

FLOW CHART

The Flow Chart is a quick reference to the structure and relationship of all the components of HindSight software. Flow Chart is in the Windows menu of every HindSight file or use Cmd/Ctrl-H to open it. Think of Flow Chart as your “H”ome. When Flow Chart is open you see buttons with the names of files. These buttons access the files.

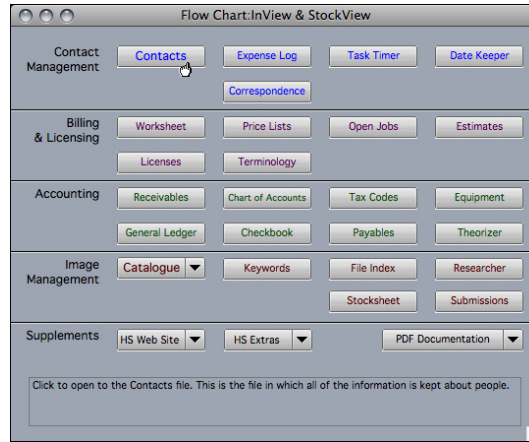
Flow Chart is also involved behind the scenes, directing the behavior of the other InView & StockView files. It has the Preferences settings that control many features for a number of the files.

If you move some of your files to another computer, for instance, to your laptop to use on the road, be sure to include Flow Chart. Without it, many of the files do not function normally. *Tip* 📌

Some of the buttons shown here may not be displayed when you open Flow Chart. The exact display depends on what components you have licensed.

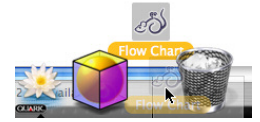
Each button represents one of the InView or StockView files. Click on any button to open that file.

Note: The Catalogue button is a popup menu. If you used the Catalogue cloning feature, this menu uses the File Index to provide a listing of those files. Choose any one of them to open it.



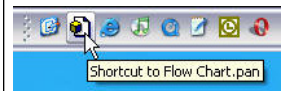
Macintosh Tip:

You can drag Flow Chart, or any other InView & StockView file, onto the Dock to create a quick access. OS X requires that it be placed on the same side of the divider line as the Trash.



Windows Tip:

You can drag Flow Chart, or any other InView & StockView file, onto the Task Bar to create a quick access.



HS WEB SITE

This popup menu offers two options, both using your web browser to go to the HindSight web site. One goes to the Support page, the other logs in to your account page.

HS EXTRAS

Your InView & StockView folder contains a folder of extra items. This menu lists and accesses them.

PDF DOCUMENTATION

InView & StockView documentation is included in PDF form. PDF files in the PDF Documentation folder or in the InView & StockView folder itself are listed and accessed via this popup menu

METAMACHINE AND PRICE GUIDE

If you own either METAmachine or Price Guide - and they are in the folder - buttons to access those files also appear in this navigation window.

RELATIONSHIP OF FILES

InView and StockView are sets of relational data files. Each file holds specific information and is designed to carry out certain tasks. Some, like the Equipment file, keep their information pretty much to themselves, while others share generously with other files. The Correspondence file draws the salutation and address for a letter from the Contacts file. In turn, the Correspondence file can send a note about the letter to the person's record in the Contacts file. *Warning!* 📌

MENUS

WINDOWS

INVIEW & STOCKVIEW

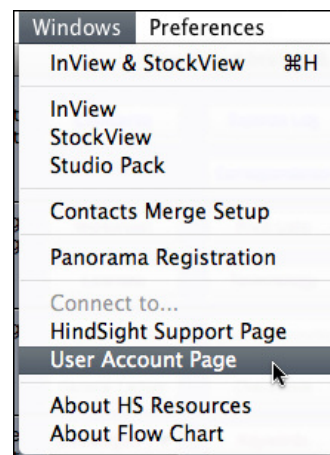
INVIEW

STOCKVIEW

INVIEW STUDIO PACK

The first four items in this menu show the available configurations of InView & StockView. Each goes to a similar navigation window, displaying the buttons to access the files in that set.

You are automatically presented with whichever one represents file set you have licensed but can view any of them.



Warning!

Because HindSight files are designed to share and exchange, the files look for each other by name, within the folder with all the other HindSight files. Changing a HindSight file name, even a little bit, like adding a word or even a space before or after its name or renaming it, breaks the relational links and the software is unable to perform all of its functions properly.



CONTACTS MERGE SETUP

Contacts Merge Setup opens a specialized window for merging different copies of Contacts files. Use of this window is covered at the end of the Contacts chapter.

PANORAMA REGISTRATION

To access your registration information on Panorama, choose this.

HINDSIGHT SUPPORT PAGE

HindSight Support Page uses your web browser to go to HindSight's Technical Support.

USER ACCOUNT PAGE

User Account Page logs on to your HindSight account for downloading updates, modifying your account information or otherwise managing your account.

ABOUT HS RESOURCES

Use this selection to check on the version of your HS Resources file. It's the source of menus, dialogs and graphics used by InView & StockView.

ABOUT FLOW CHART

About Flow Chart opens the HindSight Splash screen and provides the creator and copyright information for the Flow Chart. The lower right corner displays the version number for your set of HindSight files.

PREFERENCES

COMPANY PROFILE

The Company Profile is designed to hold information about your company. InView and StockView make use of this information in many printed reports.

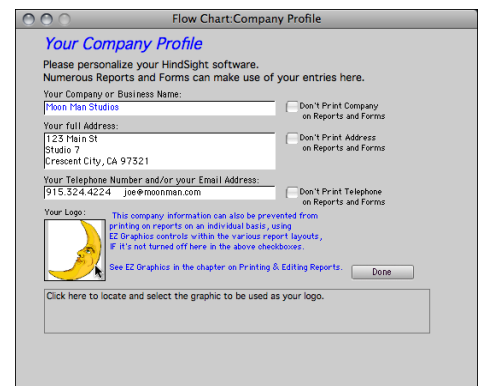
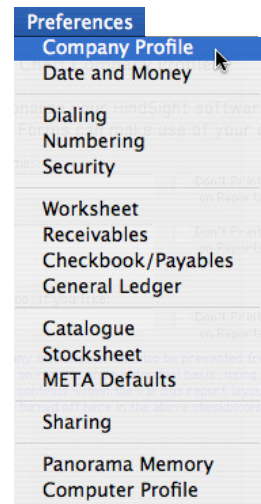
With Company Info information and EZ Graphics you can design letterheads entirely through menu driven commands. *(See EZ Graphics in the chapter on Printing & Editing Reports.)*

Enter your company information wording in this window as you want it to appear wherever you use it. Don't worry about fonts and type styles, those are controlled in the individual reports.

The checkmarks here turn off one part or another of the Company Profile universally. In order for any specific part of the Company Profile to be available to other portions of the program, the boxes on the right must *not* be checked.

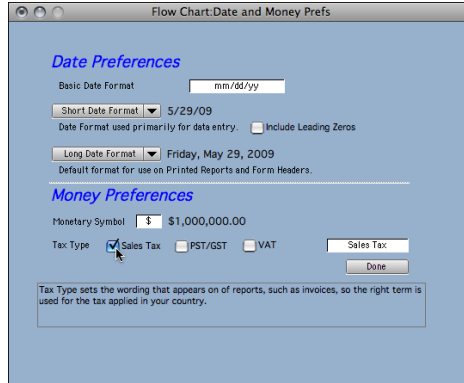
If the Company Profile is activated here, it can be turned off on a case-by-case basis using the Company Info menu in the various reports. If any part of the Company Profile is turned off here, it cannot be activated within the report forms.

Note: Most reports have the Company Info off when shipped. To activate Company Info be sure it is turned on (*unchecked*) here. In each report that you want the Company Info activated, choose All Company Info in the Company Info menu, then from the same menu choose On.



DATE & MONEY

The Date and Money Preferences make InView & StockView suitable for international use by letting you fine tune the date format and monetary symbol to be used throughout the programs.



SHORT DATE FORMAT

The short date allows you to set the separator to be used between the digits in the abbreviated mm/dd/yy or dd/mm/yy date format set in your Date and Time control panel.

LONG DATE FORMAT

The Long Date is most often used in printed reports and can be set to include the day of the week.

MONETARY SYMBOL

Enter a \$, £, F,Y or whatever symbol you wish to have printed with monetary values.

TAX TYPE

InView defaults to the use of Sales Tax as the tax added onto invoices, when appropriate. If your country utilizes a Value Added Tax instead, check the Value Added Tax box. Although the program still refers to Sales Tax on your screen, all printed invoices use the selected wording.

DIALING

Throughout InView & StockView are telephone receiver icons for dialing the phone. In order to auto dial intelligently, InView & StockView need to know certain things. This window is where you set the parameters for dialing no matter where you are in InView & StockView. *(See the Getting Started for details on using the auto dialing.)*

LOCAL AREA CODE

Enter your local area code here so the dialing function knows whether or not you're making a long distance call. If you travel with your laptop, change the area code to the area code where you are at the moment. You can change it as often as necessary to stay current.

DIALING PREFIX

If you need a dialing prefix to disable Call Waiting or to get through a hotel switchboard to an outside line, enter the prefix here. Use commas for pauses. Each comma adds approximately a two second pause. The dialing prefix is added to the beginning of everything you auto dial.

LD PREFIX

For long distance calls that don't match your local area code, the dialing function adds the entry you make here to the dialing sequence.

Note: With auto dialing you can always override the software's choice that a call is long distance or local. For instance, the dialing function assumes a call in your Local Area Code is local, but the dialing menu offers the option to dial it as a long distance call if necessary.

The dialing sequence for this choice is the Dialing Prefix , if any, the LD Prefix, the Area Code and the Telephone Number.

FOREIGN LD PREFIX

To auto dial foreign calls, enter the prefix for your particular telephone carrier. The dialing function can not distinguish between in-country long distance and foreign calls. To use the Foreign LD Prefix you must choose Foreign from the dialing menu.

The dialing sequence for this choice is the Dialing Prefix , if any, the Foreign LD Prefix, the Area Code and the Telephone Number.

ALWAYS USE AREA CODE

In some localities it's necessary to always dial the area code even for local calls; "Ten Digit Dialing."

PORT

The Port buttons make it possible for you to select the port your modem is connected to. Most of the time your modem is connected to the modem port. Internal modems usually have a modem control panel that lets you select the internal modem. In that case you set Modem Port in the Dialing Preferences here.



DIALING MODE

Dialing Mode determines whether the dialing is sent to a modem using tones or pulse. Tone is usually used. Verbal sets your computer to speak the number out loud rather than dialing the modem. As you punch the numbers into your phone the computer recites them.

Audio generates tone dialing through your computer’s speaker. Hold the phone receiver close to the computer’s speaker and hope for the best. It often works well. This setting, however, is intended for use in conjunction with desktop dialers. If you don’t know what that is, you don’t have one.

MODEM SPEAKER

If you want to hear your modem dialing, turn the Modem Speaker On. You can monitor what the modem is doing and to hear the ring as the call goes through. If you prefer silence, turn it Off.

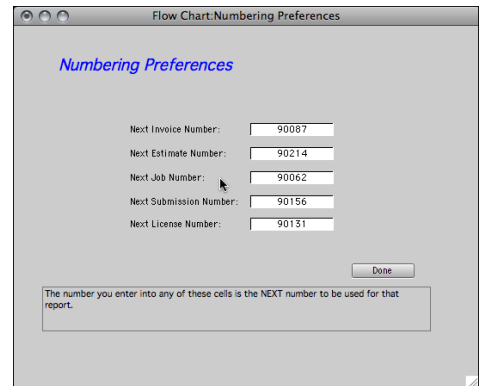
DIALING VOLUME

With the Modem Speaker On, this controls how loud you want it. Low is pretty nice to our ears. Quiet is just like turning the modem speaker off.

NUMBERING

The new numbers issued for Estimates, Jobs, Invoices, License and Submissions are generated from the Numbering Preferences. In this window, enter the **next** number you want used for these reports. Whenever the software automatically issues a number for a report, it also increments to the next number in the Numbering Preferences.

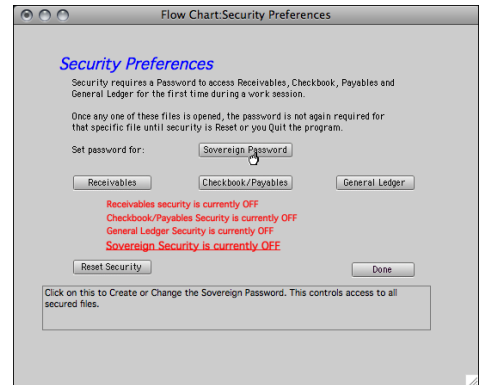
Manual entry of numbers into any of these reports bypasses the automatic numbering capabilities making it necessary to adjust these settings if you wish to use the automatic numbering.



SECURITY

Using password protection, you can prevent unauthorized access to Checkbook, Payables, Receivables and the General Ledger. Access can be set individually for these files or applied universally.

Securing files individually makes it possible to lock some files while providing authorized people access to certain other files. Checkbook and Payables share their password since use of one usually includes use of the other.



SOVEREIGN PASSWORD

No security features are operational unless you first activate them. The Sovereign password controls all access. Passwords for individual files cannot be created or changed without a Sovereign password.

To prevent others from casually creating a Sovereign password and locking you out of your own data, the first time you attempt to use it, the Sovereign password asks for an Activation Code. Simply enter the correctly spelled and capitalized name of the day of the week. If you’re creating your Sovereign password on Monday, then Monday is the Activation Code.

Once you’ve done this, you’re asked to enter your new password, then asked to enter it again to confirm that you and the computer are in agreement on just what this new Sovereign password is going to be. You can now proceed to create passwords for individual file access.

Important note: Creating a Sovereign password and nothing more, protects only the access to creating or changing individual file passwords. Setting a Sovereign password can, at a minimum, keep someone else from setting one for you without your knowledge or authorization.

Individual files are not secured until a password is entered for them. By not creating an individual password for a specific file, you can leave it permanently unlocked while protecting the other files with passwords. For instance Checkbook and General Ledger can be protected with passwords while Receivables is left with no password and is readily accessible to anyone working on your computer.

Be sure that you remember your Sovereign password. If you forget it you can’t change or create it

or the individual passwords. If you should forget it, a very convincing call to HindSight's tech support is your only hope for getting back in.

FILE PASSWORDS

If you wish to set individual passwords for some or all of the three files, click on the button for the file you wish to protect. If it hasn't already been entered during the session, you're asked for your Sovereign password before being allowed to create a file password.

Whenever you enter a new password, you're always asked to repeat the entry to confirm that it's correct before it's saved.

ACCESSING PROTECTED FILES

Once security is activated for Checkbook, Payables, Receivables and General Ledger, they cannot be opened until either their specific password or the Sovereign password has been entered. When you attempt to open any of these files, a password dialog opens for you to enter the appropriate words. The letters you type into this dialog window are deliberately unreadable. You never know who might be glancing over your shoulder, especially if you're a schizophrenic paranoid.

If you enter your Sovereign password, all protected files are unlocked even though you're only accessing one at the moment. If you enter just that file's password, the rest remain locked. The exception is that Checkbook and Payables are both unlocked when the Checkbook password is entered to access either one. Once any file is unlocked it remains unlocked until either you fully Quit Panorama or click on Reset Security in the Flow Chart Security Preferences window.

RESET SECURITY

The Security Preferences window displays the current status of the security for the protected files. If any have been accessed with their individual password, their unlocked status is displayed in red. When you click on the Reset Security button, all protection is reset and passwords are again required to get into any of the protected files. When reset, all the status displays are green.

WORKSHEET

This window has the Preferences settings for Worksheet. *(See the section on Worksheet Preferences in the Worksheet chapter.)*

RECEIVABLES

This window has the Preferences settings for Receivables. *(See the section on Receivables Preferences in the Receivables chapter.)*

CHECKBOOK/PAYABLES

This is the window in which you can set your preferences for the Checkbook and Payables files

GENERAL LEDGER

This window has the Preferences settings for General Ledger. *(See the section on General Ledger Preferences in the General Ledger chapter.)*

CATALOGUE

This window has the Preferences settings for Catalogue. References to these settings and descriptions of the features they control are in the Catalogue chapter.

STOCKSHEET

This window has the Preferences settings for Stocksheet. *(See the section on Stocksheet Preferences in the Stocksheet chapter.)*

META DEFAULTS

Before writing metadata to images, it's very helpful to enter the Contact information to be used when noting else has been entered for who created the image(s).

The same default information can be entered or changed from within Catalogue's META Panes.

META Defaults are used in Catalogue, Stocksheet and Licenses.

SHARING

The sharing functions in InView & StockView are an optional add-on feature that allows simultaneous network or internet access to the same data by numerous users. It's purchased separately, at prices determined by the number of users being authorized. Sharing cannot be activated without an access code. See the separate documentation on Sharing for more information.



PANORAMA MEMORY

This choice opens a window in which the current allocation of RAM for Panorama is displayed. It's primarily involved in working with large TIFF images. See the chapter on Memory for more information.

COMPUTER PROFILE

If you call for technical support this is one of the first places we're going to ask you to go. The Computer Profile window gives us all sorts of information about your computer. Among other things, the window shows the version number for Panorama and where it's located on your computer. The window helps to determine what's in your InView & StockView folder.

