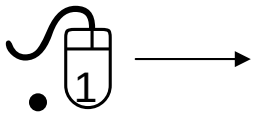
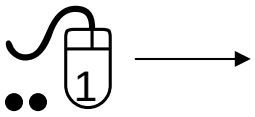
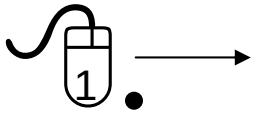
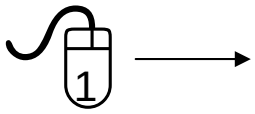
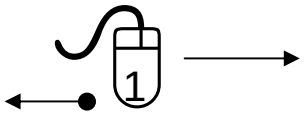
Tutorial

Introduction

This tutorial introduces the basic techniques required to effectively benefit from JDOCSHELL. The tutorial works in conjunction with the "JDOCSHELL Tutorial" knowledge base that was installed as part of the JDOCSHELL installation procedure.

Using this Tutorial

Throughout this tutorial, you will follow instructions to assist you in learning the JDOCSHELL basics. Most instructions consist of a description of the required action as well as a picture containing a graphical representation of the required action(s). The table below lists the possible actions and their corresponding graphical representation.

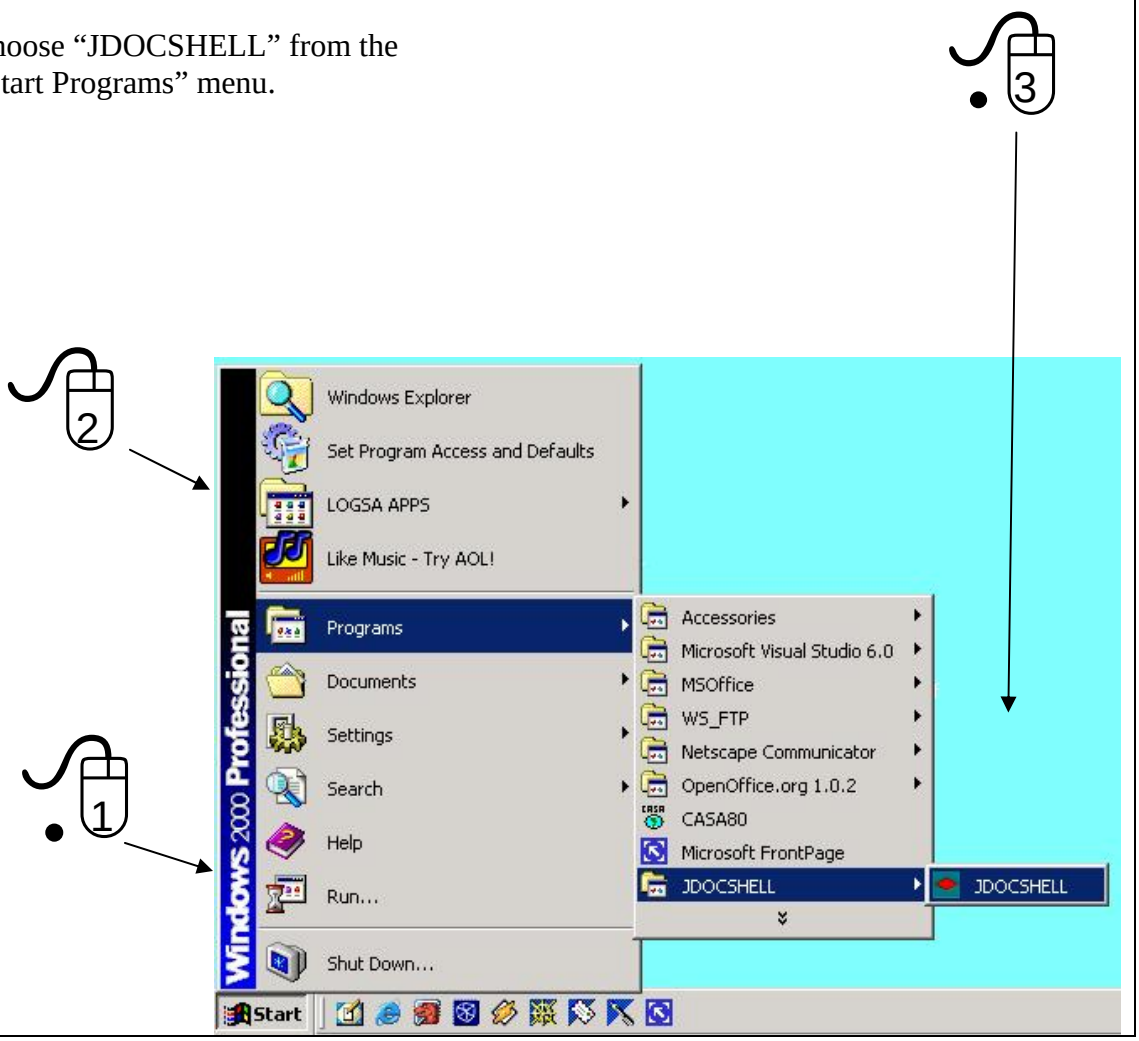
Action Graphic	Action
	***Single-click.*** Indicates that you should single click with the left (or primary) mouse button at the arrowhead location.
	***Double-click.*** Indicates that you should double click with the left (or primary) mouse button at the arrowhead location.
	***Right-click.*** Indicates that you should single click with the right (or secondary) mouse button at the arrowhead location. This almost always results in a context (or pop-up) menu.
	***Move.*** Indicates that you should simply move the mouse to the arrowhead location without clicking either mouse button.
	***Drag.*** Indicates that you should click and hold the left (or primary) mouse button at the non-dot arrowhead location and then move the mouse to the dot arrowhead location and release the mouse button.

Note: The number inside each action graphic represents the sequence order in which the action should be performed when multiple actions are required.

Starting JDOCSHELL

After successfully installing JDOCSHELL, you are ready to launch it and start learning about its features and capabilities. To start JDOCSHELL follow the instructions below.

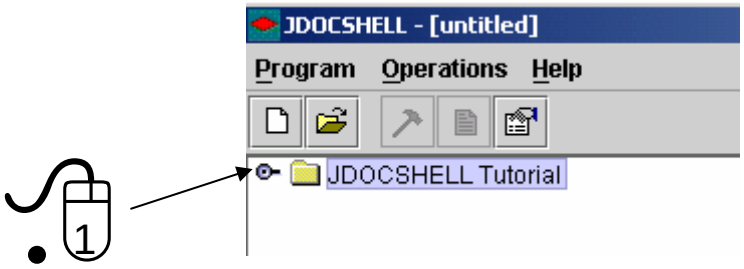
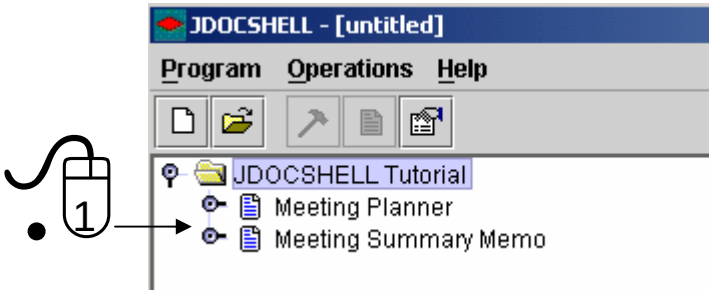
Choose “JDOCSHELL” from the “Start Programs” menu.

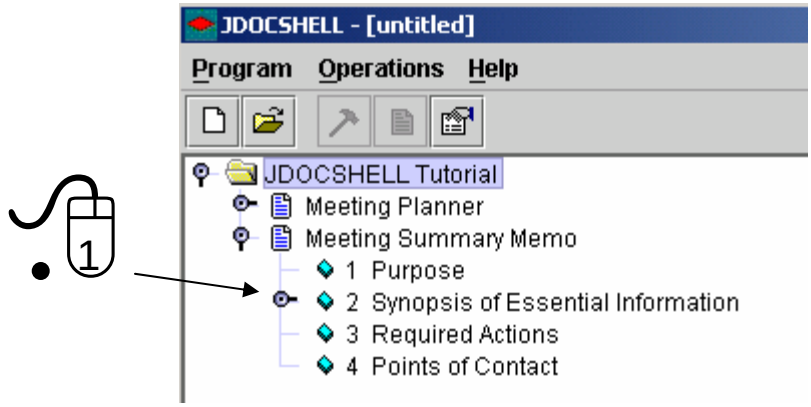
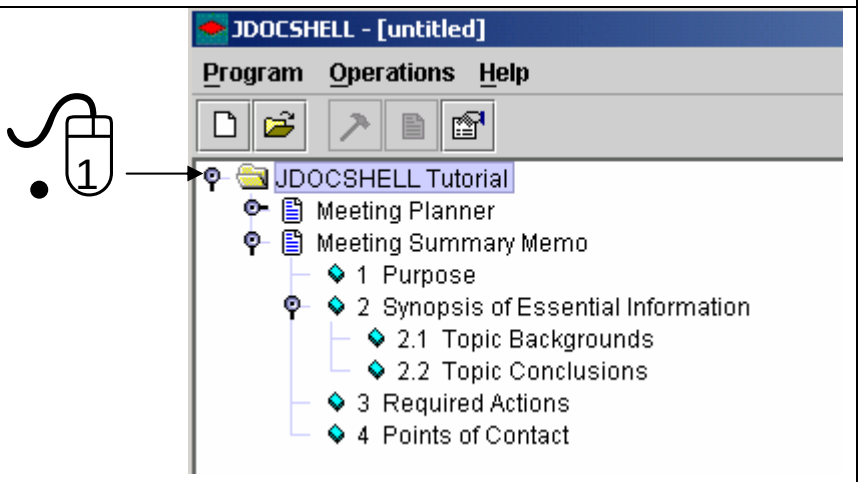
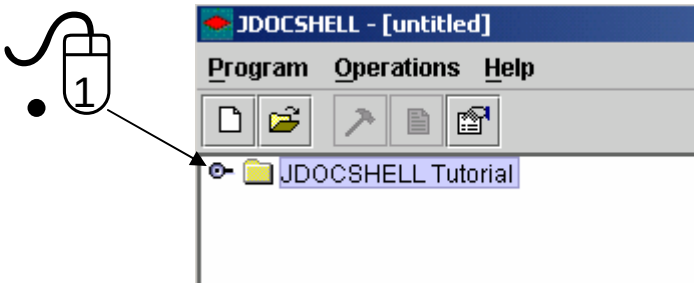


Navigating Documents with JDOCSHELL's Outline View

Most of your primary interaction with JDOCSHELL is done via the "Outline View". The outline view occupies the left-hand pane of JDOCSHELL's main window and contains the available documents. The following exercises illustrate the main techniques required for navigating the outline view.

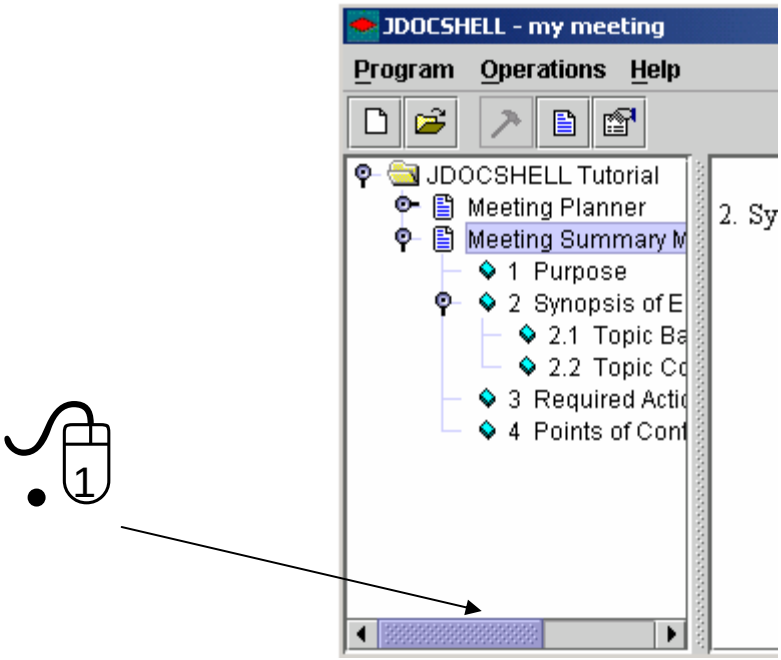
Expanding and Collapsing Outline View Items

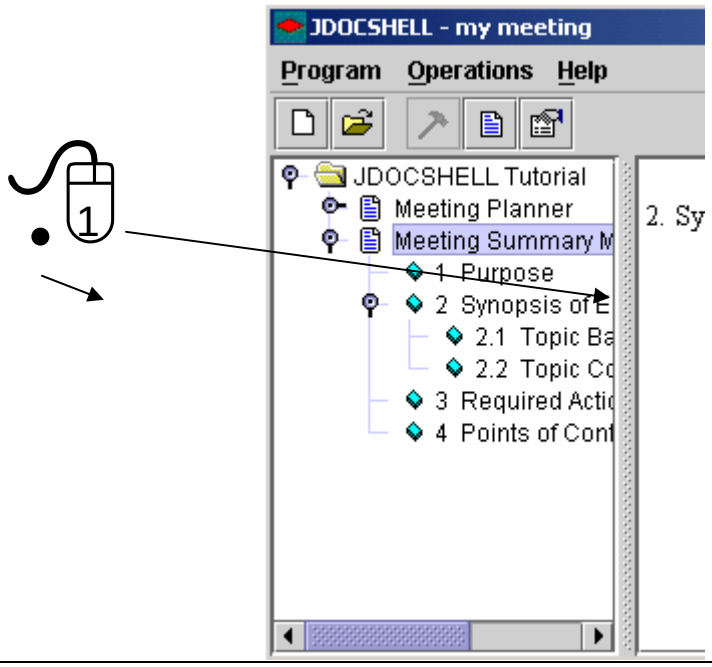
Single-click the expand node preceding the "JDOCSHELL Tutorial" folder to reveal the available documents. Examples of expandable items include: • **Knowledge bases** – Expand to reveal the available documents. • **Documents** – Expand to reveal the document outline. • **Document Sections** – Expand to reveal subsections.	
Single-click the expand node sign preceding the "Meeting Summary Memo" document to reveal the document outline.	

Single-click the expand node sign preceding the “2 Synopsis of Essential Information” section to reveal its subsections.	
Finally, single-click the collapse node preceding the “JDOCSHELL Tutorial” folder to hide its contents.	
Notice how everything beneath the “JDOCSHELL Tutorial” folder is hidden. Single-click the expand node preceding the “JDOCSHELL Tutorial” knowledge base to reveal the previously hidden items.	

Resizing the Outline View

Some items in the outline view may not fit into the visible area. If this occurs, scrollbars may be used to view the hidden items. Additionally, the outline view may be resized to accommodate easier viewing and navigation.

Scroll the outline view horizontally to the right by single clicking the horizontal scroll bar located at the bottom of the outline view.	

Resize the outline view by dragging the splitter bar to the right. Drag it far enough to reveal the items currently displayed in the outline view.	

Constructing a Document

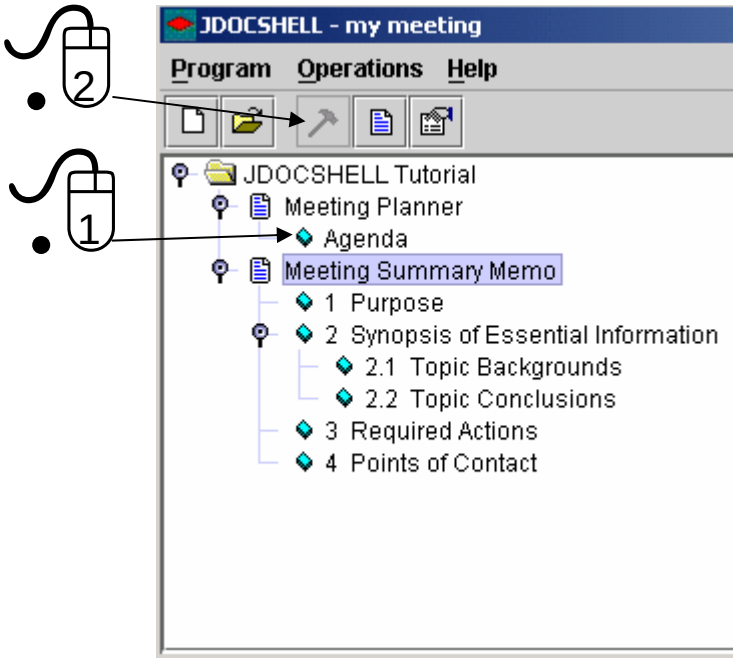
Now that you are familiar with navigating the outline view, you're ready to begin using JDOCSHELL to generate documents. The two documents used by this tutorial are a simple meeting agenda and a meeting summary memo. These documents are fictitious, and are used to merely demonstrate JDOCSHELL's features and capabilities.

The general scenario governing this tutorial is that your company requires two standard documents for every official meeting. First, a standard meeting agenda must be completed prior to the meeting. Second, all official meetings require a meeting summary memo for distribution to all attendees as well as management.

Since the content of these documents is determined by company policy, your company has developed a small JDOCSHELL knowledge base to facilitate compliance with the said policies. With this background information, lets look at what JDOCSHELL can do for you.

Navigate to the "Agenda" section of the "Meeting Planner" document found in the "JDOCSHELL Tutorial" knowledge base as shown on the right.

Single-click the "Agenda" section to highlight it. With "Agenda" highlighted, select "Construct" (hammer button) from the toolbar.

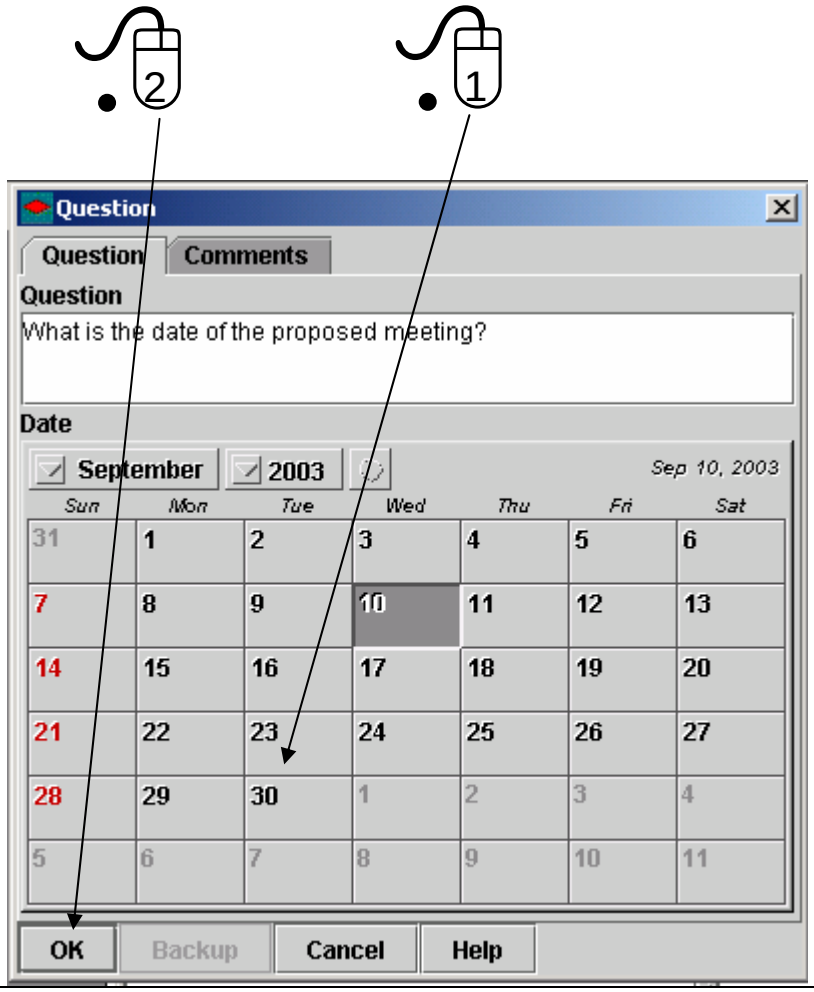


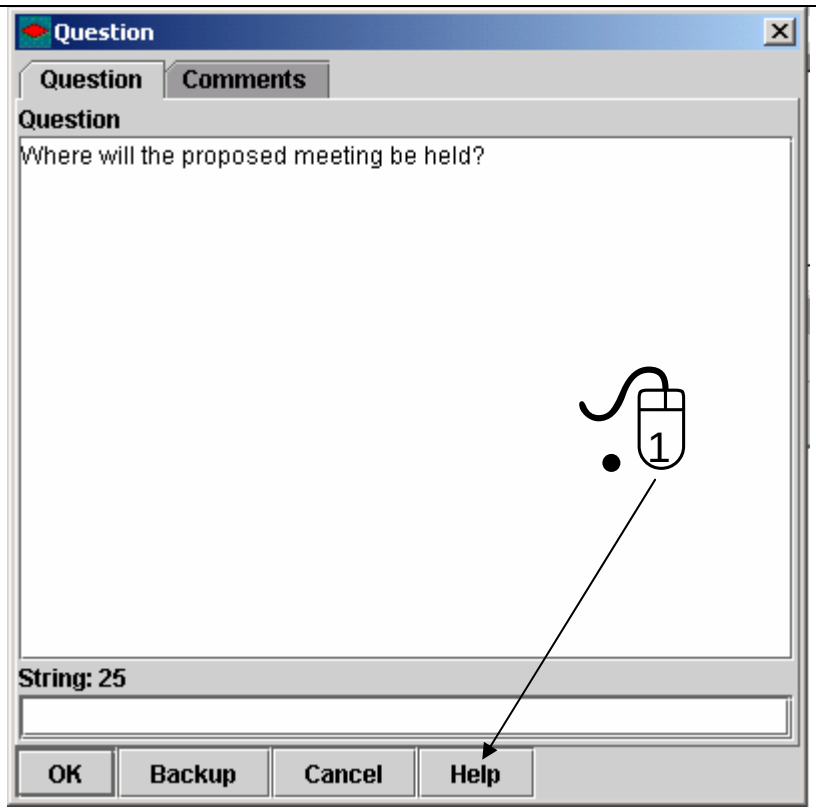
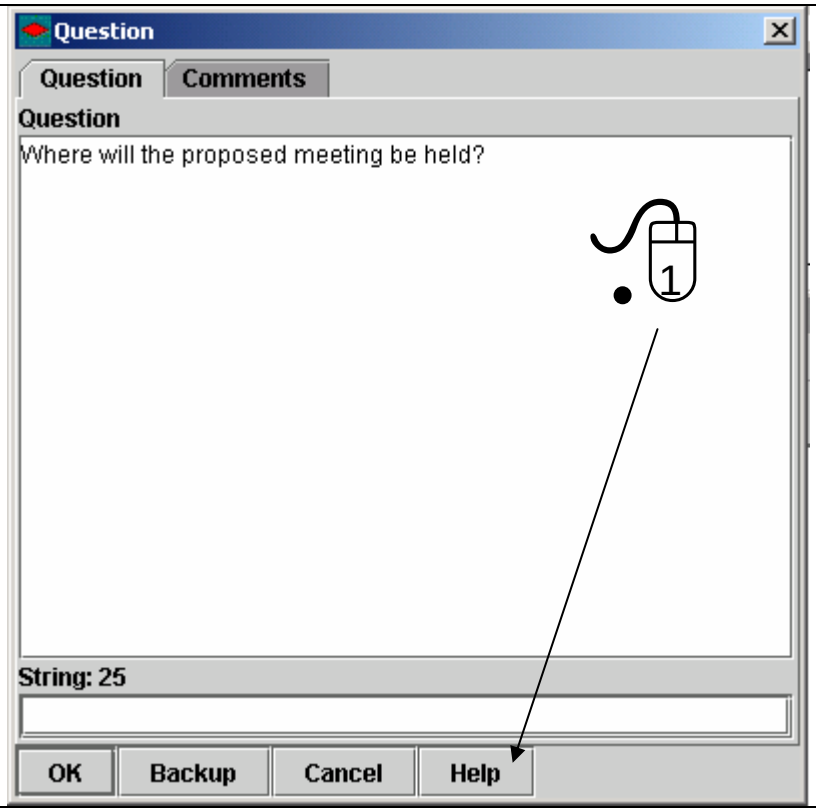
Constructing a document section initiates a series of interview questions to gather required information. The first question asks the date of the proposed meeting.

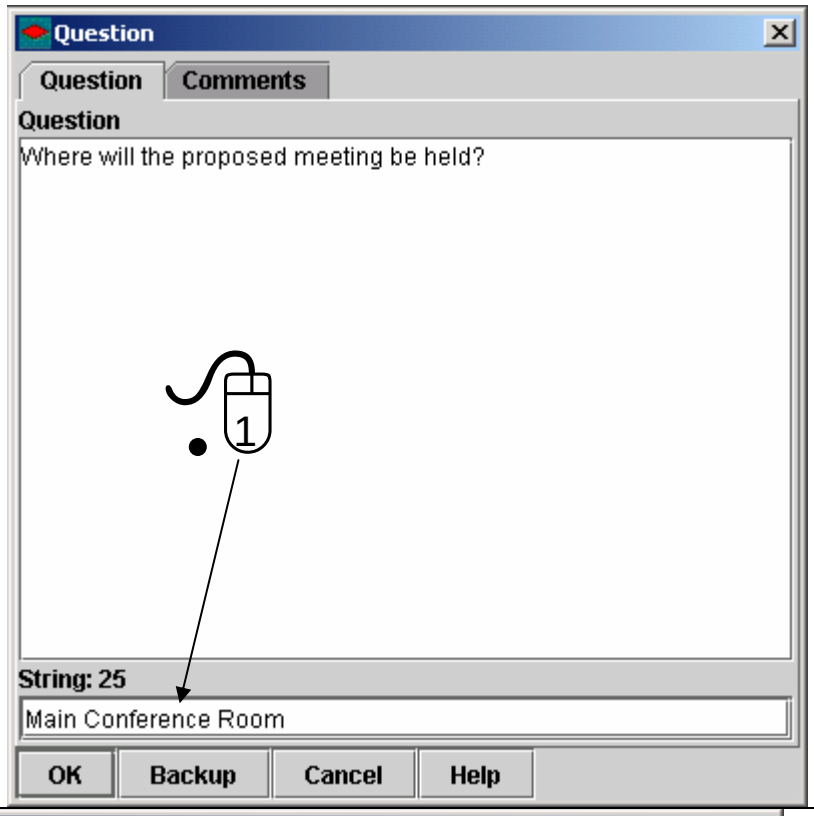
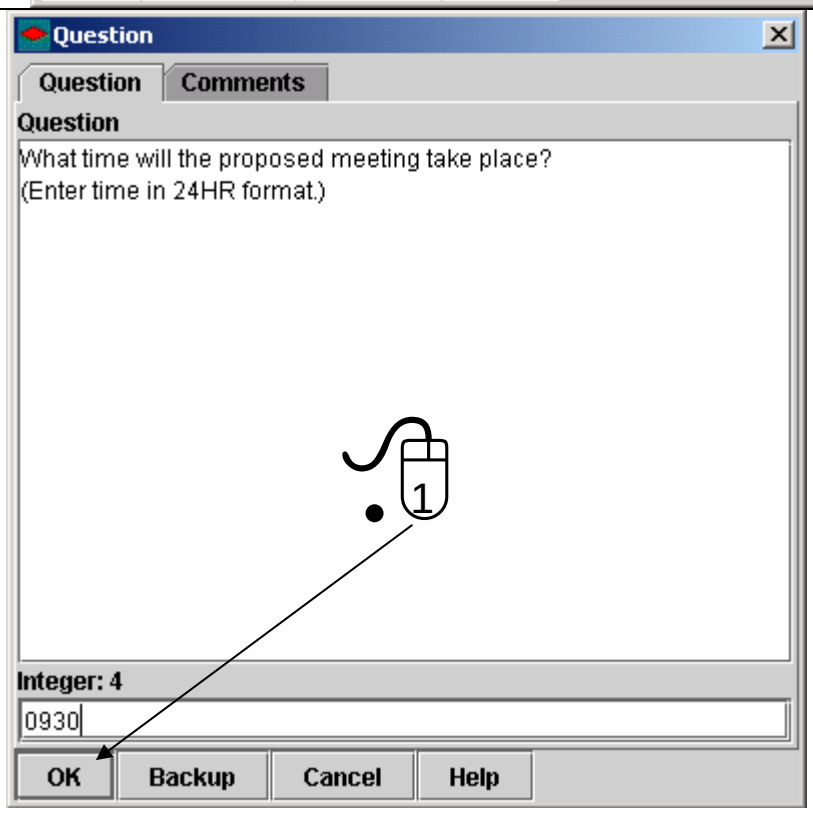
“Date” is one of many question types found in JDOCSHELL. Throughout this tutorial you will be introduced to the various JDOCSHELL question types.

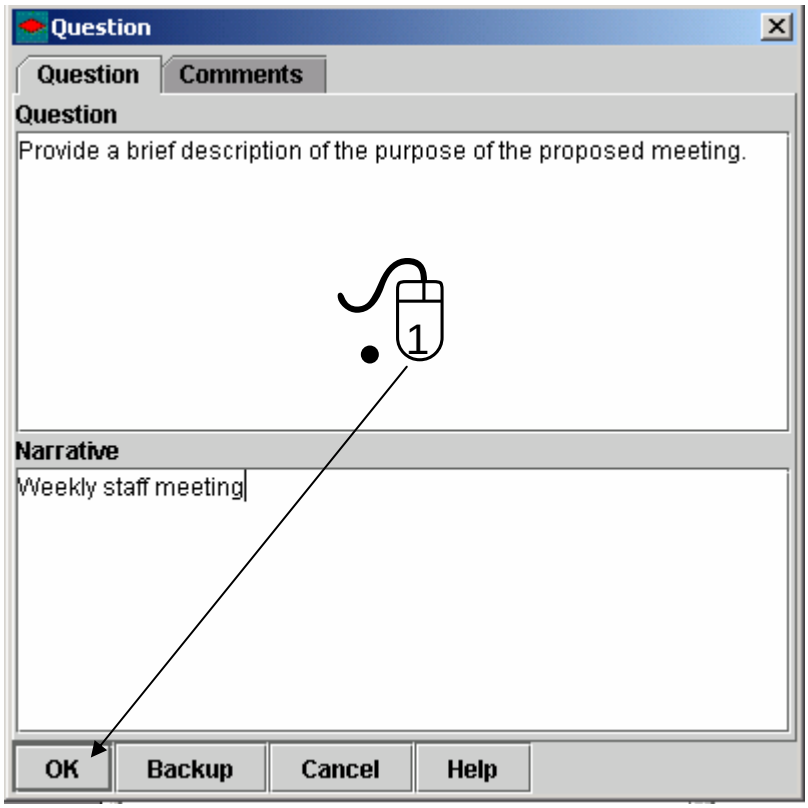
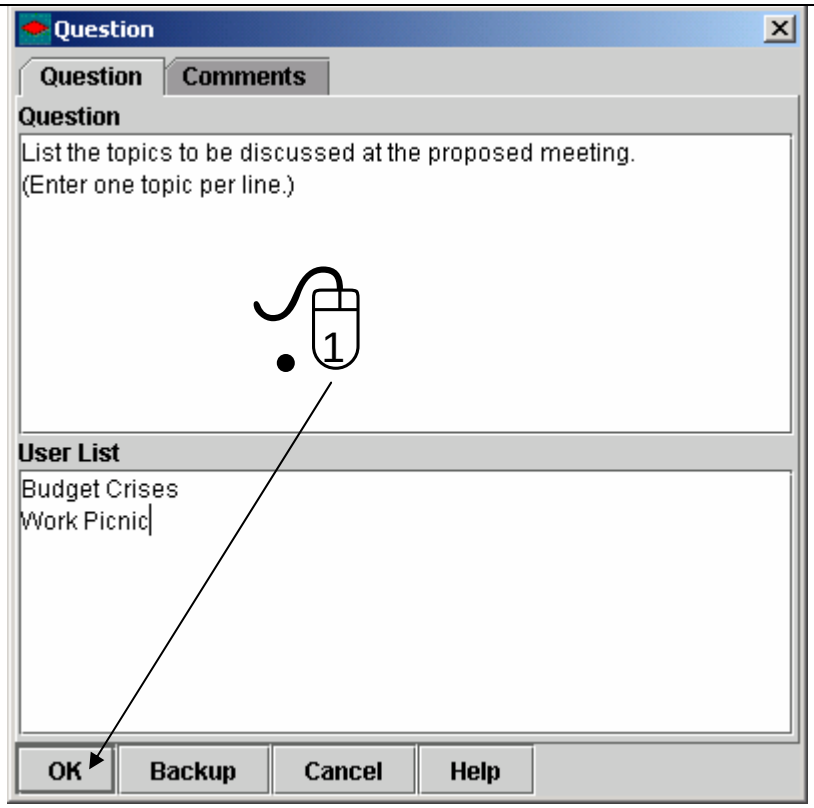
Select a date by single clicking on the calendar. Then single click on the “OK” button to proceed to the next question.

Note: The month and year may be changed using the appropriate drop down list boxes.



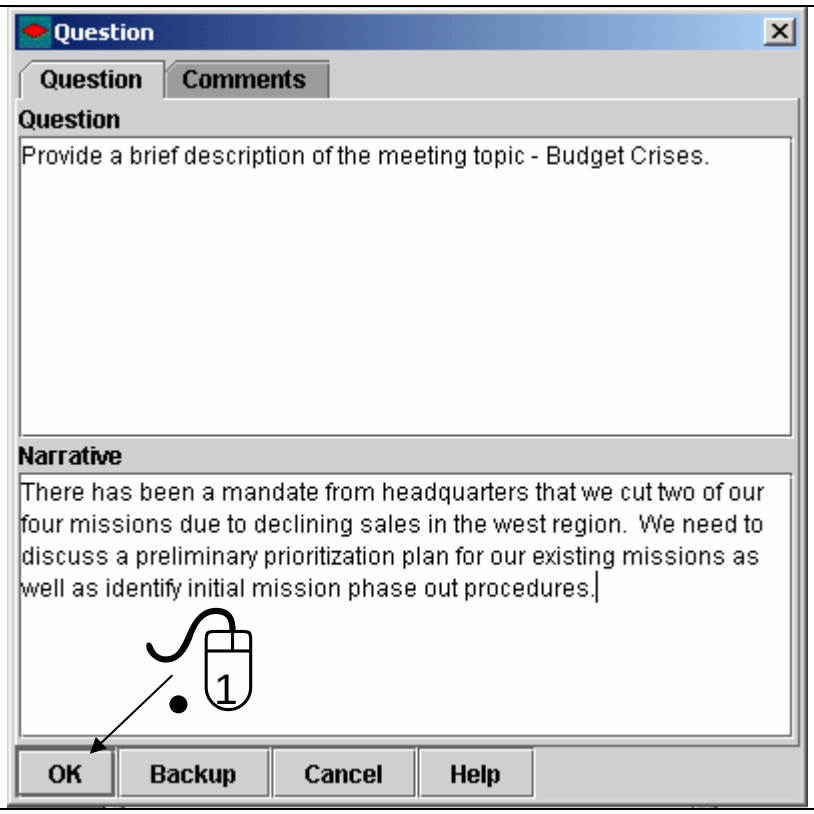
Another feature of JDOCSHELL is that all questions have associated help topics. View the question help by pressing the “Help” box on the lower right.”	
Question helps are displayed using the standard Windows help system. After reviewing the question help, return to JDOCSHELL by closing the help window with a single-click on the close button.	

This question asks for a meeting location for the proposed meeting. The Question Type calls for a string of not more than 25 characters. Single-click the answer area to give it focus so that you may type in an answer. Type "Main Conference Room" as the answer to the question and single-click "OK" to move to the next question.	
The next question asks for the time of the proposed meeting in military format. This is an integer question that accepts four digits as indicated in the Question Type. Type "0930" and single-click the "OK" button to move to the next question.	

The next question asks for a brief description of the proposed meeting. This is a “Narrative” question type and allows paragraphs to be entered. Type “Weekly staff meeting.” Single-click the “OK” button to move to the next question.	
The next question asks you to list the topics of discussion for the meeting. This is a “User List” question that allows you to input a list of items, one per line. Type “Budget Crises” then press enter on the keyboard. Type “Work Picnic” then click the “OK” button to move to the next question.	

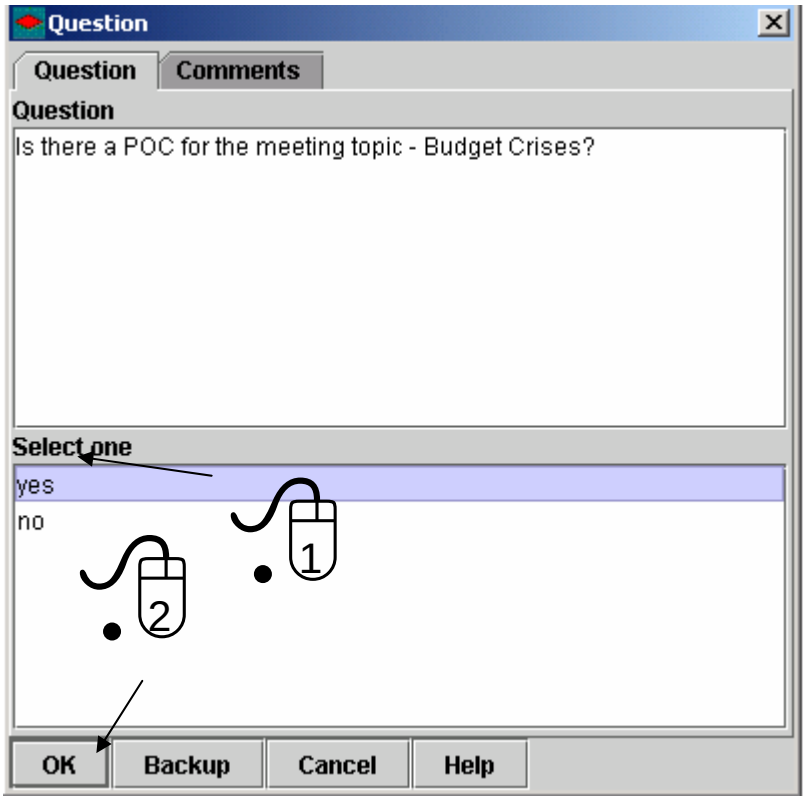
At this point, we see how the interview questions displayed are influenced by previous inputs. Since we identified “Budget Crises” as a discussion topic, JDOCSHELL is now asking for a brief description of this meeting topic.

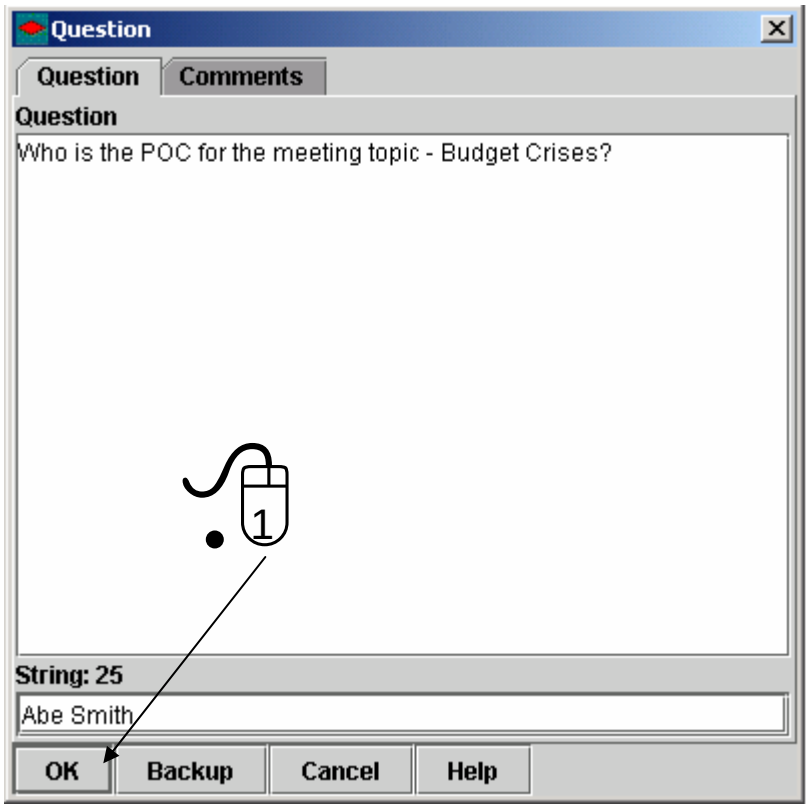
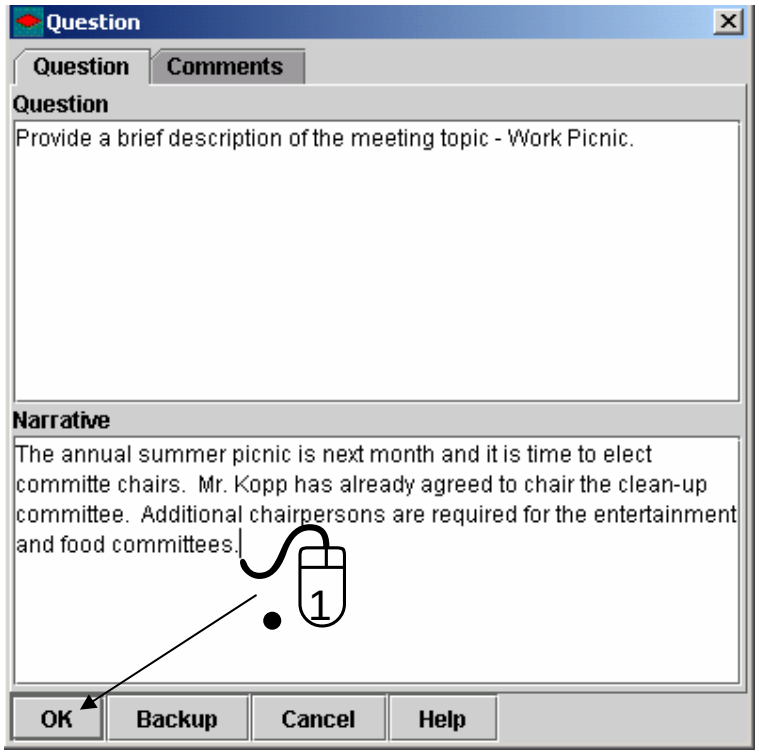
Type the information shown on the right and click “OK” to move to the next question.

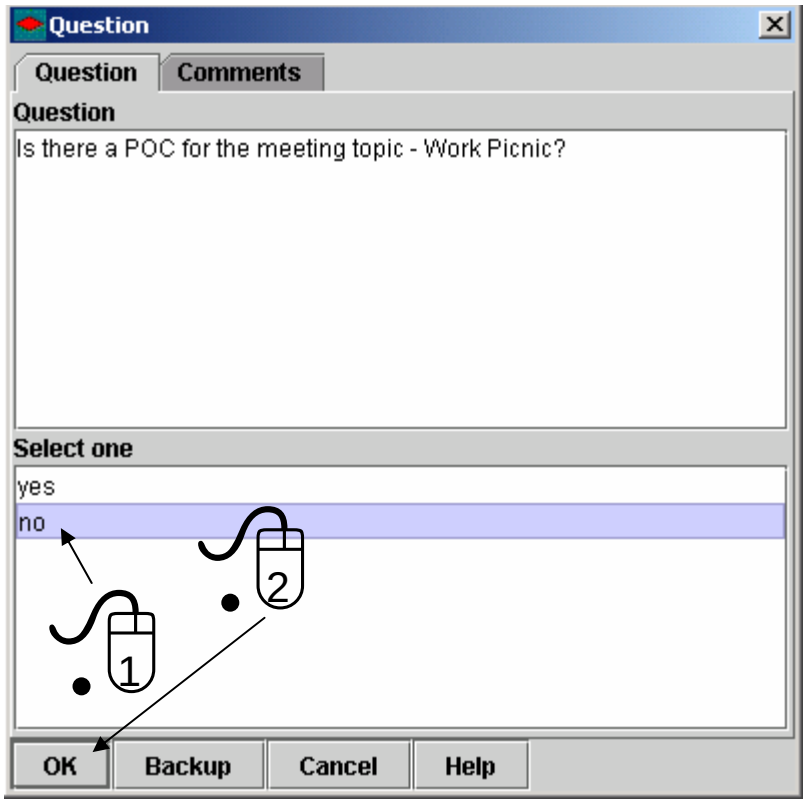


The next question asks if there is a POC for the “Budget Crisis” meeting topic. This is a single question type and allows you to choose one item from the possible answer list.

Single-click “yes”, then click the “OK” button to move on to the next question.



Since, you indicated that there is a POC for the “Budget Crises” meeting topic, JDOCSHELL asks for the name of the POC. Type “Abe Smith”, then click “OK” to move on to the next question.	
JDOCSHELL now asks for a brief description of the Work Picnic meeting topic. Type the information shown on the right and press “OK” to move to the next question.	

There is no POC for the Work Picnic topic, so single-click “no” and then single-click “OK” to procede to the next question.	

Since, there are no more questions required for the meeting agenda, you are returned to the JDOCSHELL main window as shown in Figure 1.

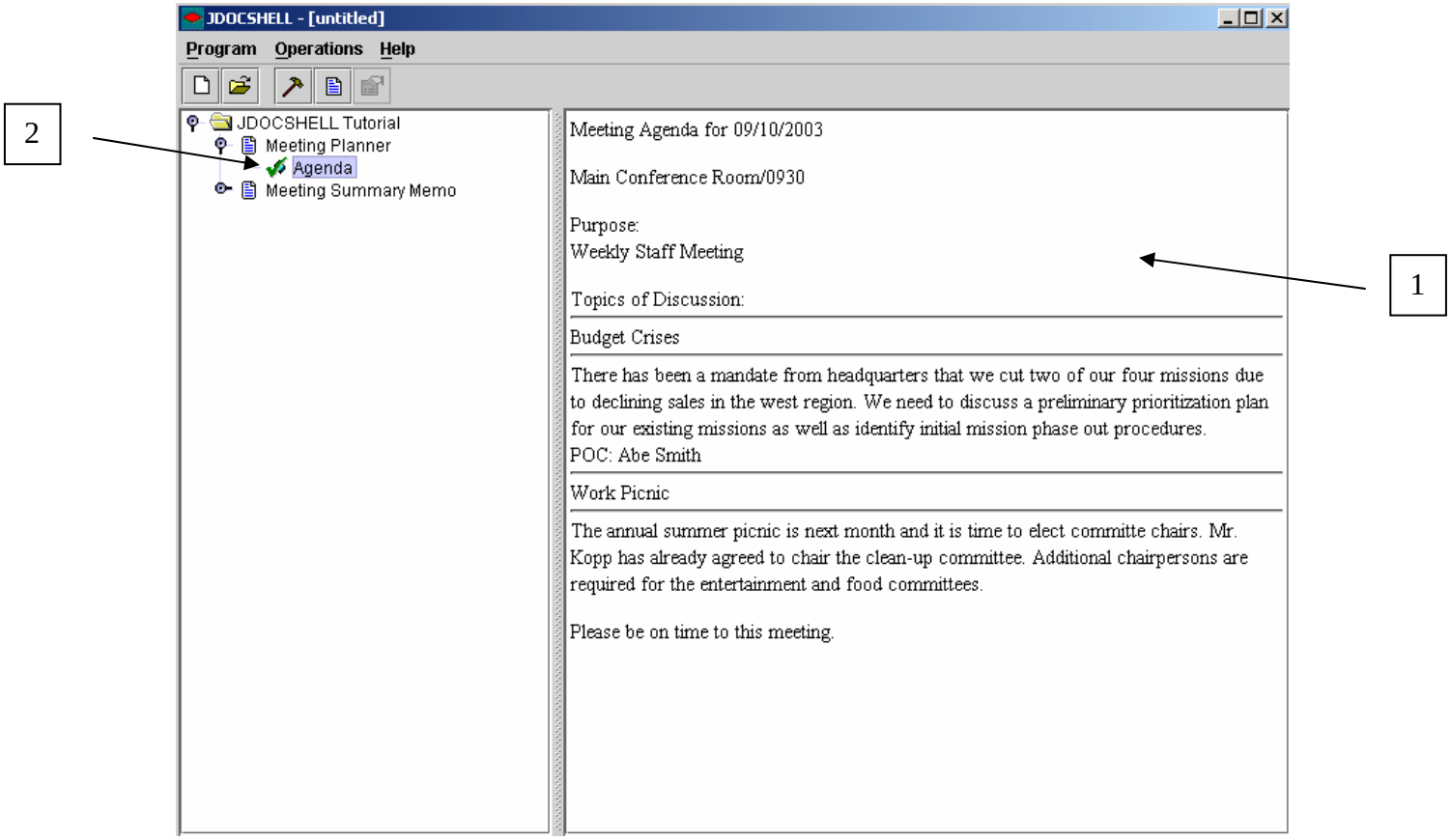


Figure 1: JDOCSHELL Main Window

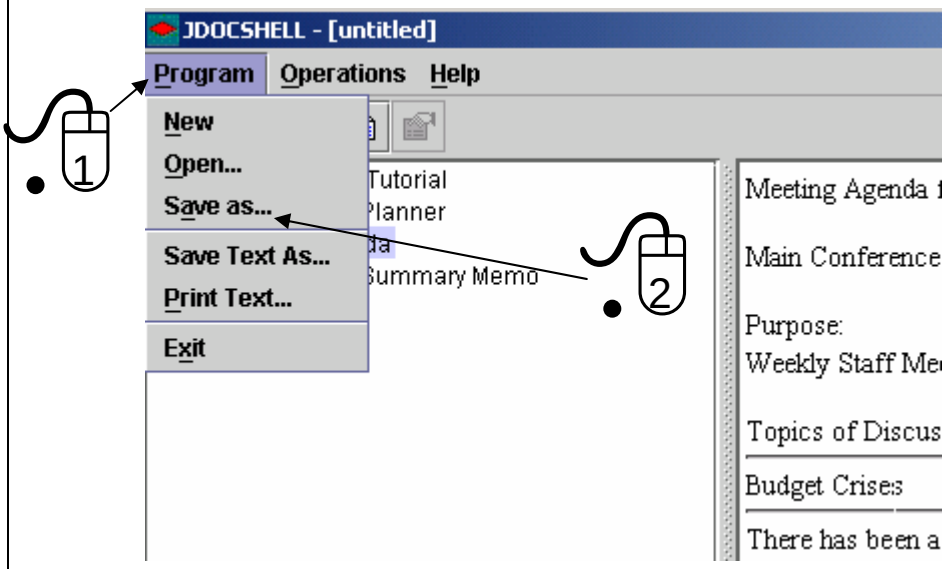
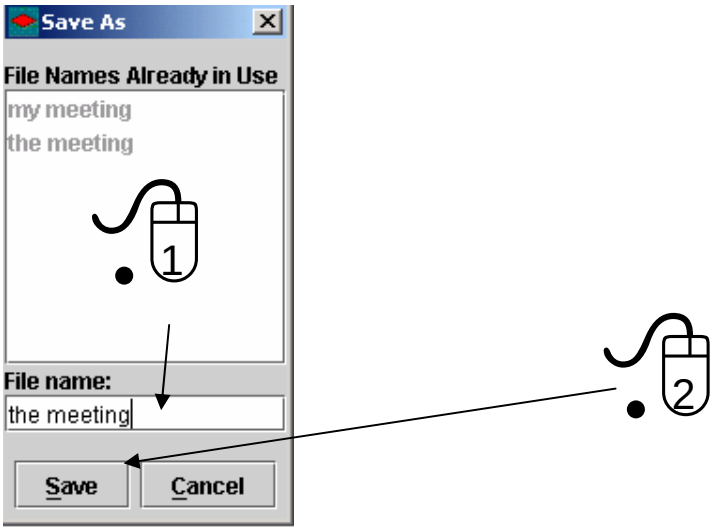
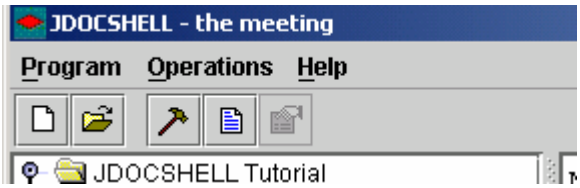
At this point there are two important observations to make about the state of JDOCSHELL.

Note: The numbers correspond to the labels found in Figure 1.

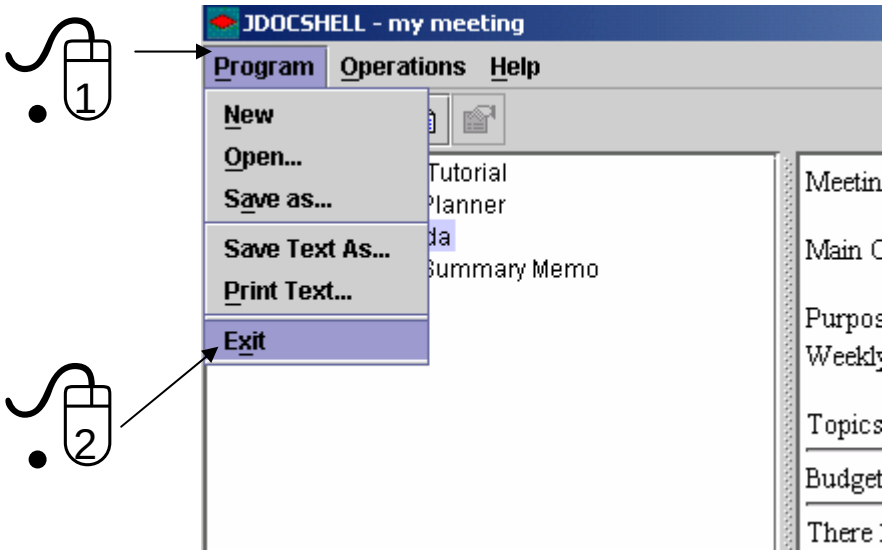
1. The text view now displays the generated text for the newly constructed section.
2. The outline view section status has changed to a “check-mark” indicating that the section has been completed

File and Print Operations

Once you have constructed portions of a JDOCSHELL document, you probably will want to save your information in a data file. The following exercise demonstrates how to accomplish this as well as printing generated text.

To save your information to a data file select “Save As…” from the “Program” menu.	
In the “Save As” dialog box type in “the meeting” as the name for the data file then press the “Save” button. At this point, you also may specify a directory for the data file by navigating to the desired folder using the Windows common “Save As” dialog box.	
Notice the title bar now displays the program name and filename of the current data file.	

So far you've used JDOCSHELL to create a meeting agenda, and since it is time to go home you decide to exit JDOCSHELL. Choose "Exit" from the "Program" menu to quit JDOCSHELL.

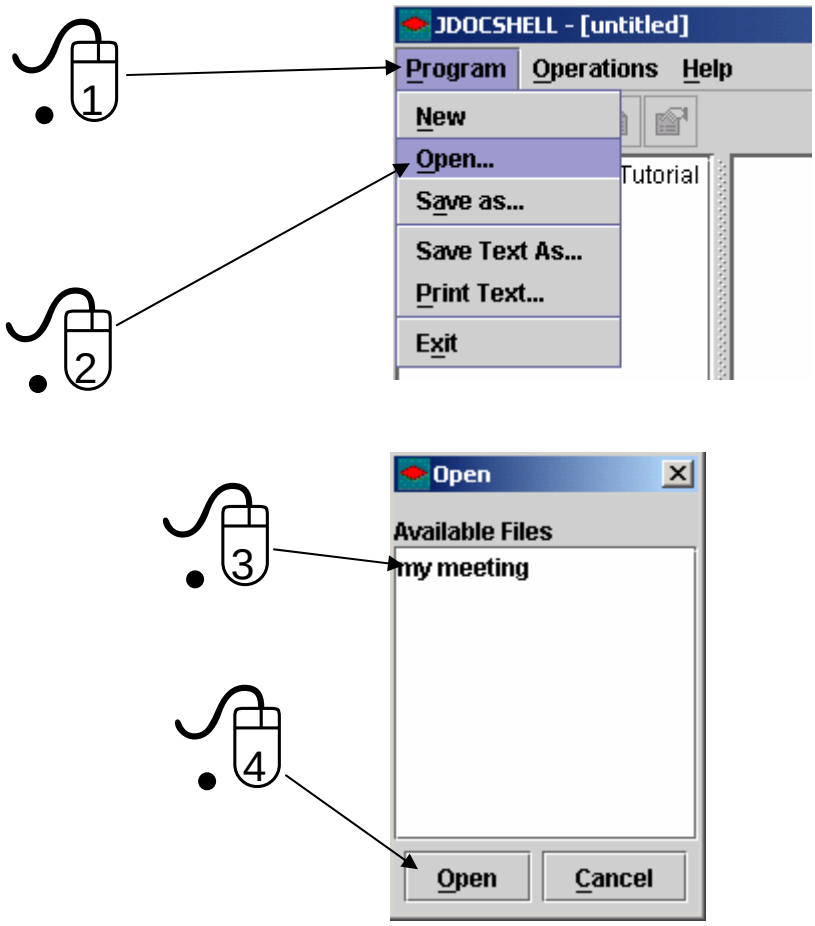


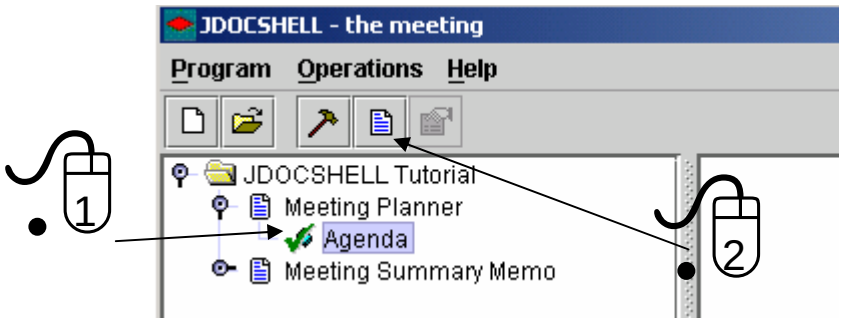
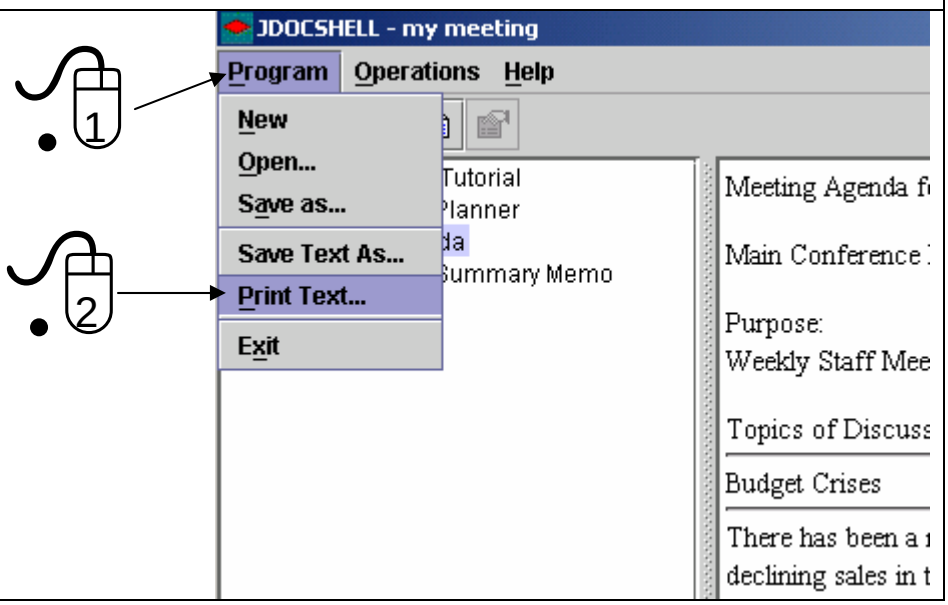
The next morning you resume your meeting planning tasks and decide that you want to print out the meeting agenda for distribution to meeting attendees.

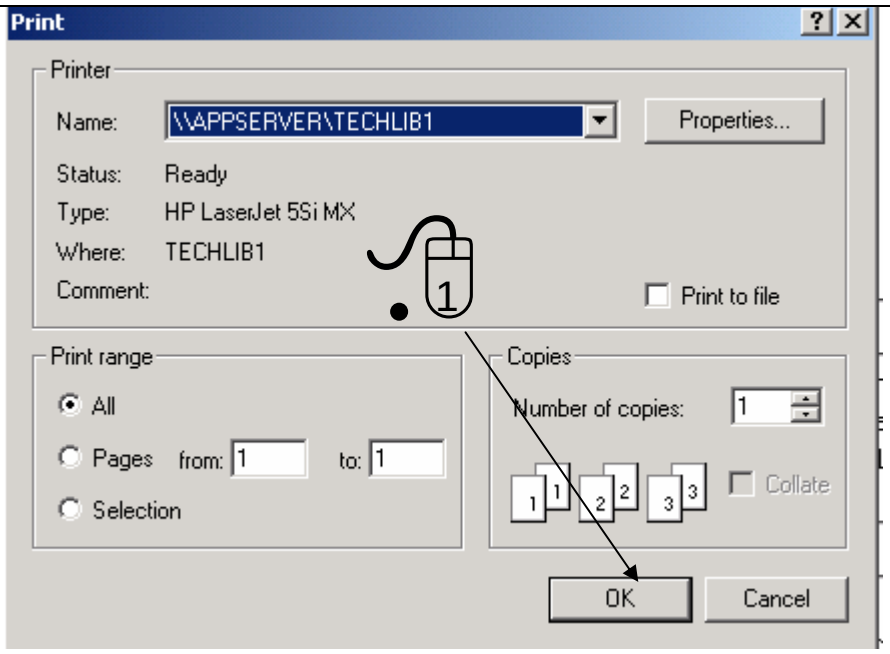
Start DOCSHELL as demonstrated in the "Starting DOCSHELL" exercise.

Hi-light "DOCSHELL Tutorial." Choose "Open" from the "Program" menu. Click on "my meeting" from the new window. Click on the "Open" box" in the lower left of the window to open the my meeting data file.

Note: You may also use the "File-Open" menu item to locate the "my meeting" data file.



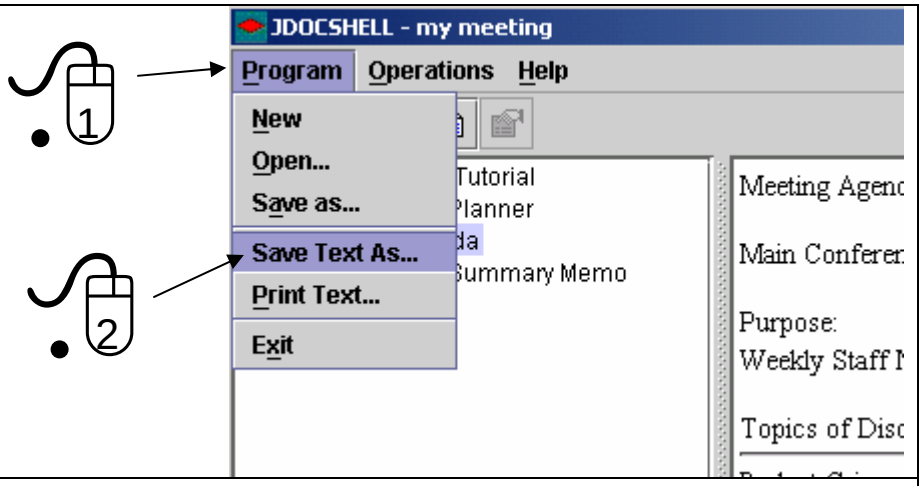
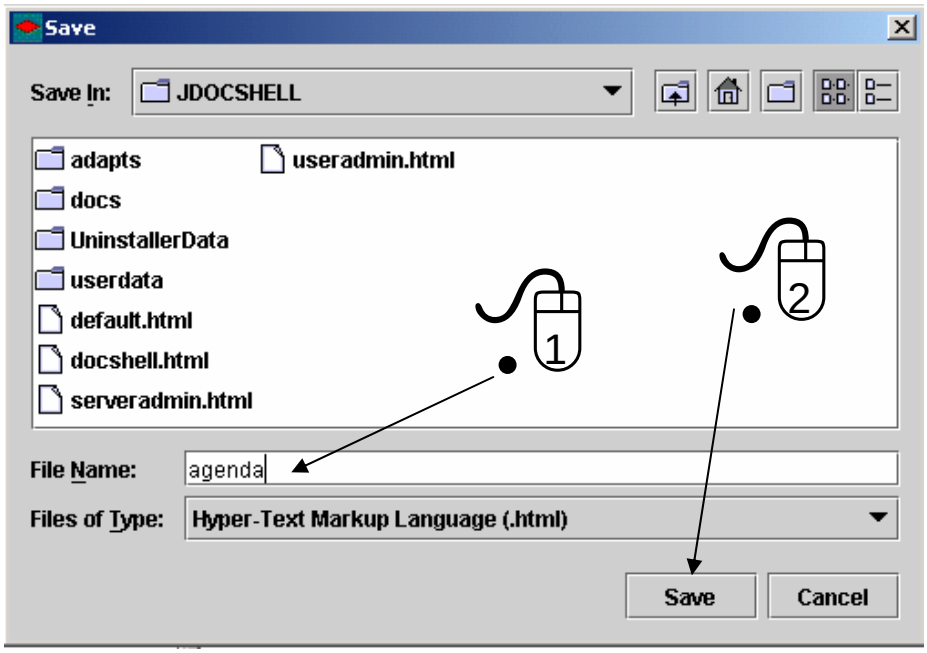
Highlight (select) the "Agenda" section of the "Meeting Planner" document. Use the techniques discussed in the previous "Navigating Documents with JDOCSHELL's Outline View" exercise to accomplish this. Notice the check mark; however, there is no text in the text view. To display the "Agenda" text, single-click the "Display Text" button on the toolbar (paper button).	
With the Meeting Agenda displayed in the text view, Select "Program" on the main tool bar. Then, click "Print Text" from the drop down menu.	

Provided you have a printer configured on your computer, you simply press the “OK” button on the “Print” dialog box to print the contents of the JDOCSHELL’s text view.	

Exporting Generated Documents

The previous exercises demonstrated how to use JDOCSHELL to generate and print a simple text document. Suppose that you would like to put some sort of clipart image in your generated document. Currently there is no support for images in JDOCSHELL; however, documents may be exported to a word processor so that more advanced word processing may be performed on the generated document.

Note: Once a document is exported it may not be brought back into JDOCSHELL. This is intended to be the final step in generating a document with JDOCSHELL.

Choose “Save Text As” from the “Program” menu to create an HTML file. This feature exports the current contents of the text view. This may be an entire document or simply a document section depending on the last JDOCSHELL operation you performed.	
Type “agenda.txt” and press the “Save” button to create an HTML file of the meeting agenda in the specified location. This newly created file may now be opened with your standard word processor (e.g. MS Word or WordPerfect).	

More JDOCSHELL Features

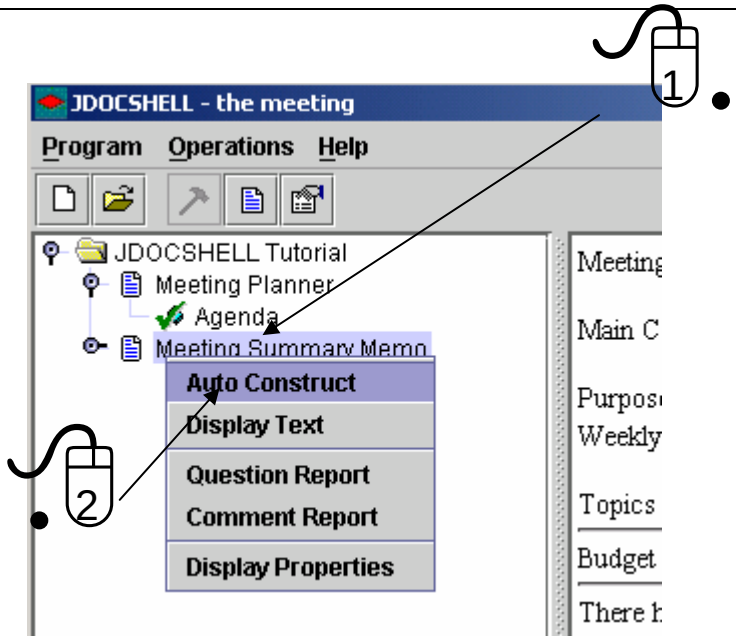
At this point, you have experienced some general scenarios used to create documents with JDOCSHELL. Simply put, you iterate through the document sections via the outline view, constructing each and providing the necessary answers to the interview questions. When all sections have “checkmarks”, the document is complete and may be output to a printer or exported to your favorite word processor.

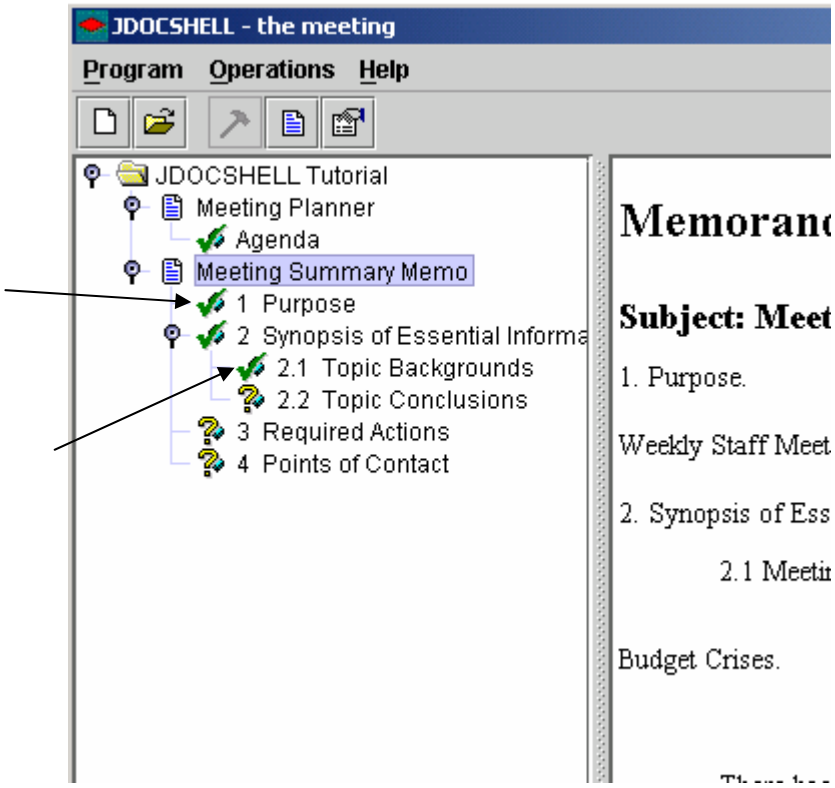
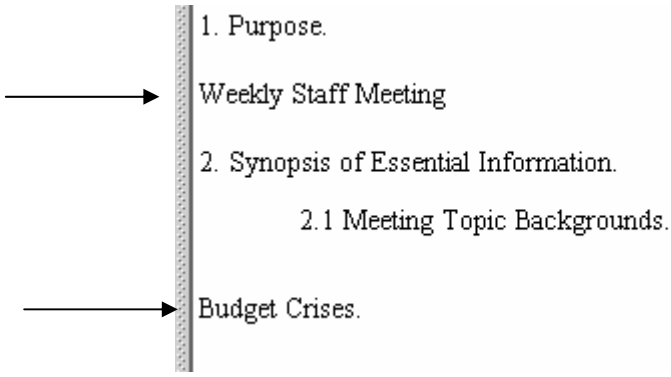
This final group of exercises will introduce additional features and capabilities of JDOCSHELL including automatic document construction, data sharing between documents, recommended answers, and commenting capabilities.

Auto-Constructing Documents

JDOCSHELL supports a feature called “Auto Construct” that will attempt to complete a document with information you have previously entered. In our meeting planning documents we can see this by auto constructing the “Meeting Summary Memo” and observing what sections are automatically completed.

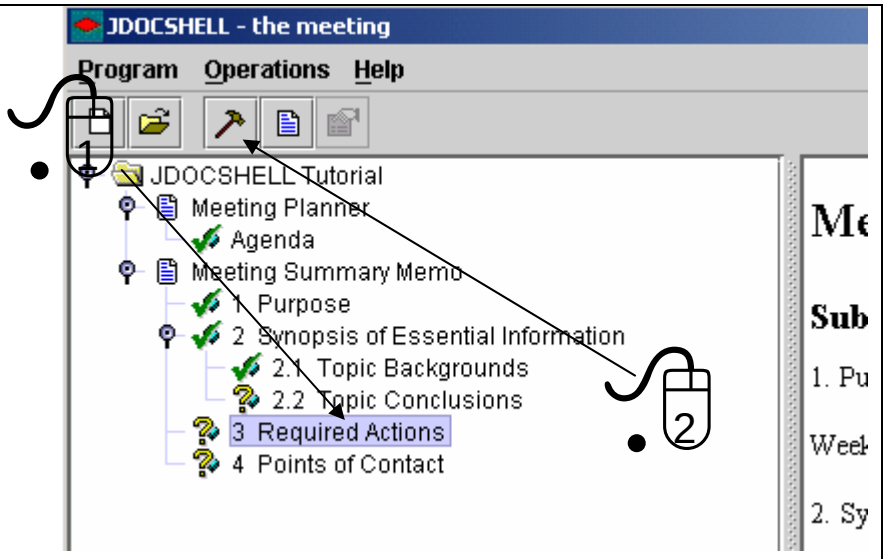
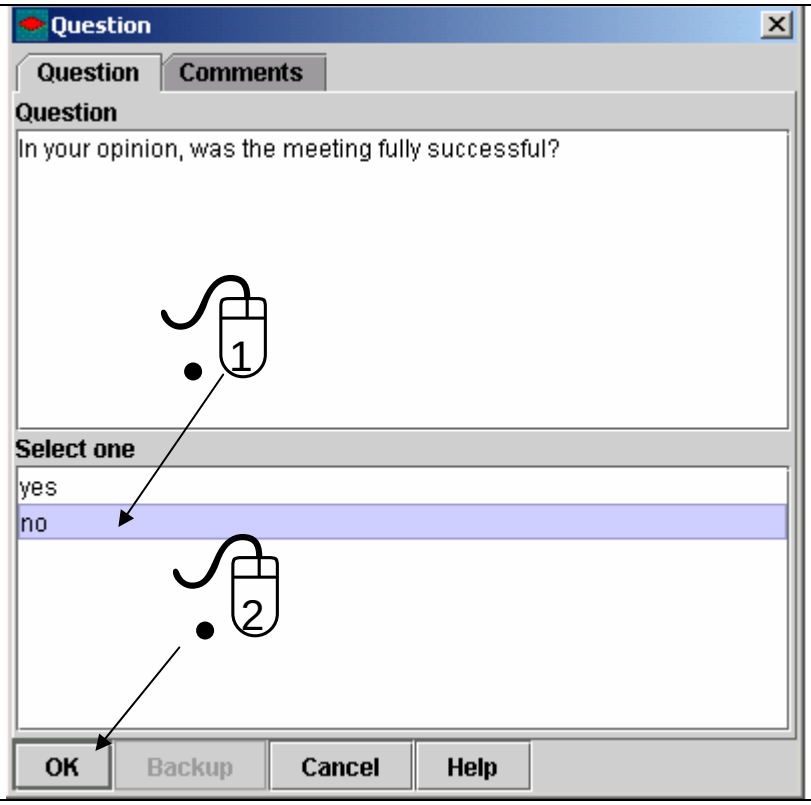
Let’s assume that the meeting has taken place, and we are now responsible for creating a meeting summary memorandum for distribution.

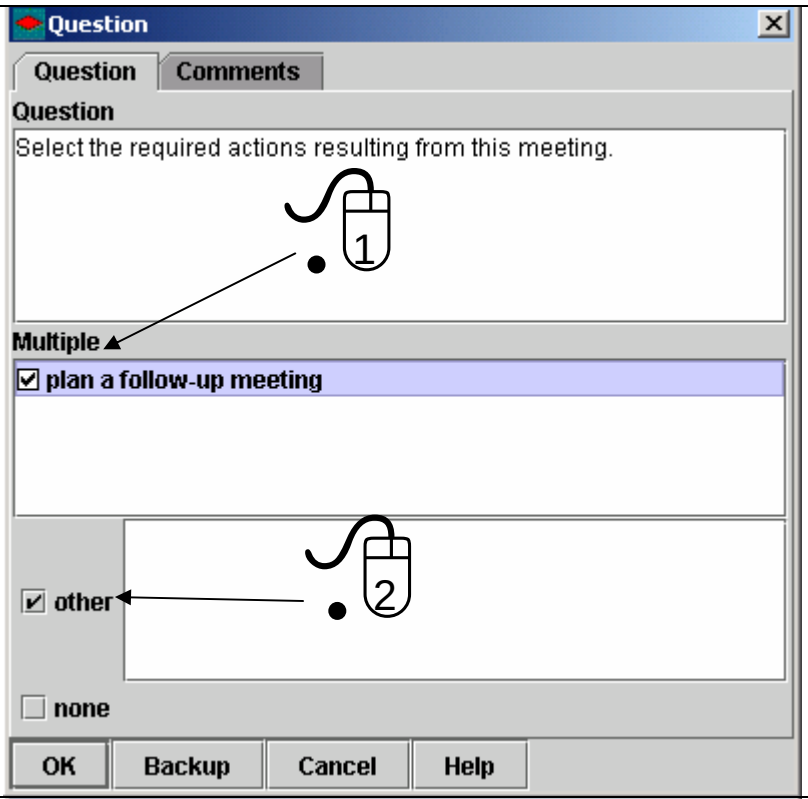
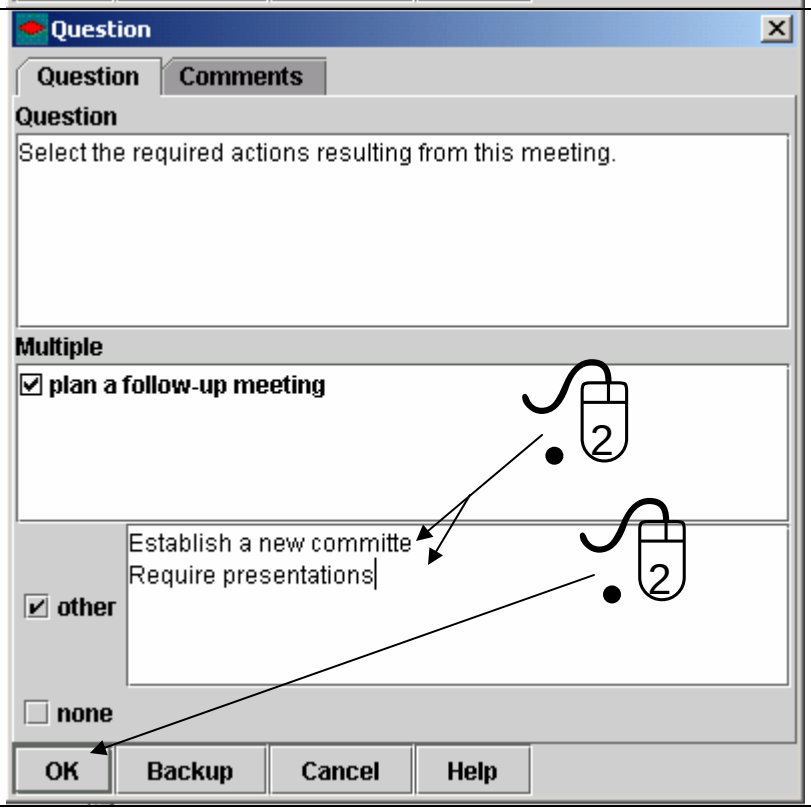
Right-click on the “Meeting Summary Memo” to display the context menu. Choose “Auto Construct” from the context menu.	

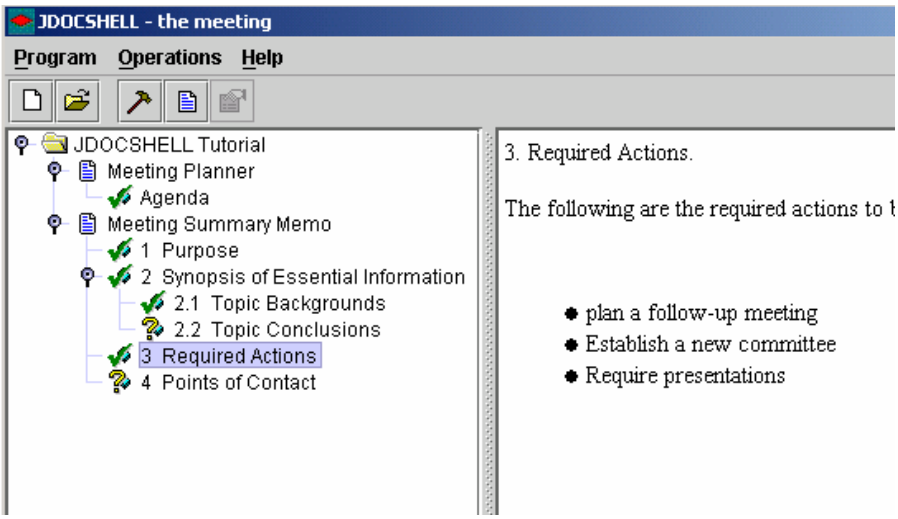
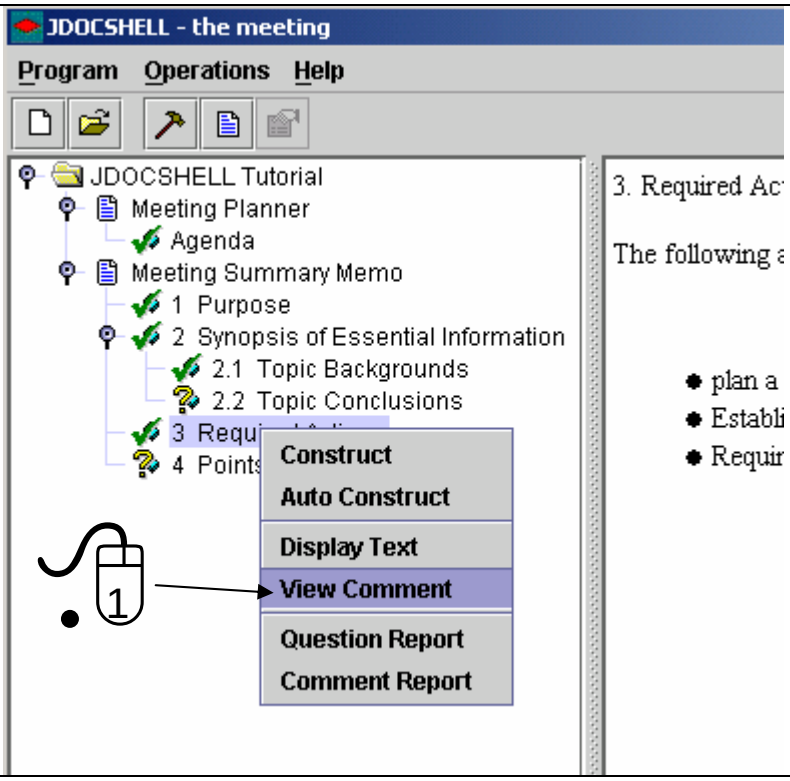
Expand the “Meeting Summary Memo” and section “2 Synopsis of Essential Information”. Notice the section status images. Specifically note that sections 1 and 2.1 are complete. This is a result of using information previously entered while constructing the meeting agenda. Additionally, a new section status, “question mark”, is displayed. This indicates that the section is partially complete. To complete the section you must construct it and provide the additional information required.	
Look at the contents of the text view. Notice the information you entered for the meeting agenda has been shared with the summary memo.	

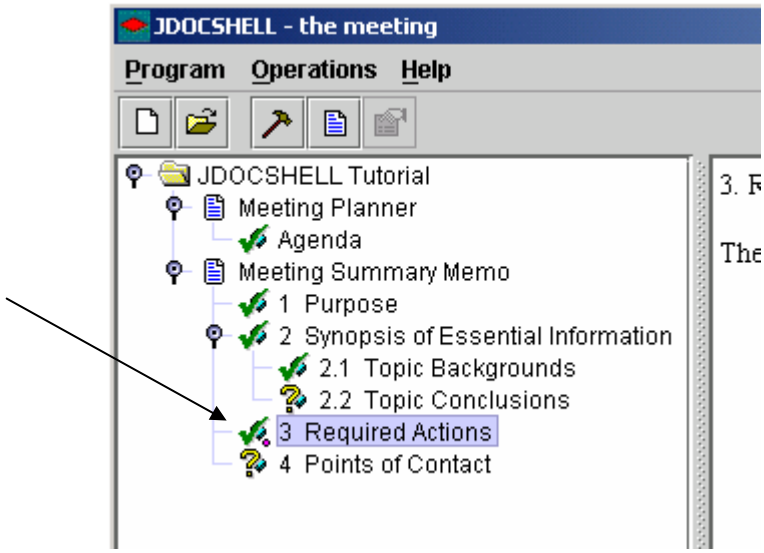
Recommended Answers, Comments, and "Other"

There are times when JDOCSHELL will make recommendations for answers to interview questions while constructing a document section. The following exercise demonstrates this feature.

Choose to construct section "3 Required Actions".	
Select "no" indicating that you feel the meeting was not successful, then press "OK" to move to the next question.	

Check “plan a follow-up meeting” and check “other” in lower left of window.	
. Since you selected “other”, JDOCSHELL offers you an active text box to enter your other required actions to the right of the checked box “other.” Type the items shown on the right then click the “OK” button to proceed. At this point, the text view displays the text for the newly constructed section. In addition, a “check mark” appears next to the section indicating it is complete.	

At this point, the text view displays the text for the newly constructed section. In addition, a “check mark” appears next to the section indicating it is complete.	
You may also provide section level comments for your documents. These are usefull during the document review/staffing process. For example, say you want someone to review the “Required Actions” section of your memo. Provide a comment for that section by right clicking on it an selecting “View Comment” from the context menu.	

The comments dialog box is displayed. Type the comment shown on the right. Press “OK” to dismiss the comment dialog box.	
Notice the visual indication (red dot) that a section comment exists. Anybody reviewing this document may view your comment as well as provide you with comments using this feature.	

At this point, we have covered the main features and capabilities of JDOCSHELL. We have used a very simple set of documents (agenda, memo), but we hope it has made you comfortable with the techniques required to benefit from JDOCSHELL.