

AIM Documents Quick Reference - Mac OS

Opening the Documents Module

To open the documents module select Documents from the AIM menu, press the **Command-#** associated with Documents, or click on the Documents button in the Home window.

When the documents module opens it first show your favorites if you have any, then your recent documents, or the last 100 new documents in reverse chronological order with the most recent at the top.

Troubleshooting Tips

On rare occasions (usually when previewing) AIM may appear to be stuck. When this happens press the **Enter** key 2 or 3 times.

On occasion some calculated fields may not update while editing. To save your changes and update the screen press **Command-S**.

When the Document Preview and other modal windows are front-most the window widgets (close, minimize, zoom) will not function. Click on a Continue, Cancel or OK button within the front-most window or press **Command-W**.

If you get an error message when trying to edit a field stating that "Your access privileges do not allow you to perform this action" it may be because the document is locked. Unlock the document and try again. If you still cannot edit the document your group may not have edit privileges. Contact your database administrator.

Productivity Tips

E-mail a document as a PDF file in one step by pressing **Command-E** while previewing.

To change the magnification of the window while editing or previewing use **Command+= (plus)** or **Command- (minus)**.

When editing a document use **Command-[** and **Command-]** to move quickly between tabs without moving your hands from the keyboard.

Control-Click on any editable field or the background of a document to get a contextual menu of editing, formatting, sorting or finding options.

Mark documents you refer to frequently as your favorites. See Finding Favorite Documents.

Find documents you have recently viewed quickly. See Finding Recent Documents.

Mark documents you may need to gather together. See Finding Marked Documents.

Document Tips & Tricks

To squeeze more lines on a page try reducing the line spacing in large text blocks slightly. Or, when previewing try reducing the page slightly using the Page Setup command.

Finding Documents

The fastest way to find documents is to press **Command-F**, type one or more text strings (separated by spaces) that match the beginning of words within a document and press **Return**. You do not need to type whole words. You do not need to press the Find button with the mouse.

If only one document is found the document will be shown in Form view. If more than one document is found the documents will be shown in list view sorted in reverse chronological order by document date.

To find documents that match a specific editable field, select all the text in the field or select no text in the field, **Control-Click** in the field and choose Find Matching Records from the contextual menu.

To find documents that match a particular text string in a specific editable field, select the text string, **Control-Click** in the field and choose Find Matching Records from the contextual menu.

See commands in the Find menu for more options.

Finding Favorite Documents

You can find documents that you need to refer to frequently by selecting Find My Favorite Documents from the Find menu. Favorites are list in reverse order, the most recent added at the top of the list.

To add a document to your favorites list check the Favorite (heart) checkbox on most layouts. To move a document to the top of the list uncheck and recheck the Favorite checkbox. Favorites are saved separately for each user.

Finding Recent Documents

Find the last 100 documents you have created or recently viewed with the Find My Recent Documents command in the Find menu. The documents will be listed in reverse chronological order with most recent at the top. Recent documents are saved separately for each user.

Finding Marked Documents

Mark documents that you need to gather temporarily using the Mark checkbox on most layouts. Find documents that you have marked by selecting Find My Marked Documents from the Find menu. Marked documents are listed in the order they were marked.

Clear your marks when finished using the commands in the Document menu. Marked documents are saved separately for each user.

Creating New Documents

To create a new document from a template select New Document from the Document menu, press **Command-N** or click on the New button in the task bar. Select the desired document from the New Document dialog. To select a project-specific template select a project number otherwise clear the project number to see generic templates.

You can also create a new document and address it in one step from the Contacts module by selecting Create Document... from the Contact menu.

Duplicating Existing Documents

To duplicate an existing document find the document first and then use the Duplicate Document menu command or Dup button. You have the option to duplicate multiple line items. The document date will be updated automatically. All other fields will remain unchanged. Take care to review all the data in the new document.

Unlocking Documents

It may be necessary to unlock old documents before editing. To unlock a document un-check the Lock field in any view. Unlocking the document temporarily will unlock the document only for you and only while the Documents module remains open. Old documents can only be unlocked temporarily.

Deleting Documents

To delete the current document choose Delete Document from the Document menu or click on the Delete button. You must unlock a document before deleting it.

Editing Documents

To edit an existing document find the document first. Refer to the commands in the Edit menu. If you get an error message that your privileges do allow editing your group may not have edit privileges or the document may be locked. Unlock the document and try again.


Addressing Documents

To address a document click on the Select... (contact) button (or the contact's name) just below the **To** label or the **CCs** label on the To From tab.

When adding CCs or Attendees you can pick multiple contacts at one time by clicking on the Select... (contact) button while pressing the **Option** key.

To show company, FAX, and e-mail info for CCs check the CC Options at the bottom of the CC area on the To From tab.

Switching Address, Phones, or FAX

 On contacts with more than one address, phone or FAX number switch the address, phone or FAX number by clicking on the small chevrons (<>) that appear next to the field.

Adding Your Signature to a Document

You can make your signature appear on a document by checking the Print Signature checkbox on the To From tab. Your signature is stored in the Staff module in Form view on the Staff/General tab. Make your signature a 300 ppi .jpg, .tiff or .png file. Contact your database administrator if you cannot insert your signature.

Saving Documents

Documents are saved automatically. Changes to documents are saved whenever you exit all fields or preview the document. You can save a document manually and update any displayed information by pressing **Command-S**.

To save a document as a PDF file preview the document first and then press **Command-S**. A dialog will ask if you want the document name copied to the clipboard. When the save dialog appears paste the document name from the clipboard.

Saving a Document as a Template

If frequently create documents with the same information you can save a document as a template. The new template will appear in the new document dialog. To save a document as a template select Save as Template... from the Document menu.

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Sorting Documents

Sort documents while in List view by clicking on any column heading in black text or the Locked, Favorite, or Marked heading to sort by that column.

In Form or List view Control-Click on any editable field and select Sort Ascending or Sort Descending from the contextual menu.

Previewing & Printing Documents

To preview a document type **Command-P** or click the Print button. To print press **Command-P** again. To save a PDF file while previewing press **Command-S**. To create a PDF file and attach it to an e-mail while previewing press **Command-E**. To cancel the preview click on the Continue button or press **Enter** or **Command-W**.

Tip: You can drag the Document Preview window around by clicking and dragging the window title bar. If the window becomes hidden behind other windows click on any button or the background of the Preview window.

Selecting Text

To select all text in a field press **Command-A**. See Figure 12 AIM Keyboard Shortcuts for Mac OS.

Spell Checking


Misspelled words have a dotted red underline when a field is entered. When typing correct the last word typed by pressing **Command-Y**. To correct any word select it and **Control-Click** to see optional spellings.

See additional Spelling commands in the Edit menu. Spelling is only checked in editable fields on the current tab. To spell check other fields not shown switch tabs before spell checking.


You can turn spelling options on or off using the Spelling Options command in the Edit menu.

You can add your own words to the user dictionary. Select or create a user dictionary using the Select Dictionaries command in the Edit>Spelling menu. Edit the user dictionary using the Edit User Dictionary command in the Edit>Spelling menu.


Inserting Text with or without Styling

 To insert text in a field and retain text styling, press **Command-V**, use the Paste button or **Control-Click** and select Paste from the contextual menu. To paste without text styling press **Command-Option-V**.

Removing Text Formatting & Styling


 To remove formatting and styling from selected text select Remove Text Format from the Edit menu or press **Command-Option-P**.

Using Drop-Down Menus


 Many fields have drop-down menus to aid in data entry. These fields are indicated with a menu indicator in the lower right corner. To make the menu appear or disappear press the **Escape** key.

Entry of items in the menu is optional. You can generally type anything into the field. Menus are always sorted in alphabetical order. To select items in the menu use the letter or number keys on your keyboard to jump to a specific letter. Or, use the **Up-Arrow** or **Down-Arrow** keys to move up or down the list.


Inserting Tabs & Bullets

 To insert a tab in a field type **Option-Tab** or use the Insert Tab command in the Edit menu or the Tab button. To insert a bullet use the Insert Bullet command in the Edit menu or the Bullet button.

Formatting Paragraph Margins & Indents

 Show the text ruler using the Text ruler command in the Edit menu when editing large text fields especially on Memos and Letters. Set left and right margins and indents by dragging the ruler widgets just as you would in a word processor. See also Inserting Tabs and Bullets.

Formatting Paragraph Tabs

 To add a tab at a specific location show the text ruler and click on the bottom half of the ruler at the location where you want the tab. To remove a tab drag it out of the text ruler. To add a tab and open the Tabs window double-click on the bottom half of the ruler. Preview tab formatting before committing using the Preview button in the Tab window.

Formatting Paragraph Alignment

To change paragraph alignment place your cursor anywhere in the paragraph and select the desired alignment from the Edit>Format>Align Text menu.

Formatting Paragraph Line Spacing


To change paragraph alignment place your cursor anywhere in the paragraph and select the desired spacing from the Edit>Format>Line Spacing menu.

Styling Text


To style text select the text first and then apply the Font, Size or Style commands in the Edit>Format menu. Or, press **Command-B** to make text bold, press **Command-I** to make text italic. To remove text style from text, select the text and press **Command-Option-P** (plain text).

Working with Line Items in Portals


Some document types have repeating items in the body known as line items. The line items appear in a portal. The portal is similar to a spreadsheet with rows and columns. Surrounding the portal are buttons which will act only on the line items in the portal.


 1 To select a line item click on the item number on the left end of the line. The currently active row is the one either shaded in gray or that has the active field (with the cursor in it).

Expanding Line Items

 Some portals have both a List and Form view. The portal normally displays a list view. To expand the list view click on the Form button at the top left of the portal. To expand a specific portal row click on the Form button on that portal row. To return to list view click on the List button.

Navigating Line Items


 To move to the next or previous line item click on the Go Next or Go Prev buttons. If your cursor is in a field it will move to the same field in the new current line item.

 Use the scroll wheel on your mouse to scroll the items in the portal.


Sorting Line Items

In Form view click on any column heading in black text at the top of the portal area to sort by that column. Your cursor will remain in the active field in the current portal row.


Moving Line Items

 To move a selected line item up or down in the list click on the Move Up or Move Down button. Moving an item does not change it's item number


Numbering Line Items

 To number line items click on the number sign button. Line items can be renumbered according to their item number or their current sort order. If you choose Item No the items will be sorted by item number before renumbering. Existing item numbers will be replaced with integers (1, 2, 3).


Marking Line Items

 To mark line items check the checkbox in the Mark column. Marked items can be sorted to the top to make them easier to work with by clicking on the Mark column heading.


Creating and Inserting Line Items


 To create a new line item click on the New button. The new line item will be created at the bottom of the portal. To insert a line item at a specific location, select the line item where you want the new line item to appear. Then click on the New button while pressing the **Option** key.

Duplicating Line Items


 To duplicate the selected item click on the Dup button. The new item will appear next in the list. To duplicate a item to the bottom of the list, click on the Dup button while pressing the **Option** button. Click on the Last button in the Duplicate Line Item dialog. To duplicate multiple items mark the items first and then click on the Dup button.

Copying and Pasting Line Items

 To copy the selected item click on the Copy button. The Item Clipboard window will appear with a list of the items you have copied. Items in the Item Clipboard window can be pasted into any document that has line items.

 Warning: when pasting items into a document of a different type some data may not be visible. You should generally only copy and paste line items between documents of the same type

Deleting Line Items

 To delete items select or mark the items first. Then click on the Delete button. A dialog will ask for confirmation. The deletion of line items cannot be undone.