "Change Password after logging In" which is currently unchecked. At the bottom of the dialog are three buttons: "Log In" with a green checkmark icon, "Refresh" with a circular arrow icon, and "Quit" with a red X icon.

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.

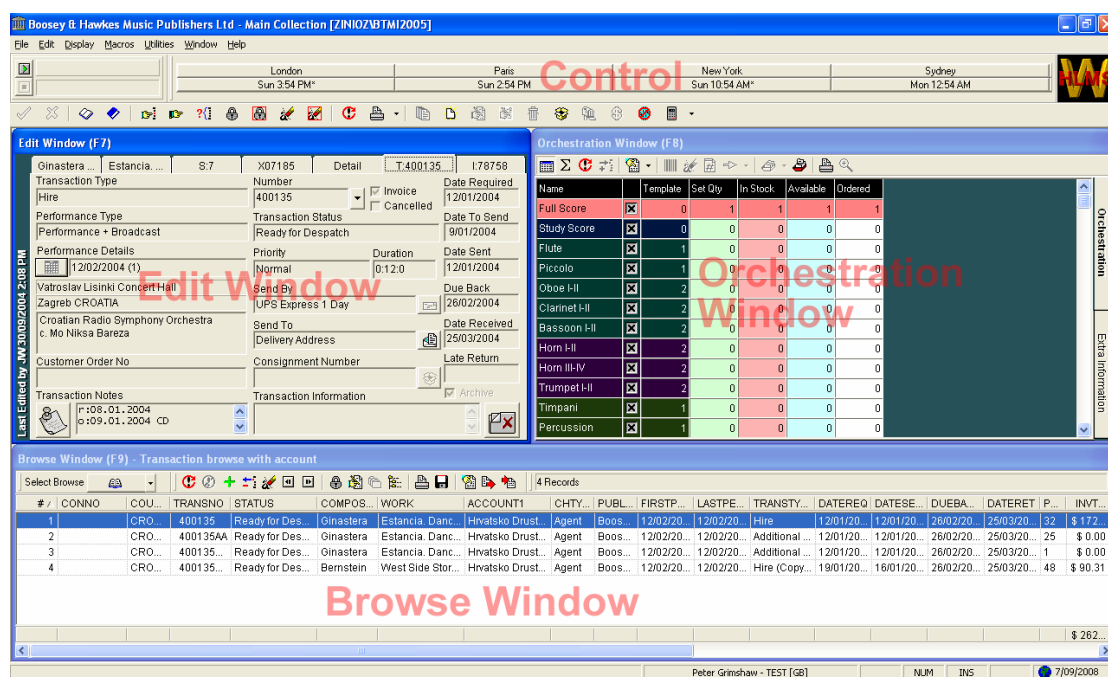
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After successfully logging on, you will be presented with the main HLMSW screen.



The screen is divided into four key areas:

- 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.
- 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:
  - Composer Tab
  - Work (Title) Tab
  - Set (Stock) Tab
  - Account (Client) Tab
  - Account Detail Tab
  - Transaction Tab
  - Invoice Tab
- 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.
- 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 key board 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 key board 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.

The screenshot shows the 'Edit Window (F7)' with the 'Composer' tab selected. The window is highlighted in green, indicating search mode. The 'Last Name' field contains 'bach'. The 'Regions of Nationality' list includes options like North America and Canada, Western Europe, Eastern Europe, Pacific, Asia, South and Central America, Middle East and India, Africa, Germany, France, Italy, and United Kingdom. A 'SEARCH MODE' label is visible on the left side of the window.

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

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.

The screenshot shows two windows from a music database application. The top window, 'Edit Window (F7)', is a form for editing composer records. It has tabs for 'Composer', 'Work', 'Set', 'Account', 'Detail', 'Transaction', and 'Invoice'. The 'Composer' tab is active, showing fields for 'Code' (with a dropdown menu), 'Last Name' (containing 'bach'), 'Title', 'First Name/s', 'Born' (with a date field and a 'ca' checkbox), 'Died' (with a date field and a 'ca' checkbox), 'Co-Author/s', 'Opus Type', and 'Society'. A 'Regions of Nationality' list is on the right, with checkboxes for North America and Canada, Western Europe, Eastern Europe, Pacific, Asia, South and Central America, Middle East and India, Africa, Germany, France, Italy, and United Kingdom. The bottom window, 'Browse Window (F9) - Composer browse', is a table listing composers. The 'Bach' record is highlighted in blue, indicating it is selected and locked. The table has columns for LASTNAME, FIRSTNAME, COMPCODE, BORN, DIED, COAUTHORS, and REGION.

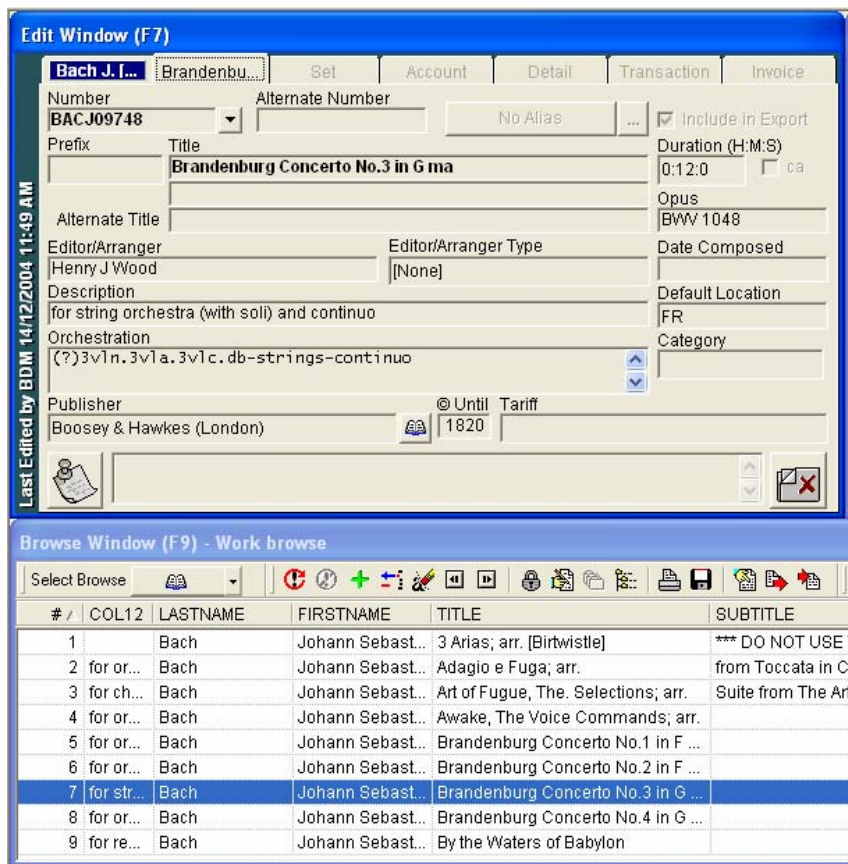
LASTNAME	FIRSTNAME	COMPCODE	BORN	DIED	COAUTHORS	REGION
Bach	Carl Philipp E...	BACC	1714	1788		Western Europe
Bach	Johann Sebast...	BACJ	1685	1750		Western Europe
Bach	Johann Christi...	BACA	1735	1782		Western Europe
Fahrbach	Philippe	FAHP	0	0		
Offenbach	Jacques	OFFJ	1819	1880		Western Europe
Rattenbach	Augusto	RATA	1927	0		South and Cen...
Rubach	Edward	RUBA	0	1971		
Shcherbachev	Vladimir Vladi...	SHCV	1889	1952		Eastern Europe
Shcherbachov	*** DO NOT U...	SHCDON	0	0		

- 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.

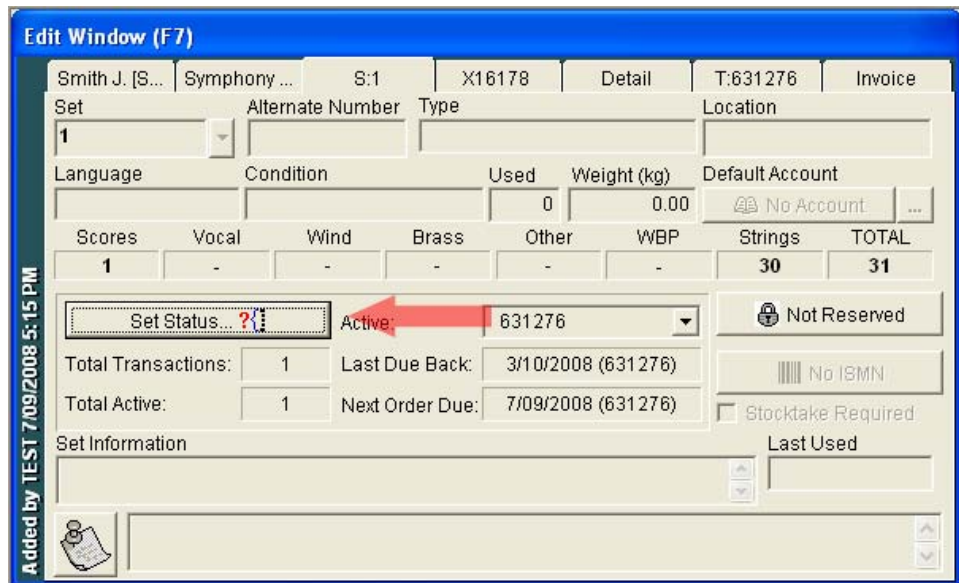
- Press **F12** to move to the Work Tab.
- Press **F3** to search (turns screen **GREEN**).
- Press **F10** to display all of the works by BACH in the system (only BACH records are displayed because the composer tabbed is locked). You can also insert information into any of the fields in the work screen to reduce the number of works displayed in the browse window.



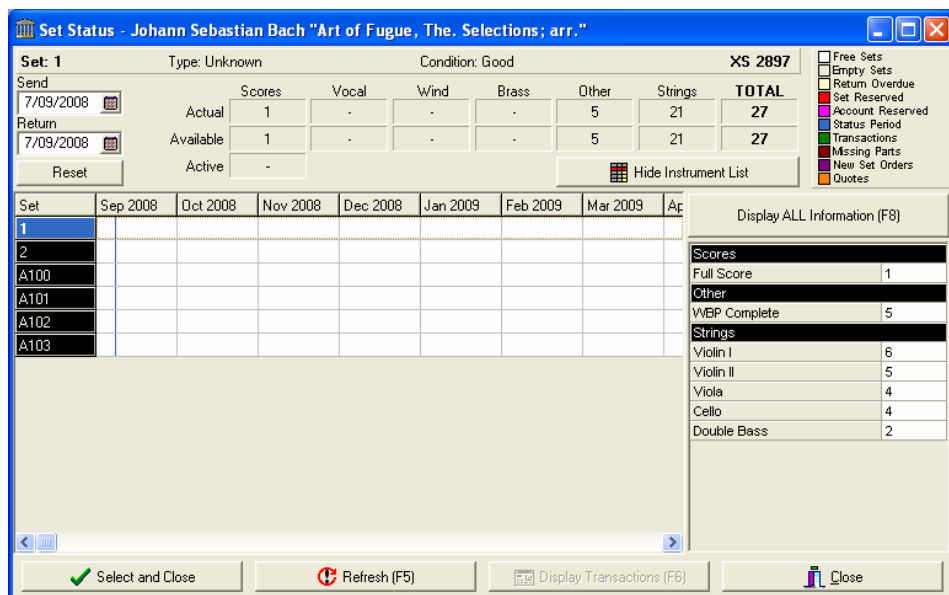
- d. Use the Up and Down arrows to select the work by BACH that you are seeking and hit the enter key to display it in the work tab of the edit window.
- e. Press **F4** to lock.

### 3. Searching for Stock/Set.

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



- 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.



- 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.

The screenshot shows two windows from an accounting software. The top window is titled 'Edit Window (F7)' and displays account details for 'City of Birmingham Symphony Orchestra [CBSO]'. The bottom window is titled 'Browse Window (F9) - Account browse' and shows a table of accounts.

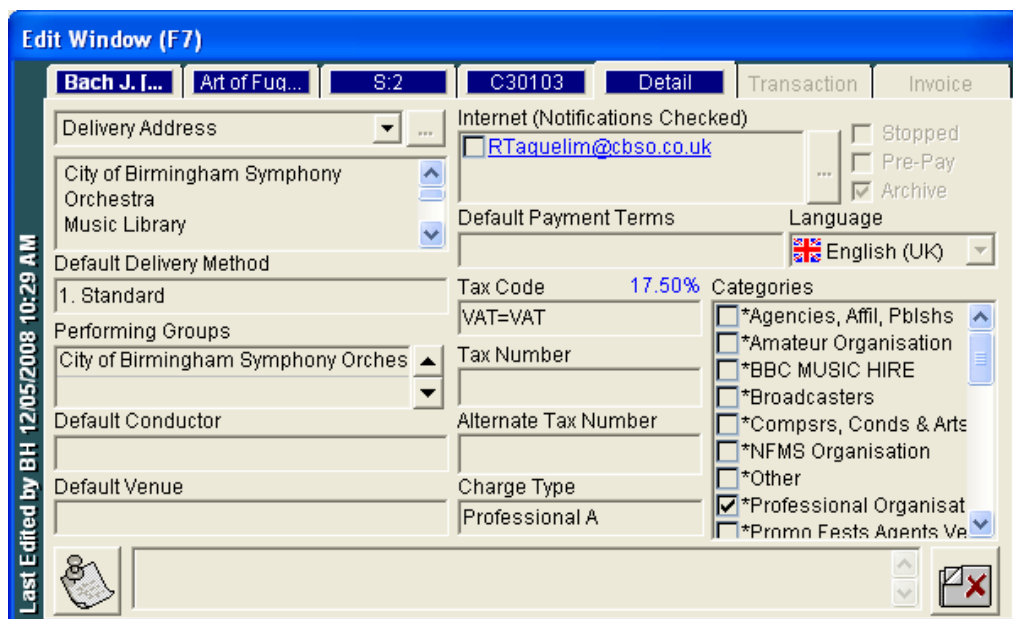
**Edit Window (F7) Details:**

- Account No.: C30103
- Alternate No.: [Empty]
- Type: Standard
- Company: City of Birmingham Symphony Orchestra [CBSO]
- Invoice Address: CBSO Centre, Berkley Street, Birmingham, B1 2LF
- Ph #1: (0121) 616 6507
- Ph #2: [Empty]
- Ph #3: [Empty]
- Fax: (0121) 616 6518

**Browse Window (F9) - Account browse Table:**

# /	ACC NO	COMPANY	LAST NAME	FIRST NAME	CITY
39	X04226	Chandos Symphony Orchestra	Stewart	K	TOWCESTE
40	X05949	Cheltenham Symphony Orchestra	Adams	J F R	CHELTENH
41	X02449	Chesterfield Symphony Orch	Hill	Eric	ROTHERHA
42	X11733	Chicago Symphony Contemporar...	Tarnopolsky	Mathias	CHICAGO
43	X14162	Chicago Symphony Orchestra	Golden	Julie	CHICAGO
44	X01965	Chichester Symphony Orchestra	Goodchild	J B	FISHBOURI
45	X05873	Chinese Culture Uni Symphony O	Graveson	Professor M	TAIPEI
46	X07762	City of Birmingham Symphony Ch...	Huws Elis	Elen	Birmingham
47	C30103	City of Birmingham Symphony Or...			Birmingham

- 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.

Note - All searches in HLMSW may be configured to your own specifications

## 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.

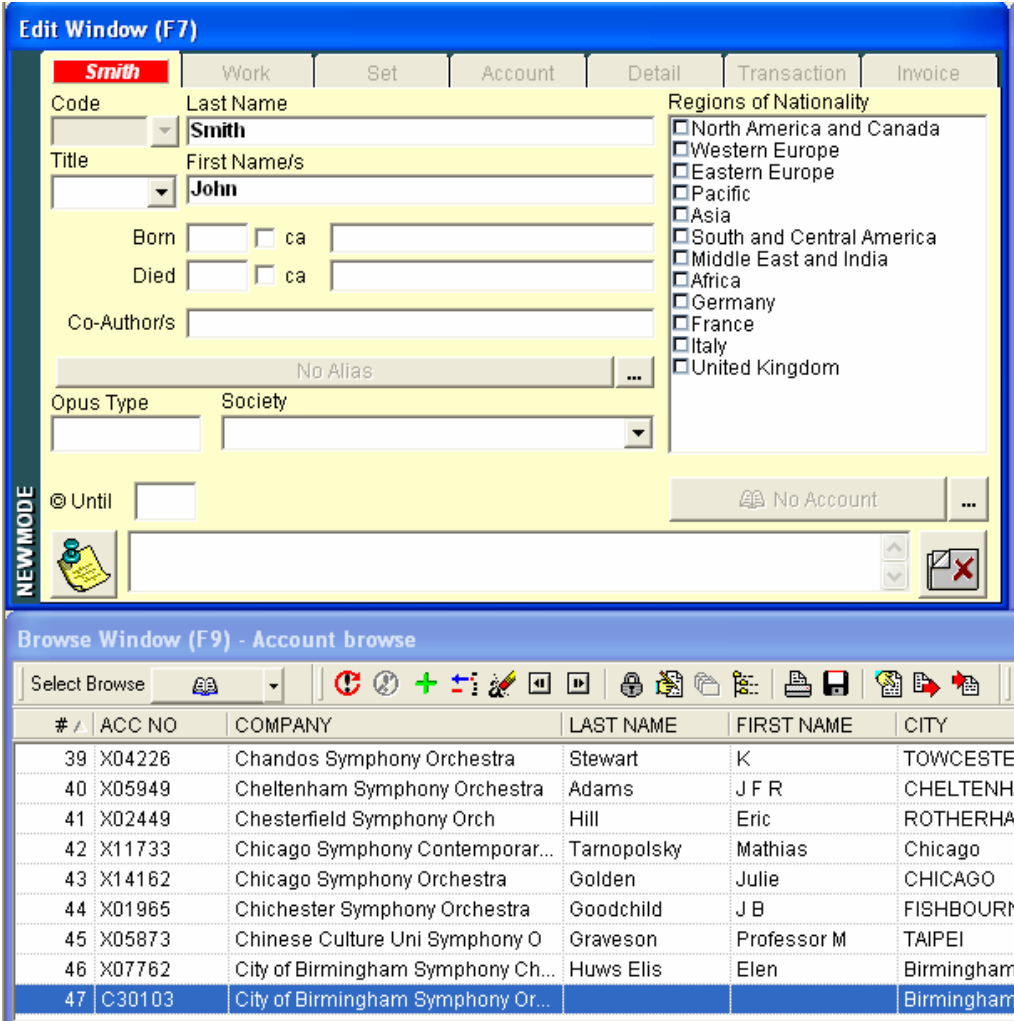


### III. Add Functions of HLMSW

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 **F12** key, and then removing all locks (**Shift + F4**) and clearing the display using **Shift + F5**.
- b.  To add a new composer, press **CNTRL + N**. The Edit screen will turn **YELLOW**.

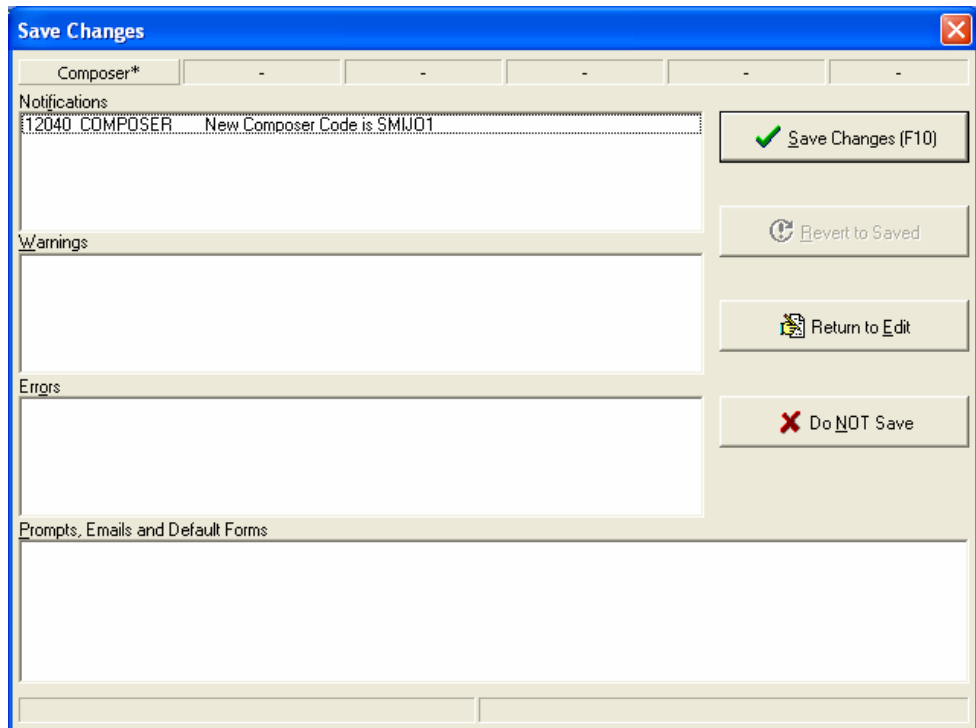


The screenshot shows two windows from the HLMSW software. The top window is titled 'Edit Window (F7)' and is currently in a yellow background, indicating it is in edit mode. It has a tabbed interface with 'Smith' selected. The form contains fields for 'Code', 'Last Name' (Smith), 'Title', 'First Name/s' (John), 'Born', 'Died', 'Co-Author/s', 'Opus Type', and 'Society'. A 'Regions of Nationality' list is visible on the right, with options like 'North America and Canada', 'Western Europe', etc. The bottom window is titled 'Browse Window (F9) - Account browse' and displays a table of accounts.

#	ACC NO	COMPANY	LAST NAME	FIRST NAME	CITY
39	X04226	Chandos Symphony Orchestra	Stewart	K	TOWCESTEI
40	X05949	Cheltenham Symphony Orchestra	Adams	J F R	CHELTENH/
41	X02449	Chesterfield Symphony Orch	Hill	Eric	ROTHERHAI
42	X11733	Chicago Symphony Contemporar...	Tarnopolsky	Mathias	Chicago
43	X14162	Chicago Symphony Orchestra	Golden	Julie	CHICAGO
44	X01965	Chichester Symphony Orchestra	Goodchild	J B	FISHBOURN
45	X05873	Chinese Culture Uni Symphony O	Graveson	Professor M	TAIPEI
46	X07762	City of Birmingham Symphony Ch...	Huws Elis	Elen	Birmingham
47	C30103	City of Birmingham Symphony Or...			Birmingham

- c. Enter **SMITH** in the last name and **JOHN** in the first name (all other information is optional).
- d. Press **F10**.

e. The save changes screen is now displayed.



This dialogue is divided into four main areas:

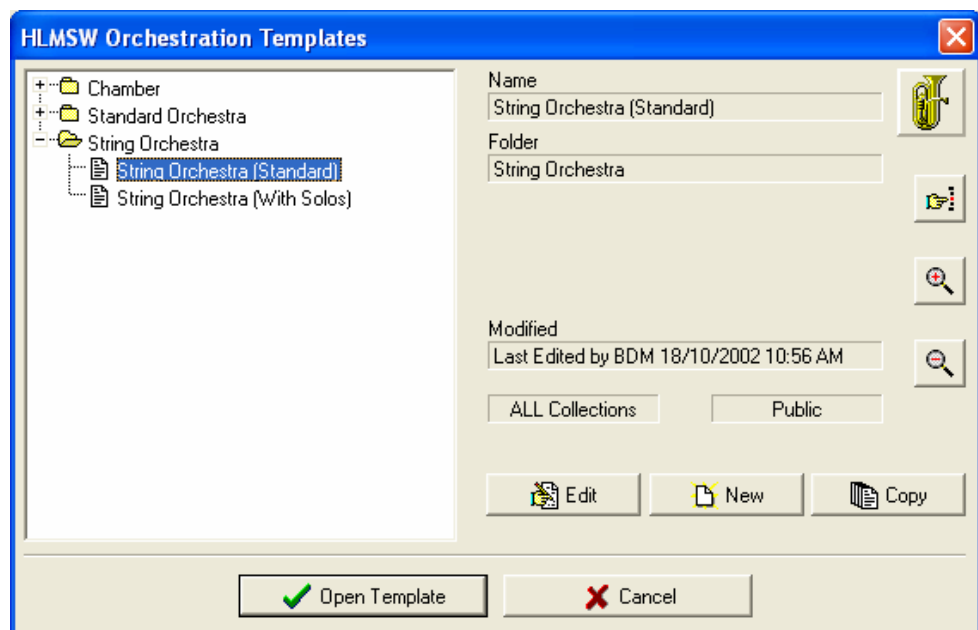
- i. Notifications Section- displays information about the operation such as: composer code, work number, invoice number.
- ii. Warnings Section- (**BLUE** in color) which alerts you when non-critical information is missing or incorrect.
- iii. Errors Section- (**RED** in color) which tells when essential 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).



- 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

**Edit Window (F7)**

Smith J. L... **Symphon...** Set Account Detail Transaction Invoice

Number  Alternate Number  No Alias ...  Include in Export

Prefix  Title **Symphony No.1** Duration (H:M:S)   ca

Alternate Title  Opus

Editor/Arranger  Editor/Arranger Type  Date Composed

Description  Default Location

Orchestration  Category

Publisher  © Until  Tariff

**NEWMODE**

Boosey & Hawkes (London)

Boosey & Hawkes (London)

Boosey & Hawkes (New York)

Boosey & Hawkes (Sydney)

Bote & Bock

Dilia

Donemus

DSCH (Direct)

DSCH (via Sikorski)

# /	ACC NO	COMPANY	LAST NAME	FIRST NAME	CITY
39	X04226	Chandos Symphony Orchestra	Stewart	K	TOWCESTE
40	X05949	Cheltenham Symphony Orchestra	Adams	J F R	CHELTENH
41	X02449	Chesterfield Symphony Orch	Hill	Eric	ROTHERH#
42	X11733	Chicago Symphony Contemporar...	Tarnopolsky	Mathias	Chicago
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44	X01965	Chichester Symphony Orchestra	Goodchild	J B	FISHBOUR
45	X05873	Chinese Culture Uni Symphony O	Graveson	Professor M	TAIPEI
46	X07762	City of Birmingham Symphony Ch...	Huws Elis	Elen	Birmingharr
47	C30103	City of Birmingham Symphony Or...			Birmingham

- 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.

**Save Changes**

Work\*

Notifications

12040 WORK New Work Code is SMJUD11

Warnings

12010 WORK No Template Information Entered

Errors

Prompts, Emails and Default Forms

Save Changes (F10)

Revert to Saved

Return to Edit

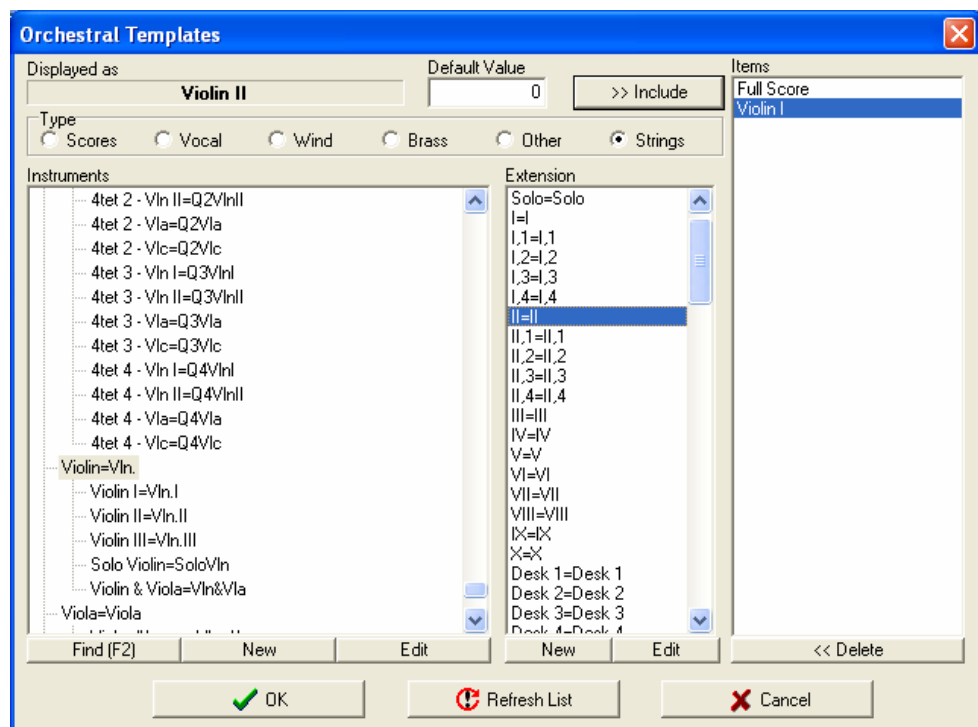
Do NOT Save

### 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.

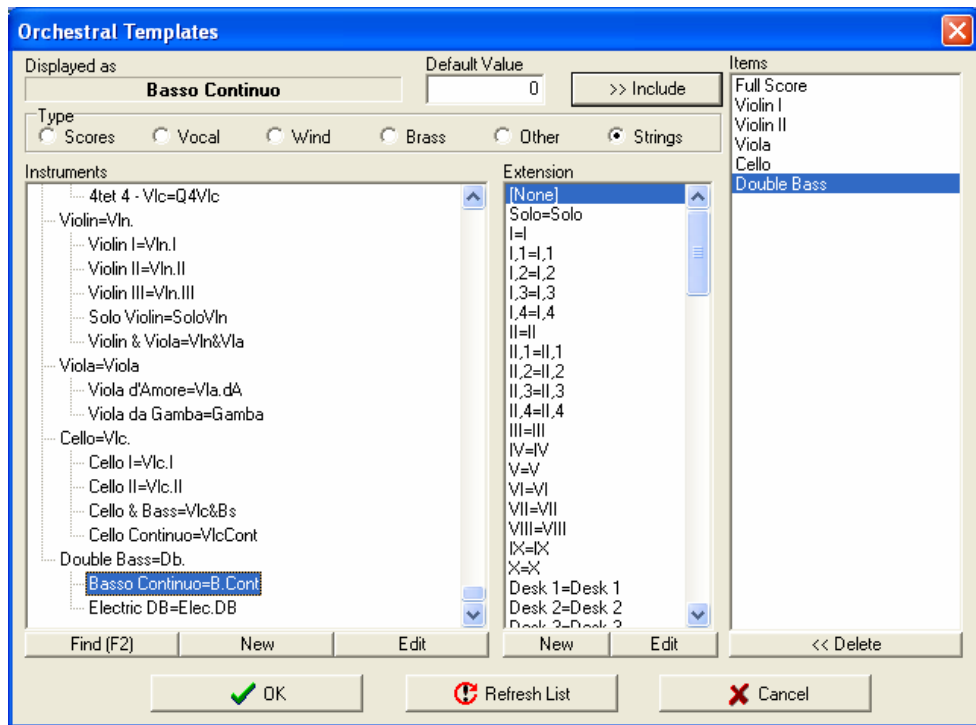


- e. Press **F8** to move to the Orchestration window, and the “Insert” key on your keyboard to open the Orchestral Templates Screen.

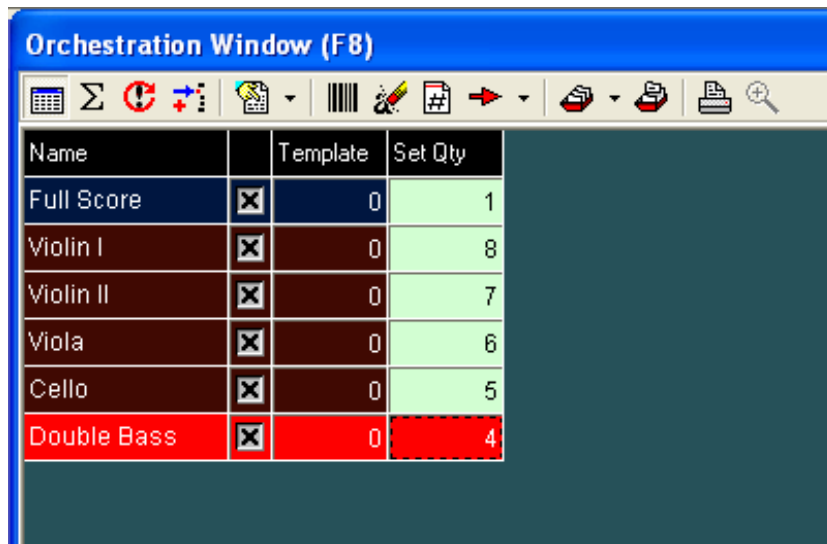


- f. With the “full score” item in the instruments section selected, press the enter key to copy this name into the “items” list on the right hand side of the screen.
- g. Now move to the bottom of the list and locate the violin section in the instruments column.
- h. In the extension column, locate 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.

- I. 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

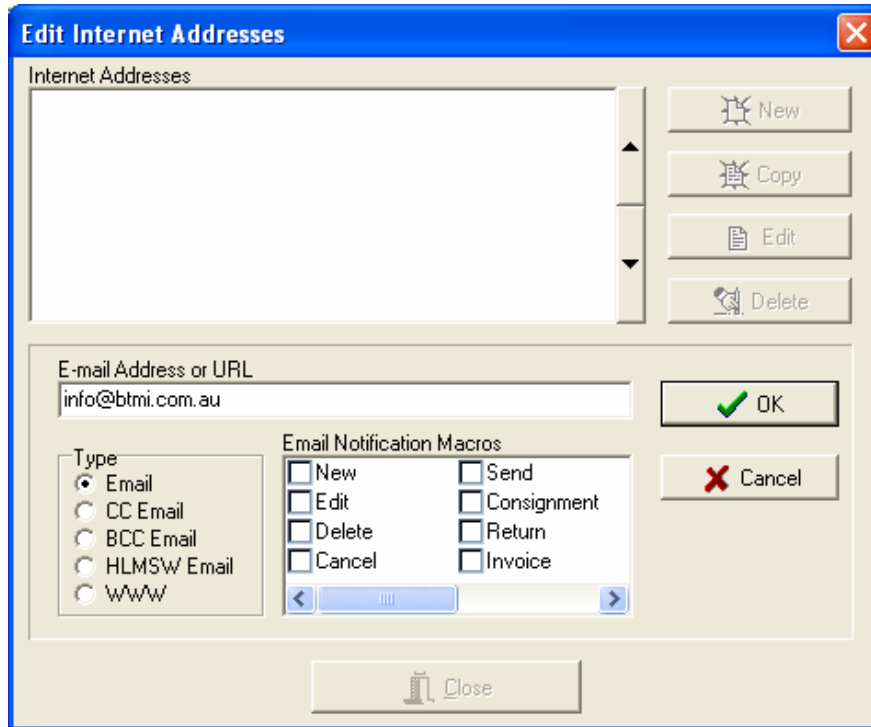
- a. Press **F12** to move to the account tab. It is NOT necessary to LOCK any of the previous tabs to create a new account.
- b. Press **CNTRL + N** to add a new item.
- c. Enter the “**Oxford Symphony Orchestra**” in “company”.
- d. Enter a fictitious address, city and country.

The screenshot shows a software window titled "Edit Window (F7)". At the top, there are several tabs: "Smith J. [S...", "Symphony...", "S:1", "X16178", "Detail", "T:631276", and "Invoice". Below the tabs, there are fields for "Account No." (containing "X16178"), "Alternate No.", and "Type" (set to "Standard"). A "No Alias" button is visible. The main form is divided into two columns. The left column contains fields for "Company" (filled with "Oxford Symphony Orchestra"), "Mr/Mrs" (a dropdown), "First Name/s", "Last Name", "Position" (a dropdown), "Salutation" (a dropdown), "Ph #1", and "Ph #2". The right column contains fields for "Invoice Address" (filled with "12 Fish Lane"), "City" (filled with "Oxford"), "State" (a dropdown), "Postcode", "Country" (filled with "UNITED KINGDOM"), "Ph #3", and "Fax". A vertical status bar on the left edge of the window reads "Added by TEST 7/09/2008 5:22 PM".

- 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.

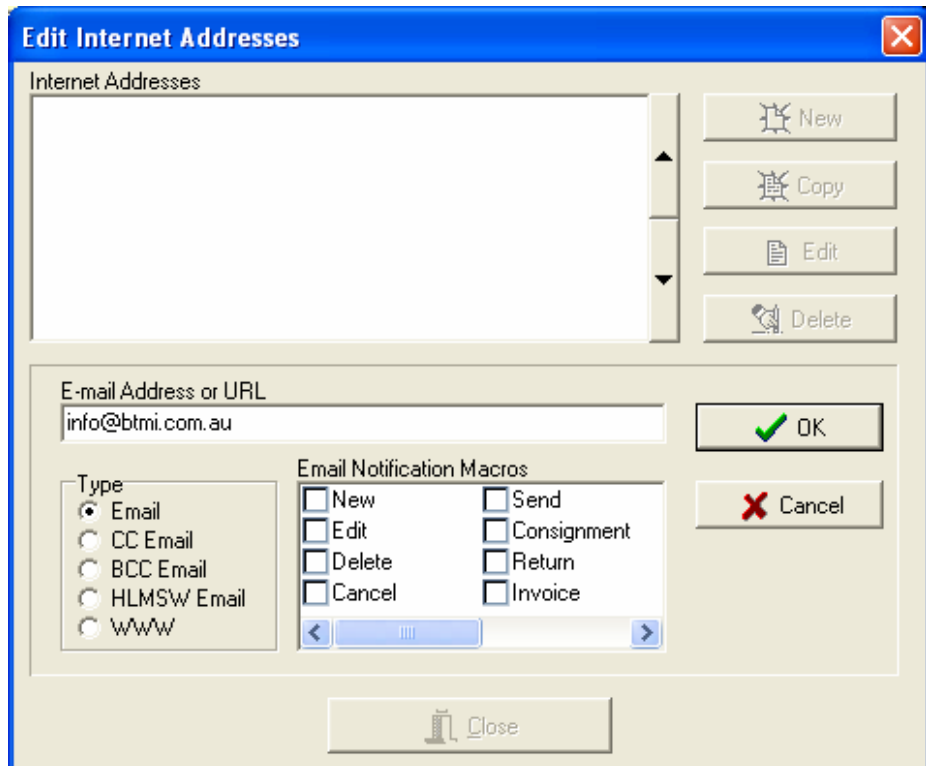


- i. Now we can save the changes to the account by pressing **F10**. And **F10 again** to commit the changes to the database.

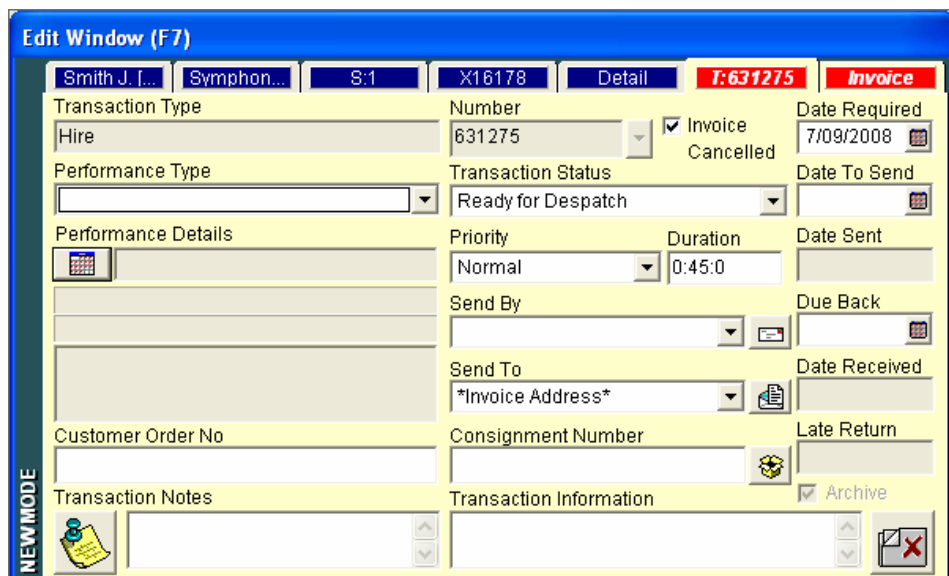
## 5. Adding a Transaction

- Before leaving the account screen, we must lock ALL of the preceding tabs. This is accomplished by pressing **SHIFT + F4**.
- Press **F12** to move to the transaction tab.
- 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.



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

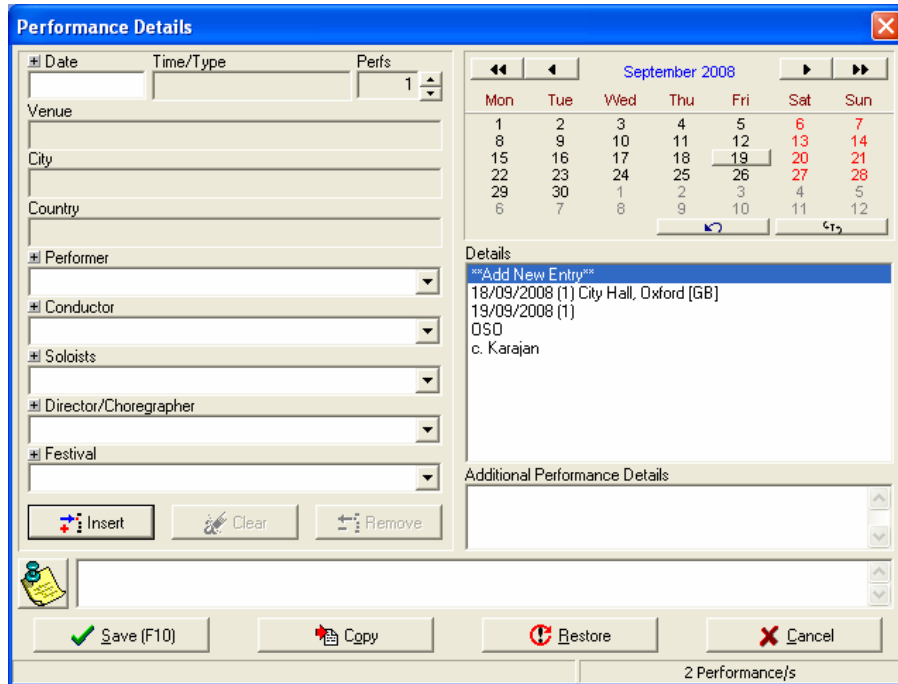


- f. For a transaction, the minimum information to enter is usually:
  - i. performance details
  - ii. dates and method of dispatch and return
  - iii. number of parts to send.
- g. To enter the performance details press the enter key. The Performance Details screen will now be displayed.

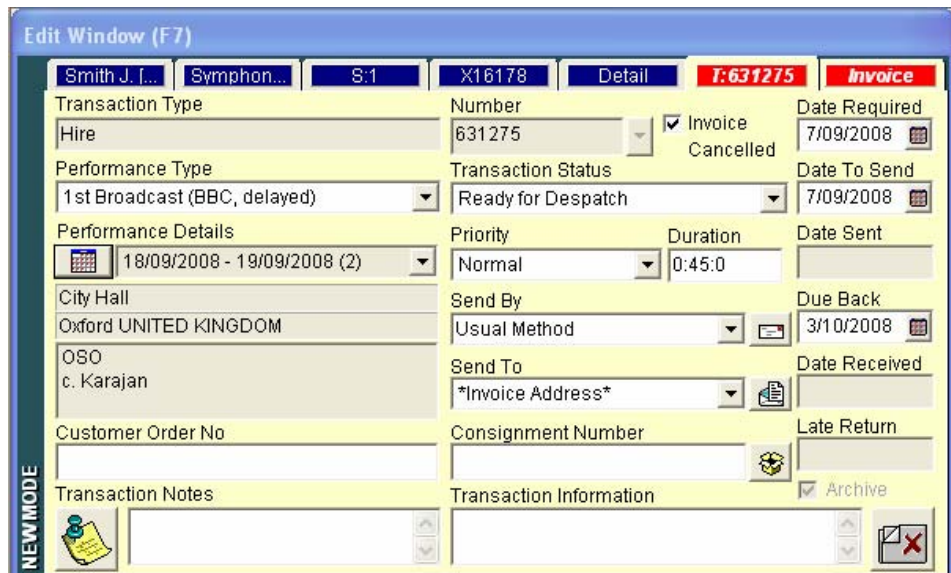
The screenshot shows the 'Performance Details' window. On the left, there are input fields for Date, Time/Type, and Perfs (set to 1). Below these are fields for Venue, City, and Country. Further down are dropdown menus for Performer, Conductor, Soloists, Director/Choreographer, and Festival. At the bottom left of this section are 'Insert', 'Clear', and 'Remove' buttons. On the right side, there is a calendar for September 2008 with days of the week (Mon-Sun) and dates (1-30). Below the calendar is a 'Details' section with a blue header that says '\*\*Add New Entry\*\*'. At the bottom of the window, there is a bar with four buttons: 'Save (F10)', 'Copy', 'Restore', and 'Cancel'. The status bar at the very bottom right indicates 'No Performance/s'.

- 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.

Name	Template	Set Qty	In Stock	Available	Ordered
Full Score	X	0	1	1	0
Violin I	X	0	8	8	0
Violin II	X	0	7	7	0
Viola	X	0	6	6	0
Cello	X	0	5	5	0
Double Bass	X	0	4	4	0

- 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.

Peter Grimshaw  
 Last Updated Sunday, 7 September 2008