Microsoft Technet: New Features

The valuable Technet product has recently been improved, with new features in the viewer program such as improved search and enhanced use of favourites. If you are not already a subscriber we recommend you consider becoming one.

By Mike Lewis

During 1999, Microsoft undertook a lengthy consultation exercise among subscribers to its monthly Technet CDs. Among other things, the company asked for suggestions for improving the product and making it easier to use. From the feedback it obtained, Microsoft decided to develop a substantially enhanced version of INFOVIEW.EXE, the viewer program used to browse, search, bookmark and annotate the Technet content.

Given the importance of Technet to support staff, it is worth taking a closer look at this upgrade. This article is based on the beta version which Microsoft issued in November 1999, but the final release should be available by the time you read this. You may find that a few of the details I will describe are different in the final release.

If you do not yet subscribe to Technet you should definitely consider doing so. Essentially, it is a bundle of CD-ROMs containing extensive technical information on Microsoft products and technologies. It includes product specs, review guides, user manuals and resource kits, plus the full Microsoft Knowledge Base.

As well as documents, it also contains software, including service packs, drivers, add-on programs, utilities and evaluation products. There are now around three dozen CDs in the bundle, many of which are updated every month. (For a full description of the product, see "*Getting The Most From Microsoft Technet*", PCSA Update 123, January 1999.)

The Search Window

One of the most important innovations in the viewer program is the simplified search window (Figure 1). To use it, you simply enter a search term, choose between "All Text" and "Title Only", and optionally select a filter. The various scope options from the previous version (Current Topic Only, Last Topic Found etc) are no longer present, although their functions are available in other ways. The search syntax is exactly the same as before, so you won't need to learn any new rules.

To open the search window, either select Tools/Search, hit the Search button on the main toolbar or press Ctrl-S

(not Ctrl-F as in the previous version - this now opens the Find dialog, which is described later). For most searches this simplified window will be all you need. However, pressing the Advanced button reveals some further options (Figure 2).

The Exclude Topics Containing control lets you specify a list of words or phrases which you want the target documents not to contain. This is similar to the boolean NOT operator, except that it is persistent: what you enter here will be retained for future searches, even across sessions, until you explicitly delete it.

The Filter By Date option is a much-requested feature. All Technet documents are date-stamped, and this option lets you include the date in your searches. You can only select dates to the nearest three months, but this should be adequate in most cases. The date does not necessarily appear in the document text, but it is visible in the search results window.

The "Find alternative word forms" checkbox lets you decide if stemming should be enabled. If it is, the program will search on different forms of the words in your search terms - for example, if you search on print, it will also find printer and printing. In the previous version, stemming was always enabled.

The "NEAR means within" option allows you to specify how the NEAR operator is interpreted. By default, X NEAR Y means that X must be within eight words of Y, but this option lets you vary that figure. In the previous version, this setting was in the Options dialog.
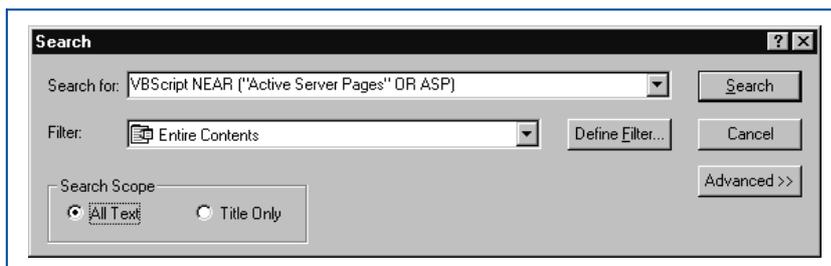

Figure 1 - The simplified search window.

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There is also a "Maximum hits to return" option. You used to get a maximum of 200 hits. You can now adjust that figure to anything between one and 2,000. If the number that you specify is less than the number of hits actually present, the least relevant ones will be discarded.

The Defaults button puts all the advanced options back to their default settings. In fact, this only works if you actually run a search. There is no way of restoring the defaults, or changing the settings in any other way, without starting a search. (This issue came to light during beta testing and might be altered in the final release.)

Search Results

After you run a search, the results will be displayed in a window like the one in Figure 3. This window is dockable: if you drag it towards the edge of the screen, it docks itself at that edge. To undock it, you press what looks like the Minimise button (but which is not necessarily in that button's usual position).

Like in the previous version, the results window is modeless, so you don't have to close it in order to scroll the current document. Unlike in the previous version, there is no option to automatically close the window when you select a document from it.

Certain aspects of the search results window were criticised by beta testers. The main problem is that it is too easy to dock it accidentally: a slight movement towards the edge of the screen is

all that's needed. Also, it takes up much too much space when docked. Another issue is that the method of undocking is not as intuitive as it could be. You expect to be able to undock it by dragging it back towards the middle of the screen, but this only makes it larger. Microsoft might change these details in the final release.

As well as the date-stamp mentioned earlier, the results window now displays a paper-clip icon to indicate documents which include links to files. These are in addition to the usual Order, Book and Topic columns. All these columns can be resized and re-positioned by dragging with the mouse.

Deleting Hits

It is now possible to remove individual documents from the search results window. This could be useful if you want to simplify the hit list. For example, you could sort the results by book, then multi-select the books you are not interested in and delete them. Deleting items in this way also affects the search history and the "Create filter with these results" option (both described later). To delete hits, simply select them, right-click and select Delete Row(s).

Find In Topic

One of the features most requested by Technet users was the ability to search the current document. In the previous version, you could do this with the Current Topic Only scope op-

tion, but that meant starting a new search and losing the current hits. Now, you can use the Find dialog to search the current document independently of the main search. This works just like the Find option in Word, Excel etc. To invoke it, choose Edit/Find in Topic or press Ctrl-F.

Filters

If you are a regular Technet user, you will know that one of the best ways of refining a search is to select a filter - what used to be called a subset. Technet comes with several pre-defined filters; you can also define your own.

For example, if your main interest is in evaluating new products, you might use the built-in Evaluation And Reviewer's Guide filter. If your job is to support Word and PowerPoint, you might create a filter based on those two products.

None of this has changed in the new version (except that there are now only eight built-in filters rather than 12 as before). However, the program now offers several faster ways of creating filters.

One possibility is to create a filter based on particular books or documents within the Contents pane. To achieve this, select the items in question (use the Shift or Ctrl keys to multi-select), then right-click and select Search. This will bring up the standard search window, with all the options intact, but with the filter set to Quick Search Filter. This filter contains ex-
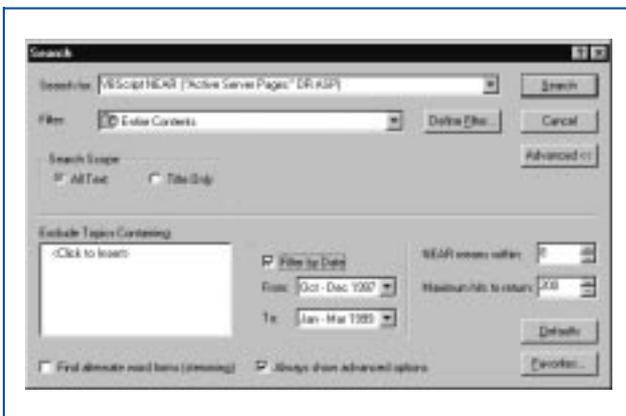
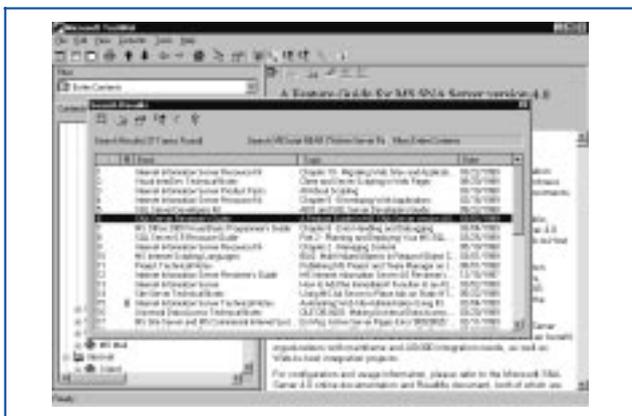

Figure 2 - The search window's advanced options.

Figure 3 - The search results window.

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actly the items you selected. You can now go ahead and run the search.

Normally, this filter is not retained after the search finishes. But, if you click on Define Filter within the search window, you will be able to save the Quick Search Filter under a new name. Alternatively, from the context menu, select Create Filter rather than Search. This will take you straight to the Define Filter dialog, with the filter already set up, ready for you to rename and save it. In this case, the filter's default name is Quick Custom Filter.

Another option is to create a filter based on the current hits. To do so, click on the "Create filter with these results" button at the top of the search results window. Or, select some or all of the documents in the results window, right-click and select Create Filter.

Either way, you will reach the Define Filter dialog, with the specified filter ready to save. (Any items which you have manually deleted from the results window will be excluded from this filter.) These features are similar to the old Previous Search Results scope option.

Contents Filtering

As well as using filters with searches, it is now possible to apply them to the Contents pane; in fact, this was possible in the previous version,

using the Contents/Select Subset command, but it is now easier and more obvious. All you have to do is select the required filter from a drop-down list which appears at the top of the pane.

As an added convenience, if you apply a filter to the Contents pane and then start a search, the same filter will be selected in the search window. Both settings are retained across sessions, so if you are only interested in a subset of the Technet content, you can set the filter in this way on a semi-permanent basis and never have to see anything else.

Search History

As in the previous version, the program keeps a record of your last 20 search terms. To run a search again, you can select the relevant term from a drop-down list, optionally edit it, then proceed with the search in the normal way. As before, only the search terms themselves are saved, not the associated filters or options.

In addition, the program now stores a record of all the search results in the current session. You can navigate backwards and forwards through these results without having to re-run the searches. To do so, click on the "Back in search results" and "Forward in search results" buttons at the top of the results window.

When you do this, the program re-

calls the hits that were previously found (excluding any which you have manually deleted from the results window). This is a lot faster than actually running the searches again. But, unlike with the record of the last 20 search terms, this history is not retained when you close the program.

Be careful not to confuse the "Back in search results" and "Forward in search results" buttons with two similarly-named buttons, "Previous in search results" and "Next in search results", which are on the main toolbar. The latter pair of buttons is for navigating within the current result set rather than between result sets.

Also, note that the search history has nothing to do with the document history, which works in the same way as in the previous version.

Favourites

A particularly useful feature in the new program is the use of favourites. These are what used to be called bookmarks, but they have been significantly enhanced. It is now easier to view and navigate them, you can arrange them in folders, and you can even flag searches as favourites.

To create a favourite, bring up the Add Favorites dialog (Figure 4). You reach this either from the Edit menu, by clicking on the Add To Favorites button in the document pane, or from
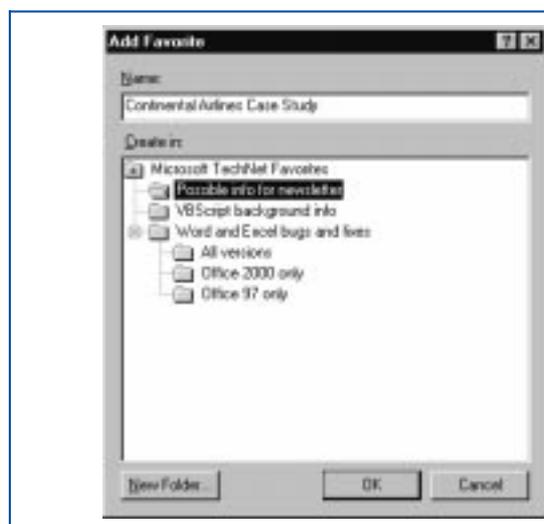
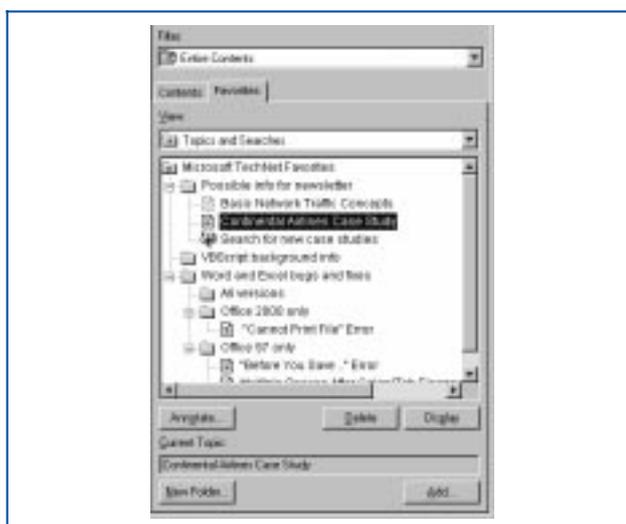*Figure 4 - Favourites are stored in a hierarchy of folders.*   *Figure 5 - You can view favourites in their own pane.*

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the document's context menu (in either pane). Once you have opened the dialog, select the folder in which you wish to store the favourite (or click the appropriate button to create a new folder), then click on OK.

Unlike in the previous version, you do not see existing favourites in this dialog; you simply select a folder to store the new one in.

Once you have created some favourites, you can get at them very easily: just click on the Favorites tab in the Contents pane. This changes the normal table of contents to a hierarchical view of your favourites and their folders (Figure 5). You can use this to navigate the favourites and select documents for viewing. (One small point to watch: in the Contents tab, you single-click on a document to view it; in the Favorites tab, you double-click.)

With the Favorites tab open, you can re-organise your favourites by drag and drop - dragging documents from one folder to another, for example. You can also annotate a favourite, delete it or rename it. Deleting and renaming only affect the Favorites tab; they don't alter the original document in any way. When you select a re-named document, the original name is displayed at the foot of the pane.

As well as flagging documents as favourites, you can save an entire search as a favourite. Unlike with the search history, this saves the search specification rather than the list of hits. This is extremely useful if you want to periodically run the same search against different content - after a monthly update, for example. As well as the search terms, this also saves the choice of filter and other settings.

To save a search as a favourite, set up the search in the usual way, then click on the Favorites button in the search window - you don't actually have to run the search to do this. This will bring up the usual Add Favorites dialog, where you select a folder to hold the favourite.

Once you have done this, the search will appear in the Favorites tab of the Contents pane, alongside your other favourites (it is usually a good idea to rename it at this point). There is no way of directly running the search from the Favorites tab (maybe there

should be), but, by double-clicking on it, you can bring up the search window with all the settings as they were when the favourite was created.

You can also do this by pressing the Display button or by selecting Display from the context menu. Either way, just one further mouse click is all that's now needed to run the search.

Finally, it is possible to filter the Favorites tab. You can choose to show the document favourites, the search favourites or both. You do this by means of a drop-down list which appears at the top of the pane.

Other New Features

There is now a Send To command on the File menu (and certain context menus) which you can use to send Technet documents by email. When you select it, it brings up your usual email client's message-composing window with the document already inserted as an attachment. You can also mail favourites in this way.

Another new command, this time on the Edit menu, is Copy Topic. This copies the whole of the current topic to the clipboard with its formatting preserved. This is in addition to the original Copy command, which only copies the selected text, in RTF format and as plain text.

An innovation which drew some criticism from beta testers is the automatic synching of the Document and Contents panes. Although this is often useful, it can also be a nuisance, especially if you search for a document which is deep down in the table of contents' tree structure. If you subsequently switch to the Contents pane, you could be faced with a lot of scrolling and clicking in order to reach other parts of the tree. In the previous release, automatic synching was an option, but it is now permanently enabled (at least, in the beta version).

When installing Technet, it is now possible to copy the entire contents of a CD to a hard disk, thus improving performance and avoiding the need to keep the CD loaded. In fact, this was also possible in the previous version, but it was not officially supported and had to be done manually.

Finally, histories, favourites and

user-defined filters are now saved on a per-user basis. They are saved in files with the extension ITS, in the current user's directory. This means that users who share a computer can now maintain their own histories, favourites and filters, which is a welcome improvement. It also makes it easier to move these items to other machines.

Conclusion

The new Technet viewer program is not a complete rewrite of the original. The overall user interface is pretty much the same, but it does offer a large number of worthwhile improvements. These include the simplified search window, the ability to recall earlier searches, the Find In Topic feature and the enhanced use of favourites - especially the ability to view your favourites in a hierarchy of folders.

Technet has always been a valuable resource for support staff, most of whom will welcome these improvements with enthusiasm. If you have not already done so, it is worth bringing yourself up to speed with the new viewer and learning what it can do for you.

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