

Helmsman 4.3.1 Windows Client User Guide

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Helmsman 4.3.1 Windows Client

User Guide

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Contents

Contents iii

Publication History	v
Chapter 1: Getting Started	1
1.1 Platforms and System Requirements	1
1.2 Terms to know	2
1.3 Installing Helmsman	2
1.3.0 Steps to install Helmsman	2
1.4 Technical Support	3
1.5 Helmsman Settings	3
1.5.1 Helmsman Preferences – General Tab	3
1.5.1.1 Accessing Collections on a Network Server	5
1.5.1.2 Advanced Server Options	6
1.5.1.3 Accessing Collections from a Local Drive	8
1.5.2 The Search Tab	8
1.5.2.1 Boxes and Buttons	9
1.5.2.2 Multiple Search Words	11
1.5.2.3 Distance Between Words for Is Near Searches	12
1.5.2.4 Setting the Search Occurrences Dialog to Always on Top	12
1.5.3 The Document Viewer Tab	13
1.5.3.1 Boxes and Buttons	14
1.5.3.2 Letting Helmsman Set Your Viewing Method and Path	16
1.5.3.3 Setting Your Window Size	16
1.5.3.4 Setting The Way Documents Open	17
1.5.4 The Language Tab	18
1.5.4.1 Boxes and Buttons	19
1.5.4.2 Setting the Language in Which You Use Helmsman	20
1.6 Logging in to Helmsman	21
Chapter 2: The Open Collection Dialog	22
2.1 Boxes and Buttons	23
2.2 Opening Collections	24
2.2.1 Opening a Single Collection	24
2.2.2 Opening Multiple Collections	25
2.3 Viewing the Message of the day	25
2.4 Getting Help	26
Chapter 3: The Browser Window	27
3.1 Menu Options	28
3.2 Toolbar Icons	31
3.3 Moving the Toolbar	32
3.4 Boxes and Buttons	33
3.5 Showing and Hiding Locked Documents	36
3.5.1 Showing Locked Documents	36
3.5.2 Hiding Locked Documents	37
3.6 Importing Security Keys	38
3.7 Viewing Document Properties	40
3.8 Opening a Document	42

3.9	Printing a Document	42
3.10	Navigating Documents in the Document List	43
3.10.1	Opening the Next Document in the Document List	43
3.10.2	Opening the Previous Document in the Document List	43
3.10.3	Opening Multiple Documents	44
3.11	Searching Documents	45
3.11.1	Search Structure	45
3.11.2	Searching the Document List	46
3.11.3	Using Asterisks to Search	48
3.12	Viewing Search Occurrences	49
3.12.1	Viewing a Specific Search Occurrence in the Document	Error! Bookmark not defined.
3.12.2	Getting Help on the Search Occurrences Dialog	52
3.13	Using the Word List	53
3.13.1	Using Word List with Copy and Paste	55
3.13.1.1	Copying a Single Word	55
3.13.1.2	Copying Multiple Words	56
3.13.2	Using Word List with Drag and Drop	58
3.14	Setting Categories	59
3.14.1	Adding Categories	59
3.14.2	Removing Categories	61
3.15	Opening New Collections	62
3.16	Printing a Document List	62
3.17	Viewing the Message of the Day	63
3.18	Sending E-Mail to Support	64
3.18.1	E-Mail Features	64
3.18.2	Creating and Sending the E-mail	65
Chapter 4: For users who have Adobe Exchange 4.05 or higher		67
4.1	The Helmdata Directory	67
4.2	Annotations	67
4.2.1	Creating Annotations	67
4.2.2	Storing Annotations	68
4.2.3	Editing Annotations	68
4.2.4	Deleting Annotations	69
4.2.5	Viewing a Notes Summary	69
4.3	Bookmarks 70	
4.3.1	Creating Bookmarks	70
4.3.2	Editing a Bookmark Name	71
4.3.3	Editing a Bookmark Location	71
4.3.4	Deleting Bookmarks	71
4.4	Print Zone 73	
4.4.1	Printing a Zone	73
4.4.2	Repositioning a Bookmark and Zone Printing	74

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First official release on product CD with Helmsman 4.0. Version 1.0.

August 1997

Release 0.1 for beta with Helmsman 4.0. Clarification for Adobe products and improvements suggested by developers and quality assurance.

July 1997

Initial release.

Chapter 1: Getting Started

1.1 Platforms and System Requirements

Helmsman supports PCs using Microsoft® Windows® 95, Windows 98, Windows 2000, or Windows NT® 4.0 with Service Pack 3 or later. Helmsman uses TCP/IP and NFS as the data network protocols when obtaining data from a network source. You need a minimum level of equipment and software capability to run Helmsman. Specifics are outlined below.

Helmsman Supported Platforms and Requirements

Platform - Microsoft® Windows® 95, Windows 98, Windows 2000, Windows NT® 4.0 or later with Service Pack 3 or later, or Windows XP

Processor - Pentium® 133 MHz minimum, Pentium Pro recommended

Monitor - SVGA color monitor and graphics card

Disk Space:

26 MB (minimum) for Helmsman and Adobe Exchange

14 MB (minimum) for Helmsman if Adobe Exchange is already installed

Disk Space for Installer - 50 MB (minimum)

Memory - 32 MB RAM (minimum)

Mouse - Windows-compatible

Printer - Graphics-capable (PostScript or non-PostScript), supported by Windows

Adobe Acrobat 5 Requirements

Intel Pentium processor.

Microsoft Windows 95 OSR 2.0, Windows 98 SE, Windows Millennium Edition, Windows NT 4.0 with Service Pack 5, Windows 2000, or Windows XP

64MB of RAM

24MB of available hard-disk space

Additional 70MB of hard-disk space for Asian fonts (optional)

1.2 Terms to know

Collection – a grouping of documents, usually grouped by product and software release.
 Search Occurrence – each separate appearance of a word or phrase used for a search.

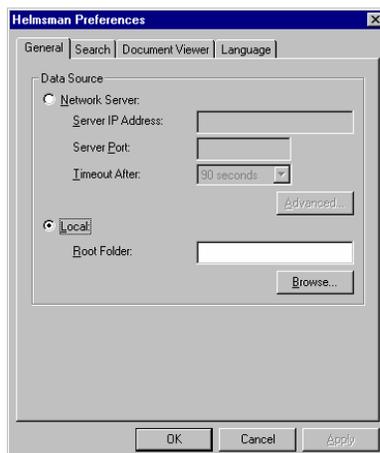
1.3 Installing Helmsman

The installation of Helmsman will load the Helmsman viewer on your computer. The documentation or pdf files remain on the CD. To access the documentation, you must install Helmsman and have Acrobat Reader or Exchange on your computer.

Steps to install Helmsman

1. Insert the CD into your CD-ROM drive. If your computer has autoplay turned on, the installation program will start. If autoplay is turned off you will have to locate your CD-ROM drive and click on the “start.exe” file.
Note: Not all CDs contain the Helmsman software. You can download the latest Helmsman software at www.nortelnetworks.com/support, under the Helmsman product name.
2. Follow the onscreen messages in install Helmsman and Adobe Reader (if necessary).
3. Start Helmsman using one of the following methods:
 Go to Start/Programs/Helmsman 4.3.1/Helmsman 4.3.1.
 Go to Windows Explorer/Program Files/Helmsman 4.3.1 and double-click on Helmsman.exe.
 Go to Windows Explorer/Program Files/Helmsman 4.2 and drag the Helmsman.exe file onto your desktop. Double-click the shortcut on your desktop
4. If a message box appears with the message:
 ”No collection was found in the root path. Modify the root path in the preferences and try again.” This means you didn’t provide some information Helmsman requires in the installation process. Click okay and complete step 5.
5. The Preference tab will appear. Select the “Local” radio button and enter your CD-Rom drive.

Figure 1: Helmsman Preferences Dialog, General Tab



1.4 Technical Support

If you encounter a problem not covered in the Help system or the User's Guide, please call Helmsman technical support.

In North America, call 1-877-662-5669 Option 4 or 1-615-432-4848. You may also email Helmsman Support at helmsupt@nortelnetworks.com.

1.5 Helmsman Settings

1.5.1 Helmsman Preferences – General Tab

You use the General Tab to tell the application where it should access document collections, on a network server or from a local drive. To access the General Tab, from the Preferences Dialog, click the General Tab. The General Tab opens, as illustrated in Figure 2.

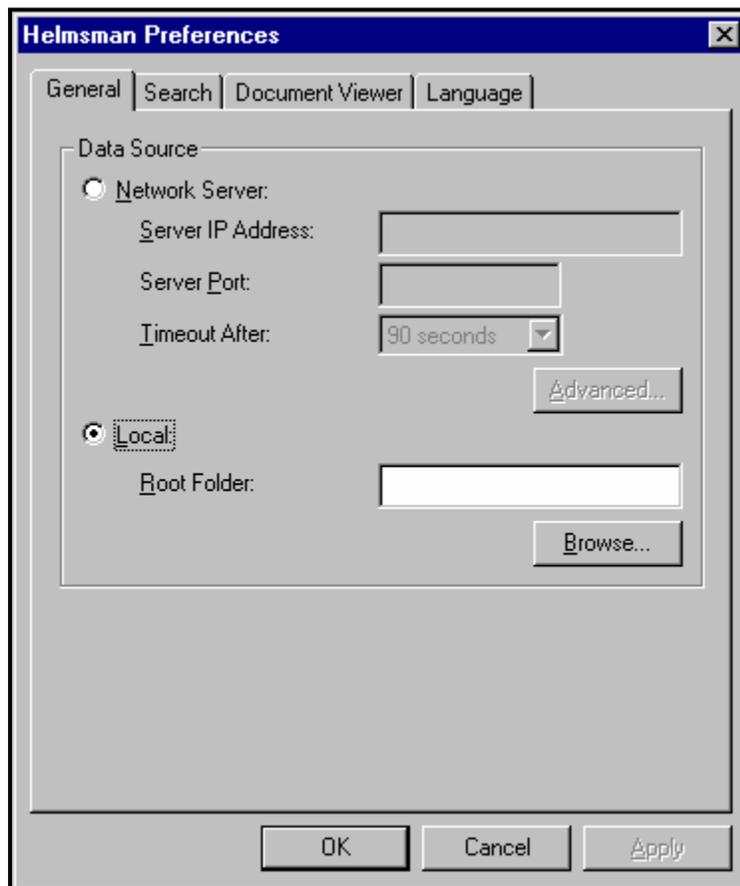


Figure 2: Helmsman Preferences Dialog, General Tab

On the General Tab you:

- Set preferences for accessing collections on a network server
- Set preferences for Advanced Server Options
- Set preferences for accessing collections from a local drive

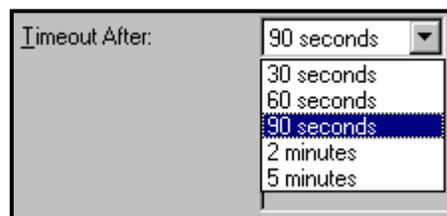
The General Tab contains the following boxes and buttons:

Boxes:

Server IP Address: - The Server IP Address is a unique identifier that distinguishes between different machines set up on a network. Enter the IP address of the server to which you are connected in the **Server IP Address:** box (e.g., 47.157.0.85).

Server Port: - Bit streams that identify the route you use to access the server define the Server Port. Enter the server port number in the **Server Port:** box (e.g., 22543).

Timeout After: - The **Timeout After:** box tells the application how long to wait for a server response before canceling a retrieval function. Select the amount of time you want to allow the server before it times out by clicking the down arrow and making a selection from the list provided. The range is 30 seconds to 5 minutes.



Note: The default is 90 seconds.

Root Folder: - Enter the path or click the **Browse...** button to select the name of the parent folder for this data source.

Buttons:



Figure 3: Advanced Button

Advanced... - After you choose the Network Server: option and enter data in the required boxes, click the **Advanced...** button. The Advanced Server Options Dialog opens.



Figure 4: Browse Button

Browse... - If you do not know the path for the file, click the **Browse...** button to find it.



Figure 5: OK Button

OK - When finished selecting preferences, click **OK** to set your preferences and close the Dialog.



Figure 6: Cancel Button

Cancel - Click **Cancel** to exit the Dialog without saving changes made since you clicked **Apply** last.



Figure 7: Apply Button

Apply - When complete, click **Apply** to set the preferences.

1.5.1.1 Accessing Collections on a Network Server

If you are accessing Collections on a Network Server, take the following steps:

1. Get the following information from your system administrator:
 - Server IP address
 - Server Port
 - Your assigned username
 - Your assigned password
2. From the General Tab, click the radio button for the Network Server: option. The **S**erver IP Address:, **S**erver Port:, and **T**imeout After: boxes open.
3. The Server IP Address is a unique identifier that distinguishes between different machines set up on a network. Enter the IP address of the server to which you are connected in the **S**erver IP Address: box (e.g., 47.157.0.85).
4. Bit streams that identify the route you use to access the server define the Server Port. Enter the server port number in the **S**erver Port: box (e.g., 24583).

- The **Timeout After:** box tells the application how long to wait for a server response before canceling a retrieval function. Select the amount of time you want to allow the server before it times out by clicking the down arrow and making a selection from the list provided, as illustrated in Figure 8.

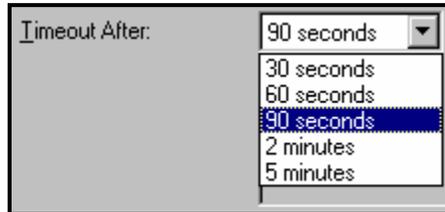


Figure 8: Timeout After Box

The range is 30 seconds to 5 minutes.

Note: The default is 90 seconds.

- When complete, click **Apply** to set the preferences, or select another tab to view.

When finished selecting preferences, click **OK** to set the preferences and close the Dialog.

1.5.1.2 Advanced Server Options

You use the Advanced Server Options to optimize performance when you retrieve documents from a server. After you choose the Network Server: option and enter data in the required boxes, click the **Advanced...** button. The Advanced Server Options Dialog opens, as illustrated in Figure 9.

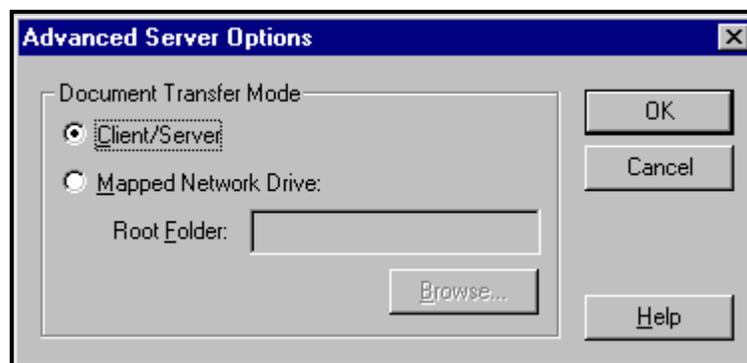


Figure 9: Advanced Server Options Dialog

Note: Nortel Networks recommends that you consult with your Helmsman Technical Support representative prior to setting these options.

- **Client/Server**

The Client/Server document transfer mode uses sockets to retrieve documents from the server. This mode works well when using a document viewer that is capable of byte serving, such as a plug-in.

Note: When in Client/Server mode, the system is always byte serving.

To use the Client/Server Document Transfer Mode, take the following steps:

1. From the Advanced Server Options Dialog, click the radio button for the **C**lient/**S**erver option.
2. When complete, click **OK** to set the preference and return to the General Tab.

- **Mapped Network Drive**

The Mapped Network Drive document transfer mode relies on mapped network drives to retrieve documents from the server. With a helper application document viewer, (which is not capable of byte-serving), the Mapped Network Drive mode optimizes performance by providing access to documents through the file system as opposed to a sockets layer.

You must map the location of a collection's documents to a specific drive on the client machine to use this mode. You can do this with one of the many available NFS software packages.

Example: Suppose the server is named X15. The system administrator needs to make X15 visible to your machine when viewing the contents under Network Neighborhood, or one of its sub-networks. Select a drive letter that is not already in use on your machine and map this drive letter to the Collections folder on X15.

Note: A mapped network drive tells the application that it has been NFS mounted, which involves remote access. If you are using a CD-ROM to view documents and perform searches, the application accesses the CD-ROM and pulls the documents directly.

To use the Mapped Network Drive Document Transfer Mode, take the following steps:

1. From the Advanced Server Options Dialog, click the radio button for the **M**apped Network Drive: option. The **R**oot **F**older: box opens.
2. Enter the path or click the **B**rowse... button to select the name of the parent folder for this data source.

When complete, click **OK** to set the preference and return to the General Tab.

1.5.1.3 Accessing Collections from a Local Drive

If you are accessing Collections from a Local Drive, take the following steps:

1. From the General Tab, click the radio button for the **Local:** option. The **Root Folder:** box opens.
2. Enter the path to the collection on your C: drive (e.g., c:/helmsman/wir21)

OR

Enter the drive letter on which your CD-ROM resides, followed by a colon (e.g., d:).

When complete, click **Apply** to set the preferences, or select another tab to view. When finished selecting preferences, click **OK** to set the preferences and close the Dialog.

1.5.2 The Search Tab

To access the Search Tab, from the Preferences Dialog, click the Search Tab. The Search Tab opens, as illustrated in Figure 10.

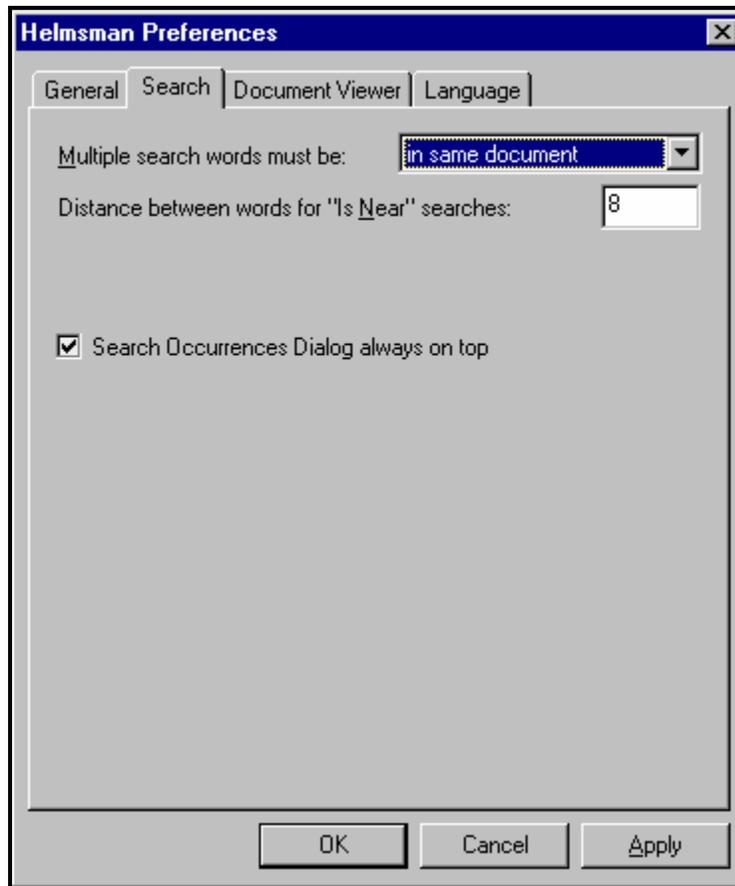


Figure 10: Helmsman Preferences Dialog, Search Tab

On the Search Tab you:

- Set search word parameters
- Set the distance between words for "Is Near" searches

1.5.2.1 Boxes and Buttons

The Search Tab contains the following boxes and buttons:

Boxes:

Multiple search words must be: - Select the option you want by clicking the down arrow and making a selection from the list provided.

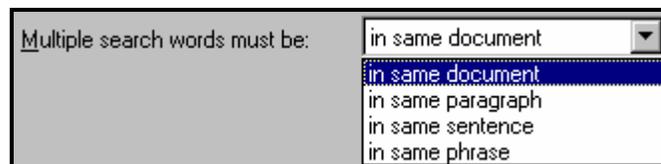


Figure 11: Multiple search words must be: Box

The options are:

In same document - Make this selection if you want the application to find both words inside the same document.

In same paragraph - Make this selection if you want the application to find both words inside the same paragraph.

In same sentence - Make this selection if you want the application to find both words inside the same sentence.

In same phrase - Make this selection if you want the application to find both words inside the same phrase.

Note: The default is in same document.

Distance between words for "Is Near" searches: - Select the number of words that can be in between the words for which you are searching. The range can be from 1 to 999 words.

Note: The default is set to 8 words. This option will only work with In Text searches.

Search Occurrences Dialog always on top - To force the Search Occurrences Dialog not to minimize when you open another application, click in the checkbox to place a checkmark. The default is checked.

Buttons:

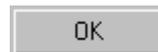


Figure 12: OK Button

OK - When finished selecting preferences, click **OK** to set your preferences and close the Dialog.



Figure 13: Cancel Button

Cancel - Click **Cancel** to exit the Dialog without saving changes made since you clicked **A**pply last.



Figure 14: Apply Button

Apply - When complete, click **A**pply to set the preferences.

1.5.2.2 Multiple Search Words

When you search documents, you have the option to search for multiple words, using AND, OR, or IS NEAR to define the search mechanism. The application looks for both words in the same document, paragraph, sentence, or phrase, depending on your settings on this tab.

To set the parameters for multiple search words, take the following steps:

1. From the Search Tab, go to the **Multiple search words must be:** box.
2. In the **Multiple search words must be:** box, select the option you want by clicking the down arrow and making a selection from the list provided.

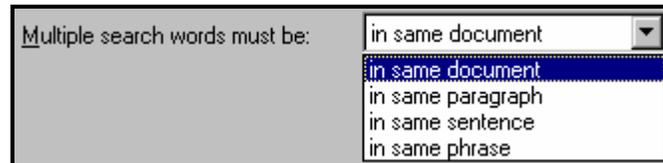


Figure 15: Multiple search words must be: Box

The options are:

In same document - make this selection if you want the application to find both words inside the same document.

In same paragraph - make this selection if you want the application to find both words inside the same paragraph.

In same sentence - make this selection if you want the application to find both words inside the same sentence.

In same phrase - make this selection if you want the application to find both words inside the same phrase.

Note: The default is in same document.

3. When complete, click **Apply** to set the preference.

1.5.2.3 Distance Between Words for Is Near Searches

You also have the option to search for words that are near each other in a document. When you search for words that are near each other, you must tell the application how far apart those words can be.

To set the parameters for multiple search words, take the following steps:

1. From the Search Tab, go to the **Distance between words for "Is Near" searches:** box.
2. In the **Distance between words for "Is Near" searches:** box, select the number of words that can be in between the words for which you are searching. The range can be from 1 to 999 words.

Note: The default is set to 8 words. This option will only work with In Text searches.

3. When complete, click **Apply** to set the preference and go to the next tab, or click **OK** to save your changes and exit the Preferences Dialog.

1.5.2.4 Setting the Search Occurrences Dialog to Always on Top

When you select a particular search occurrence on the Search Occurrences Dialog, the Search Occurrences Dialog minimizes and you view the occurrence in Adobe. If you want the Search Occurrences Dialog to remain open while you view the occurrence (for faster access to the next occurrence or another occurrence on the Dialog), you can set the Dialog to be Always on Top.

To set the Search Occurrences Dialog to Always on Top, take the following steps:

1. From the Search Tab, go to the **Search Occurrences Dialog always on top** box.
2. Click in the checkbox to place a checkmark.

Note: The default is checked.

Note: You can also set the Search Occurrences Dialog to always on top on the Search Occurrences Dialog. Right-click the Helmsman icon on the title bar and select the Always on Top option from the menu.

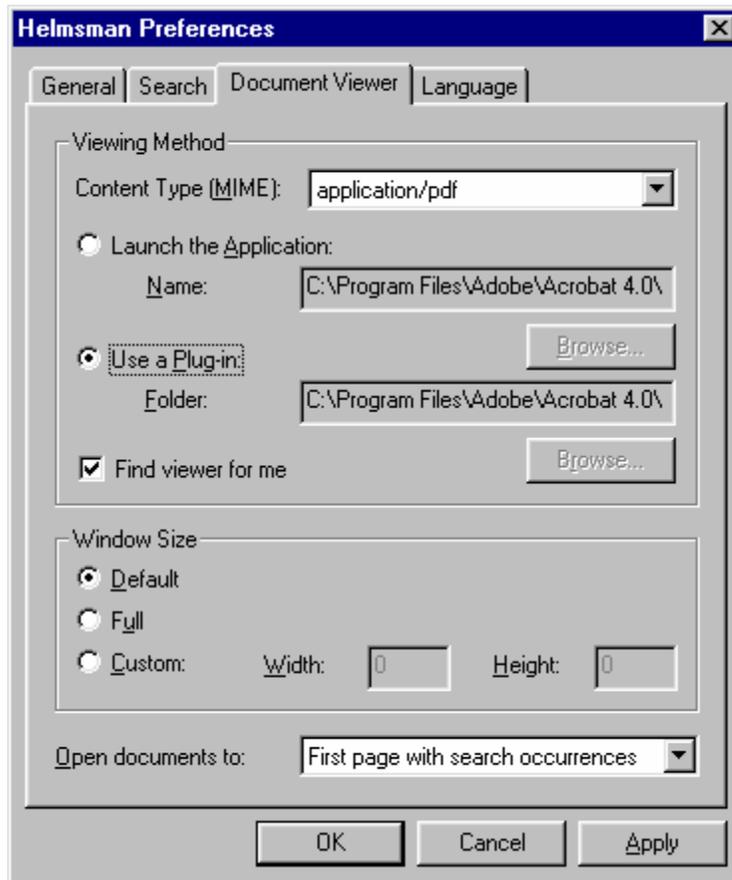
1.5.3 The Document Viewer Tab

To access the Document Viewer Tab, from the Preferences Dialog, click the Document Viewer Tab. The Document Viewer Tab opens, as illustrated in Figure 17

Important: it is recommended that you use your viewer as a plug-in. Some search functionality is not available when reader is lanced as an Application.

Using Adobe as a plug-in also gives you a speed advantage, when you use a plug-in, only the parts of the file that are being viewed are retrieved. This process, called byte serving, affords a speed advantage that you see most when you access documents from a server data source.

Figure 16: Helmsman Preferences Dialog, Document Viewer Tab



On the Document Viewer Tab you:

- Set preferences for Viewing Method
- Set preferences for Window Size
- Set preferences for the location in the document to which the display opens

1.5.3.1 Boxes and Buttons

The Document Viewer Tab contains the following boxes and buttons:

Boxes:

Content Type (MIME): - This box is defaulted to use application/pdf. You do not need to change the default.

Name: - Enter the path to the helper's (Acrobat) executable file (Acrobat.exe).

Folder: - Enter the path to the Adobe executable file.

Find viewer for me - To let Helmsman find the path to your helper or plug-in for you, click this box to place a checkmark. The application populates the **Name:** and **Folder:** boxes for you and disables editing in the boxes. To edit the **Name:** and **Folder:** boxes yourself, click this box to remove the checkmark.

Width: - To convert the monitor width to pixels, multiply the width of the monitor in inches by 72 (72 pixels per inch) and enter that number in the **Width:** box.

Height: - To convert the monitor height to pixels, multiply the height of the monitor in inches by 72 (72 pixels per inch) and enter that number in the **Height:** box.

Open documents to: - Select the option you want by clicking the down arrow and making a selection from the list provided.

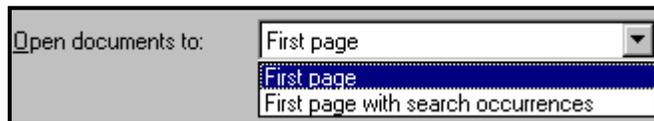


Figure 17: Open documents to: Box

The options are:

First page - make this selection if you want to open the document to the first page.

First page with search occurrences - make this selection if you want to open the document to the first occurrence of the search term.

Buttons:

Launch the Application: - To set your viewing method, if you are using Adobe as a helper, click the radio button for the **Launch the Application:** option.



Figure 18: Browse Button

Browse... - If you do not know the path, click the **Browse...** button to find it.

Use a Plug-in: - To set your viewing method, if you are using Adobe as a plug-in, click the radio button for the **Use a Plug-in:** option.



Figure 19: View Plug-ins Button

View Plug-ins... - Click the **View Plug-ins...** button to see a list of available plug-ins.

Default - Select this option if you want the size of the window to be determined by the application, based on the size of your display. This option is the default.

Full - Select this option if you want Helmsman to use your entire display when it opens.

Custom: - Select this option if you want to set the size of the window yourself, and then enter the appropriate sizes in the **Width:** and **Height:** boxes. The application must then be closed and reopened.



Figure 20: OK Button

OK - When finished selecting preferences, click **OK** to set your preferences and close the Dialog.



Figure 21: Cancel Button

Cancel - Click **Cancel** to exit the Dialog without saving changes made since you clicked **A**pply last.



Figure 22: Apply Button

Apply - When complete, click **A**pply to set the preferences.

1.5.3.2 Letting Helmsman Set Your Viewing Method and Path

It is recommended that you leave the default settings as set by the Helmsman installation.

1.5.3.3 Setting Your Window Size

To set the size of the window in which you view documents, take the following steps:

1. From the Document Viewer tab, click the radio button for one of the following options:

Default - Select this option if you want the size of the window to be determined by the application, based on the size of your display. This option is the default.

Full - Select this option if you want Helmsman to use your entire display when it opens.

Custom: - Select this option if you want to set the size of the window yourself, and then enter the appropriate sizes in the **W**idth: and **H**eight: boxes. The application must then be closed and reopened.

Width: - To convert the monitor width to pixels, multiply the width of the monitor in inches by 72 (72 pixels per inch) and enter that number in the **W**idth: box.

Height: - To convert the monitor height to pixels, multiply the height of the monitor in inches by 72 (72 pixels per inch) and enter that number in the **H**eight: box.

Note: When you restart Helmsman, open a document to test the settings. If you are not satisfied with the window size, increase or

decrease the number of pixels until you have customized the screen appropriately.

2. When complete, click **Apply** to set the preference and go to the next tab, or click **OK** to save your changes and exit the Preferences Dialog.

Note: To view the results of your settings on this tab, you must exit Helmsman and restart.

1.5.3.4 Setting The Way Documents Open

To set the location in the document to which the display opens, take the following steps:

1. From the Document Viewer Tab, go to the **Open documents to:** box.
2. In the **Open documents to:** box, select the option you want by clicking the down arrow and making a selection from the list provided.



Figure 23: Open documents to: Box

The options are:

First page - make this selection if you want to open the document to the first page.

First page with search occurrences - make this selection if you want to open the document to the first occurrence of the search term.

3. When complete, click **Apply** to set the preference and go to the next tab, or click **OK** to save your changes and exit the Preferences Dialog.

1.5.4 The Language Tab

To access the Language Tab, from the Preferences Dialog, click the Language Tab. The Language Tab opens, as illustrated in Figure 24.

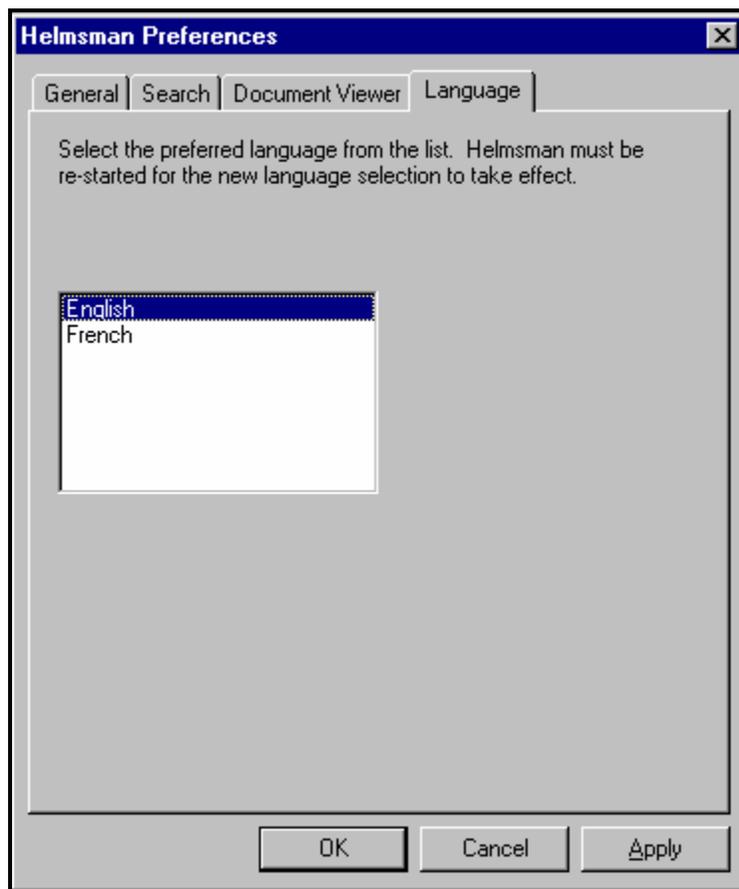


Figure 24: Helmsman Preferences Dialog, Language Tab

On the Language Tab you:

- Set preferences for the language in which you use Helmsman

Note: The default is English.

1.5.4.1 Boxes and Buttons

The Language Tab contains the following boxes and buttons:

Boxes:

Language List: - Lists languages available for use in Helmsman.

Buttons:



Figure 25: OK Button

OK - When finished selecting preferences, click **OK** to set your preferences and close the Dialog.



Figure 26: Cancel Button

Cancel - Click **Cancel** to exit the Dialog without saving changes made since you clicked **A**pply last.

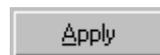


Figure 27: Apply Button

Apply - When complete, click **A**pply to set the preferences.

1.5.4.2 Setting the Language in Which You Use Helmsman

To set the language in which you use Helmsman, take the following steps:

1. Select the language you want to use from the list by clicking it to highlight.

Note: The default is English.

2. When complete, click **Apply** to set the preference, or click **OK** to save your changes and exit the Preferences Dialog.

Note: When you change the language and click **OK** to close the Preferences dialog, a confirmation dialog opens, as illustrated in Figure 28.



Figure 28: Language Change Confirmation

To restart Helmsman showing the new language setting, click **OK**.

To reapply the previous language setting and not restart Helmsman, click **Cancel**.

1.6 Logging in to Helmsman

When you start Helmsman for the first time, once you enter your preferences and click **OK**, the Preferences Dialog closes. The Helmsman splash screen opens.

The Splash Screen dissolves to the Browser Window. If you are accessing collections from a network server, the Login Dialog opens, as illustrated in Figure 29.

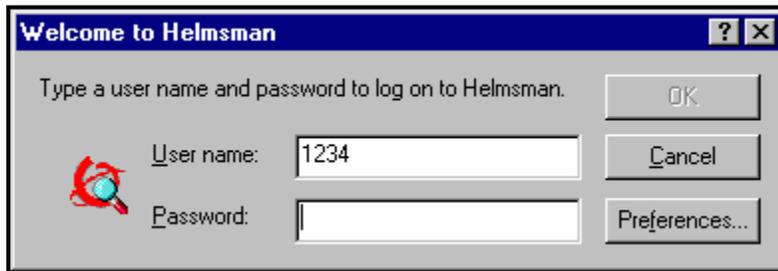


Figure 29: Login Dialog

To log in to Helmsman, take the following steps:

1. Enter the user name assigned to you by your system administrator in the **U**ser **n**ame: box.
2. Enter the password assigned to you by your system administrator in the **P**assword: box.
3. Click **OK**. The Open Collection Dialog opens. (To exit Helmsman, click **C**ancel.)

Note: Helmsman opens by default to the setting (network or local) that was in force when you closed the application last. To update your preferences from the Login Dialog, click the **P**references... button.

Note: If you are accessing collections from a local drive, you do not have to log in to Helmsman. After setting your preferences, the Open Collection Dialog opens immediately.

Chapter 2: The Open Collection Dialog

Once you log in to Helmsman (or if you are accessing collections from a local drive, once you open Helmsman), the Open Collection Dialog opens, as illustrated in Figure 30.

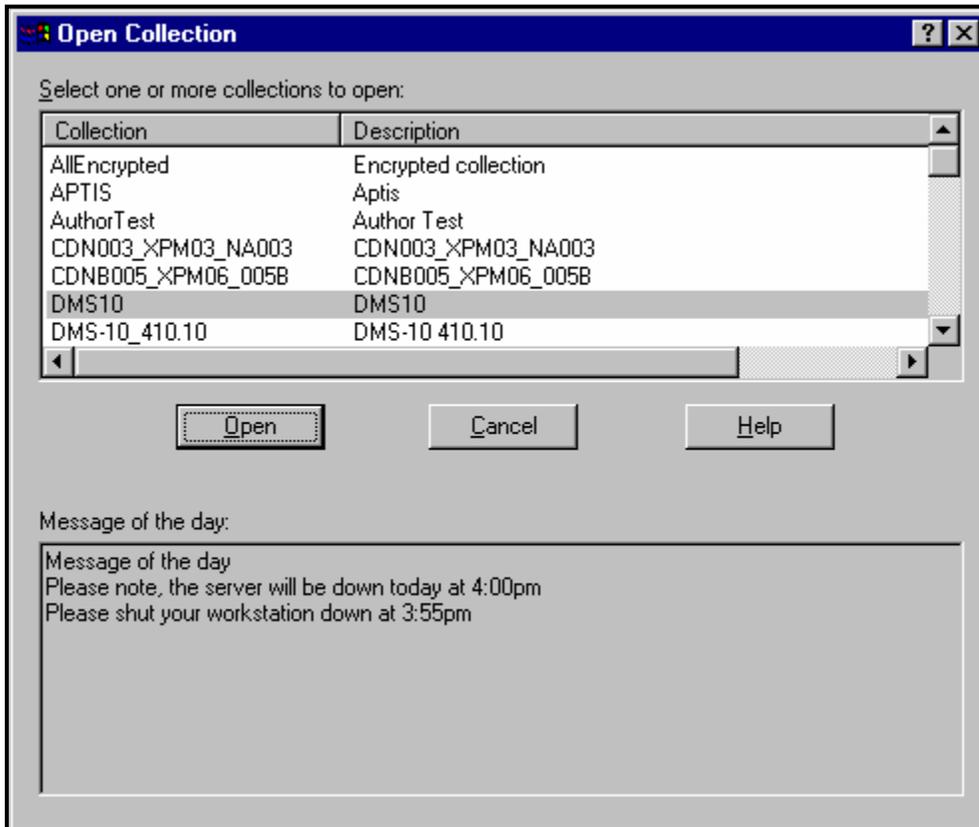


Figure 30: Open Collection Dialog

On the Open Collection Dialog, you:

- Open Collections
- View the Message of the day
- Get Help

2.1 Boxes and Buttons

The Open Collection Dialog contains the following boxes and buttons:

Boxes:

Collection List - Lists the collections, including collection name and description, you can select to open.

Message of the day: - Shows messages from the server connection in the **Message of the day:** box. This box does not show when you access collections from a local drive.

Buttons:

Figure 31: Open Button



Open - After highlighting a collection or collections, click the **Open** button to show the document list for the selected collection(s).



Figure 32: Cancel Button

Cancel - Click the **Cancel** button to close the Open Collection Dialog without opening the document list and return to the Browser Window.



Figure 33: Help Button

Help - Click the **Help** button to open the online help file for the Open Collection Dialog.

2.2 Opening Collections

When you start Helmsman, the Helmsman Browser Window opens and the Open Collection Dialog opens in front of the Browser.

2.2.1 Opening a Single Collection

To open a single collection, take the following steps:

1. Click the collection you want to open to highlight it.
2. Click the **Open** button. (Click the **Cancel** button to close the Open Collection Dialog without opening the document list and return to the Browser Window.)

Note: You can also double-click the collection you want to open.

3. The Open Collection Dialog closes and the Browser Window shows the document list for the selected collection, as illustrated in Figure 34.

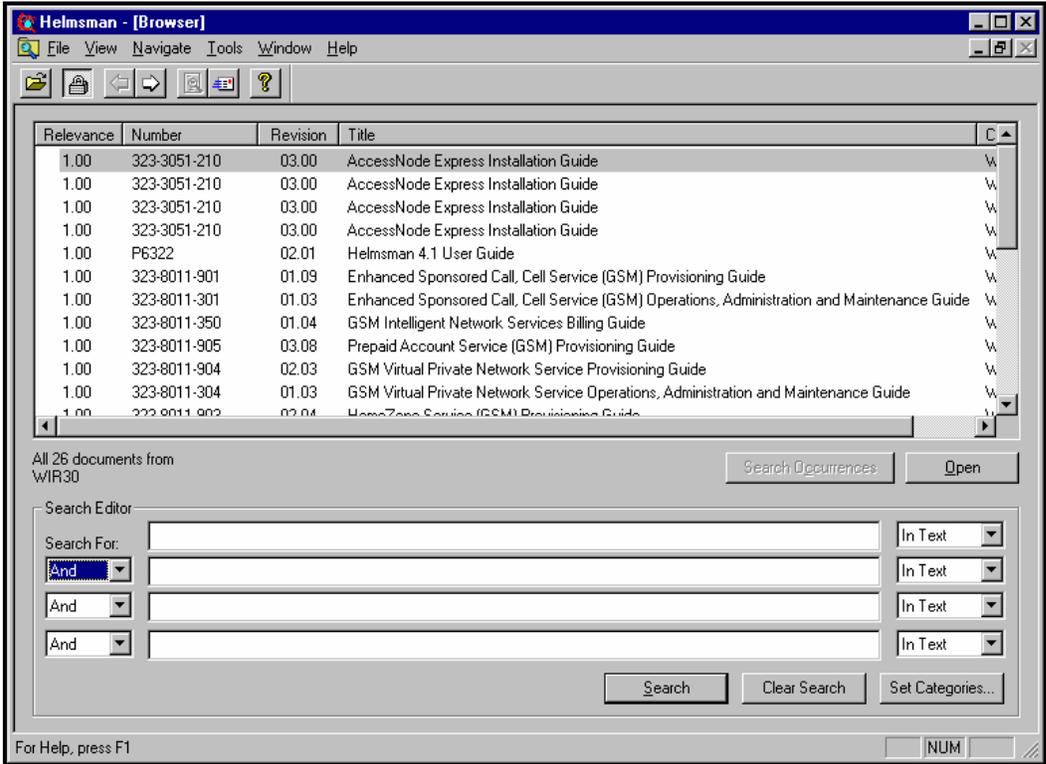


Figure 34: Browser Window

Note: If you are opening a large collection, and only want to open a few documents in the collection, click the **Stop** button while the documents are loading. Only the collections loaded at that point show in the Document List.

2.2.2 Opening Multiple Collections

To open multiple collections, take the following steps:

1. Use the Ctrl key to highlight individual collections throughout the list. You can also use the Shift key to highlight a collection, and then highlight a collection further down the list. All collections in between the first and last collections you select are also highlighted.
2. Click the **Open** button. (Click the **Cancel** button to close the Open Collection Dialog without opening the document list and return to the Browser Window.)
3. The Open Collection Dialog closes and the Browser Window shows the document list for all selected collections.

Note: Initially, all documents in the collection show. Locked documents have a padlock graphic beside them. Click the **Show/Hide locked documents** button on the toolbar to show only the documents that are available (unlocked).

Note: If you are accessing collections from a network server, you can only open up to 15 collections simultaneously.

Note: The benefit of opening multiple collections is that searches will include content from all open collections.

2.3 Viewing the Message of the day

If you use Helmsman with a server, the Open Collection Dialog shows messages from that server connection in the **Message of the day:** box.

If you use Helmsman with a local connection (your CD-ROM drive), you do not have a **Message of the day:** box.

2.4 Getting Help

To get help about the Open Collection Dialog, take the following steps:

1. From the Open Collection Dialog, click the **H**elp button.
2. The online help file opens to information regarding the Open Collection Dialog.

To exit the Help window, select **F**ile and **E**xit from the menu.

Chapter 3: The Browser Window

Once you select a collection or collections from the Open Collection Dialog and click the Open button, the Open Collection Dialog closes and Helmsman displays the document list for the selected collection(s) in the Browser Window, as illustrated in Figure 35.

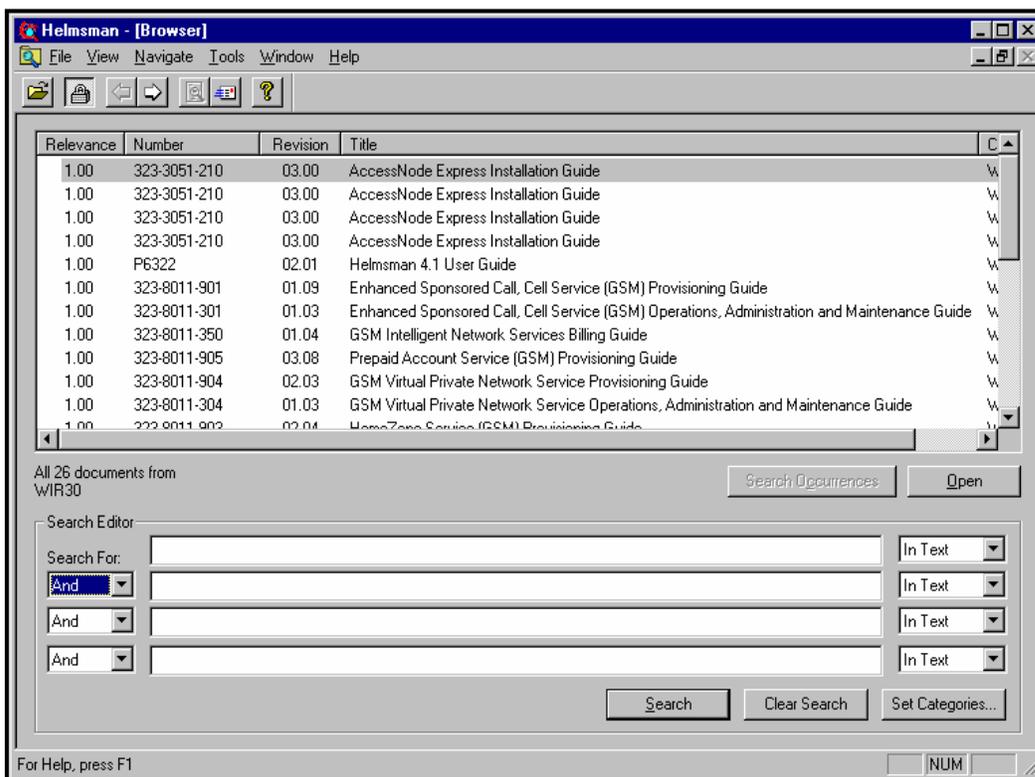


Figure 35: Browser Window

From the Browser Window, you:

- Show/Hide Locked Documents
- Import Security Keys
- View Document Properties
- Open A Document in PDF
- Print A Document
- Navigate Through Documents
- Search the Document List
- View Search Occurrences
- Use the Word List
- Set Categories
- Open New Collections
- Print a Document List
- View the Message of the day
- Send E-mail to Support

3.1 Menu Options

The Browser Window contains the following menu options:

File

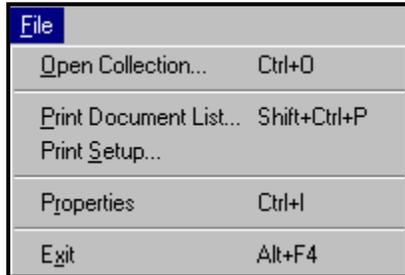


Figure 36: File Menu

Open Collection... - Opens the Open Collection Dialog.

Print Document List... - Opens the Print Dialog to print a list of documents shown for selected collection(s).

Print Setup... - Opens the Print Setup Dialog.

Properties - Opens the Document Properties window for the highlighted document.

Exit - Closes Helmsman.

View

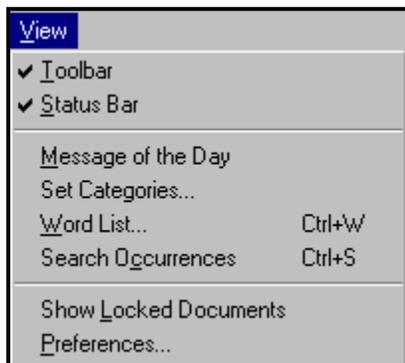


Figure 37: View Menu

Toolbar - When checked, you see the toolbar shown on the Browser Window. To remove the toolbar from the Browser Window, select this option to clear the checkmark.

Status Bar - When checked, you see the status bar shown at the bottom of the Browser Window. To remove the status bar from the Browser Window, select this option to clear the checkmark.

Message of the Day - Opens the Message of the day Dialog. This option is only available if you are accessing collections from a network server.

Set Categories... - Opens the Set Categories Dialog.

Word List... - Opens the Word List Dialog.

Search Occurrences - After you perform a search, opens the Search Occurrences Dialog for the highlighted document.

Show Locked Documents - Shows all documents, both secure and public, for the selected collection(s).

Preferences... - Opens the Preferences Dialog.

Navigate

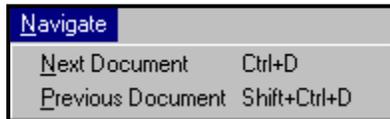


Figure 38: Navigate Menu

Next Document - Opens the document below the highlighted document in the document list.

Previous Document - Opens the document above the highlighted document in the document list.

Tools



Figure 39: Tools Menu

Security Keys ►

Import... - Opens the Import Security Key Browse window.

E-Mail - Opens the Compose Mail Message Dialog.

Window

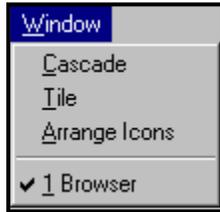


Figure 40: Window Menu

Cascade - Shows open windows stacked and cascading from the top left to the bottom right of the screen.

Tile - Shows open windows edge to edge, from the top to the bottom of the screen.

Arrange Icons - This option is not currently functional.

Open Windows - Open windows show at the bottom of the **Window** menu option. The window you are currently using shows with a checkmark to the left of the window title.

Help

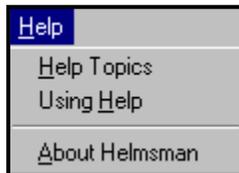


Figure 41: Help Menu

Help Topics - Opens the Online Help Window for Helmsman.

Using Help - Opens the Online Help Window describing the use of Help for Helmsman.

About Helmsman - Opens the About Helmsman Dialog, showing the client product version, the server version, copyright information, and language you are using.

3.2 Toolbar Icons

The Browser Window contains the following toolbar icons:



Figure 42: Open Collection Icon

Open Collection - Opens the Open Collection Dialog.



Figure 43: Show Locked Documents Icon

Show locked documents - Shows all documents, both secure and public, for the selected collection(s).



Figure 44: Previous Document Icon

Previous Document - Opens the document above the highlighted document in PDF format.



Figure 45: Next Document Icon

Next Document - Opens the document below the highlighted document in PDF format.



Figure 46: Search Occurrences Icon

Search Occurrences - After you perform a search, opens the Search Occurrences Dialog for the highlighted document.



Figure 47: Mail Icon

Mail - Opens the Compose Mail Message Dialog.



Figure 48: Help Topics Icon

Help Topics - Opens the Online Help Window for Helmsman.

3.3 Moving the Toolbar

You can place the toolbar horizontally or vertically on your window, or you can set the toolbar as free-floating anywhere on your desktop.



Figure 49: Toolbar, Horizontal Orientation

The toolbar defaults to a horizontal orientation.



To move the toolbar to a vertical orientation, click the mouse button anywhere on the toolbar and, holding the mouse button down, drag the toolbar to the left or right side of the Browser Window.

Figure 50: Toolbar, Vertical Orientation

To move the toolbar to a free-floating toolbar, click the mouse button anywhere on the toolbar, and holding the mouse button down, drag the toolbar off of the Browser Window. The free-floating toolbar is Always on Top. This function is especially useful when you are working within Acrobat.



Figure 51: Toolbar, Free-Floating

Note: The free-floating toolbar has an extra icon, used for minimizing or maximizing the Helmsman application window.



Figure 52: Minimize/Maximize Icon

You can hover over the individual icons with your mouse to see a tip that briefly describes the function of the icon. You see a more complete description, while hovering over the icon, on the status bar at the bottom of the screen.

3.4 Boxes and Buttons

The Browser Window contains the following boxes and buttons:

Boxes:

Document List - Shows the list of documents available for the selected collection(s).

Search For: Criteria Box 1 - Enter the word, phrase or number for which you are searching.

Search For: In Text/In Title/In Number Box 1: Select the option you want by clicking the down arrow and making a selection from the list provided.



Figure 53: In Text/In Title/In Number Box

The options are:

In Text - Select **In Text** if you want to search for the criteria in Search For: Criteria Box 1 in the body of each document in the collection.

In Title - Select **In Title** if you want to search for the criteria in Search For: Criteria Box 1 in the title of each document in the collection.

In Number - Select **In Number** if you want to search for the criteria in Search For: Criteria Box 1 in the document number of each document in the collection.

Search For: And/Or/Is Near Box 1 - Select the option you want by clicking the down arrow and making a selection from the list provided.



Figure 54: And/Or/Is Near Box

The options are:

And - Select **And** if you are using a complex query to match both the criteria in Search For: Criteria Box 1 and Search For: Criteria Box 2 in the document.

For example: You enter “line” in Search For: Criteria Box 1, select the And conjunction, and enter “trunk” in Search For: Criteria Box 2. The program returns only occurrences where both “line” and “trunk” appear in the same paragraph.

Or - Select **Or** if using a complex query to match either the criteria in Search For: Criteria Box 1 or Search For: Criteria Box 2.

For example: You enter “line” in Search For: Criteria Box 1, select the Or conjunction, and enter “trunk” in Search For: Criteria Box 2. The program returns occurrences where “line” appears or where “trunk” appears in the document.

Is Near - Select **Is Near** if using a complex query to match the criteria in Search For: Criteria Box 1 when it appears near the criteria in Search For: Criteria Box 2.

For example: You enter “line” in Search For: Criteria Box 1, select the Is Near conjunction, and enter “trunk” in Search For: Criteria Box 2. The system returns occurrences where “line” appears within 8 words of “trunk”.

Note: You may only use the Is Near search only for In Text searches.

Search For: Criteria Box 2: Enter the additional word, phrase or number for which you are searching.

Search For: In Text/In Title/In Number Box 2: Select In Text, In Title, or In Number by clicking on the down arrow.

Search For: And/Or/Is Near Box 2: Select And, Or or Is Near by clicking on the down arrow.

Search For: Criteria Box 3: Enter the additional word, phrase or number for which you are searching.

Search For: In Text/In Title/In Number Box 3: Select In Text, In Title, or In Number by clicking on the down arrow.

Search For: And/Or/Is Near 3: Select And, Or or Is Near by clicking on the down arrow.

Search For: Criteria Box 4: Enter the additional word, phrase or number for which you are searching.

Search For: In Text/In Title/In Number Box 4: Select In Text, In Title, or In Number by clicking on the down arrow.

Buttons:

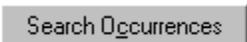
A rectangular button with a light gray background and a thin black border. The text "Search Occurrences" is centered in a dark gray font.

Figure 55: Search Occurrences Button

Search Occurrences - After you perform a search, opens the Search Occurrences Dialog for the highlighted document.



Figure 56: Open Button

Open - Opens the highlighted document in PDF format.

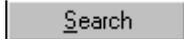


Figure 57: Search Button

Search – Begins the search of the collection for documents matching the criteria you entered in the Search For: Criteria boxes.



Figure 58: Stop Button

Stop - Cancels a search in progress.

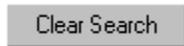


Figure 59: Clear Search Button

Clear Search – Clears criteria entered in the Search For: Criteria boxes.



Figure 60: Set Categories Button

Set Categories... - Opens the Set Categories Dialog.

3.5 Showing and Hiding Locked Documents

Document level security applies to documents stored on CD-ROM, a local hard drive, or a network. The document's security level is encrypted, unlocked, or public.

Documents show security status with the following icons to the left of the document title:

Padlock

The padlock represents a locked document. You must insert a floppy key to decrypt. Word list activities do not include padlocked files.

Key

The key represents files that you have decrypted and that you can now access. All searches and word list activities include these files.

No symbol

No symbol to the left of a document represents that the document is public and no document security is in force.

3.5.1 Showing Locked Documents

To show the document list including documents that are locked (secured), take the following steps:

1. Once you open a collection, from the Browser Window, click the **Show/hide locked documents** icon or select the **View** and **Show Locked Documents** options from the menu.

Note: When Show Locked Documents is active, the menu option shows with a checkmark beside it.

2. The Document List shows all documents in the selected collection(s), regardless of security status.

3.5.2 Hiding Locked Documents

To show the document list excluding documents that are locked (secured), take the following steps:

1. Once you open a collection with locked documents showing, from the Browser Window, click the **Show/hide locked documents** icon or select the **View** and **Show Locked Documents** options from the menu.

Note: When Show Locked Documents is inactive, the menu option shows without a checkmark beside it.

2. The Document List shows only documents in the selected collection(s) that are not locked.

3.6 Importing Security Keys

Encrypted documents appear with a padlock in the left margin of the document list. If you attempt to open a locked document without a security key, an error message shows, as illustrated in Figure 61.



Figure 61: Locked Document Message

You must obtain a floppy key file from the Helmsman Security Management System to unlock encrypted files. Once you import the security key, the unlocked files show in the document list with a key beside them. Contact Helmsman Technical Support for further details.

To import security keys, take the following steps:

1. Insert the diskette containing the floppy key file (.fkf) into the correct drive, or access the directory on the local hard drive where the .fkf is stored.
2. From the Browser Window, select the **T**ools, **S**ecurity Keys ►, and **I**mport... options from the menu.
3. The Import Security Key File Dialog opens, as illustrated in Figure 62.



Figure 62: Import Security Key File Dialog

4. Locate the key file (enter the drive name and location where it resides), and click the **O**pen button.
5. Once you import all keys, a Dialog opens, as illustrated in Figure 63.



Figure 63: Successful Import Dialog

The Dialog shows the number of keys you imported.

6. Once you import the security key successfully, the document appears in the listing with a key to the left.

Note: If you encounter an error during importing, the error is displayed.

You can import additional keys as necessary. The application can manage multiple keys associated with multiple collections. Each time you import a key, the application determines if the key matches the specifications for an expired key.

3.7 Viewing Document Properties

Each document includes searchable properties, stored in a metadata file.

To view Document Properties, take the following steps:

1. In the Document List, click the document for which you want to view properties to highlight it.
2. From the Browser Window, select the **F**ile and **P**roperties options from the menu.
3. The Document Properties Dialog opens, as illustrated in Figure 64.

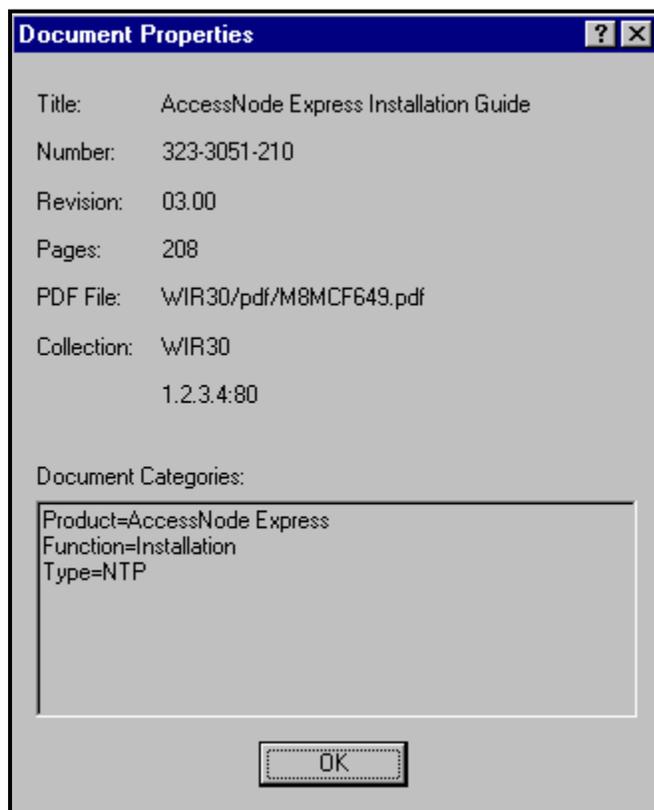


Figure 64: Document Properties Dialog

The Document Properties Dialog lists information from the metadata file about the highlighted document including:

Title: The title of the highlighted document.

Number: The document number associated with the highlighted document.

Revision: The revision number of the highlighted document.

Pages: The number of pages in the highlighted document.

PDF File: The PDF file name of the highlighted document.

Collection: The collection to which the highlighted document belongs.

Document Categories: Product, Function, and Type entries in the metadata file for the highlighted document.

4. Click **OK** to close the Document Properties Dialog and return to the Browser Window.

3.8 Opening a Document

To open a document, take the following steps:

1. From the document list, double-click on the desired document or click once on the desired document and click the **O**pen button.
2. The selected document opens in PDF Format.
3. Use the Acrobat features to manipulate the document.

Note: Adobe Acrobat features are explained in the Adobe Acrobat on-line help. For help on Acrobat, please refer to the Exchange Help menu, and related documents installed by the Acrobat installation program in the Acrobat directory.

3.9 Printing a Document

To print all or a portion of an open document, take the following steps:

1. From the Acrobat Window, select the **F**ile and **P**rint... options from the menu.
2. The Print Dialog opens.
3. To print the entire document, click the **O**K button. To print a portion of the document, select the **P**ages radio button in the Print Range box, and enter the page number with which you want to start, and the page number with which you want to end printing in the appropriate boxes. (To exit the Dialog without printing, click the **C**ancel button.)

3.10 Navigating Documents in the Document List

3.10.1 Opening the Next Document in the Document List

To open the document below the highlighted document, take the following steps:

1. From the Browser Window, click the **Next Document** icon or select the **Navigate** and **Next Document** options from the menu.
2. The document below the highlighted document opens in PDF Format.

3.10.2 Opening the Previous Document in the Document List

To open the document above the highlighted document, take the following steps:

1. From the Browser Window, click the **Previous Document** icon or select the **Navigate** and **Previous Document** options from the menu.
2. The document above the highlighted document opens in PDF Format.

3.10.3 Opening Multiple Documents

You can open up to 10 documents without closing open files. If you attempt to open eleven (11) documents, the application closes the first document you opened. Each time you open a document after the maximum of 10 has been reached, this loop pattern is repeated, consistently replacing the document at the top of the list.

Special Note

Under some conditions, when you open a document for viewing, Acrobat issues the following message.

"There was an error opening this document. The maximum number of files are already open. No other files can be opened or printed until some are closed."

When this occurs, select and close one of the open documents.

Note: When you close the document, any bookmarks or annotations you added or modified are automatically saved.

Note: When you open the first document in Acrobat and close Acrobat, the Acrobat window closes. When you open additional documents, you may close the document, but the Acrobat window remains open until you close the entire Helmsman application.

3.11 Searching Documents

To conduct a search, you must open at least one collection of documents. To focus the search, use the **Search For: Criteria** boxes, the Word List Dialog, or the Set Categories Dialog to limit the number of documents retrieved.

In Number Example

When you perform an In Number search, enter the set of numbers as a unit, delineated by hyphens, especially when you use more than one set of numbers.

If you search for the document, 290-3407-453, enter 290-3407 or 290-*-453 to produce the correct results, If you enter 290-340*, you do not produce the desired results.

Wildcard Example

When you use an asterisk or question mark delimiter with a partial number, valid queries search on a wild card series of one segment delineated by a hyphen.

If you search for 290-3407-453, valid wild card search entries are 29*, or 340*, or 45*, or *53, or *90.

3.11.1 Search Structure

Search areas combine to form a query in a structured, specific manner. The application combines all In Text search areas first, joined by the conjunctions specified in the In Text search areas.

Note: If you know part of a title or part of a number, you can narrow the search by entering the partial title or number because title and number operators take precedence over text entries.

The application processes all search criteria as a unit, combining multiple search areas using the conjunctions you specify. The application combines the result of an In Text search using AND or OR with the result of the In Title/In Number search to yield the final result.

When you click the **Search** button, the application generates a document list in the Browser Window, showing all documents matching the criteria you entered.

3.11.2 Searching the Document List

To search the Document List, take the following steps:

For the example: We are searching the DMS-10 document list for documents about Meridian Mail. We are receiving a message that says “No SCSI Address 0 during bootup of Meridian Mail.”

1. From the Browser Window, enter the word, phrase or number for which you are searching in the **Search For: Criteria Box 1**.

For the example: We enter “Meridian Mail” in the **Search For: Criteria Box 1**.

2. In the **Search For: In Text/In Title/In Number Box 1**, select the option you want by clicking the down arrow and making a selection from the list provided, as illustrated in Figure 65.



Figure 65: In Text/In Title/In Number Box

The options are:

In Text - Select **In Text** if you want to search for the criteria in Search For: Criteria Box 1 in the body of each document in the collection.

In Title - Select **In Title** if you want to search for the criteria in Search For: Criteria Box 1 in the title of each document in the collection.

In Number - Select **In Number** if you want to search for the criteria in Search For: Criteria Box 1 in the document number of each document in the collection.

For the example: We select **In Title** because we are looking for documents specifically about Meridian Mail.

3. In the **Search For: And/Or/Is Near Box 1**, select the option you want by clicking the down arrow and making a selection from the list provided.



Figure 66: And/Or/Is Near Box

The options are:

And - Select **And** if you are using a complex query to match both the criteria in Search For: Criteria Box 1 and Search For: Criteria Box 2 in the document.

For example: You enter “line” in Search For: Criteria Box 1, select the And conjunction, accept the In Text default, and enter “trunk” in Search For: Criteria Box 2. If you set your Search Preferences to find multiple words in the same paragraph, the program returns only occurrences where both “line” and “trunk” appear in the same paragraph.

Or - Select **Or** if using a complex query to match either the criteria in Search For: Criteria Box 1 or Search For: Criteria Box 2.

For example: You enter “line” in Search For: Criteria Box 1, select the Or conjunction, accept the In Text default, and enter “trunk” in Search For: Criteria Box 2. The program returns occurrences where “line” appears or where “trunk” appears in the document.

Is Near - Select **Is Near** if using a complex query to match the criteria in Search For: Criteria Box 1 when it appears near the criteria in Search For: Criteria Box 2.

For example: You enter “line” in Search For: Criteria Box 1, select the Is Near conjunction, accept the In Text default, and enter “trunk” in Search For: Criteria Box 2. The system returns occurrences where “line” appears within 8 words of “trunk”.

Note: You may only use the Is Near search for In Text searches.

For the example: We select **And** because we want a document that is titled Meridian Mail (or contains Meridian Mail in the title) AND contains text regarding our specific error.

4. In the **Search For: Criteria Box 2-4**, enter the additional word, phrase or number for which you are searching, if necessary.

In the **Search For: In Text/In Title/In Number Box 2-4**, select In Text, In Title, or In Number by clicking on the down arrow, if necessary.

In the **Search For: And/Or/Is Near Box 2-3**, select And, Or or Is Near by clicking on the down arrow, if necessary.

For the example: We enter "SCSI Address 0" in the **Search For: Criteria Box 2**. In the **Search For: In Text/In Title/In Number Box 2**, we accept the **In Text** default because we are looking for information regarding the SCSI Address 0 error in the body of the documents.

5. Once complete, click the **Search** button to initiate the search.
6. When the search is complete, the Document List shows all documents meeting the search criteria you entered.

Note: To stop the search in progress, click the **Stop** button.

3.11.3 Using Asterisks to Search

Asterisks produce a match with any character, including zero.

Example entries for a query on mo:

Modem World

Module Madness

Emotions

Mo La La

For "In Text" searches:

Searching on mo* means: Find all documents which have words beginning with 'mo'. Thus the query retrieves Modem, Module, and Mo of Mo La La. The query retrieves Mo because the asterisk can substitute for zero characters.

Note: 'Emotions' contains the letters 'mo', but it does not begin with 'mo', so the query does not retrieve it.

For "In Title" and "In Number" searches:

This works the same way except the word need not begin with the letters specified. There is an implied asterisk before, but the asterisk must be physically keyed in after the search term(s) to provide returns for In Title searches. Therefore, searching on mo* will retrieve all those fetched by the "In Text" searches, plus Emotions.

Clearing a Search

Clearing a search clears the search text boxes and returns the document list to the complete listing of documents for the selected collection(s). The choices that you last defined under Set Categories are still in effect. If necessary, access the Set Categories Dialog and change the settings.

To clear a search, take the following steps:

1. From the Browser Window, click the **Clear Search** button.
2. The application clears all **Search For:Criteria** boxes and returns the document list to the complete list for the selected collection(s).

3.12 Viewing Search Occurrences

Once you initiate a search and the application returns documents that met your criteria, you can view the listing of each page on which a match occurred, and the number of times on that page a match occurred.

To view search occurrences, take the following steps:

1. From the Browser Window, click once to highlight the document for which you want to view search occurrences.
2. Click the **Search Occurrences** icon, click the **Search Occurrences** button, or select the **View** and **Search Occurrences** options from the menu.
3. The Search Occurrences Dialog opens, displaying the Collection Name, Document Number, number of pages on which search criteria was met, the page numbers on which the criteria was met, and the number of occurrences on each page for the selected document, as illustrated in Figure 67.

Important: Search Occurrence functionality is slightly different depending on whether you are using Acrobat Reader or Acrobat Exchange.

Figure 67: Search Occurrences Dialog box with Acrobat Reader

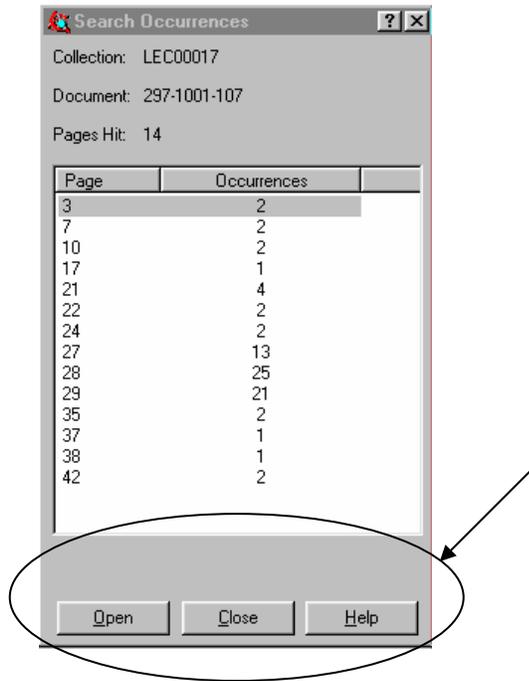
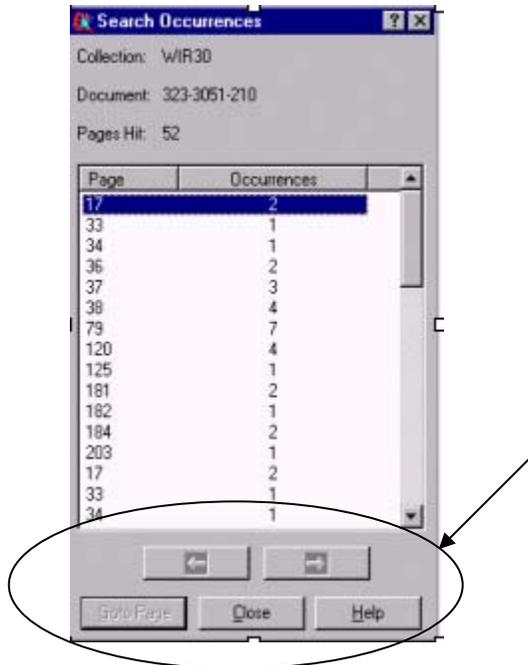
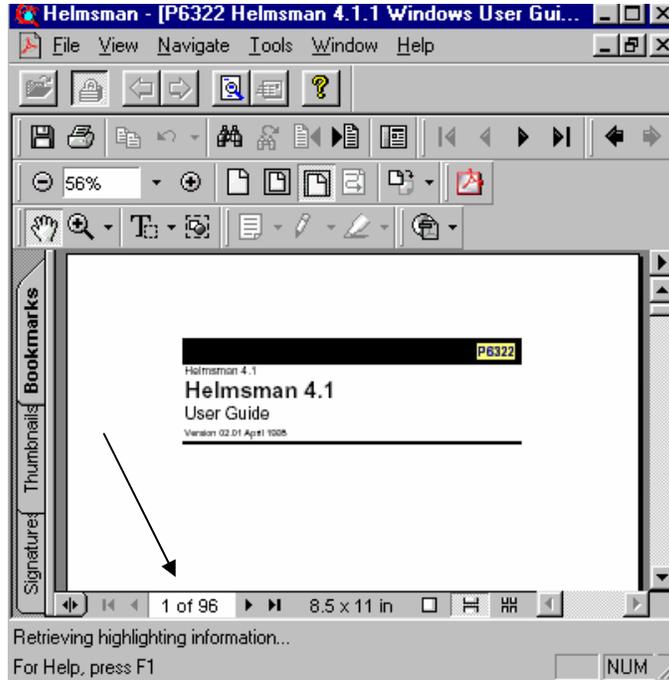


Figure 68: Search Occurrences Dialog box with Acrobat Exchange

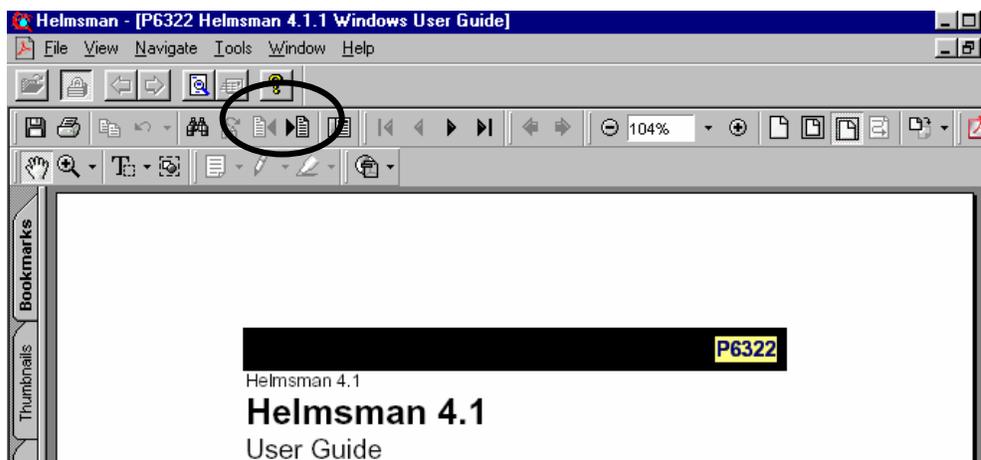


4. Note: The differences in the navigation area of the dialog box. There are two points to note.
 - a. If you use Acrobat Exchange and click on a page number in the “search

occurrence” list or click on the *GotoPage* button, the document will open to that page number. If you use Acrobat Reader, the document will open to the first page that has a search result. You may use Adobe Reader’s “goto page” functionality to go directly to the desired page. To do this, click on the page information at the bottom of the Reader window and type in the page number.



b. In Acrobat Exchange, you may use the navigation arrows on the *Search Occurrences Dialog* box to move to the next or previous page with search results. In Adobe Reader, this functionality is available from the menu (see the circled item in the screen shot below).



Note: In Exchange, when you click the *Previous Occurrence* or *Next Occurrence* button, the *Search Occurrences Dialog* moves to the back of your desktop (behind open applications), unless you set it to Always on Top on the Search Tab.

If you have the *Search Occurrences Dialog* open and you open a different document, the *Search Occurrences Dialog* automatically refreshes with the current document's search occurrences. When you do this, the selection in the document list changes and the highlighted document opens. The *Search Occurrences Dialog* automatically refreshes each time you access a new document.

3.12.1 Getting Help on the Search Occurrences Dialog

To get help about the Search Occurrences Dialog, take the following steps:

1. From the Search Occurrences Dialog, click the **H**elp button.
2. The online help file opens to information regarding the Search Occurrences Dialog.

To exit the Help window, select **F**ile and **E**xit from the menu.

3.13 Using the Word List

You use the Word List to search on specific words and fragments. You can also perform a search on a single word and all forms of that word to focus the search.

To use the Word List, take the following steps:

1. From the Browser Window, select the **V**iew and **W**ord List... options from the menu.
2. The Word List Dialog opens, as illustrated in Figure 69.



Figure 69: Word List Dialog

Note: You must have at least one collection open to use the Word List.

3. Enter the word or fragment for which you are searching in the **W**ord to lookup: box.

Note: Enter the word or fragment in uppercase or lowercase. The Word List is not case sensitive.

4. Click the **L**ookup button.

- The word for which you searched, and variations on the word (e.g., a lookup on the word switch returns switch, SWITCH, SWITCHABLE, Switching, etc.), shows in the list box. The number of times each word occurs in the collections shows in the number column of the list box, as illustrated in Figure 70.

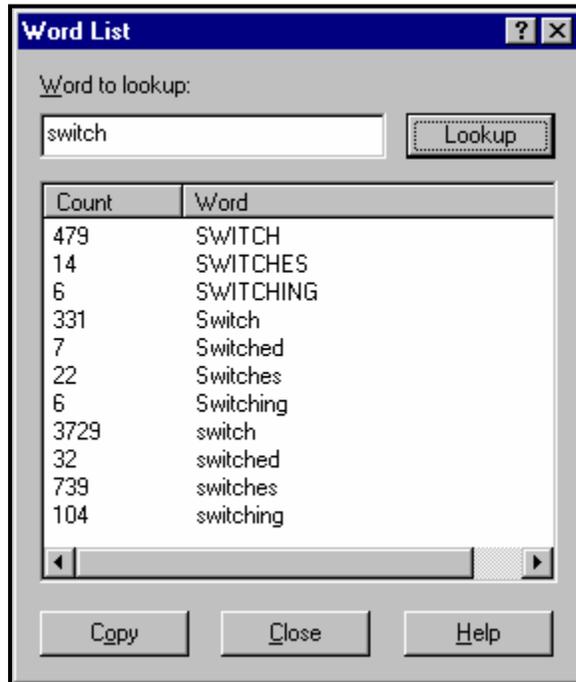


Figure 70: Word List Dialog, Search Results

Note: The Word List does not specify in which documents the word is found, only the number of occurrences.

- When complete, click the **C**lose button to return to the Browser Window.

3.13.1 Using Word List with Copy and Paste

Use the **C**opy button to copy one or more words from the Word List list box into the **Search For: Criteria** boxes at the bottom of the Browser Window.

3.13.1.1 Copying a Single Word

To copy a single word, take the following steps:

1. Click the word you want to copy to highlight it.
2. Click the **C**opy button.
3. The application immediately pastes the highlighted word to the first empty **Search For: Criteria** box, as illustrated in Figure 71.



Figure 71: Search For: Criteria Box After Paste

4. When complete, click the **C**lose button to return to the Browser Window.
5. Continue your search as described in Section 3.11.2.

3.13.1.2 Copying Multiple Words

To copy multiple words, take the following steps:

1. To copy multiple words in consecutive order in the Word List, click the first word you want to copy. Hold down the Shift key and click the last word that you want to copy. All words in between the first selection and last selection are highlighted, as illustrated in Figure 72.

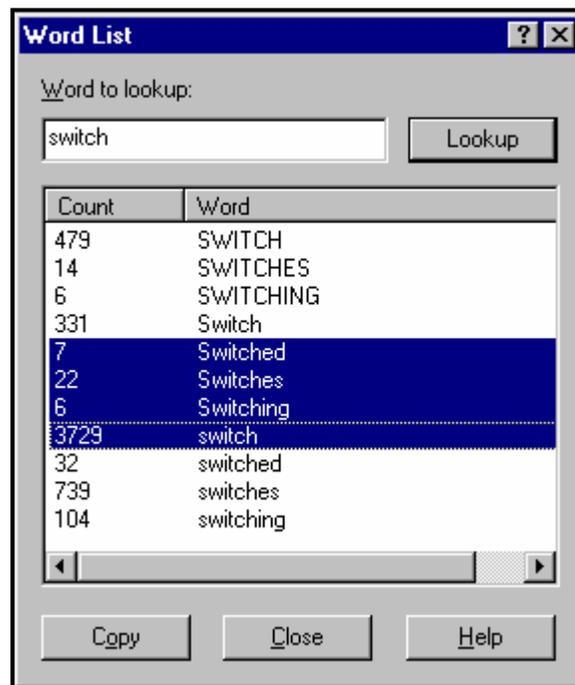


Figure 72: Word List Dialog, Highlighting Multiple Words

To copy multiple words not in consecutive order, hold down the Ctrl key while clicking to highlight each word.

2. Click the **Copy** button.
3. The application immediately pastes the highlighted word to the first empty **Search For: Criteria** box, the second highlighted word to the next empty Search For: Criteria box, etc., until all **Search For: Criteria** boxes contain a word, as illustrated in Figure 73.



Figure 73: Search For: Criteria Boxes After Pasting Multiple Words

Note: If you select more search terms than you have open boxes, the application fills the open boxes and displays a message that there are more terms than fields, as illustrated in Figure 74.

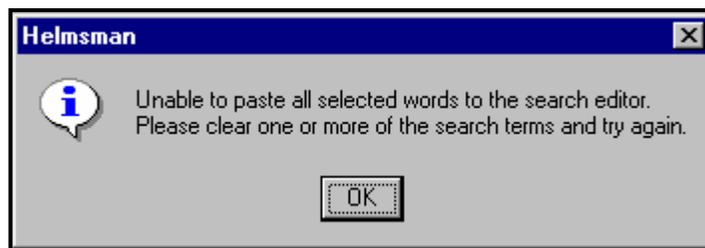


Figure 74: Unable To Paste All Words Message

4. When complete, click the **C**lose button to return to the Browser Window.
5. Continue your search as described in Section 3.11.2.

3.13.2 Using Word List with Drag and Drop

Use the drag and drop function to insert one or more words from the Word List list box into the **Search For: Criteria** boxes at the bottom of the Browser Window.

To drag and drop a word, take the following steps:

1. Click the word in the Word List you want to drag and drop to highlight it.
2. Holding the left mouse button down, drag the cursor to the position where the word is to be placed in the **Search For: Criteria** box on the Browser Window.
3. Release the mouse button.
4. The selection shows in the **Search For: Criteria** box.

Note: Drag and drop treats the last position of the cursor in the **Search For: Criteria** (even if it is in the middle of a word) as the spot in which to drop the selected word.

When you are building a phrase on which to search, this feature is invaluable. When the selected word is dropped, the application inserts the word with one space on each end.

For Example: If you previously placed the word 'switch' in the **Search For: Criteria** box, you place the cursor in the middle of the existing word and again drop the word 'switch' in that **Search For: Criteria** box, the outcome is: swi switch tch.

5. When complete, click the **C**lose button to return to the Browser Window.

3.14 Setting Categories

You use the Set Categories Dialog to narrow searches. Each document also has a properties file attached called metadata. This file contains information about the document including the product the document references, the kind of document it is (function), and the type of product the document describes. You use the Set Categories Dialog to filter the document list based on these three fields in the metadata file.

3.14.1 Adding Categories

To add categories, take the following steps:

For Example: You want to filter the document list to include only documents that are technical documents.

1. From the Browser Window, click the **Set Categories...** button, or select the **View** and **Set Categories...** options from the menu.

Note: You must have at least one collection open to use the Set Categories function.

2. The Set Categories Dialog opens, as illustrated in Figure 75.

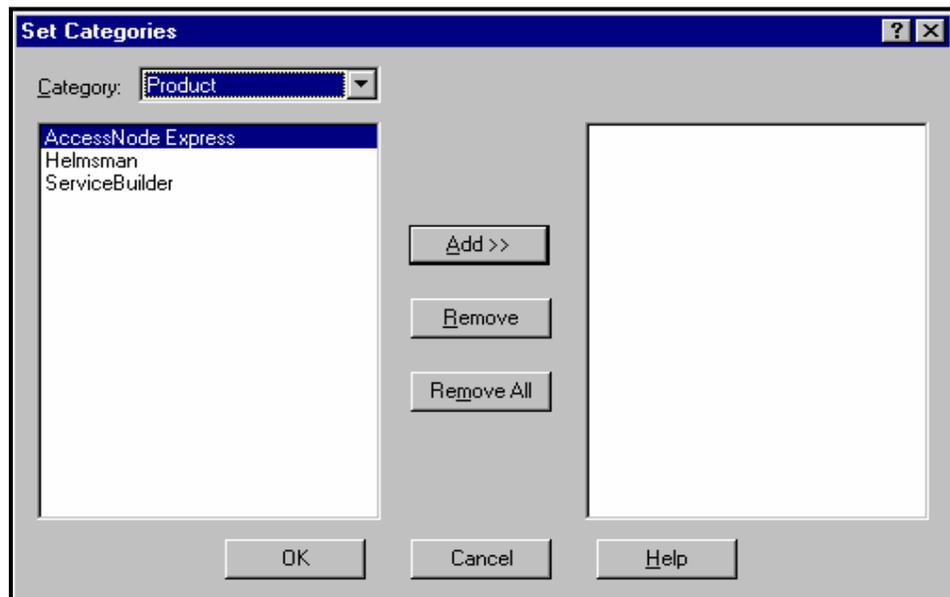


Figure 75: Set Categories Dialog

3. In the **Category:** box, select the option you want by clicking the down arrow and making a selection from the list provided. The options are:

Product: what the document describes

Function: what kind of document it is, e.g., maintenance

Type: what the product does

Note: If the documents shown in the document list have information in the product, function or type categories in their respective metadata files, these qualifiers show in the list box on the left.

For the example: We select **Type** because we want to see documents with a **Type** classification of Technical.

4. Click the listing for which you want to filter to highlight it.

For the example: We select **Technical** because we want to see documents with a Type classification of **Technical**.

5. Click the **Add>>** button to move the selection to the list box on the right.
6. Repeat this process for every category value you want to set.
7. All selections you make for the open collection(s) show in the list box on the right.
8. Once completed, click the **OK** button to filter the document list based on your selections.

Note: Any searches you do from this point reflect results only on the remaining documents in the list. When you Set Categories, the settings remain in effect until you change them or restart the application. You must Set Categories each time you restart the application because restarting clears settings you made during the session.

3.14.2 Removing Categories

To remove category settings, take the following steps:

1. From the Set Categories Dialog, select the setting you want to remove from the list box on the right by clicking once to highlight it.
2. Click the **Remove** button. To remove all selections, click the **Remove All** button.

Note: You can Add items to or Remove items from either list by double-clicking on the desired item.

3. Click the **OK** button to filter the document list based on the remaining categories. If you remove all selections, the document list returns to all documents in the open collection(s).

Note: If you experience difficulty, you may need to review the categories. Review the choices based upon their descriptions above, change categories if necessary, and proceed with the search.

You can repeat this procedure several times until all the necessary categories and subcategories show in the right-hand list box. In the same manner, you can select other categories from the combo box, and assign or remove properties.

3.15 Opening New Collections

To open a new collection, take the following steps:

1. From the Browser Window, click the **Open Collection** icon on the toolbar or select the **F**ile and **O**pen Collection... options from the menu.
2. The Open Collection Dialog opens.
3. Click the collection you want to open to highlight it. To open multiple new collections, use the **Ctrl** key to select multiple collection.
4. Click the **O**pen button. (Click the **C**ancel button to close the Open Collection Dialog without opening the document list and return to the Browser Window.)

Note: The **O**pen button is disabled until a collection is highlighted.

5. The Open Collection Dialog closes and the Browser Window shows the document list for the selected collection.

Note: If you change CD-ROMs while viewing documents, click the **Open Collection** button again to view the new files.

3.16 Printing a Document List

Once you have opened a collection or performed a search and you see the resulting list of documents in the Browser Window, you can print a list of those documents. The document list includes, each document listed on the Browser Window and its relevance value, document number, document revision, document title and collection name.

To print a document list, take the following steps:

1. From the Browser Window, select the **F**ile and **P**rint Document List... options from the menu.
2. The Print Dialog opens.
3. Click **OK** to print the document list.

Note: The list does not show locks and keys.

3.17 Viewing the Message of the Day

If you use Helmsman with a server, take the following steps to view the Message of the Day:

1. From the Browser Window, select the **View** and **Message of the Day** options from the menu.
2. The Message of the Day Dialog opens, as illustrated in Figure 76.

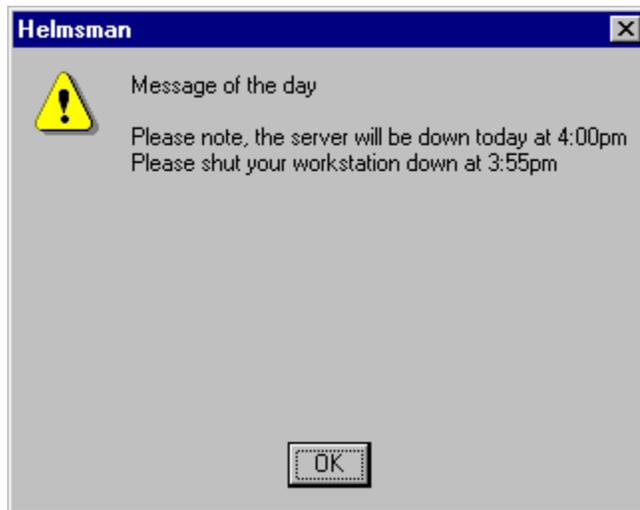


Figure 76: Message of the Day Dialog

3. To exit the Message of the Day Dialog, click the **OK** button.

Note: If you use Helmsman with a local connection, you do not have access to the **Message of the Day** option on the **View** menu.

3.18 Sending E-Mail to Support

You can send e-mail feedback from within Helmsman. Helmsman supports two types of mail: SMTP and MAPI. Both types send a text message to the recipient you specify.

3.18.1 E-Mail Features

SMTP

The Internet messaging standard, used to transfer mail, is SMTP. RFC 821 and RFC 822, a set of two documents explaining the SMTP standard, can be found at a number of FTP and WWW sites on the Internet.

MAPI

MAPI is the messaging component of an open architecture standard known as the Microsoft Windows Open Services Architecture (WOSA). MAPI provides cross-platform support through such industry standards as SMTP, X.400 and Common Messaging Calls (CMC). MAPI is a component of the Microsoft® Windows® 95 and Microsoft® Windows NT® operating systems.

3.18.2 Creating and Sending the E-mail

To create and send an e-mail to support, take the following steps:

1. Open or highlight the document in the Browser Window about which you want to send a mail message. You must have at least one collection open, and select a document to send an e-mail.
2. From the Browser Window, click the **Mail** icon on the toolbar or select the **T**ools and **E**-Mail options from the menu.
3. If you are already logged into a mail server, the Compose Mail Message Dialog opens, as illustrated in Figure 77.

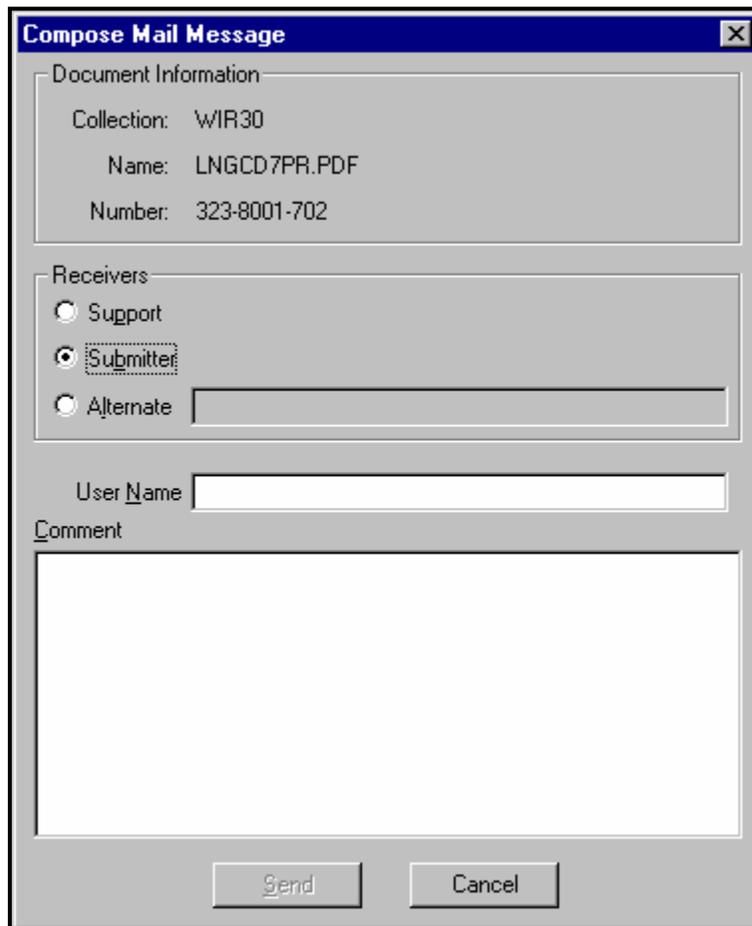


Figure 77: Compose Mail Message Dialog

If you are **not** already logged into a mail server, one of the following happens:

- When the application locates the mapi32.dll, the MAPI login Dialog opens so that you can set the profile.

Note: Click the **Options** button to expand the Dialog for further settings. Refer to your system administrator or the MAPI documentation for assistance with setting these options.

- If the application cannot locate the mapi32.dll file, the SMTP Dialog opens. Enter the required information and click **OK** to exit the Dialog.
 - Once you have logged into the mail server with MAPI, or specified the SMTP mail host, the Compose Mail Message Dialog opens.
4. The Collection name, document name, and document number show in the Document Information section of the Dialog based on the document you opened or highlighted.
 5. Select the person to whom you are sending the e-mail by clicking one of the three radio buttons in the Receiver section of the Dialog. The options are as follows:
 - **Support:** Select this option to send an e-mail to Nortel Helmsman Technical Support.
 - **Submitter:** Select this option to send an e-mail to the person who processed the document into PDF for viewing within Helmsman.
 - **Alternate:** Select this option to send an e-mail to an address that you enter in the box provided.

Note: You can enter more than one e-mail address in the Alternate: box. Enter multiple e-mail addresses separated by a semi-colon.

6. Enter your user name in the **User Name** box.
7. Enter your question or comment in the **Comment** box.
8. Click the **Send** button to transmit the e-mail to the specified recipient. (Click **Cancel** to close the E-mail Dialog without transmitting the e-mail.)

Note: The system must have either MAPI or WinSock 1.1 installed in order to successfully send E-Mail feedback to any addressee.

Chapter 4: For users who have Adobe Exchange 4.05 or higher

Helmsman includes special plug-ins that enhances the capabilities of the application. The special plug-ins include functionality for annotations, bookmarks, and zone printing. If you installed Acrobat at the same time you installed the Helmsman application, the plug-ins now reside in the Acrobat/Exchange/Plug-ins directory. If you installed Acrobat separately from Helmsman, and did not place the plug-ins in the Acrobat/Exchange/Plug-ins directory, copy the files to that subdirectory.. See the release notes included on the distribution CD for instructions.

4.1 The Helmdata Directory

You can create annotations and bookmarks through a plug-in with Acrobat. The application automatically stores your notes and bookmarks in the helmdata directory, rather than with the document's .pdf file. The application creates the helmdata directory for you when you first access Helmsman.

4.2 Annotations

Helmsman has a plug-in feature that allows you to create, store, edit, and delete annotations for read-only documents on your CD-ROM, local drive, or a network. Annotations show as icons on the document page. The helmdata directory, created expressly for storing user-defined annotations and bookmarks, stores the annotations locally.

Note: You cannot migrate annotations and bookmarks forward to new document revisions or collection releases. However, annotations and bookmarks are portable--you can copy them to another system running Helmsman, send them to another user, etc.

Access to the Annotation options is from the "Notes tool" icon on the toolbar.

4.2.1 Creating Annotations

To create an annotation, take the following steps:

1. From Acrobat, click the **Note** icon on the toolbar.
2. The mouse cursor becomes a note icon. Click the mouse in the PDF viewing area to open an annotation window. A blinking cursor shows inside the annotation window
3. Type the desired text of the note.
4. When finished, click the upper left corner of the annotation window. The window converts to the text note tool icon, shaded in yellow.

5. The note icon is positioned at the point on the page where you clicked the mouse to open the annotation window.
6. To move the note icon, position the mouse over the note, then drag and drop the note icon to the desired location.
7. To add additional notes, follow steps 2 through 6 above. When you have finished adding annotations, click the hand icon on the toolbar to change the note icon cursor back to the hand tool.

Note: If you page sequentially at a rapid rate, annotations may not appear until the paging ceases.

4.2.2 Storing Annotations

When you close a page containing annotations, the application writes all of the page's annotations to the annotations database. When you open a page that contains annotations, the application reconstructs all annotations. You are not required to take any action in order to store your annotations.

Note: Acrobat normally presents a Save Dialog when you close a document after modifying annotations or bookmarks. Because the application writes annotations and bookmarks to a separate database in the helmdata directory, Helmsman disables the save Dialog. **YOU DO NOT NEED TO MANUALLY SAVE A DOCUMENT IN WHICH YOU CREATED OR DELETED BOOKMARKS OR ANNOTATIONS.**

4.2.3 Editing Annotations

To edit an annotation, take the following steps:

1. Open the page on which the annotation exists.

Note: It may be useful to generate a Notes Summary page first in order to know the page numbers with annotations on them.

2. Double-click the note icon for the note you want to edit.
3. The Annotation text box enlarges so that you can modify, add to, or delete text.

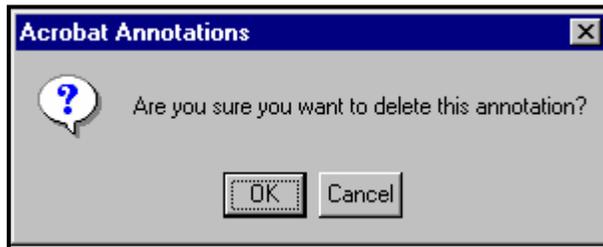
4.2.4 Deleting Annotations

To delete an annotation, take the following steps:

1. Open the page on which the annotation exists.
2. Click the Note icon once to highlight it.
3. Press the **Delete** key on the keyboard, or right-click on the Note icon and select **Delete**.
4. An Acrobat confirmation Dialog opens, as illustrated in Figure 78.

Figure 78: Acrobat Deletion Confirmation

5. Click **OK** to delete the note. (Click **Cancel** to exit the Dialog without deleting the



annotation.)

4.2.5 Viewing a Notes Summary

To view a Notes Summary, take the following steps:

1. From the Acrobat Window, select the **T**ools, **A**nnotations, and **S**ummarize **A**nnotations options from the menu.
2. If you have annotations attached to an open document, Acrobat generates a page (on-screen) showing all annotations listed in chronological order by page number.
3. If you have more than one annotation per page, the application assigns a number to each note, in increments of one (1), starting the numbering process over for each new page on which you have annotations.
4. To exit the Notes Summary, select the **F**ile and **C**lose options from the menu.

4.3 Bookmarks

Helmsman also has a plug-in feature that allows you to create personal bookmarks. The application stores your bookmarks locally in a separate directory called helmdata. Bookmarks are portable, meaning that you can copy them to another system running Helmsman, or shared them with another user via diskette.

Note: To remove all bookmarks, simply delete the helmdata directory. It will be re-created as necessary.

Special Note: CAREFUL! If you remove all bookmarks by deleting the helmdata directory, you delete all user-defined bookmarks and annotations for all .pdf documents.

To view the bookmarks for a specific document, open the document. Acrobat opens the document with all its predefined bookmarks listed in the scrolling region to the left of the document.

The plus signs to the left of some of the bookmarks indicate bookmarks that have additional bookmarks under them. To expand the tree, click the plus sign. The plus sign converts to a minus sign, displaying the additional bookmarks underneath.

4.3.1 Creating Bookmarks

Before you create a new bookmark, make sure you are positioned at the place in the document where you want the bookmark. Although you can rearrange bookmarks, the application stores the bookmark in the database with the page in the document that is open when you create the bookmark.

To create a new bookmark, take the following steps:

1. From the Acrobat Window, select the **Create New Bookmark** icon from the Bookmark Window toolbar.
2. A new bookmark shows at the end of the bookmark list, highlighted, with the name Untitled.
3. Type the name of the new bookmark.
4. The cursor replaces the word Untitled with the new bookmark name and the application saves the bookmark to the helmdata directory.
5. Click the mouse anywhere in the white space to disable editing the bookmark name.

4.3.2 Editing a Bookmark Name

You can edit the name or location of a bookmark in the bookmark pane of the Acrobat window.

To edit a bookmark name, take the following steps:

1. Click the mouse on the small dog-eared page icon to the left of the bookmark. The entire bookmark item will be selected.
2. Click the mouse anywhere in the name portion of the bookmark item to highlight the bookmark title.
3. The insertion point follows the last character of the name.
4. Type the desired new name for the bookmark.
5. When finished, click the mouse in the white space to the left of any bookmark.
6. The insertion point in the edited bookmark will disappear and the mouse cursor will revert to the pointer.

4.3.3 Editing a Bookmark Location

To edit a bookmark location, take the following steps:

1. Click the small dog-eared page icon to the left of the bookmark to select the entire bookmark.
2. While holding down on the mouse, move the bookmark up or down in the listing. An emboldened line shows above the listing.
3. Release the mouse when you see the emboldened line at the correct location.

Note: Be very careful when you move a bookmark. Do not move too far to the right or you will insert the bookmark into the listing in the middle of a bookmark item with sub-items. The bookmark then becomes the umbrella for all the sub-items below it. This could corrupt the pre-defined bookmarks that accompany the document. MOVE STRAIGHT UP THE LISTING WITH A SMOOTH VERTICAL MOVEMENT.

4.3.4 Deleting Bookmarks

To delete a bookmark, take the following steps:

1. Click the mouse on the small dog-eared page icon to the left of the bookmark to select the entire bookmark item.
2. Press the Delete key on the keyboard, or select the **E**dit and **D**elete options from the menu.
3. A delete confirmation Dialog opens.
4. Click **OK** to delete the bookmark, or click **Cancel** to exit the Dialog without deleting the bookmark.
5. The application deletes the bookmark from the listing and from the helmdata directory.

4.4 Print Zone

Helmsman also has a plug-in feature that allows you to print a specific zone (chapter, section, etc.) of an open document without going through the time-consuming effort of printing individual pages or groups of pages. Zone printing replaces the cumbersome task of identifying a start and end page in a print Dialog because the region (or group of pages) is automatically determined when you select an Acrobat bookmark. A zone begins at the first page of the bookmark you selected and ends at the last page of that bookmark.

Note: Helmsman does not support zone printing of multi-column documents.

Special Considerations

In order for this feature to work successfully, you must copy the Acrobat plug-in that supports zone printing (helmzp32.api) into the Acrobat/Exchange/Plug-ins directory. If you did a typical installation of Helmsman, this file is already located in the appropriate Acrobat directory.

4.4.1 Printing a Zone

To print a zone, take the following steps:

1. From the Browser Window, open the document for which you want to print the zone.
2. From the Acrobat Window, select the **File** and **Print Zone...** options from the menu.
3. The Print Zone Dialog opens. The Dialog lists all parts of the document, grouped into zone regions. You can expand regions with plus signs to the left of them to display all the sub-topics underneath.
4. Click the entry you want to print to highlight it. Click the plus sign to the left of the bookmark to expand the listing in tree fashion, showing all the zones under that particular bookmark. All zones under the highlighted bookmark are also highlighted for printing.

Note: To print a portion of the information found under a bookmark grouping, click beside the individual item to highlight only that line.

5. The information at the bottom of the Print Zone Dialog updates as you highlight different zones. Information includes:
 - **File name:** shows the file name of the document you opened.

- **Zone bounds:** signifies the range of page numbers that have been selected to print.
 - **Pages to print:** indicates the number of pages that will be output to the printer.
6. Click the **Print** button to print your selection. (Click **About** to access a Dialog about the helmzp32.api plug-in file. Click **Cancel** to exit the Dialog without printing your selection.)

Note: The Print Zone Dialog is designed to be modeless, but Nortel recommends that you close the Dialog after printing to refresh the Dialog when a new document is opened. This will ensure that the Dialog is populated with the zone printing information from the newly opened document.

4.4.2 Repositioning a Bookmark and Zone Printing

Bookmarks are arranged in page number order in the document. You can rearrange the order of the bookmarks by clicking the page icon to the left of the bookmark and dragging it up or down. However, you may encounter conflicts with the zone print feature when you rearrange bookmarks.

For Example: By clicking the page icon and dragging the **Alarm reporting and surveillance** bookmark up, you reposition it before the **About this document** bookmark. However, when you access the Print Zone Dialog and click the repositioned bookmark you see an error message due to a conflict with the Helmzp32.api file.

The Helmzp32.api error message occurs if you move a bookmark from a later page and place it before a bookmark on an earlier page.

This conflict arises because the zone print feature calculates page numbers to determine the range or region of a document to print. Whenever a bookmark for a group of higher page numbers is moved before a bookmark for a group of lower page numbers, the Helmzp32.api cannot perform accurate calculations. Click **OK** to clear the error Dialog, and reposition the bookmark back to its original location. Proceed with the zone-printing feature.

The Helmzp32.api error message also occurs when you try to print a zone after you add a bookmark in the middle of a document because Acrobat automatically appends it to the end of the bookmarks listing.

For Example: This bookmark was added on page 117 of the open document; however, Acrobat tags it on to the end of the listing.

You can click the page icon and drag the Print Zone Test bookmark up to reposition it before the System Level Recovery Procedures bookmark. However, when you

access the Print Zone Dialog and click the repositioned bookmark, you receive the same error message due to a conflict with the Helmzp32.api file.

Click **OK** to clear the error Dialog, and reposition the bookmark at its original location, then proceed with the zone printing feature. The application prints the zone, starting with the page number where the bookmark was inserted ALL THE WAY TO THE END OF THE DOCUMENT. Be careful with this, especially with large documents. Currently, you cannot stop the printing once you click the **Print** button.

Note: Although this can be a tedious process, if you reposition the new bookmark within the exact region of page numbers that it references, the Print Zone feature will work accurately.

Helmsman 4.2

Helmsman 4.2 Windows Client

User Guide

Address comments to:

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Nashville, TN 37228-1397

Attention: Helmsman Product
Manager

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