

GETTING STARTED

INSTALL THE SOFTWARE

Need we say that before you can use HindSight software, it must be installed on your hard drive? Good, we won't say it then!

Please be sure to read and follow the installation steps contained in the Installation PDF file.

FILES AND RESOURCES

All variations of InView & StockView require that you have Panorama or Panorama Direct (a scaled down version of Panorama) installed on your hard drive, with the resources you wish to use. Resources are files used by the software to provide additional functions.

WHERE PANORAMA AND RESOURCES GO

The Panorama or Panorama Direct application can be anywhere you choose on your hard drive(s). HindSight software will find it.

(From here on, all references to Panorama apply to both Panorama and Panorama Direct.)

The Panorama Dictionary and Zip Magic! are automatically installed in the same folder as Panorama. Put them anywhere else on your hard drive and they just won't work.

Note: Your software comes with a set of serial numbers. Save them. Write them down, or better still, use the Equipment file in InView to also save serial numbers for all of your software programs.

HINDSIGHT SOFTWARE MODULES

The HindSight software covered by this manual is available in a variety of configurations such as InView, StockView, InView & StockView and Studio Pack. You may have bought just one module or you may have sprung for the whole shebang. All the files, no matter which group they belong to, must be in the same folder! *Warning!* ♦

INSTALLATION

Installation varies slightly depending on your purchase and computer platform.. Procedures often change in order to make installation easier. Please refer to the separate Installation instructions that came with your software. Installation instructions are also located on your HindSight CD.

USE THIS MANUAL

We know, you don't want to and probably won't read most of this manual. That's your loss.

At the very least READ THIS CHAPTER. It explains many of the basics and features that apply to the entire program.

The software has many features you're never even going to know about and are going to struggle without if you don't read. You've invested in an excellent tool that represents thousands of hours of work to construct for you. Get the value of your investment by referring to this manual frequently.

Most chapters describe the specific file for which they're named. Each of these chapters starts with an overview of the file and its purposes. This is followed by a description of each of the file's windows and then its menus. Some files have significant features that are described in detail at the end of the chapter.

The back of the manual consists of a few utilitarian chapters. Be sure to note the one on Printing and Editing so you can modify reports like a champ.

USE WWW.HSLTD.US

HindSight has gone to great lengths to build a friendly and useful web site from which you can get a lot of value, but only if you look in on it once in a while.

The site has forums in which you can find answers, ask questions and pick up on tips about using this software. Updated versions of the software are posted from time to time with improvements and even new features. There are resources to help you find other sources of information on building or perfecting your own web site, registering copyright, buying a new computer and much more.

And, owners of a current release of HindSight software are entitled to be included in HindSight's FindAPhotographer.us. A directory being promoted in a variety of ways to serve as one more source of work for you.

LANGUAGE 101

If we're gonna work together we need to be sure we're speaking the same language. We'd like to assume that you already know how to use your computer and the system features. We're going to

Warning!

All the HindSight files must be loose in the same folder otherwise they'll be unable to find each other when attempting to exchange information.



cover a few basics here to be sure you know what we're talking about because it really helps. There is a limit though, so if you don't know about things like clicking and dragging, you need to refer to your system manual and get up to speed.

Following is a short, crash course reference to this manual's terminology and some of the most common menus and tools. Most are basics that you should familiarize yourself with.

MACINTOSH AND WINDOWS

This manual is written for both Macintosh and Windows users. For the most part, illustrations have been created on a Macintosh.

Although some screens and most menus have a slight variation in appearance, they are equivalent. In a very few instances we've noted the features that are not available on both platforms. The bigger issue is the use of certain keys to issue commands.

The Macintosh and Windows operating systems offer most of the same capabilities, but trigger them in different manners. It's therefore very important for you to know what we mean when we mention keyboard commands.

The illustration shows a Macintosh menu and a Windows menu. The Command key on Macintosh is equivalent of the Control key on Windows. This manual identifies them together as Cmd/Ctrl. For instance, Cmd/Ctrl-S is the keyboard command for Save. Macintosh users press Command-S, Windows users press Control-S.

The Option key on Macintosh is the same as the Alt key on Windows. They are identified together as Opt/Alt.

Select a Contact	⌘1
Select a Company	⌘`
Omit from Selection	⌘-
Select Tags	⌘0
Select Hot Notes	
Select Due Events	
Select Specified Events	
Find/Select...	⌘F
Find Next	⌘G
Change...	
Select All	⌘A
Select Duplicates	
Select Reverse	
Remove Unselected	

Select a Contact	Ctrl+1
Select a Company	Ctrl+`
Omit from Selection	Ctrl+-
Select Tags	Ctrl+0
Select Hot Notes	
Select Due Events	
Select Specified Events	
Find/Select...	Ctrl+F
Find Next	Ctrl+G
Change...	
Select All	Ctrl+A
Select Duplicates	
Select Reverse	
Remove Unselected	

The Macintosh does have a Control key, but it is not the equivalent of the Control key on Windows. It is matched by the Right Click on Windows. They aren't used often, but when they are they'll be identified as Cntl/RClick. *Reference*

When keyboard shortcuts are the same for both, the manual shows the one choice. Shift-Double-Click means the same on all computers; hold the shift key and double click.

Reference:

Cmd/Ctrl is
Command on Macintosh
Control on Windows.

Opt/Alt is
Option on Macintosh
Alt on Windows

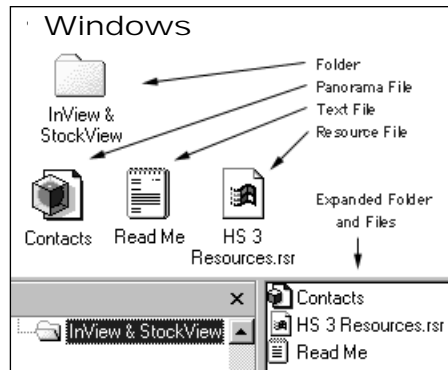
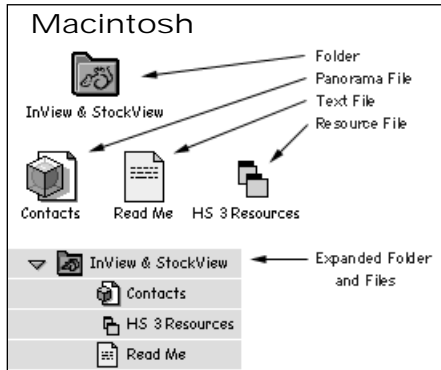
Cntl/RClick is
Control on Macintosh
Right Click on Windows

QUICK TERMINOLOGY GUIDE:

- Folder located on the your hard drive, it's a container for files and often other folders.
- File sometimes called a database or document, it stores certain information in a specific manner and often performs functions.
- Window a display area that shows all or portions of the contents of a file and often lets you enter information or make choices.
- Field contains one kind of information within a file such as the names or the phone numbers.
- Record an entry compiled from one piece of information from each field in a file, such as a person's name plus city plus phone number.
- Report a compilation of specific fields and calculations for viewing on screen and/or printing.

FOLDERS AND FILES

Knowing the difference between the folders and files is important. InView & StockView are collections of Panorama files. Contacts and Catalogue are some of these files. Typically files are kept in a folder to keep things orderly. Folders are containers for files and other folders.



WINDOWS

A single file may have several windows. Windows vary slightly depending on their purpose of the moment, but for the most part their parts remain the same.

Windows frame the environment in which certain information is displayed whether it's a graphic, a form to be filled in or a report to be printed.

Learning how to work with multiple windows is very helpful. Two or more windows from one file can be open at once so you can have different views of the same or related data. You can also open Windows from other files at the same time. *Tip* ♦



Tip: Only one window at a time is "active".


On Macintosh, the buttons for closing or are colored instead of greyed to indicate that a window is the active window.

On Windows, the color that you set in the Appearance panel of the Display Properties control panel shows which window is active.

TOOL PALETTE


Most windows have a tool palette at the far left side that you should familiarize yourself with. The tool palette changes depending on the window and the circumstances. On occasion you find Panorama's tool palette instead of our version. Graphics Mode is purely Panorama tools. Keep reading to learn more about these tools.

We won't provide a detailed explanation of each, but will give you a nutshell review of ours and theirs.

The Graphics Mode T-square and triangle tool is deactivated for entering Graphics Mode in all HindSight files. But Graphics Mode is accessible when there are forms to modify. 


In HindSight software, you go to Graphics Mode by typing, Cmd/Ctrl-Y, or choose Graphics Mode from the Windows menu.


To exit Graphics Mode, click on the Graphics tool. It does work for exiting Graphics Mode.


The tape reels, or Macro Recorder, is deactivated in all HindSight windows. 

Next are arrows, ours and Panorama's are shown, for scrolling through the records you have chosen to look through. Single arrows move you one record at a time, forward or back through the records. Double arrows take you to the first or last of the selected records. Your database might contain a thousand records but the scrolling only goes through those records that are selected at the moment.



The Delete Record scissors are for removing the active record. Ours and Panorama's are shown. Be sure you want to get rid of the record before you use this tool. Hold the Option key and click to side-step the "About to Delete..." warning. 






The L-shaped arrow, Add New Record tool, adds a new record to the end of the file. Ours and Panorama's are shown. 

The Print This Record icon is for printing one record, the active record, as it appears on your screen. No matter how many records are selected it only prints the one. 









Warning!
 These are not the same as Copy and Paste in the Edit menu. They deal with an entire Record at a time rather than a single cell, text string or graphic object.

The next tools only appear in Data Sheet tool palettes.

-  The Tab Down arrow toggles the Tab key between moving down or across in Data Sheet windows.
-  The two-faced, but happy, guy copies the entire record to the clipboard. ⚡ *Warning*
-  The Glue Pot pastes an entire record. ⚡ *Warning!*
-  The Insert Arrow inserts a new record above the active record.
-  The outline tools are used only if your database has Summary Groups. The first, Expand, expands only the active group. The second, Expand All, expands the entire database. The third, Collapse, collapses the active group. They are only available in the Data Sheet window.

Next are tools you encounter in Graphics Mode. These tools and others are covered in depth in the chapter on Printing & Editing Reports.

-  The T-square and Triangle gets you out of Graphics Mode. Yes, this looks like the Graphics Mode tool we said was disabled, but, when you are revising the look of your forms in Graphics Mode, it's the Data Mode tool and the exit.
-  The Pointer tool is used to select, resize and move graphic objects. This is the tool that's in your hand as soon as you enter Graphics Mode.
-  The Cross Hairs are for aligning objects.
-  The Magnifying Glass is to enlarge the display in Graphics windows for fine tuning. Shift-click to reduce the display.
-  The Text tool is used to edit Text. It has many features and capabilities.
-  The Tile tool creates tiles. It's also used to re-assign tile types.

COMPONENTS OF A FILE

If you don't know the difference between a file and a folder, turn back one page and look over the diagrams. An understanding of these terms and others is important in using your computer, period.

All files have a window called the Data Sheet which is the core of each file. The Data Sheet is where all the data in a file is displayed in rows and columns. Most files have additional windows which let you look at all or parts of the data in other ways also. Some files, such as Worksheet, have several windows for viewing and printing the file's contents. A few files have only one window and no access to the Data Sheet. Trust us, some things are better when you don't see it all.

Experts' Tip:
 Any file with an accessible Data Sheet lets you switch from the standard HindSight menus to Expert menus. While in the Data Sheet, the Windows menu toggles Expert and standard menus by holding the Shift key as you select About...(file name) The Expert menus give access to Panorama's full Search, Sort and Math menus. Save your data before experimenting with these menus, especially the Math menu. Math works on the active column and the active, or selected records and can easily change the entire content of the column. Use Revert To Saved when you need to go backwards.

Contacts							
Category	Value	Contact	Company	Address	City	State	Zip
Contact	3	Dan Jafee	Bookmark Press	5200 Rockhill Rd.	Kansas City	MO	6411
Client	3	Dave Beezley	PepCo Food Systems	6606 LBJ Freeway	Dallas	TX	7524
Prospect	1	Dave Houser	Popular Science	2 Park Ave.	New York	NY	1001
Client	2	Dave Wyland	Newsweek Magazine	251 West 57th Street	New York	NY	1001
Client	2	David Alpern	Newsweek Magazine	251 West 57th Street	New York	NY	1001
Prospect	1	David Friend	Life Magazine	Time-Life Building	New York	NY	1002
Contact	1	David Walker	Photo District News	49 East 21st Street	New York	NY	1001
Client	1	Debbie Bondulic	Newsweek Magazine	251 West 57th Street	New York	NY	1001
Prospect	3	Deidre Shymanski	McCann-Erickson Worldwide	201 California St.	San Francisco	CA	9411
Client	2	Denise Stramel	Solbourne Computer, Inc.	1900 Pike Road	Longmont	CO	8050
Vendor	3	Dennis	Dennis Laminating	17 West 20th Street	New York	NY	1001
Subject	2	Dennis Banks			Sante Fe	NM	
Contact	3	Diana Walker	Time Magazine	1050 Connecticut St.	Washington	DC	2003
Contact	3	Diane Skurky	U.S. Senator Ben Nighthorse	1129 Pennsylvania St	Denver	CO	8020
Contact	2	Dick Weisgrau	ASMP	14 Washington Road	Princeton	NJ	0855

In the Data Sheet each horizontal row represents one entry, a Record, in that file. Each vertical column of information is a Field. For example: Address, City, and State are individual fields which can contain different information from record to record. The point at which a record and a field intersect is a cell. A cell holds one piece of information. For instance a City field has different cities listed, one for each record. A single city name, such as Chicago, is in a cell which is listed in the City field of a particular record. ⚡ *Tip*

A Data Sheet often has much more information, more fields, than you can fit across even the largest screen. You can select and view all records or only some of the records, but each record in the Data Sheet shows all the fields in horizontal rows. You can split the Data Sheet window into two scrollable sections making it possible to simultaneously see columns that are actually far apart in the data sheet row.

The column width and window splitter arrangements, when saved, are remembered and in the same place the next time you open that file.

SPLITTER BAR

In the Data Sheet only, (the next section of this chapter tells about the Data Sheet) the window can be split into two synchronized windows. The result allows you to simultaneously view fields that are otherwise too far apart from one another to view at once.



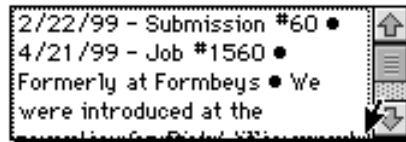
RESIZING FIELD WIDTH

In the Data Sheet only, a field's width is adjustable. Move the cursor up to the top of the window where you see the field's title. When the cursor converts to a double tipped horizontal arrow, depress the mouse button and drag right or left to expand or reduce the width of the entire column.



EXPANDING CELLS

In the Data Sheet only, resizing field widths makes it difficult to see the contents of cells in the data sheet. An opened cell can be expanded to any size you desire so you can see all of it's contents. When you enlarge it enough, it gains a scroll bar.

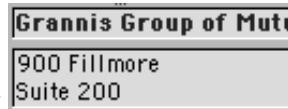


Cells are enlarged by moving the cursor over the lower corner of the cell. When the arrow inverts, you're over the spot on which to click and drag the cell to its new dimensions. Although it's always a bottom corner, the left or right depends on the justification of the cell. On right justified numbers it's the lower left. On left justified text it's on the right.

TAB, ENTER AND RETURN

Obviously one way to get from one place to another within a window is to use the mouse to click on wherever you want to work. But as you enter data, knowledgeable use of the keyboard can greatly aid the process. When you've entered data in a cell, the Tab key closes the cell and moves to the next cell in the sequence opening it for your input. On Macintosh, the Enter key closes any size cell too, but remains in that cell instead of moving on. The Enter key on Windows closes a single line cell but will Return to the next line on a multi-line cell.

If a cell is only a single line high, the Mac's Return key can be used to close the cell, but in cells more than a single line high the "Return" key will add lines within the cell. For this reason, the best habit to develop is use of the Return key when you want a carriage return within a cell and the Enter (Macintosh only) or Tab key for closing a cell.



Cells can also be closed with a single mouse click elsewhere in the window.

BUTTONS

Buttons are on-screen objects that trigger an action when you click on them with the mouse. Some buttons trigger popup menus, that is, as menu that opens within the window as opposed to the drop down menus in the menu bar at the top of the screen. Buttons with popup menus are marked with a downward pointing triangle.



CURSOR ICONS

In addition to the inverted triangles to differentiate a popup menu from a standard push button, as you move the cursor over a button it changes to illustrate what's what. When over push buttons, the cursor is a hand with a pointing finger. Over popup menus it converts to a menu icon. If you look closely, the menu icon often has a pattern of dots on it. These dots indicate that the keys can alter the built-in functions. The Dynamic Help system and the manual describe these alternative behaviors on a case by case basis.



WINDOW SIZES

What you see on one computer may be very different from what you see on another. So don't be surprised if it looks different on your portable than it did on your 54" MaxySink monitor. InView & StockView assess your monitor size and color and open windows according to what they learn. On a big monitor windows open in various regions of the screen and some never have scroll bars. On a 9 inch B&W monitor, the buttons shift to black lines on white and most windows have either vertical or horizontal scroll bars to provide access to hidden parts of the window. Some monitors, such as a portable grayscale screen wind up with a little of each.

WINDOW COLORS

As you move around within InView & StockView, you're bound to notice a lot of gray. Nice metallic look, don't you think? Well gray might be easier to live with than chartreuse, but if you prefer lilac or red, it's yours. Virtually every data entry form in InView & StockView has customizable colors. Printing forms and dialogs do not contain this chameleon trick.

BACKGROUND COLOR

To change the background colors of a window, hold the Opt/Alt as you double-click anywhere on the background area of the window. The software isn't real picky about where you click, just miss the buttons, cells and other window components. Your double-click is rewarded by the System Color wheel. Pick a color, any color, and then click OK. Do you like that. No? Then try again. There's no limit to how many times you can change the colors, so experiment with the hue and saturation.

CELL COLOR

The color behind the data entry cells is adjustable too. Hold the Cmd/Ctrl key and double-click on any part of the window's background and you're in the color wheel again.

PRIME TEXT COLOR

These same windows have colored text in them. This text is the Prime text. It represents what's likely to be the more important information and the color should be used to draw your eye to it. If you'd like a new color for this text Cntl/RClk-double-click on the background.

The remaining elements, the other text and the buttons are not able to be re-colored.

DEFAULT COLOR

OK, so you've played with the colors for a while and now you just want to start over. Or all of a sudden you decide gray wasn't so bad after all. It's not our default, we knew this could happen. No problem though, hold the Shift key and double-click on the background. You're back to safe gray and blue Prime Text.

NAVIGATING FROM FILE TO FILE

Throughout InView and StockView, most actions can be initiated by the keyboard or, if you prefer, the mouse. Using the mouse lets you explore the menus and buttons fully before making a choice. Keyboard commands let experienced users, those familiar with the menus and buttons, move around more quickly. ♦ *Tip*

The Flow Chart serves as a home base and quick reference diagram of the organization of HindSight software. It also provides immediate access to individual files while in any other HindSight file. The Flow Chart is selected by either using the mouse to drop down the Windows menu or by typing Cmd/Ctrl-H. Flow Chart allows you to open any other HindSight file simply by clicking on the button bearing its name.

You can also open files by choosing Open File from the File menu or using the keyboard command, Cmd/Ctrl-O. Either opens a standard dialog box that lists the files available to you. In this dialog box you use the mouse to scroll to the name of the file that you want to open or on Macintosh, type the first few letters of the file's name and the list will automatically scroll to that choice. When you arrive at, and highlight your selection, click Open or press the Enter key or double-click on the file name and the file you chose opens.

Several files have the names of related files listed in their Windows menu, often with a keyboard command listed at the right. This makes it simple to access the files that relate to the task at hand.

Tip: Explore the menus. Notice that keyboard commands are listed to the right of menu items for quick reference until they become second nature.

MENUS

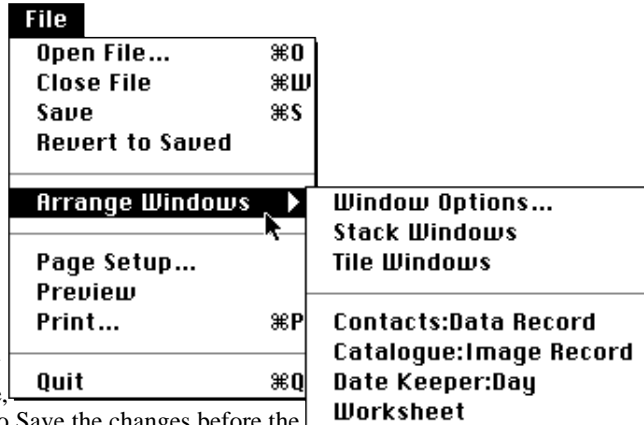
SPECIALIZED MENUS

In addition to the standard menu described below, each file has menus designed specifically for its features and contents. We discuss the special functions of those menus in the chapters that apply.

FILE

OPEN FILE...

Open File is an easy way to get from one file to another. It's an alternative to using the Flow Chart. Choose Open File or type Cmd/Ctrl-O and a dialog box opens listing files and folders. Locate the file you want and click Open.



CLOSE FILE

Close File closes the active file. The name of the file is at the top of a window, left of the colon. All open windows with the same name left of a colon are closed. If you've made changes in the file, you're always asked if you want to Save the changes before the file closes. Cmd/Ctrl-W closes the whole file. Not just a window, but every window that belongs to the file with the active window.

SAVE

Save preserves the active file by writing everything about it onto your disk. Your work is safe only when it's been Saved to disk. When you are entering lots of new data or anytime you do something worth preserving, use Cmd/Ctrl-S or choose Save from the File menu. Save replaces earlier versions of a file.

REVERT TO SAVED

Revert to Saved refers to the disk for the file as it was when you last used Save. Any changes you've made since that last Save are cast aside and the file as seen on-screen is restored to its former self. That's good if you made mistakes or tried experimenting with graphics and want to get back to where you were before. That's bad if you just entered 200 new contacts without saving.

ARRANGE WINDOWS

Arrange Windows provides Panorama Window Options followed by a list of any open files and windows. This list is a quick access to a file or window that is buried behind others. Choose a window from the list and it comes to the top of the heap. *Note* ▶

PAGE SETUP...

Opens the dialog box that allows you determine some aspects of how a program and your printer work together. What you see depends largely on the printer's software driver.

PREVIEW

Preview opens a window that displays a picture of the current window or report exactly as it will print. When trouble shooting a printing problem, this is the way to find out what the software is instructing the printer to produce.

PRINT...

Opens a dialog to initiate printing. Usually, all selected records are included in the printout.

QUIT

Quit shuts down Panorama and takes you to the Desktop. Any InView or StockView files that are open are closed in the process. If files have been changed since the last Save, you're asked if you want to Save those changes.

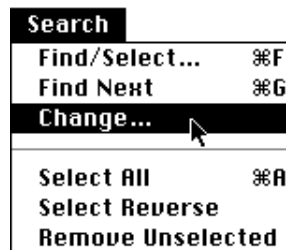
Note:
In Panorama 5.5, Arrange Windows has been replaced by a separate Window menu which serves the same purpose. Don't be confused by it and the Windows menu found throughout InView & StockView. In future versions the Windows menu will, by necessity take on a new name.



SEARCH

The Search menu is for locating specific information. In some files a few of the selections in this menu are highly specialized. Others let you construct the parameters to be applied in a search.

Take time to read the Finding Information section at the end of this chapter to learn about its features. Knowing how to use it makes a big difference in your Search and Select tasks.



FIND/SELECT...

Find/Select.. opens the standard Panorama selecting dialog box. With it you can search any data field for any sort of criteria.

FIND NEXT

Find Next resumes scanning for matches after Find is used. It picks up where the Find left off and scans the selected records for the next occurrence of the data you are locating. Following a Find command, use it repeatedly until no further matches are found; indicated by a beep.

CHANGE..

Change.. opens a dialog that lets you to enter data the way it is now in a field and the way you want it to be instead. The change affects the highlighted or active field, when Change is activated. Change only affects selected records.

Don't overlook this powerful tool. In a flash it can convert just the right records among thousands to a new area code or correct a misspelled city. Change is described in more detail at the end of this chapter.

SELECT ALL

Select All selects every record in the file. If you're in a Record window, only one record shows, but the record count at the bottom of the window shows how many are selected. In the Data Sheet, or any list view, you can see the full set of records in your file.

SELECT REVERSE

Select Reverse flip-flops a Select. Currently Selected records are Unselected and the Unselected become Selected.

If you had All records Selected, there's nothing to reverse, so you end up with the same selection. This feature is useful on those occasions when it's easier to pinpoint and select the records that you don't want rather than those you do want.

REMOVE UNSELECTED

Remove Unselected deletes every unselected record from the database. Use this menu choice with caution. When records are removed they cannot be recovered in any way except Revert to Saved or by closing the file without using the Save command.

Keep backups on hand.

SORT

Sorting arranges any field in either alphabetical, numeric or chronological order.

SORT UP

Sort Up sorts the active field alphabetically, numerically or chronologically, as fits the case, in ascending order.

SORT UP WITHIN

Sort Up Within sorts the active field alphabetically, numerically or chronologically, as fits the case, in ascending order while leaving earlier sorts intact.

**SORT DOWN**

Sort Down sorts the active field alphabetically, numerically or chronologically, as fits the case, in descending order.

SORT DOWN WITHIN

Sort Down Within sorts the active field alphabetically, numerically or chronologically, as fits the case, in descending order while leaving earlier sorts intact.

GROUP UP

Group Up divides the selected records in the database into Groups sorted in ascending order. A special Summary Record is inserted at the end of each Group.

REMOVE SUMMARIES

Remove Summaries removes the Summary Records created by Group Up. No real data is removed.

FONT

This menu appears in reports throughout InView and StockView to set the report to one of a limited selection of Fonts. (*See EZ Graphics in the chapter on Printing and Editing Reports.*)

MARGINS

The Margins menu provides controls over the Top, Left and Bottom margins of reports. (*See EZ Graphics in the chapter on Printing and Editing Reports.*)

COMPANY INFO

The Company Info menu appears in selected reports to easily create letterheads. (*See Company Profile in the Flow Chart chapter and EZ Graphics in the chapter on Printing and Editing Reports.*)

FUNCTIONS

The Functions menu is the menu you'll use for many of the tasks within a file. It's choices change completely from one file to another. Selections here manipulate the data in that file.

WINDOWS

The Windows menu offers different ways of viewing the data in a file. It also lists names of related files attached to the file that you may want to open.

TRANSFER

The Transfer menu is only found in the Contacts and Catalogue files. It does exactly as the name implies, transferring data from one file to another.



AUTO DIALING

The dialing popup menu appears in many places throughout InView & StockView files. With a modem properly connected, dialing a number is very simple. Click and hold on the receiver icon. A menu pops up listing your dialing choices. On Macintosh besides a modem it can dial calls using Vonage, Skype and others, even on a wireless internet connection.

PREPARATION

There are some requirements to make dialing work.

To dial numbers on Macintosh, you need to download and install Jon's Phone Tool. At this writing it's a \$15 program available at <http://homepage.mac.com/jonn8/jpt/>. It runs as a free demo for 14 days.

Installation is simple. See their instructions, but it involves nothing more than dragging the 3.8 MB program to your Applications folder.

In Jon's Phone Tool, click on the button for the Preferences. In the Dialing Rules, be sure that all Dial Method settings are set properly. If you have a phone line plugged into your computer, you want Modem.

In most cases that's it although you may find other uses for this software, such as dialing a number from a web page. Please see the User's Guide for Jon's Tool for more information.

You should now be able to dial numbers directly from Contacts whether you have standard or internet phone service

If you don't have Jon's Phone Tool installed and you attempt to dial a number, you'll see a spinning beach ball for a few moments, then you'll be asked to locate Jon's Phone Tool. Click Cancel.

To dial phone numbers via modem on Windows, you need to download and install Phone Dialer Pro. It's a \$30 shareware program available at <http://www.phonedialerpro.com/>

After installing go to Dialing Options and be sure that "Enable Copy as a Dial Command" is checked.

OPERATION

When you make a dialing selection, a dialog window appears on screen as the modem dials. When you click OK the modem goes off-line, hangs up. If you click OK before dialing is completed, the call is canceled. If you click OK after dialing is completed, but before you pick up the phone, the call is cut short.

Your mission is to pick up the phone during or immediately after the dialing. Once you're on the line and dialing is finished, click OK to get the modem off the line.

Note: In all but the Contacts and Task Timer files, dialing is limited to the first phone number listed for the Contact. (See the Contacts and Task Timer chapters for info on their expanded abilities.)

DIAL...

Dial... opens a dialog showing the contact's phone number as the auto dialer is prepared to dial it. The number is the same as the number on the second line of the menu. If you need to make a quick and temporary change in the way the number should be dialed, make the changes here and press OK. The auto dialer dials the modified number.

1 (123) 456-7890

The second item in the popup menu is the contact's number as it is about to be auto dialed. This is an educated guess; a calculated number derived by comparing the contact's area code to the Local Area Code entered in the Flow Chart Dialing Preferences. If the area codes do not match, it's assumed to be a long distance call.

LOCAL

If the auto dialer is offering a long distance combination in the second line of the menu, this over rides it and dials only the local number. Assuming you have the correct Local Area Code set for your home, using this is likely to be necessary only if you're traveling with a laptop and have not updated the Local Area Code to your present location.



L O C A L W I T H A R E A C O D E

For areas where you must dial an area code for local calls, (ten digit dialing) without using a 1 or other long distance prefix, Local w/Area Code dials just the Area Code and the Phone Number.

L O N G D I S T A N C E

If the auto dialer is ready to dial a local call, but the call is actually long distance, this overrides and adds the Long Distance Prefix and the Area Code to the number. This is for situations when a call within your Local Area Code is actually long distance.

F O R E I G N

Foreign calls always require an override. This selection causes the auto dialer to replace the Long Distance Prefix with the Foreign Long Distance Prefix.

D I A L I N G P R E F E R E N C E S

Dialing Preferences opens the Flow Chart Dialing Preferences window so you can check or change the settings.

E X P O R T F A X T E X T

The Contacts file has the ability to export data for use in a fax/modem phone book. It can include all Contacts, or just a set of Contacts that you've pre-selected. The feature is accessed by clicking on the button for selecting the dialing mode. Depending on the current setting for the dialing mode, this is usually depicted as a telephone icon just to the left of the receiver icons used for dialing the phone. The bottom of this popup menu lists "Export Fax Text".



S P E L L C H E C K I N G

While you're editing a cell, meaning the cell is active, the edit menu adds the option to check spelling, Cmd/Ctrl-I. Click to insert the cursor at the point from which you want the spell checker to begin checking and press Cmd/Ctrl-I. The spell checker scans the cell and highlights the first suspect word that it finds.

On Macintosh, hold both the Control and Option keys and click on the highlighted word.

On Windows hold the Alt key and Right click on the highlighted word. A popup menu appears listing possible substitutes for the misspelled word.

If you choose one from this list, the suspect word is replaced by your choice. Press Cmd/Ctrl-I to resume scanning the cell. The spell checker stops when it reaches the end of the cell.

If you have a word that you're uncertain of, rather than having the whole cell scanned, double-click on, or drag across the word to highlight it. As before, on Macintosh, hold both the Control and Option keys and click; on Windows hold the Alt key and Right click to get the list of suggestions.

The spell checker is dependent on the Panorama Dictionary being in the same folder as Panorama.

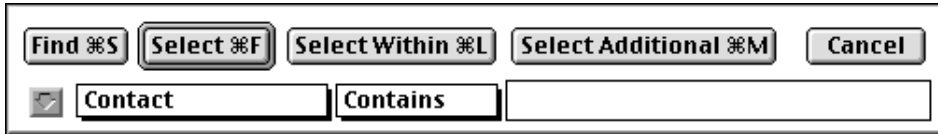
Note: The dictionary is not user editable.

FINDING INFORMATION

Searching is one of the strengths of InView & StockView due to Panorama’s powerful searching abilities. But a tool is only as good as the workman using it and software is no exception. Although you may have considerable amounts of data entered into your files, its value is based on your ability to find it again.

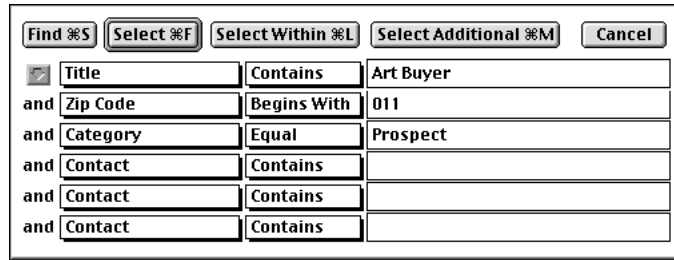
Most searches use the same search dialog window.

In this example we’re about to search for a Contact whose name CONTAINS whatever we type into the third spot in the window. We can search for a Contact whose name contains “Smith” and get several matches. We can search for a Contact whose name contains “iam Smi” and find every William Smith in the file. If someone has a unique combination of letters in their name, we can enter just those letters to find them. Then too, there’s the marvelous help of Clairvoyance. If you start typing the name from the beginning at some point it will be recognized and completed.



By clicking on the arrow at the left side of the window, the search window expands to give you more search options. Clicking where it said “Contact” produces a menu of the fields that can be searched. Clicking on “Contains” produces a menu of the ways we want the data compared to produce a match. In this example, we’re going to select all entries for buyers, in the Springfield area, who are listed as Prospects.

Clicking on the word “and” changes it to “or” which also adds new implications. And means a record has to satisfy all the lines of criteria to be selected. Or means a record has only to match any one of the criteria to be selected.



The illustrated search for Prospects who are buyers in the Springfield area is very different if set to or. It would result in everyone who is a buyer regardless of location plus everyone whose Zip Code begins with 011 and everyone who is entered as a Prospect. The result doesn’t come close to the desire.

An attempt to select people whose 1st area code is 212 and whose 1st area code is 617 isn’t going to work since no single area code can be both. Changing it to 212 OR 617 is going to select those who satisfy either qualification.

When your search is ready click on the Select button to have the entire file checked for matches.

Play with the searching while in the Data Sheet view so that you can easily observe the results. You’ll harm nothing, but will learn to use a very valuable tool. *Tip* ♦

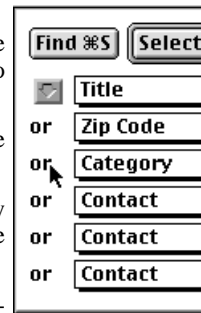
Whenever you conduct a successful search. The result is referred to as the selected set of records. Many windows display a record count in the lower left corner showing how many records are currently selected out of the whole database. Unselected records aren’t gone, they’re just hidden from view until called up by another selection or a Select All. *Tip* ♦

The Find, Select, Select Within and Select Additional buttons all add further and powerful controls over selections.

1 of 247 Selected Records/3518 Total in Contacts

Find scans only the currently selected records for the first match, but does not select or un-select any. After selecting everyone in New York, you can use Find to locate the first Editor among them. Find Next, in the Search menu, then locates the next Editor and the next and the next and so on. The whole time your selection of New York stays put.

Select Within searches only the already selected records and reduces the selection to just those that match your criteria. Using the New York selection above, using Select Within on Title for Editor or Publisher narrows the selected set of records to just editors and publishers in New York. It ignores those that weren’t already selected.



Tip: It’s not necessary to Select All before searching. When you click Select all records are included in the search.

Tip: Select Reverse, in the Search menu, hides the selected records and shows the unselected. This is very useful since sometimes it’s easier to select the ones you don’t want, the reverse the selection.



Select Additional retains the currently selected records and adds any others that match your criteria. Once again using the New York selection above as a starting point, using Select Additional on Title for Editor or Publisher adds all editors and publishers regardless of their city to the records already selected for New York. It now shows all editors, publishers and New Yorkers.

These searches can be conducted one after another to very finely hone your selections.

Although we've used Contacts as the demonstration file these same principles apply in Catalogue for searching through image data and in virtually every other file in InView & StockView

CHANGING INFORMATION

Sooner or later you're going to want to convert a whole lot of information to something else. For instance, maybe you discover your assistant has been logging all your Yonkers clients in as Yonckers. Or after entering babies on thousands of images in your Cross References, you decide to use baby. You may even need to substantially reword something entered in a gazillion records. Surely you'd rather not retype it all.

Often referred to as Find and Replace, we offer Change, located in the Search menu.

Change affects all the selected records in a specified field. Within the field it can be used for changing all occurrences of a single word, a phrase or an entire paragraph in all the records containing the information you're changing.

Most of the time you can start by doing Select All. It's okay if you have records selected that don't contain the information to be changed. They're unaffected since they won't match the change criteria.

In some cases though, you may not want to change everything that does meet the change criteria, such as a change of Area Code for only particular Zip Codes. In these cases you should first select only those that need the change. Or, if it's easier, select those that need to be shielded, then do a Select Reverse.

Since the change is only applied to data in the active field, it's important to let the software know which field the change is to be performed in, so click into any cell within the desired field. If you accidentally change Yonckers to Yonkers on a phone number field, there's no harm done, but there's no change either.

Go to the Search menu and choose Change.

The Change dialog has two major parts, From: and To:. In the From side of the window, enter or paste the text to be changed. On the To side enter what it should be changed to.

Your entry in From must accurately match whatever it is you wish to change. *Tip*

Enter enough in the From that entries not meant to be changed don't get caught by accident. For instance changing man to male may unintentionally change manager, workman, manufacturing, Kathmandu and, well, you get the idea.

The Replace Entire Words

Only option can help relieve the pressure. It makes sure that only full words get changed, not pieces within words that happen to match what you've entered.

Adjust Capitalization determines whether or not the change is applied according to case. With this option off, only entries with matching case are altered. With Adjust Capitalization on, all matching entries are changed regardless of case and their new condition is adjusted to match the case of their previous condition.

Tip: Sometimes what you're changing From may be a bit complex to remember and/or retype accurately. Consider using Copy in the Edit menu before choosing Change. Then you can Paste it into the Change dialog.

WINDOWS TO MAC TO WINDOWS AND BACK

Your InView & StockView files can be run on either Macintosh or Windows operating systems as long as you follow a few simple rules.

You must first have the appropriate version of Panorama installed on any computer on which you intend to use InView & StockView. Panorama for Macintosh does not work on Windows and vice versa. Every computer requires its own registered copy of Panorama.

WINDOWS

To run on Windows, InView & StockView files must have the appropriate suffix added. The suffix identifies the type of file so Windows knows how to deal with it. In most cases this is ".pan", but some files such as those inside the Form Letters and the Terms & Conditions folders require a ".pwp" suffix instead. Conversion from Mac to Windows is as simple as adding these suffixes correctly.

The HS Resources involves more than just the addition of its ".rsr" suffix. It requires an internal conversion. Fortunately, you don't have to perform this surgery. There are a few options for you. You can use the Platform Converter described below, you can grab a copy from the Windows formatted portion of the HindSight CD or you can download just the resource file from the Downloads section of our web site at <http://www.hindsightltd.com>.

MACINTOSH

On Macintosh, the suffixes are not necessary, but InView & StockView files bearing Windows suffixes run just fine as long as they ALL have the suffix. If you have some with a suffix and some without, the files won't find each other.

Instead of a suffix, Macintosh files bear a hidden identifier for the OS to recognize how to handle them. InView & StockView files that have been saved on a Windows formatted disk no longer have their file type intact. In this case they must be run through the Platform Converter described below. Expert users can use utility programs such as ResEdit or Snitch to re-install the File Type and Creator.

Warning! Versions of Panorama prior to version 3.5 can not properly run InView & StockView files with Windows suffixes attached. Once the files have been opened and saved on a Windows OS computer they cannot be run at all on Panorama 3.1.5 or earlier.

MIXED ENVIRONMENTS

In a mixed environment where you want to readily open InView & StockView files on either platform via network connections, save them on a Macintosh computer with all the Windows suffixes in place and with the HS Resources saved in both its Macintosh and Windows formats. Both platforms can successfully open and save files located on a Macintosh drive.

At this writing, PC MacLAN is the networking software of choice to put Windows computers onto a Macintosh network. Dave is the software to use for putting Macs onto a Windows network. Over time our recommendations may change so be sure to check in on our web site for the most current advice.

Moving files back and forth via an ejectable disk requires use of the Platform Converter. This is due to the fact that although Macintosh can read Windows formatted disks, Windows can't read a Macintosh formatted disk. Since Windows doesn't recognize some of the parts associated with the Macintosh files, the files cannot be saved on a Windows formatted disk and still retain their functionality on Macintosh.

Note: Opening files over a network is not the same as a multi-user configuration. Network usage in this manner only allows one computer at a time to access any given file.

PLATFORM CONVERTER

Included in the HindSight Extras folder is a utility file named Platform Converter. This file can change the file type identifications and formats of files that are being switched from use on one platform to the other. Going from Macintosh to Windows it adds appropriate suffixes. Going from Windows to Macintosh it imbeds the File Type and Creator. In both instances it converts files, such as the HS Resources file, as necessary.

The Platform Converter and its use are quite likely to go through changes as new operating systems are released. Updated versions and instructions are posted on the downloads section of our web site.



WHERE TO BEGIN

Now that you have the basics under your belt, you're ready to start using your new HindSight software.

At least in the beginning, the file named Flow Chart is your best entry point. To make it easier to access Flow Chart, you can make a short cut available on your Desktop.

On Macintosh, locate Flow Chart in the folder, then drag it to the Dock on your Desktop. It needs to be placed on the same side of the Dock's divider line as the Trash icon.



On Windows, right click and drag the Flow Chart icon to the Task bar. Make a Shortcut there instead of Copy or Move.

On either platform, the Flow Chart icon is now your quick doorway into InView & StockView files.



See the next chapter to learn about how Flow Chart serves as your navigational center for accessing InView & StockView components as well as the place to establish and save your preferences for the programs.

SET UP YOUR PREFERENCES

You can start entering data immediately in files such as Contacts, for your names and addresses, or in Catalogue where all of your image data is stored. Before going too far though, be sure to go to the Preferences menu in Flow Chart. For printing reports, consider filling out the Company Info which can be used to create letterheads. If you work with digital images, be especially sure to go to the META Preferences and fill in the default information.

The chapter on Flow Chart comes next for good reason. We want you to learn about it ASAP.

