

## AIM Details Quick Reference - Mac OS

### Opening the Details Module

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

When the Details module opens it will show all Details in the order they were originally entered. To see other Details use the commands in the Find menu.

### 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.

If you get an error dialog telling you that the Troi File plug-in is not installed you will not be able to add or open details. See your database administrator for proper installation of the Troi File plug-in.

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

When the Report 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 Detail is locked. Unlock the Detail and try again. If you still cannot edit the Detail your group may not have edit privileges. Contact your database administrator.

### Productivity Tips

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

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

Find Details you have recently viewed quickly. See Finding Recent Details.

Mark Details you may need to gather together. See Finding Marked Details.

### Details Basic Concepts

The Details module acts as an index and visual reference to detail files on disk (usually a network volume). The Detail files are stored in their original format (.dwg, .dxf, .pdf, etc.) in a single folder designated as the Library folder.

In the Details module there is one record for each Detail file in the Library folder. Each record contains a rough visual facsimile or thumbnail along with a reference to the original file in the Library folder. The record also contains additional information such as key words, categories, etc. used to help locate Details.

Details are placed in the Library folder through a cataloging process. Candidate details are collected and placed in one or more Source folders. Usually Details with similar attributes are grouped together. For instance, all door details would be kept separated from foundation details.

During the cataloging process each Detail file is renamed with a serial number and moved or copied into the Library folder. When cataloged Details can be tagged with additional information such as spec section numbers, project numbers, key words, etc.

The cataloging process is usually monitored by someone appointed as the Detail librarian. This person should be someone with the expertise necessary to determine if a Detail is suitable for placement in the library.

See the section on Adding New Details for instruction on adding Details to the library.

### Finding Details


The fastest way to find Details is to press **Command-F**, type one *or more* text strings (separated by spaces) that match the beginning of words within a Detail 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 Detail is found the Detail will be shown in Form view. If more than one Detail is found the Details will be shown in List view Details will be sorted in the order they were originally entered into the Library.

See commands in the Find menu for more options.

### Finding Your Favorite Details


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

-  To add a Detail to your favorites check the Favorite (heart) check box in most views. To move a Detail to the top of the list un-check and recheck the Favorite check box. Favorites are saved separately for each user.

### Finding Your Recent Details

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

### Finding Your Marked Details

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

Clear your marks when finished using the Unmark commands in the Detail menu. Marked Details are saved separately for each user.

### Filtering Details

To filter Details in List view by Category, Key Word, Project, Specification Section, Uniformat Number or Set, choose the appropriate Filter By command in the Find menu. Move between the various filter options by clicking on the tab at the top of the Filter Details window. To filter the list view click on an item in the list under any tab.

### Finding Detail Sets

To find a set of Details previously saved, select Find Sets... from the Find menu. Select one *or more* sets in the AIM Set window. To select multiple sets hold the **Shift** key when selecting additional sets after the first. Click on the Show button to view the Details contained in the set(s).

### Sorting Details

Sort Details while any view by selecting the appropriate command from the View menu.

### Viewing Linked Details

To view Details linked to the current Detail go to Form view and then the Linked tab.

You can navigate to a linked Detail in Form view by clicking on the thumbnail of the linked Detail in the Linked tab.

### Selecting and Deselecting Details


When in List view it is possible to select a single Detail or multiple Details. Details can be selected one at a time or as a continuous or discontinuous range. Your selection is temporary and will be changed when using the commands in the Find menu. To save your selection see the section on Marking and Unmarking Details.

To select a single Detail click on the Detail thumbnail. The Detail will be become highlighted. To select multiple Details in a continuous range, select the first Detail then hold down the **Shift** key when selecting the second Detail.

To select individual Details not in a continuous range or to add details to those already selected hold down the **Command** key while selecting Details.

At least one Detail must be selected at all times. To change the current selection, select another Detail.

### Marking and Unmarking Details

-  Details can be marked for later reference. To mark a Detail, click on the Mark check box in the lower-left corner of the Detail in List view or the upper right corner in Form view. To unmark a Detail click on the Mark check box again. Marked Details are saved individually for each user.

To mark more than one Detail at a time see the Mark commands in the Detail menu.

To identify a set of Details for use by all users see the section on Saving Sets of Details.

### Linking and Unlinking Details

To link Details they must first be selected. In List view select the Details to be linked. Then choose Link Selected Details... from the Detail menu.

To unlink a Detail from the current Detail click on the minus (-) button on the Linked tab in Form view.

### Opening Detail Files

To open a Detail file select Open Detail from the Detail menu. Or press **Command-Shift-O**. Only the most recently selected Detail will open. The detail file will open in the application that created it.

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### Adding New Details

Details should generally be added to the Detail library by the Detail librarian. It is generally not a good idea to have everyone entering Details into the library. The database administrator can disable creating records in the Detail module for those groups of users who should not add records.

To add new Details click on the Add button in the task bar or select Add Details... from the Detail menu.

In the Add Details window make sure the path to the library and source folders are set correctly. Reset the paths using the buttons provided if necessary. If the Library folder is on a network volume make sure the volume is mounted before you begin.

In the Default Settings for New Details section of the Add Details window add a description, notes, spec sections, categories and keywords to be added to new Details as they are cataloged. This will lessen the need to go back and add repetitive information once a group of similar Details have been added to the library.

You can toggle the various settings on and off without clearing the fields by checking or un-checking the check box next to the name of the setting or by using the All Off or All On buttons in the lower left corner of the window.

In the Add Details window you can also specify whether to add the Detail name as key words, lock the files being cataloged, copy or move files into the Library and create thumbnails for the files if possible. Note that thumbnails can be added only for common file formats. See the section on Adding a Thumbnail for more information.

When you have the default settings set correctly click on the Start button to begin the cataloging process. When the cataloging process is complete you will be returned to the main AIM Details window with the Details just cataloged visible in the window.

You can add additional information to Details after they have been cataloged. See the section on Editing Details for more information.

### Adding A Thumbnail to a Detail

Thumbnails for details are added automatically during the cataloging process for common file formats such as: .jpg, .png, .tif, .pdf, etc. If a thumbnail is not created for a Detail when cataloged you can paste a thumbnail of the detail from the clipboard.

To paste a thumbnail first copy the Detail to the clipboard in your CAD program. Then in the Details module choose Paste Thumbnail from the Edit menu. If a thumbnail already exists you will be asked to confirm replacing the existing thumbnail.

When selecting the Detail in your CAD program be careful not to select large objects beyond the Detail bounds as this may cause the thumbnail to appear very small when pasted into the Detail record.

If your CAD program doesn't place a suitable image on the clipboard you can use a screen capture utility to take a snapshot of a portion of the screen in your CAD program and paste that as the thumbnail.

### Editing Details

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

To edit the original Detail file on disk you will need to unlock the Detail file if the file was locked when cataloged. To do this locate the file within the Library folder. Select the file in the Finder and choose Get Info from the File menu. If necessary, un-check the Locked check box for the file.

### Saving Details

Changes made to Detail records are generally saved automatically. Changes to Details are saved whenever you exit all fields. You can also save a Detail manually and update any displayed information by pressing **Command-S**.

### Deleting Details

To delete the current Detail choose Delete Selected Details... from the Detail menu or click on the Delete button. You must unlock a Detail record before deleting it. Deleted Detail files will not be deleted immediately. They will be moved out of the Library folder to the Desktop and placed in a folder called Deleted Details.

### Unlocking Details



It may be necessary to unlock Detail records before deleting or editing. To unlock a Detail un-check the Lock field in any view. Unlocking the Detail temporarily will unlock the Detail only for you and only while the Details module remains open.

### Duplicating Existing Details

Detail records within the Details module cannot be duplicated. However, you can duplicate the associated files for the selected details to a folder outside the Library folder.

To duplicate Details must first be selected. See the section on Selecting Details for more information. Once the Details have been selected, choose Duplicate Selected Details... from the Detail menu. You will be prompted to select the folder where the Details are to be saved.

Use this command to create a new set of Detail files to be altered for a specific project.

### Saving Sets of Details

At any time you can save selected, marked, or all found Details as a set which can be recalled later and can be shared with other users.

To save Details as a set choose the appropriate Save command from the Detail menu. In the AIM Set window you will be prompted to give the set a unique name. Name the set and click on the Save button. See the section on Finding Sets for more information.

### Adding Details to a Set

You can add to or replace Details in an existing set. Start by choosing the appropriate Save command from the Detail menu. In the AIM Set window select the name of the set you want to add to or replace. Click on the Save button and select whether to add the Details to the set or replace the Details in the set.

### Previewing & Printing Reports

To preview the found set of Details 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.

### Changing the Detail Background Color

To change the background color of selected Details choose Set Background Color... from the Detail menu. Specify a number representing the desired color: 1 for white, 2 for light gray, 3 for medium gray, 4 for dark gray, and 5 for black.

### Editing Value Lists

To edit the values in drop-down value list choose Edit Value Lists... from the Detail menu. Select the name of the value list in the List field. Edit the values in the Values field. Click the OK button when finished. To edit the spec sections or Uniformat number value lists select Preferences from the Detail menu. Then click on the appropriately labeled button and make any necessary changes to the lists.

### Setting the Library folder

To set the location of the Library folder choose Preferences... from the Detail menu. Click on the Library button and select the folder where the Details are stored. If the Library folder is on a network volume the volume must be mounted first. The path to the Library folder needs to be set separately on Mac OS and Windows in a mixed OS environment. The path to the Library folder must be the same from each workstation within each operating system.

### Notes