

C U S T O M F O R M S

The files within the InView & StockView package have numerous report forms built in. Worksheet for instance has invoice, estimate and job report forms built into it. These are *internal* forms that you can modify extensively to suit your needs. When you save Worksheet, for example, you also save its forms. When you copy Worksheet, the forms are copied too. This is true of the other files as well with the built in forms that are relevant to their core purpose.

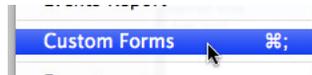
In addition to the built in forms, you can add forms of your own to many of the files. These amount to internal custom forms since they are saved inside the file.

The ability to customize forms is terrific and has been a longtime advantage in using InView & StockView. The downside has been that upgrades move your data from these files into the new version files, but cannot move your custom touches to these internal reports.

The solution is the use of *external* Custom Forms. These are report forms saved in a separate file that is untouched by upgrades. The Custom Forms file becomes a central repository for your customized InView & StockView reports.

In the case of Catalogue, these forms are fully accessible by other Catalogues eliminating the need to repetitively customize a form within every Catalogue clone. A Custom Forms envelope can be used by any file that deals with names and addresses such as Contacts, Correspondence, Receivables, Worksheet and Stocksheets.

Not all InView & StockView files have or need Custom Forms. Those that do, have Custom Forms listed in either their Windows menu or their Reports menu. You can also type Command-; to access the Custom Forms selection window within files that utilize it.



Each file has its own Custom Forms selection window listing the forms that you have associated with that file. It lists any *internal* custom forms you've created within the file plus any *external* forms you've added for the Custom Forms file.

Beside the list are several buttons giving you options for dealing with your custom forms.



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.

O P E N

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.

N E W

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

In this window, 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*  *Warning!* 

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.



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

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 created a form of your own in a file named Custom Forms. See Creating External Forms at the end of this section.

E D I T

Click to highlight a custom form then click Edit to open it for graphically editing it's layout. Whether it's an internal or external Custom Form, the selected form is opened for modification.

R E N A M E

Rename allows you to correct or change the name of a Custom Form. Forms can be renamed over and over again but the name here must match the actual form name.

Warning!
Until you Save the file, your Custom Forms are not preserved. Closing without saving or using Revert to Saved restores the Custom Forms to their last saved condition.



DELETE

Click to highlight one of your custom forms then click Delete to remove the form name from the list. The form itself remains as it was.

CLOSE

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

CREATING AN INTERNAL CUSTOM FORM

New forms are empty blanks, although each contains a full set of the file's menus. It's entirely up to you to make the form whatever your heart desires. Graphics Mode gives you access to 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 whatever you need.

A shortcut in creating your own Custom Forms is by copying and then 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.

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. Consider that an expert level process.

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.

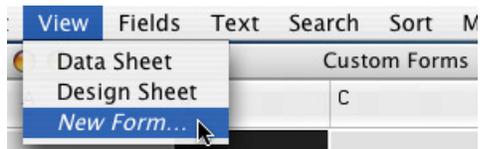
External Custom Forms have the huge advantage of being immune to loss of your customization when the InView & StockView files are replaced by backups or upgraded. External Custom Forms are able to print anything from your InView & StockView files using your customized graphic design.

CREATE A CUSTOM FORMS FILE

A new 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

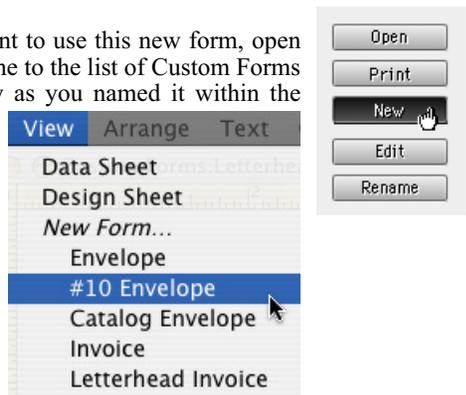
To add new forms to your Custom Forms file, click on the View menu, choose New Form and give the form a name. You now have a new, blank form to work with. This new form is entirely under your control from start to finish. You can build your own report within in it or copy a layout from another file,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



Be sure to open any InView & StockView files meant to use this new form, open the Custom Forms selection window and add the name to the list of Custom Forms for use by that file. Enter the form name precisely as you named it within the Custom Forms file.

As you add more Custom Forms, the View menu of your Custom Forms file lists them. This is one way to access those forms when you need to edit them or to copy them to create additional forms.

As long as the names are consistent, they are also accessible via the Open and Edit buttons of the Custom Forms selection window.



Important Note! See the following Page Setup section.

COPYING A FORM

Copying an existing form from an InView & StockView file can give you the best starting point. Open the form that most closely resembles your desired report. Put the form into Graphics Mode and from the Edit menu choose Select All Objects then choose Copy.

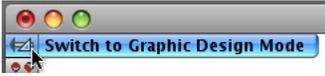
Go to a new and empty Custom Forms window, be sure it's in Graphics Mode and Paste. The entire copied layout will appear, ready for your modifications. This is a good time for File>Save.

Now make whatever changes you desire to this new external Custom Form.

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.

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

This step is only necessary for editing and not a needed step for everyday printing.

PAGE SETUP

Until a form within your Custom Form has had Page Setup applied and then run through a print cycle, InView & StockView files won't even acknowledge its existence.

When you create a new report form within your Custom Forms file, go to File>Page Setup to choose the paper size and orientation. These can be readily changed later if necessary.

Next go to File>Print. You don't need to commit ink to paper, but you do need to cause internal flags to be set. Instead of running the form through your printer you can simply choose Preview. Don't worry about what you see, it's the process that matters. When you save the Custom Forms file, things click into place and the form is ready to work as intended.

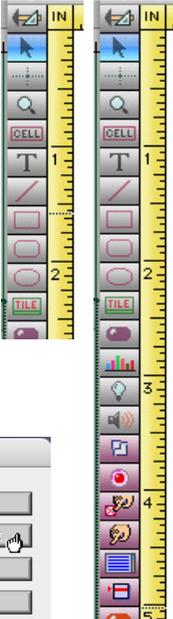
Aside from the Editing described above, this is probably the only time you would use File >Print from within the Custom Forms file itself.

GRAPHICS EDITING

Panorama offers different sets of graphics tools based on the level of Panorama you've licensed. Most HindSight customers have Panorama Direct which 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. The Printing & Editing Reports chapter of the HindSight Users Guide offers some basic tips on Panorama's Graphics tools. The HindSight web site has a growing library of movies and 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.



PRINTING CUSTOM FORMS

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.

