

P R I N T I N G A N D E D I T I N G R E P O R T S

The printed reports in InView and StockView can be customized to suit your needs. You adjust the various object-oriented elements already created in HindSight software to fit your letterhead design or change fonts or add graphic elements. To edit or not to edit the report designs is a question of your style and the printer you use.

We're often asked why we don't include more information about how to make specific types of changes to particular reports or labels. There are just too many reports in InView & StockView to make it practical. Instead we've done our best to introduce you to the tools and techniques for making adjustments.

Many reports do include notes within the window from which they print. For instance, Catalogue's caption label windows list the label stock for which they were designed and Contact's rotary file cards include card stock information as well as Page Setup tips. Check windows prior to graphics editing to see if such tips are present. They may save a great deal of time.

Printouts are pre-designed for printers. Most compatible printers for your computer accept our settings with no trouble, but odd printers, different fonts and graphic elements occasionally require you to make simple modifications. Most reports are preset for US Letterhead, 8.5 x 11 inch, paper with a top margin of 1.5 inches to accommodate many letterheads without modification. *Tip* ♦

Reports include some of the data within their file and exclude other data. Reports may also include conclusions drawn from the data. You can change where and how information is displayed on the screen and positioned for printing. You can, if you like, install graphics in some reports.

Reports organize information from your files in a variety of ways for printing. Sometimes the report simply prints what is there. Other times reports perform calculations using the data and the results are printed. As a result, some reports, like envelopes, are very simple graphically, while others are extremely complex, like an Invoice that gathers information from a number of places to print and calculates and show the results, or the Address Book that has multiple, dynamic columns and prints odd and even pages.

Don't let this scare you off. One of the advantages of HindSight software is that you can modify virtually anything that prints. Unless you know what you're doing though, your first graphics editing should be a simple one, not a major overhaul of a Delivery Memo with Images due yesterday! The graphics are easy if you approach them properly. Some people learn to swim by diving in. All unguarded swimming pools post advisories, and so do we. Rather than sink or swim, we suggest you start in shallow water. Read before you leap... and weep. *Tip* ♦

Tip: In many cases, Page Setup, in the File menu, is the only adjustment necessary to adjust margins properly. If your Page Setup window has an option for Maximum or Larger Print Area, this moves the printing up and to the left by about a quarter inch on the page.

Tip: Before attempting to modify the graphics of a report, cover yourself with a fresh backup.

E Z G R A P H I C S

We hate to call it the wading pool because there's so much you can do with EZ Graphics, but it is as safe as graphics changes get. EZ Graphics is available to some degree in all reports. How can you find out where it is? Well, look at the menus of a report. If any of the following menus are listed, that report has EZ Graphics.

E Z G R A P H I C S M E N U S

With EZ Graphics you make menu selections to modify a report. EZ Graphics covers many modifications needs, but has fewer features than the full Graphics Mode. You will probably make some simple modifications using EZ Graphics and other, more complex adjustments in Graphics Mode if and when you read and become familiar with that.

F O N T

The Font menu is limited to six common fonts found on all Macintosh or Windows computers. The menu does not indicate the current font settings of the report. For that you need full Graphics Mode.

Choose a font from the Font menu to set the entire report to that font. Current font attributes, point sizes and type styles, remain the same. For instance, a bold, 24 point plain word and a 10 point italicized word each keeps those characteristics as you change from one font to another. The one exception is Company Info in the report. It has a separate control described below. (*See Company Info.*)

If you choose Other... in the font choices, a dialog box opens where you enter a font not listed in the menu. To make this work, the font name must be spelled exactly correctly and must be installed in the computer's Fonts folder.

Company Info	
Company Name	
Company Address	
Company Phone	
Company Logo	
✓ All Company Info	
<hr/>	
On	
Off	▶
<hr/>	
Up/Down	
Left/Right	
<hr/>	
Font	▶
Size	▶
Style	▶
Justification	▶

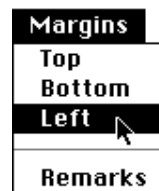


M A R G I N S

T O P , B O T T O M A N D L E F T

Each of these three choices opens a dialog window where you enter the number of inches for that margin. In this case, the current setting is displayed. Accuracy is to 100ths of an inch, two places after a decimal point.

Note: Not all printers are made equal. Setting margins smaller than a half inch may result in some parts of your printout being cut off. There are variances on how close to the edge printers are willing to put ink to paper. For most printers this is about .5 inches. The larger print area option in some Page Setup dialogs can bring the printing area to within .25 inches of the paper edge.



R E M A R K S

Available only in the Margins menu of Worksheet and Stocksheets reports, Remarks increases or decreases the area for the Remarks to print. The Margin settings dialog shows the current height of the Remarks area. You enter the size, in inches, for the desired height of the Remarks box.

S H O W / H I D E I T E M S

Available only in Worksheet's Summarized Estimate and Summarized Invoice, this toggles the line by line items on or off by adjusting the Data tile. When the Items are set to Show, the reports become a combination of the Itemized and Summarized reports. ⚡ *Warning!*

Warning!
Manually altering size or position of the Data tile, or its contents, in either of these report forms has the potential of rendering this feature inoperable.

C O M P A N Y I N F O

The Company Info menu determines the appearance and position of information from the Company Profile window of Flow Chart.

Note: If any of the "Don't" buttons are checked in the Flow Chart Company Profile, those elements won't work in reports no matter what you do in the reports themselves.

Note: If you want the Company Info elements in a report that lacks these menus, it can be done using Graphics Mode. Use EZ Graphics to get the fonts, sizes and such looking the way you want them. Now choose Graphics Mode from the Windows menu. The elements you've configured are there, but they now say CoName, CoAddress and CoPhone. The Logo looks pretty much the same. Click once on any one that you want to move to another form. Shift-click on any others that you wish to move. (See *Selecting Objects* later in this chapter.) Choose Copy from the Edit menu. Now go to the report in which you want the elements. Put it in Graphics Mode and Paste. Use the Pointer Tool to position them as desired and you're done.

Y O U R L O G O

A logo is not controlled through the Company Profile window of Flow Chart. Place a graphic file named Logo in the HindSight folder. That's all that's necessary. (See *Computer Generated Logo* near the end of this chapter for information about adding a digital logo.)

- C O M P A N Y N A M E
- C O M P A N Y A D D R E S S
- C O M P A N Y P H O N E
- C O M P A N Y L O G O
- A L L C O M P A N Y I N F O

Before you can adjust any of the Company Info elements, specify the one to affect with your menu choices. When you choose one, a checkmark appears beside it in the menu to show what you're about to change. ⚡ *Warning!*

The Company Logo can be moved with the following commands, but ignores those that don't apply to it, such as change font size.

All Company Info applies modifications you choose to all of these at once.

O N

To use any elements of the Company Info they must be turned On. Select Company Info elements above) and turn them On.

Note: Reports that can use Company Info are shipped with them all turned Off.

O F F

When you choose this, Company Info elements with a checkmark in the menu are banished into the electronic ozone. Luckily, the On setting knows how to get them back.

Warning!
If you delete Company Name, Company Address, Company Phone, Company Logo, or All Company Info in the full Graphics Mode it can not be adjusted in EZ Graphics.

UP/DOWN

If you choose Up/Down a dialog window opens where you enter positive (+) or negative (-) inches to indicate how and how much to move the Company Info elements checked. Negative numbers move objects up. Positive numbers move them down. Numbers with neither a plus nor a minus are considered positive.

LEFT/RIGHT

A dialog window opens when you choose Left/Right. To move the Company Info checked in the menu, enter a negative number for left, or a positive number for right. The objects move left or right by the amount specified.

FONT, SIZE, STYLE AND JUSTIFICATION

Company Info elements, except for the Company Logo, with a checkmark are changed to the font, size, style and justification you select here. Current settings are not displayed in this menu.

Both Font and Size show Other... as your final choice. Other... opens a dialog box where you enter a font name or size other than those listed in the menu. Font names must be spelled exactly right and the font must be in the system's Fonts folder.

GRAPHICS MODE

The Big Time. Before you start to change things around we strongly advise you to read ahead in this chapter then carefully and experiment with changes on a "modification copy" of your software, not on the original working copy. There's nothing like experimentation on a safe copy to really learn how this works. Sure beats trying to repair a botched editing job in your working files.

Take a look at EZ Graphics, above. It's not just for sissies. EZ Graphics lets you adjust margins and fonts in many reports without any sweat or swearing. In fact, you may discover that using EZ Graphics first makes the job in Graphics Mode a whole lot easier.

There are too many reports built into InView & StockView to elaborate on each here. Each has characteristics of its own. If you learn to use the graphics tools, you should be safe to work on them.

HOW TO MAKE A MODIFICATIONS COPY

Modifying Reports takes a little time and planning. Do yourself a favor. Set aside some unhurried time to do this rather than wait until the last twenty minutes before you must mail or fax an Estimate to a client or dash off an important letter.

The first step is to make a copy of the file with the Reports you want to modify. For clarity sake, let's use Worksheet as an example. The steps for making a modification copy of Worksheet apply to any other file that has reports you want to modify.

TO BEGIN

Make sure Worksheet is closed. Make the modification copy at the Desktop level. Open the HindSight software folder. Highlight the Worksheet file by clicking once! (Don't click twice. That opens the file.) On Macintosh, go to the File menu and select Duplicate. A duplicate file called Worksheet copy appears below the Worksheet file you highlighted. On Windows, go to Edit and choose Copy, then Paste. A new file named Copy of Worksheet appears. With way, that's your modification copy to work on.

Double-click the Worksheet copy and you're ready to safely make changes in the Report forms. Later, the entire modified copy, or parts of it you change, is substituted for the working file's report. As your confidence is runs higher, you can risk working in the original, but, even then, be sure to make a copy as a safety net... just in case.

MAKING MODIFICATIONS

Each report that can be edited has Graphics Mode in the Windows menu. To make changes you must be in Graphics Mode. If you click on the Graphics Mode tool in the palette, Panorama's usual access to Graphics mode, there is a beep and nothing more. InView and StockView gain access via Graphics Mode, located in the Windows menu or Cmd/Ctrl-Y. At last, you're ready to start making adjustments.

To exit the Graphics Mode window click the T-square and triangle icon (Switch to Data Mode) at the top of the tool palette.



Note: If you activate Company Info in a report, the Company Info elements show as the simple equations for CoName, CoAddress and CoPhone. In Graphics Mode you can move them, resize them change the fonts or other attributes. If you delete them, you're destined for error messages the next time you try to use EZ Graphics. If Company Info elements are in your way, we suggest you move them.



ELEMENTS OF A REPORT

Reports are printed from templates; windows designed to assemble all the pieces of data into a variety of meaningful configurations. Knowing what the basic elements of these templates are and what they do makes it much easier to successfully modify them for different results.

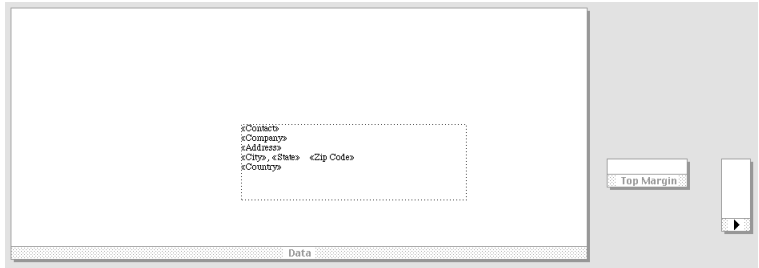
TILES

When you first open any report template, the first thing you may notice is that it's broken into several parts. The largest parts of a report are the tiles. Tiles look a lot like window shades.

They're called tiles because they are tiled together to create the total report.

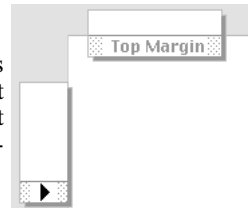
The white area of a tile represents the paper on which the report is to be printed. Only text and graphics within the white area of a tile are printed.

The report pictured here is for an envelope; a very simple report. It consists of a Data tile and two margin tiles, Top Margin and Left, represented by an arrow. It doesn't matter where these tiles are located within the window. They are properly assembled when printed.



The Top Margin's vertical height controls how far the paper advances through the printer before the main tile, the Data tile, is handled. The Left Margin tile influences how much area the printer will ignore along the left edge. Increasing and decreasing these tiles controls where the printed portion of the report begins.

Note: The illustration to the right shows how the margin tiles influence is applied to the envelope report illustrated above. You would never actually assemble the tiles in this manner.



Some reports are much more complex and involve a greater number of tiles. In addition to the Top and Left margin tiles, an invoice utilizes several additional tiles. **Warning!**

The First Page Header is the top of the first page. The white area we've left at the top of the layout is available for your name and logo whether printed by the program or already on pre-printed stationary.

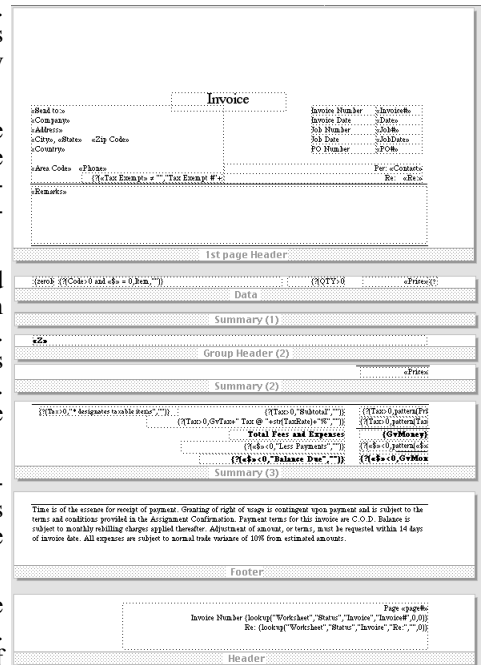
Any additional pages start off with the Header tile which is pictured at the bottom of our layout. The fact that it's at the bottom doesn't matter. The software knows that it represents the top of all additional pages.

The Data tile is the most used tile. It gets repeated for as many lines as there are items in the report. An invoice with 30 items repeats the Data tile 30 times. A contact report prints the Data tile repeatedly for as many Contacts have been selected for the report. Letters in the Correspondence file consist of one large Data tile.

Many reports utilize a Footer tile. It serves as a bottom margin and often contains text or graphics to be printed at the bottom of every page of the report.

The rest of the tiles tend to be specialized and are only used to print, or suppress, certain types of data. Summary Tiles for instance, print various levels of totals and subtotals in an invoice. Group Headers provide headings for different groups of items in the report.

When a tile's height is set to zero, with no white showing, it suppresses that piece of information from being printed.



Warning!
Deleting tiles or moving elements from one tile to another can have considerable impact on a report. Until you're more experienced with re-designing reports it's best to stick to simpler changes such as just repositioning items on a tile or changing fonts.
Protect yourself with backups no matter how experienced you think you are with graphics.

The size of each tile has considerable influence over the printed result.

The height of the tiles added together equal the length of the report with some exceptions. Some tiles, such as the Data tile, are used repeatedly. An invoice with 20 items repeats the Data tile once for each item. If some of the items make up groups with subtotals, the report may use the Summary 1 tile at least a few times and so on. If all of this adds up to more than the page length, as set in Page Setup, the report goes on to as many additional pages as necessary.

Tile height controls how much vertical space is devoted to each tile's purpose. When any tile is shortened vertically the overall report is shortened too. Shorten a Data tile that is about to print for 20 items and the overall difference is 20 times the amount of the change.


Tile width influences the results too. If the Data tile in a report is 3 inches wide and the Page Setup is for US Letterhead (8.5 X 11 inches), the software recognizes that there's room to use the tiles side by side. This technique is especially useful with caption labels for 35mm slides. In this case the tiles have been set small enough to allow the Data tile to be reproduced four times on each line *Tip* ♦

```
{?(Tax>0 or «$»<0,"Subtotal" "" }
{?(Tax>0,"Sales Tax @ "+str(TaxRate)+"%"}
Total Fees and Expenses
{?(«$»<0,"Less Payments" "")}
{?(«$»<0,"Balance Due" ".")}
```

Tip: A 2 inch wide Data tile doesn't always yield four across on an 8.5 X 11 inch page. They add up to an apparently acceptable eight inches, but that may be too close for your printer's liking after allowing for its built in left and right margins.

TEXT BLOCKS

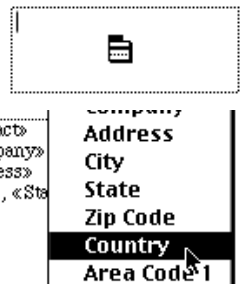
When you switch a form into graphics mode you see that the tiles are usually covered with dotted boxes containing text. Sometimes the text is easy to read, other times it appears to be a lot of gibberish. Sometimes we want literal phrases to print in our reports, but much of the time we want interpreted text to be printed. *Warning!* ♦

All of this text is created and/or edited using the Text tool on the graphics mode tool palette. To use the Text tool, click on it's icon. 

Static text, text that simply prints as it looks, is created by clicking into some open space and typing whatever words you want. After they've been typed they can be resized and repositioned as you desire. This same text is edited or modified by clicking into it wherever the changes are to be made.

Merge text is text that is replaced by the actual contents of the fields in the file. For instance, contact names are stored in the Contacts field of the Contacts file. To have a report respond to whichever name is being used at the moment, a report in the Contacts file needs to merge the Contact field into the report. This requires only the name of the field bracketed in chevrons, « and ». The field name must be spelled and capitalized exactly as they are in the file.

To alleviate the need for you to figure all of this out, a very handy feature is included with the Text tool. Find some open space to work in within the window. It doesn't matter where because you can move and resize things later. With the Text tool selected, click and drag the mouse to create a rectangle then release the mouse button. A blinking cursor should now be inside a dotted rectangle.

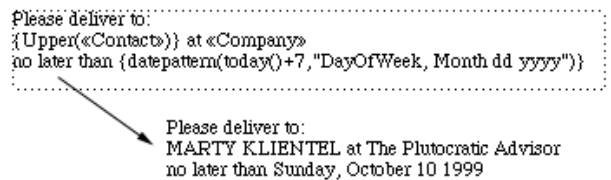


With the mouse located anywhere over the box, hold the Cmd/Ctrl key, then click and hold the mouse button. A menu pops up right where you clicked, listing all of the available fields in this particular file. Choose one and it gets entered, chevrons and all, ready to drop in the appropriate data.

Several fields can be added together in a single text box or they can each be given a box all their own.

Static text and Merge text can be used together in a single text box, but anything between chevrons must be a proper field name or it prints as static text, chevrons and all.

Formula text evaluates information in the file to produce interpreted results. Formulas can perform math, rephrase data or decide whether circumstances are such that they should print anything at all. Formulas are enclosed in curly brackets, { and }.



It's not our objective to teach you about formula writing here. That's considered a more advanced subject than the intended scope of this manual.

As with static and merge text, formula text can exist with the same text as the other, but alterations between the curly brackets must be made properly or else it prints something like "Operand expected but not found!" instead of what you intended.

Warning!
Reports in the Graphics Mode have equations designed to locate and install data or perform functions required for a report. Messing with these equations means chaos. Equations are text between and including these brackets: { } Unless you are an expert Panorama user, do not rewrite or make changes in the wording or sequence of these equations without first reading about equation writing and date patterns. You can change the font style or size or position of things. That does not affect how things function, just how they look when printed.



Fonts Note: You can't have more than one font in one style and one size in a text box. For example, you can't have part of a text box print in Palatino Plain and a word or two in Palatino Bold. Similarly, you can have only one size font per text or graphics box but you're not stuck with only one look per report. You can use several different fonts and/or font styles in a report that has a number of individually styled text boxes.

CHANGING GRAPHICS OBJECTS

All of the parts in a report form are graphics objects. Resizing tiles, text boxes or other graphics objects affects the appearance of data on the page when you print a report.

SELECTING OBJECTS

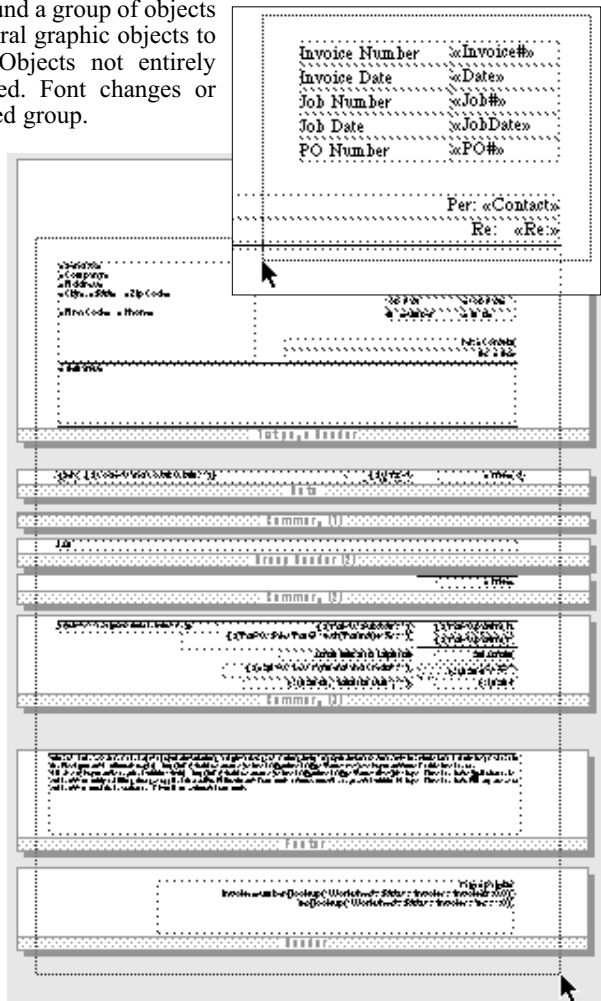
Graphic objects in a report form must be selected to be affected. In order to reposition, resize or change fonts, it must be selected! Objects are selected by clicking on them with the Pointer tool. To make a simple change, such as a different font, move around in a report clicking on the objects, one at a time, and make the change. To select several objects at once, Shift-click the objects to change and apply the change to all the selected objects.



Lassoing means to drag a rectangle around a group of objects using the arrow cursor tool. Lasso several graphic objects to select a group of objects at once. Objects not entirely enclosed by the lasso are not selected. Font changes or realignment applies to the entire selected group.

Make an easy left margin adjustment by lassoing everything in the report while leaving the tiles extending outside the lasso. Next hold the Shift key to constrain movement to a perfectly horizontal axis, depress the mouse on any of the selected objects and drag left or right. They all move as a single unit. Vertical alignment is unaffected.

◆ Tip ◆ Tip



Tip: Use this method only if you need to place some other text, or object, to the left of existing objects on tiles. The EZ Graphics Margins menu, Left Margin, works wonderfully for a simple left margin adjustment.

Tip: Items that are not within the white area of the tiles do not print. If you need a Text box, or any other graphic object, out of your way, consider moving it into the gray area to the side of the tiles rather than deleting it. Objects in this grey area do not print. You can keep all sorts of spare parts on hand for possible future use. To restore these parts just drag them back onto their tile.

Warning!
Do **NOT** change the type of a Report tile (Data, Header, Footer, Summary, etc.) . Do not delete a tile, even if it has no data. Empty tiles are a certain type and dimensions for a reason. Monkey with these and you create significant changes in your printed reports. It's not a pretty sight.

SELECT ALL OBJECTS

Select All Objects, in the Edit menu of Graphics Mode, selects everything in the report form. Changing fonts, say from Arial to Times, doesn't affect other attributes such as sizes or style, so a 10 point word in bold stays 10 point bold. Tiles and lines selected by Select All Objects aren't affected by a change of fonts.

RESIZE TILES

Resizing tiles affects the location and spacing of information printed in a report. Adjust the vertical height of certain tiles to temporarily accommodate more or less information.

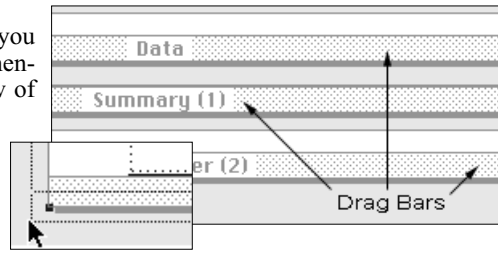
◆ Warning!

The Remarks text in Worksheet serves as a good example. Pull the bottom of the Header tile up or down, and then resize the Remarks text box to control the space allotted to Remarks, more or less as your needs vary from one job to another.(As you resize, hold the Shift key to maintain the tile's width and thus the right and left margins.)

Note: The EZ Graphics Margins menu of Worksheet and Stocksheet reports easily increases or decreases the area for the Remarks to print. The Margin settings dialog shows the current height of the Remarks area. You enter the size, in inches, for the desired height of the Remarks box.

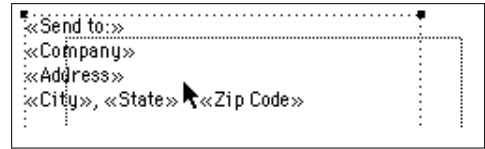
To include or exclude information in Reports such as in the Group Header (2) and Summary (2) tiles of Worksheet, increase the vertical dimension to show information or decrease it to hide it. Remember, text boxes must be entirely inside the white portion of a tile to print. Not 99% in or large gaps appear in your print outs. If you Decrease a tile to its smallest vertical dimension and leave the text box in its original size, you exclude the information in the text box and the tile from your

printout. (Again, hold down the Shift key as you decrease the size to maintain the right and left dimensions.) Instructions for this appear in the window of forms that have this option.



Click on the Drag Bar of a tile to select it. Use the corner handles, below, to resize it or click and drag on the Drag Bar to move it to the new position.

To resize tiles and other graphic objects, click and drag on the handles (small black squares) at the corners.



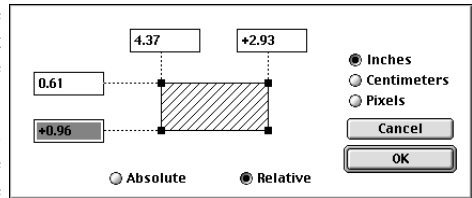
To move Graphic objects, click inside the object and drag it to a new position.

If you accidentally resize or delete anything, there is a path to recovery. Use Revert to Saved or, if you already saved the changes, make another copy of your working file and try again. You are working on a modification copy, yes?

PRECISION RESIZING

Any of the methods we've described leave a lot to be desired when you want to make accurate adjustments to a hundredths of an inch or a centimeter. The mouse is pretty much a hit and miss proposition when it comes to fine tuning.

With any single text box or a tile selected, go to the Edit menu and choose Dimensions. The window that opens displays the exact location and sizes of the selected object.













The numbers coming from the top left corner represent the position within the window at which the object starts. In most cases as long as you leave the radio button setting on Relative, all you need to worry about is where the object ends.

The highlighted box in the lower left indicates the vertical size of the object and the box in the top right indicates the horizontal size of the object. If you need a tile to be eight and a quarter inches wide, change the top right number to +8.25, click OK and it's done - exactly.

GRAPHICS MODE TOOLS

When a form is in Graphics Mode, the tool palette contains several tools with substantial design and report building capabilities.

-  The Data Mode tool gets you out of Graphics Mode. Use it to Print or Preview the results of your efforts.
-  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 great for critically aligning objects. Select it for use along with the Pointer tool.
-  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. Be sure to see the section on Text Blocks earlier in this chapter for details on this very important tool.
-  The Tile tool creates tiles. It's also used to re-assign tile types. Don't use it unless you know what you're doing.
-  The Line tool is used for drawing line. Use the Graphics menu to select the line width, pattern and color.
-  The Rectangle tool draws squares and rectangles. Color or shade them, drop them behind text.
-  The Rounded Rectangle draws rectangles with soft shoulders. As with the rectangle tool, you can add shades and colors.
-  The Oval draw circles and ovals.



A C C O M M O D A T E O R A D D Y O U R L O G O

P R I N T E D S T A T I O N E R Y

If you use pre-printed stationery, you can adjust InView and StockView forms to accommodate any pre-printed areas. Typically logos and header information are at the top of your stationery. Measure the distance from the top edge of your paper to the bottom of the last line of your header. That is the size of blank space you need above the first text box on the Body tile in the your report forms. If you pride yourself on being atypical and your logo and address are elsewhere, follow the same procedure. Measure and adjust the size of text boxes as necessary. Hold the Shift key as you resize to maintain either the vertical or the horizontal dimensions. Be sure to run a test print to check the new placement. Some printers do not print margins exactly as they appear on-screen because of the way they feed paper through the printer. Make minor adjustments on-screen until you achieve exact placement on the print out.

C O M P U T E R G E N E R A T E D L O G O

Create a logo in any graphics or image editing software and use it in HindSight software forms. The instructions above for making space to accommodate a logo apply whether it is pre-printed or digitized. We know computer generated logos gobble up storage space and can slow down your work pace. Despair not.

InView and StockView can use one digitized logo in any number of places without increasing the demand for disk space and memory by each additional use. EZ Graphics looks for this logo.

Save your logo as a BMP, PICT, JPEG or TIFF image. If your computer has lots of processing power and tons of memory, a big graphics file is no problem. In most cases though, it's best to keep it under 100K.

Name your graphic document exactly "Logo". Place it in the same folder with all your HindSight software files.

Many reports, such as the reports in Worksheet and Stocksheet, are ready to use it. Open those forms, one at a time, and choose Company Logo in the Company Info menu. Go to the Company menu again and choose On. Your Logo appears near the upper right of the first page. You can use this one logo in as many report forms as you like.

Use EZ Graphics or Graphics Mode to position the logo where you want it to appear in your print-out.

In Worksheet and Stocksheet Report forms you want it in the 1st Page Header tile. If you need to change the dimensions of the display area for your logo, you must use Graphics Mode.

If you want to add your logo to reports that have no Company Info menu, install your logo properly in a form that does have the Company Info menu and do a test print-out to be sure it's working correctly. When you're sure it works, activate Graphics Mode then click on the logo and Copy it to the Clipboard. Now you can Paste the logo anywhere you want it

A D V A N C E D U S E R S

The full blown version of Panorama has tools to create and modify Flash Art beyond what we've provided. You can use multiple logos and graphics, named however you wish. Panorama Direct users are not offered these luxuries, but you can upgrade if it means enough to you.

L O G O T R O U B L E S H O O T I N G

If your logo doesn't appear, check to see that it is the format that you think it is. Be sure that it's loose inside the HindSight software folder along with all the other files. On the desktop, View the HindSight folder listed alphabetically by Name. Your logo, named Logo, should be listed right along with Flow Chart, HS 3 Resources and all the other HindSight files. It is there? OK.

Maybe you entered the graphic's name, Logo, incorrectly. (no extra spaces, no variation in case allowed!)

S A V E

Until you Save, your graphics changes are only theoretical. That's great as you experiment and use Revert to Saved when things don't work out. Once you're satisfied, though, use Save to preserve your masterpiece. The Save command is your friend. Save after doing anything you're sure you want to keep. Save before you do something risky that you may want to undo. You can redeem yourself from a mistake, serious or minor, using Undo from the Edit menu (Cmd/Ctrl-Z) of Graphics Mode or the Revert to Saved command in the File Menu and have another go at it. Save when you really need to keep it. Oh, yes, and back up your data!

T R A N S F E R C H A N G E S T O A W O R K I N G C O P Y

Presuming there is no valuable data to lose, you can replace the entire working file with the modified copy. You can also transfer one whole report at a time or parts of a report. These instructions also work if you made a mess and need to retrieve the “as shipped” form or if you’ve loaded an update and want to bring your customized graphics into the new files.

To Copy and Paste all or parts of a report, from one file to another, have both files, the modified copy and the working (or Master) file open and the report in each open and in Graphics Mode.

Note: You can’t have two files with the same name open at the same time. As long as your modifications copy has a different name, such as Worksheet copy, you can open both at once.

In the modified copy, Select All to copy the complete report form or select the parts you changed (Shift-click to select several parts at once).

Copy the selection to the Clipboard.

Now, go to the working report form, still in the Graphics Mode. Select the part or parts you are replacing (or Select All Objects, if that’s the plan). Hit the Delete key or choose Clear in the Edit menu to remove the selected parts. Clear avoids using the Clipboard which holds your valuable revisions.

Paste from the Clipboard to your working file report. Save your transferred work and give yourself a pat on the back.

T E R M S & C O N D I T I O N S

Most of the reports printed by Worksheet and Stocksheet have standardized terms and conditions that are typically printed on the back side of invoices, estimates, delivery memos and such. These reports are all accessible via the Reports menus of Worksheet and Stocksheet.

As shipped they are intended only as samples and are no substitute for the advice of your attorney and/or accountant. *HindSight can not and will not assume responsibility for the results if you use these samples in the course of conducting your business.*

Now that we’ve got the disclaimer out of the way, feel free to use the terms and conditions, reword them to meet your needs, or eliminate them all together.

If you choose to reword them, the wording can be edited and changed within each report one by one. You don’t have to get into Graphics Mode. Just click the cursor inside the text box of the Footer and add to or replace the text. Or you can access them all in one place for easier and more consistent editing using the T&C Editor as described below.

Within your InView & StockView folder is a folder named Terms & Conditions. It contains several files that are the actual source of the wording for all of those reports. When you edit the words within the reports, your changes are saved in the Terms & Conditions folder.

Each of the files in the Terms & Conditions folder is named for where it is utilized.

There is no need to print or open the documents directly. They can only be opened or accessed for editing through Worksheet, Stocksheet or the T&C Editor. They can only be printed from the matching report forms in Worksheet and Stocksheet. *Tip* ♦

Changes are immediately and permanently applied to the matching Terms & Conditions file.

I N S T A L L I N G T E R M S & C O N D I T I O N S

The HindSight Extras folders contains folders named for a variety of graphic arts professions: professional photography, graphic design or illustration. The Terms & Conditions folder inside the folder that applies most closely to your profession should be dragged into your InView and/or StockView folder in order to have those terms used in your printed reports. It should replace any Terms & Conditions folder already in the InView & StockView folder rather than go inside it.

Note: The programs ship with the photographers’ terms already in place.

Very Important: The files must be loose in the Terms & Conditions folder and their names must not be changed. The Terms & Conditions folder must be inside the InView & StockView folder and not buried in any additional folders.

T & C E D I T O R

The T&C Editor, included in the folder, allows you to quickly access and edit all of these forms. They make use of the built-in word processing capabilities to allow you to include various fonts, sizes and styles within a single block of text.

To edit any of the Terms & Conditions, open the T&C Editor. Use the popup menu in the top left

Tip:

The Invoice and Estimate Terms in Worksheet and the Submission and Leasing Terms in Stocksheet include a popup menu to select other terms from the Terms & Conditions folder or to create or rename terms.

These forms default to whichever terms in the folder bear their names - exactly.



corner to select the specific set of Terms & Conditions to edit. Make changes as desired. See the chapter on Correspondence if you're unfamiliar with the use of the Text menu and Ruler.

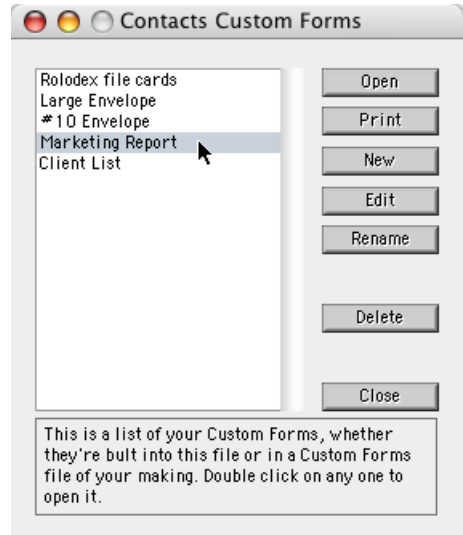
Warning! There is no Save or Revert in the File menu of the T&C Editor. Any changes you make in the T&C Editor are immediately applied to the file. You cannot make changes, then go back to a previous version unless it's by restoring a back up copy of the individual file(s) to the Terms & Conditions folder.

Note:
External Custom Forms is a new feature and may not yet be included in all of your InView & StockView files. The Contacts and Catalogue are the first to have this feature.

CUSTOM FORMS

In addition to the forms built into files, in several you have the ability to create your own Custom Forms. They can be saved externally in a separate file named Custom Forms, or in Contacts and Catalogue, these forms can be added to the file itself as internal forms. The benefit to external forms is that they survive upgrades to the file and, especially in the case of Catalogue are accessible by other Catalogues. An external envelope can be used by several files.

The Custom Forms dialog window lists any existing custom forms in the file plus any forms you've entered for the Custom Forms file. Beside the list are several buttons giving you several options for dealing with your custom forms.



OPEN

Click to highlight one of your custom forms then click Open to open it for printing or editing. You can also double-click on the name in the list.

NEW

In Contacts and Catalogue, New begins by asking if you are adding a NEW form within the file itself or a Custom form in an external Custom Forms file.

In this case, a click on New opens a second dialog for naming and for creating a new internal form within the file. Enter a name for this new form and click on Paste Form to create it. You can now edit the empty new form. *Warning!* *Tip*

An advantage to internal forms is that they have a set of menus specifically designed for the file - ready to work on printing, searching and just about anything else you care to do in the file.

If you click on Custom, the program simply asks for the name of the Custom Form, adds it to the list and stops. The assumption is that you are creating, or already have, a form of your own in a file named Custom Forms. See Creating External Forms at the end of this section.

EDIT

Click to highlight a custom form then click Edit to open it for graphically editing it's layout. The selected form is opened for modification.

RENAME

Rename makes it easy to remember what you've designed the form to do. Forms can be renamed over and over again.

DELETE

Click to highlight one of your custom forms then click Delete to remove it from the list.

CLOSE

Get outta Dodge fast. Close closes the Custom Forms dialog window.

CREATING AN INTERNAL CUSTOM FORM

As we said above under New, the forms are empty blanks, although each contains a full set of the file's menus. It's entirely up to you to make the forms anything your heart desires or ignore their existence. Graphics Mode lets you control which tiles, fonts and everything else go into the form. You can even create your own data input window rather than a mere report form. If you're not familiar with Panorama's graphics tools, now's the time to start learning. Go to the Getting Started chapter, study up and then create to your heart's content. *Tip*

Note: Although you may discover ways to create your own buttons and other elements, connecting them properly is another matter and may prove frustrating or even futile. Help in these areas is a pay-as-you-go proposition which could be educational for you and profitable for us.

Warning!
Although this dialog gives you the option to insert the new form within a list of all existing forms and windows in the file, don't do it. If you insert it into the wrong position it won't be recognized as a Custom Form and you'll never again be able to access it.

Tip:
In Catalogue, if you include the word "Label" in an internal Custom Form name, the custom label is listed as one of the available labels in the Label Templates popup menu.

Tip:
You can create Custom Forms by modifying existing forms. Open any existing form in the file and put it into Graphics Mode. In the Edit menu choose Copy Form and then Paste Form. Rename the form - don't use the insert option - and click the Paste Form button. You now have an exact copy of the original form to start making modifications. This form is automatically included in the list of custom forms.

CREATING EXTERNAL FORMS

External Custom Forms are created in a Panorama database of your own making. The file must be named exactly Custom Forms and it must be in the same folder as your other InView & StockView files or they won't be able to find and use it.

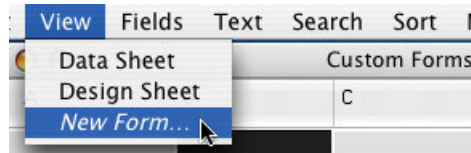
External Custom Forms have the huge advantage of being immune to loss of your customization when the InView & StockView files are replaced by backups or upgraded. External Custom Forms are able to print anything from your InView & StockView files using your customized graphic design.

CREATE A CUSTOM FORMS FILE

A Custom Forms file is created by going to the File menu of any InView & StockView file and choosing Open File. In the ensuing window, click on New Database. A new Panorama file named Untitled opens on your screen. Return to the File menu and choose Save. You're asked to name the file. Give it the name of Custom Forms (we suggest that you click on the option to Save Window Positions) and save it into your InView & StockView folder.

CREATE A CUSTOM FORM

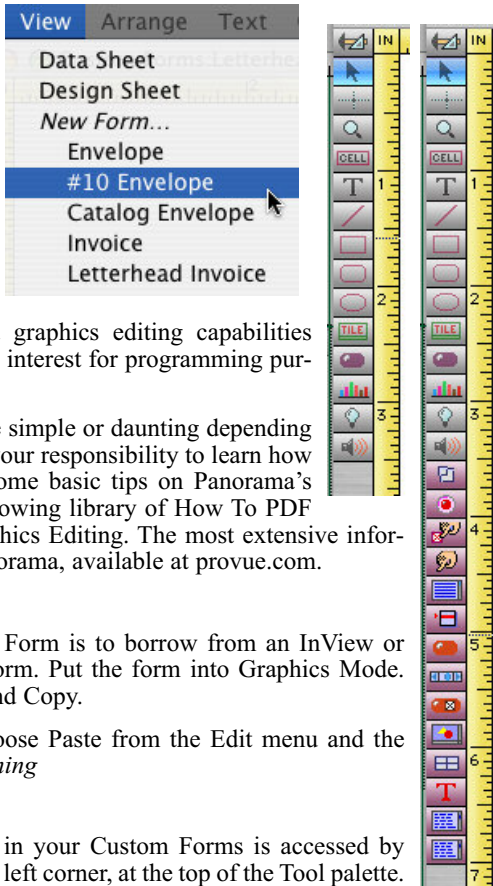
To add Custom Forms to your Custom Forms file, click on the View menu, choose New Form and give the form a name. You now have a new, blank form to work with. This new form is entirely under your control from start to finish. You can build your own report within in it or copy a layout from another file, paste it here and modify it.



Note: Be sure to open any InView & StockView files meant to use this new form and add the name to the list of Custom Forms for use by that file.

As you add more Custom Forms, the View menu lists them. This is your access to those forms.

Panorama offers different sets of graphics tools based on the level of Panorama you've licensed. In most cases Panorama Direct provides an adequate set of editing tools. The full, but higher priced, Panorama does offer some higher end graphics editing capabilities although most of the additional tools are of more interest for programming purposes.



Working with Panorama's Graphics Mode can be simple or daunting depending on the degree of your ambitions. Ultimately it's your responsibility to learn how to use the graphics tools. This chapter offers some basic tips on Panorama's Graphics tools. The HindSight web site has a growing library of How To PDF files in the Reference section that includes Graphics Editing. The most extensive information is available in the documentation for Panorama, available at provue.com.

COPYING A FORM

An easy way to get started with a new Custom Form is to borrow from an InView or StockView file. Open the file and the desired form. Put the form into Graphics Mode. Choose Select All Objects from the Edit menu and Copy.

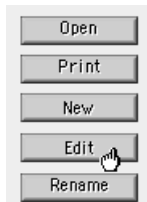
With your Custom Form in Graphics Mode, choose Paste from the Edit menu and the entire copied layout appears in the window. *Warning*

EDITING FORMS

Within the Custom Forms file, Graphics Mode in your Custom Forms is accessed by clicking on the T-square and Triangle in the upper left corner, at the top of the Tool palette. It's the same tool used for getting out of Graphics Mode.

One problem you're likely to encounter right away is that the field names and formulas in your form don't seem to work. That's because they're trying to use data and fields that don't exist in your Custom Forms file. Not to worry, we've solved that one for you.

Be sure that the Custom Form itself is not in Graphics Mode. Open the Custom Forms dialog window in the file the form is to work with. Highlight the form name in the list and click on the Edit button. The Custom Forms file is opened and the



Tip: Typically Worksheet limits you to two invoice forms and two estimate forms; Summarized and Itemized. By using Custom Forms you can create an unlimited number of formats for these and other reports.

Warning!
Although you can choose and use Copy Form and Paste Form, it has hazards in this case. Copy Form includes menus from the InView & StockView file that will not work in your own Custom Forms file.

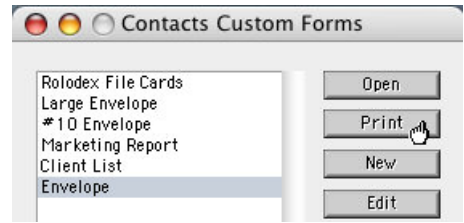


form is displayed. The you're asked if you'd like the file filled with sample data. Answer Yes, and the Custom Files fields are converted to match those of the InView & StockView file that triggered the action and they are filled with data from that file. You can now edit the form, preview and even print using real data and getting accurate feedback.

P R I N T I N G C U S T O M F O R M S

To Print an external Custom Form, open the Custom Forms dialog in the file for which the printing is to be done. Highlight the desired report and click Print.

The Custom Form is opened and used for the printing process.



I T O U G H T A B E I N M O V I E S

And so it is. See our movie on Custom Forms by visiting the Reference Library in the Support section of our web site at <http://hsltd.us/reference/howto/howto.html>

