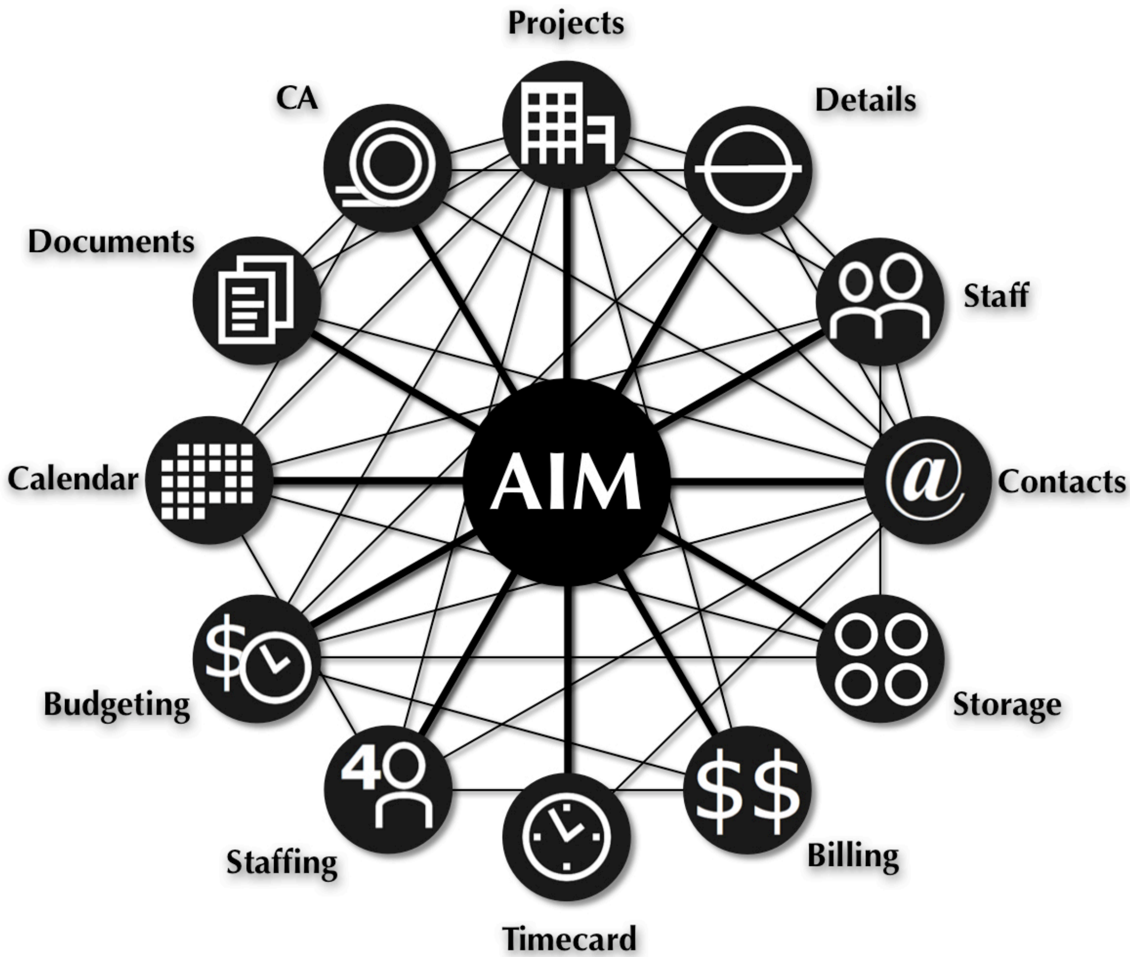
AIM

Architecture Information Manager

User Guide



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0 About This Guide

This documentation describes the day-to-day use of the AIM software. It is intended for any user of the AIM System.

0.1 Obtaining Support

If you need assistance with administering the AIM system please contact your database administrator. If you need technical support from the software developer have your database administrator contact Architectronica by sending email to barry@architectronica.com or by calling 310.376.7054.

0.2 Installation

Your database administrator may have already installed the AIM_Client folder on your local hard disk drive. If you do not have an AIM_Client folder on your local hard disk drive refer to section in the AIM Installation Guide (AIM Install Guide.pdf) entitled 9.0. Install AIM_Client Folder & Files.

1 General Concepts: What is AIM?

AIM is an information management system for storing and retrieving information in an architectural firm or design practice. The AIM system will allow many users on a local area network to easily manage and share project related information. AIM has been tested and refined under actual working conditions in many architectural offices to make it as simple and easy to use as possible.

AIM is a set of templates for FileMaker Pro, a multi-user cross-platform database application from FileMaker, Inc. All information entered into AIM is stored in a collection of database files located on a dedicated server on the network. Storing all the information in one central location makes management more efficient than other decentralized methods. With this system users on the network (depending on their access privileges) can enter information into the system. The information is automatically stored in the central database file where all users can access it. This system is known as a client-server system. The server or host stores and serves the data to the clients or users on the network.

The AIM system is composed of several modules that perform different functions. These modules may include Contacts, Documents, Timecard, Projects, etc. Your system will be composed of those modules, which your organization has licensed. Modules can be licensed individually.

1.1 AIM License Requirements

All components of the AIM system are copyrighted. Users pay a fee to license access to all or part of the AIM system. The AIM system remains the property of Barry Isakson, AIA/Architectronica and may not be copied or duplicated except in strict accordance with the license agreement.

1.2 The Players

There are three distinct types of persons involved in the use of the AIM system: the Software Developer, the Database Administrator, and you the User.

1.2.1 Software Developer

Architectronica is the software developer of the AIM system. Architectronica can assist you in getting the most out of your AIM system.

1.2.2 Database Administrator

One person in your organization is usually designated as the database administrator, referred to throughout this guide as just administrator. The administrator is responsible for managing the AIM database files and assisting you. If you need assistance with the AIM software you should communicate your needs to your administrator. If necessary, your administrator will contact the software developer for additional support. You should not contact the software developer directly unless you are the sole user and administrator of the system.

You administrator also controls access and privileges within the system. If you need access to some part of the system or need to change your privileges, contact your administrator.

1.2.3 Users

Users are those persons within your organization, such as yourself, who will be entering and viewing data in the AIM system.

1.2.4 Groups

Each user belongs to a group. Each group has been assigned access rights and privileges within the AIM system by the administrator. All users in a group share the same access rights and privileges.

1.3 Security

The AIM system is protected with passwords. You will not be able to log into the system without supplying a login name and password. Your database administrator should have provided these to you. Passwords within the AIM system should be well-kept secrets. You should not to tell your password to anyone. If your password becomes known to anyone other than yourself and your administrator you should make arrangements with your administrator to change your password. You cannot change your password directly. Keep your login name and password in a safe place that will not be discovered by others or memorize your login name and password.

1.4 File and Folder Locations and Names

File and folder locations are very important in the AIM system. DO NOT move or rename any of the files and folders in the AIM system once they are installed. All the folders in the AIM system begin with the prefix AIM_. You must have read/write privileges to these folders if the AIM system is to function properly. The location of these folders will vary slightly depending on what operating system you are using (Mac OS or Windows) and what type of AIM installation you have (Demo, Single-user, or Multi-user).

The one file you will need to open is the AIM_Start file. As part of the installation process an alias/shortcut may have been made to this file and placed on your desktop, in the Dock (Mac OS), or in the Start menu (Windows). You can move the alias/shortcut anywhere you like but you should not rename it.

Refer to the Figures in the AIM_Admin_Guide for the proper location of all the AIM files and folders.

1.4.1 Macintosh Operating System (Mac OS X)
If you are using the Macintosh operating system (Mac OS) your AIM folders will be located in your home folder.

1.4.2 Windows Operating System
If you are using the Windows operating system (WIN) your AIM folders will be located in your personal folder within the Documents & Settings folder.

1.4.3 Demo
If you are using a demonstration version of AIM, all your files will be located in the AIM_Demo folder. The AIM_Start file is located in the AIM_Demo folder.

1.4.4 Single-user
If you are the sole user of the system you have a single-user version of AIM. All your files will be located in the AIM_System folder. The AIM_Start file is located in the AIM_Client folder.

1.4.5 Multi-user
In a multi-user version of AIM, all of your files will be in the AIM_Client folder. The AIM_Start file is located in the AIM_Client folder.

2 Starting the AIM System (Figure 1)
To start the AIM system, locate the alias/shortcut to the AIM_Start file and open it. This will launch the FileMaker Pro application and open the AIM_Start file. DO NOT open any of the other files in the AIM system.

When the AIM_Start file opens it will either present you with a login screen where you can type a login name and password or it will report one or more errors and display the errors on screen. If you do not receive any errors proceed to the section **Logging In**.

2.1 Startup Errors
Once your system is installed and configured correctly you will rarely encounter startup errors. However, you may encounter errors which include: start file has timed-out, start file is locked, start file has been renamed, client folder is locked, client folder has been renamed, client folder has been moved, start file is being shared, no system name was supplied, network protocol is incorrect, etc.

If you encounter startup errors read the log and attempt to correct the problem yourself. If you are unable to correct the problem and continue to receive errors, contact your administrator.

2.2 Logging In
When the AIM_Start window appears there are two fields in which to type the login name and password provided to you by your administrator. The login names and passwords are case-sensitive. Make sure your caps-lock key is not down. A warning will appear in the window if your caps-lock key is not in a locked position. If a login name is already in the Name field the cursor will be placed in the Password field, otherwise it will be placed in the Name field. If you are not sharing your system with another user, your login name will

automatically be saved in the AIM_Start file to save you time. Passwords are not saved and must be entered each time.

If a login name is not already in the Name field type your login name matching the case exactly.

Press the <tab> key to advance the cursor to the Password field. You can press the <tab> key to move back and forth between the Name and Password fields. Do not press the <return> key until you have entered both the login name and password.

In the Password field, type your password matching the case exactly.

Press the <return> key or press the Login button to continue the login process. To cancel the login process, press the Cancel button.

If you fail to type in a login name or password you will be prompted to do so before the login process can proceed.

The login process will take several seconds as the AIM_Start file attempts to communicate with the FileMaker Server software on your network. Be patient! Once communication is established several additional files will need to be opened before the system is ready to use. Once you have logged in successfully you will see the AIM Home window.

2.3 Login Errors

If the AIM_Start file is unable to connect to the AIM system it may be due to several problems. The AIM system files may be off-line and unavailable on the network. If you get a message that the AIM_Start file is unable to connect to the AIM system contact your database administrator.

After the AIM_Start file connects to the AIM system, your login name and password will be verified. If your login name and password are correct the login process will proceed. If your login name and password are not correct you will be presented with another opportunity to enter them. If you are unable to enter a correct login name and password after three attempts, the AIM system will quit as a security precaution. If you continue to have problems logging in contact your administrator for assistance.

3 Using the AIM System

The AIM System is composed of several modules. Modules have different functions such as contacts, timecard, and documents. Which modules you have will depend on which modules your organization has licensed and which of those licensed modules your administrator has given your group access to.

Each module contains information of a specific type. For example, the contacts module contains information about people and companies. Each instance of a contact in the Contacts module is known as a record. Each contact has various attributes such as a name, address, etc. These attributes are stored in fields. The easiest way to visualize records and fields is as a matrix, much like a spreadsheet, where each record is a row and each field is a column.

Within a module you will only occasionally work with all the records. You will usually find a subset of the records known as the found set. One of the records in the found set will be the current record. All operations you perform will either be on the current record or the found set of records.

3.1 Home Window (Figure 2)

The modules your group has access to are listed in the AIM Home window. From the AIM Home window you can open any of the modules listed by clicking on the button for that module. The home window is your main control center for the AIM system. To close the AIM system and quit FileMaker use the Quit/Exit button on the Home window or select Close AIM… from the AIM menu.

On Mac OS you can reduce the size of the Home window temporarily by clicking anywhere in the square at the top of the window. This will hide the module buttons and reduce the window to just the size of the square. To expand the window, click in the square again.

3.1.1 Modules

The AIM system is modular. Which modules you have will depend on which modules your organization has licensed. Each module is composed of one or more FileMaker Pro files that work together. Each module is related or linked to other modules in the system. Once a module is open you can perform various actions in the module such as finding, sorting, printing or editing information.

3.1.2 Opening Modules

To open a module, click on the button in the Home window with the name of the desired module.

When opening a module the AIM system performs various checks. These include checking the number of current users of the module. If the number of licensed users has been reached for a given module you will get an error message and will not be able to open the module. You can ask another user to close the module, which will then allow you to open it. See Closing Modules.

When the module opens it may have to open several files from the server before the main window appears. This process can take a few seconds per file depending on the speed of your server and your network. Be patient. This will greatly improve performance. See Closing Modules below.

If the module is already open (indicated by a dot on the right end of the module's button) the module will be shown if it is hidden and brought to the foreground. This process is much faster than opening a closed module.

What appears in the module window varies from module to module but generally the module will open to your list of favorite records. If you have not marked any favorite records then your most recently viewed records will be listed. If you do not have any recently viewed records then all the records will be listed. See the section below on Special Common Fields.

3.1.3 Reducing the Size of the Home Window (Mac OS Only)

To save screen space when not in use you can reduce the size of the Home window by clicking in the dark square at the top of the window. This will reduce the size of the window to just the square. To return the window to its original size, click in the square again.

3.1.4 Hiding All Open Modules

To hide all modules, click on the Hide All button in the Home window or select Hide All Modules from the AIM menu. All the module windows will be hidden but the Home window will remain open.

3.1.5 Showing All Open Modules

To show all modules, click on the Show All button in the Home window or select Show All Modules from the AIM menu. All the modules whose main windows are already open will be shown. Modules, which have not been opened, will not be shown.

3.1.6 Closing Modules

As a general rule you should not close modules over the course of a day unless prompted to do so by the AIM system. If you close a module and then have to reopen it the system will have to go through the opening process all over again taking unnecessary time. Instead you should simply hide a module. See the Task Bar section below on hiding a module.

To close a module rather than hiding it select the Close command from the bottom of the menu with the name of the module (Contact, Document, Timecard, etc.).

3.1.7 Closing the AIM System

As a general rule you should not close the AIM system over the course of a day unless it would represent a security risk. In other words, leaving the system open would allows others to gain access to the system with your user name and your groups' privileges. This can be prevented using a screen saver that requires a password to unlock the screen.

Leaving the system open has performance benefits as modules do not have to be reopened. The FileMaker Pro software also caches information on your hard drive making access quicker the next time you need to access a module.

To close the AIM system Quit/Exit button at the bottom of the Home window or select the Close AIM… command at the bottom of the AIM menu. This will quit FileMaker and close the AIM system. At this time there is no way to completely close the AIM system and leave FileMaker open.

3.2 Module Window Views

To make using the AIM system easy to learn each module has a set of common features it shares with all other modules. Once you learn the features for one module you will be able to use every module in the system. Each module has a main window and may have one or more subordinate windows. Each module window has two primary views, List and Form.

3.2.1 Form View (Figure 3)

In Form view the window shows only one record (the current record) at a time usually in much greater detail than a list view. The tabs in a form view may be different from those in a List view.

3.2.2 List View (Figure 4)

List view shows records in the current found set. The number of records shown will vary depending on the number of records in the found set and the vertical height of the window. List views have column headings above each of the fields displayed. Records in the found set can be sorted by clicking headings in black text above the desired sort field. You can resize the window using your standard operating system window controls to make the window taller and display more records.

3.3 Module Window Parts

Each main window has a common set of parts. These parts include menus, task bar, tabs, body, body elements (fields, buttons, portals) and footers, which are explained below.

3.3.1 Task Bar (Figure 5)

The area at the top of a module window is known as the task bar. The task bar has buttons for most of the actions you will need to perform that are common to all modules. It also displays some status information about the module. Which actions you can perform will depend on what privileges your group has. Refer to Figure 5 for a brief explanation of the buttons in the task bar. Actions in the task bar are grouped according to their function and color-coded. If a button is dimmed (inactive) it may be because the action does not apply or your group does not have sufficient privileges.

Module Button (white & gray)

On the left end of the task bar is the module button. The module button returns you to the Home window for backward compatibility with the original Architectronica system. If you Option/Alt click on the button you will get a window displaying status information about the module. The module icon helps you to identify which module the window belongs to.

Home & View Buttons (white & gray)

Home

The home button takes you to the Home window, which will be displayed on top of all open module windows.

View (Form or List)

Toggles the module window view between Form and List views. See the sections below on List View and Form View.

Record Navigation Buttons (blue)

The record navigation buttons allow you to move to the next or previous record in the module. The last button in the group also displays the current record number and the number of records in the found set. These buttons will be dimmed or inactive if your group does not have Browse privileges in the module or if there are no records in the current found set. These commands can also be found in the View menu.

Next Button
Moves you to the next record in the found set of records. Shift-click to go to the last record. The button will be dimmed or inactive if you are on the last record. This button is equivalent to selecting the Go Next menu item from the View menu.

Prev Button (previous)
Moves you to the previous record in the found set of records. Shift-click to go to the first record. The button will be dimmed or inactive if you are on the first record. This button is equivalent to selecting the Go Previous menu item from the View menu.

Curr or Rec Button (current record)
Moves you to the current record in the found set of records if you have scrolled the window so the current record is not visible in the window. This button is equivalent to selecting the Go Current menu item from the View menu.

Option/Alt-click to go to a specific record number. This is equivalent to selecting the Go Specify… menu item from the View menu.

This button also displays the current record number and the total number of records in the found set.

Find Buttons (yellow)
The next set of buttons allows you to find records and manage the found set of records within the module. The last button in the group also displays the number of records in the found set and the total number of records in the module. These buttons will appear dimmed or inactive if your group does not have Find privileges within the module. Equivalent commands will be found in the Find menu.

Find Button
The Find button presents a dialog window where you enter one or more strings of text to search for within the module. Generally, it is only necessary to type short 4 or 5 character strings to get a short list of matching records. This button is equivalent to using the Find Quick… menu item in the Find menu.

Fav Button (favorites)
Finds all the records where you have marked the Favorites check box. If you have marked more than one favorite record the records are presented in List view and sorted in the reverse order in which you marked them. Favorites are always sorted in the reverse order in which you checked them. You can move a favorite to the top of the list by un-checking and then re-checking the Favorite check box for the record, and then clicking

on the Favorites button again. This button is equivalent to using the Find My Favorites menu item in the Find menu.

Hist Button (history)
Many of the modules keep track of the last 100 records you have recently viewed in Form view. This happens automatically as you use the module. The records will be listed in reverse chronological order. The most recently viewed record will be at the top and the oldest record viewed will be at the bottom. This makes it easy to find records you have recently viewed without having to remember anything specific about them. This button is equivalent to using the Find My Recent menu item in the Find menu.

All
Shows all the records in the module. Displays the number of records in the found set and the total number of records in the module.

Print Button (green)
The Print button allows you to print various reports from the current module for the current record, the found set of records, or all the records in the module. You can also print the current view as it appears in the window by Option/Alt-clicking the Print button. The button will appear dimmed or inactive if your group does not have Print privileges in the module. See the section below on Printing Reports for more information on using the Reports window.

You'll find additional print commands under the main menu for the module (Contact, Document, Timecard, etc.).

Editing Buttons
The editing commands allow you to alter data in the current module. Use them with care. The buttons will appear dimmed or inactive if your group does not have specific privileges or there are no records in the found set.

New (create) Button
Creates a new record in the module. In some modules a dialog may appear where you will need to provide specific information before the record is created. If you have the privilege that allows you to create new records you should take care not to create duplicate records in some modules such as the Contacts module. The button will be dimmed/inactive if your group does not have Create privileges. The button is equivalent to the New (record) command in the main menu for the module.

Dup (duplicate) Button
Duplicates the current record. In some modules a dialog may appear where you will need to provide specific information before the record is duplicated. If you have the privilege that allows you to duplicate new records you should take care not to create duplicate records in some modules such as the Contacts

module. The button will be dimmed/inactive if your group does not have Duplicate privileges or there are no records in the found set. The button is equivalent to the Duplicate (record) command in the main menu for the module.

Del (delete) Button
Deletes the current record after one or more confirmation dialogs. Be certain you want to delete the record. The operation cannot be reversed once it has been completed. This button will be dimmed/inactive if your group does not have Delete privileges or there are no records in the found set. The button is equivalent to the Delete (record) command in the main menu for the module.

3.3.2 Tabs (Figure 3)
Below the task bar in the module window is the tab area. Tabs allow you to move between layouts, which contain different groups of similar information for the current or found records.

The tab area also displays a record label to identify the current record. The type of information shown in the label will vary depending on what module you are in. The information will change as you navigate from record to record.

There may be one or two rows of tabs. The upper row of tabs are the major tabs. The second row of tabs (if any) are the minor tabs. Each major tab can have zero or more minor tabs. You select a tab by clicking on it. The currently selected tab is the lightest tab in the row. To make navigation easier, when selecting a major tab the minor tab for the previously selected tab will be remembered when you return to it.
Which tabs you can see is dependent on which tabs your groups has access to. Tabs you do not have access to are not shown.

You can navigate to the next or previous tab using the Next Tab or Previous Tab commands in the View Menu.

3.3.3 Body
Below the Task Bar and Tab area in the body of the window are displayed fields of information for the current record or found records depending on whether you are in List or Form view. You can toggle the window view between List and Form views by clicking on the View button in the Task Bar. Within the body of a module window are several different types of fields and buttons for interacting with the information in the module. Some of these elements are described below.

You can also change the view using the View as List and View as Form commands in the View menu.

3.3.4 Fields
Fields contain the attributes for the instance of the type of data for the current module. If you are in the Contacts module, for instance, the fields contain attributes for the current Contact record. Fields generally appear

recessed or raised and have a lighter color that the background. Fields have two primary attributes, enterable and editable.

Field Types
There are generally 5 field types. Text, number, date, and time fields display their contents using alphanumeric characters. Container fields generally display the picture in the field.

Field Modes (Figure 6)
Field modes are described below. See also the section below on Editing Text Fields.

Non-enterable Fields
Non-enterable fields display their contents with gray text and cannot be entered or edited.

Enterable Fields
Enterable fields can be entered and their contents selected but may or may not be editable. When your mouse button is depressed anywhere in the window (except on a button) a dotted black line appears around enterable fields.

Non-editable Fields
Editable fields usually have gray text or do not have a recessed appearance. You cannot edit these fields. All calculated fields are not editable. If the field is enterable you can select the text and copy it to the clipboard. If you attempt to edit a field that is not editable you will get an error dialog.

Editable Fields
Editable fields have black text and are recessed in appearance. You can edit these fields provided your group has editing privileges and the record is not locked. If you do not have editing privileges you will receive an error message when trying to edit the field. You can, however, copy the text to the clipboard.

Fields with Menus
Fields with pop-up menus have a raised appearance and a small arrow on the right end. Clicking on the field will produce a menu to choose an item from. You cannot type in a pop-up menu field. This type of field is being phased out in favor of fields with drop-down menus.

Fields with Drop-Down Lists
Fields with Drop-Down lists have a depressed appearance and in most cases have a small arrow on the right end. Clicking on the field will produce a list to choose an item from. You can select an item from the list or type directly into the field.

When selecting an item from the list you can use your arrow keys to navigate up and down the list and in most instances you can type a key on your keyboard and jump to the closest match in the list. If the list is sorted alphabetically press the desired letter key on your keyboard. If the list is sorted numerically press the desired number on your keyboard. If you type fast enough you can type more than one letter or number to select a closer match.

If you press the Enter key (not the Return key) the selected item in the list is entered into the field replacing the entire field contents and the text insertion point (blinking cursor) is placed at the end of the text in the field.

If you press the Return key, the selected item in the list is entered into the field replacing the entire contents of the field and the text insertion point or text selection is advanced to the next field in the tab order. See Field Navigation below.

If you want to show or hide the drop-down list without altering the contents of the field by press the Escape key on your keyboard. On Mac OS you can also use Command-Period to hide the list.

Once you have selected an item from the list or dismissed the pop-up list you can edit text in the field

Editing Value Lists

Some fields with pop-up lists have lists that can be edited. If an "Edit…" menu item appears at the bottom of the list you can edit the items in the list by selecting the Edit… item. If you are in a multi-user environment all users will see any changes you make to the list. Items in the list can be in any order. Any changes made to the list will be lost the next time the module is upgraded. This type of list is being phased out in favor of persistent value lists.

Other fields with pop-up lists that do not have an "Edit…" item may be editable by editing preferences for the module using the Preferences command in the main menu for the module. Contact your administrator before editing these lists. Items edited through the preferences command are persistent across upgrades. The items in the list will always appear in alphabetical order.

Fields with Pop-up Dialogs

Fields with pop-up dialogs have a raised appearance. When your cursor is over a field with a pop-up dialog the cursor will change to a hand. Clicking on the field will produce a dialog where you will have options for editing the field.

Fields with Check Boxes

Fields with check boxes can be selected by clicking on the square next to the box with the desired value. You can select or deselect one or more check boxes.

Warning: if you press the delete key on your keyboard while the checkbox field is active you will delete the entire contents of the field. If this happens in error, immediately, without leaving the field, select Undo from the Edit menu to restore the contents of the field.

Fields with Radio Buttons
Fields with radio buttons can be selected by clicking on the button next to the desired value. You can select only one radio button.

Warning: if you press the delete key on your keyboard while the radio button field is active you will delete the entire contents of the field. If this happens in error, immediately, without leaving the field, select Undo from the Edit menu to restore the contents of the field.

3.3.5 Special Common Fields

The fields below are common to most modules in the AIM system.

Locked Field
The locked field determines whether a record is locked or unlocked for editing purposes. You cannot edit a record unless it is unlocked. You cannot change the locked status of a record unless your group has Lock and/or Unlock privileges. If your group has Lock but not Unlock privileges you will receive a warning when locking the record. Once the record is locked you will not be able to unlock it unless your group also has Unlock privileges. When you unlock a record you have the option of unlocking it permanently or temporarily. If the record is unlocked temporarily it will be unlocked only for you and not other users and it will relock automatically when the module is closed.

Favorite Field
The Favorite field is for each user to keep track of their own set of favorite records (Contacts, Documents, Projects, etc.) and be able to find then quickly by clicking on the Fav button in the Task Bar. You can add a record to your list of favorites by checking the Favorite field. Favorites are added to the list in LIFO (last in first out order). In other words, the most recently added favorite record would appear at the top of the list when finding your favorite records. To move a current favorite to the top of the list, toggle the favorite field off and then on again. The next time you find your favorites it will appear at the top of the list.

Marked Field
The Marked field is for each user to keep track of their own arbitrary set of records (Contacts, Documents, Projects, etc.). Marking records is useful if you want to perform some operation such as printing on an arbitrary set of records. You can mark a record by checking the Marked field. Each user’s marked records are kept track of separately. You can find all the records you have marked by using the Find Marked command in the Find menu.

3.3.6 Buttons (Figure 6)

Aside from the buttons in the Task Bar, buttons may also appear in the body of the window. These buttons usually perform special tasks relating just to the current module and perhaps the current Tab. The buttons may have text labels or icons.

3.3.7 Portals (Figure 6)

Portals contain records from another table or module that are related to the current record in the current module. A typical example would be contacts for a specific project. In the project module there might be a portal on a Form view for a specific project that lists all the contacts (from the Contacts module) for that project. Portals are used throughout the AIM system and have their own set of fields and buttons separate from the module they are in. Portals usually have many rows and columns representing the records and fields from the related table. Portal column headings with black text can be used to sort the records within the portal just like a list view and buttons along the left side are used to operate on the portal rows.

3.3.8 Footer (Figure 3)

At the bottom of the module window is the footer section. Additional buttons and fields appear here. These fields and buttons are usually common to most modules and pertain to the record in the module rather than the data in the record.

3.4 Menus

3.4.1 AIM Menu (Figure 7)

Under the AIM menu you will find menu commands pertaining to the entire AIM system and not just the current module. Some modules and some supporting windows will not have any commands in the AIM menu.

3.4.2 Module Main Menu

The main menu for a module appears immediately to the right of the AIM menu and is named for the module (Contact, Document, Timecard, etc.) Some commands will be the same for every module and others will vary from module to module. If you don’t find a button for the action you want within the current module window check the AIM menu to see if there is a menu command for the action. Some common Main Menu commands are described below.

New
Creates a new record in the module.

Duplicate…
Duplicates a record in the module.

Delete…
Deletes the current record in the module.

Import…
Imports data into the current module. This command requires that your group have the Import privilege. The administrator is usually the only user with access to this command. Warning: this command creates new records from an external source. Use this command with great care.

Export…
Export data to a destination outside the AIM system. This command requires that your group have the Export privilege. See Exporting Data below.

Lock/Unlock (records)…
Lock records in the module.

Mark/Unmark (records)…
Mark records in the module.

Print…
Print reports, documents etc. from the module.

Preferences…
Edit preferences for the module.

Close (module)
Closes the module. In a multi-user system using this command will allow another user to open the module if the limit of licenses users has been reached.

3.4.3 Edit Menu

The Edit menu contains standard editing commands for manipulating the contents of fields in the current record or all records in the found set. A couple of very important commands are covered below.

Save Changes
Saves all changes to the current record and refreshes the current view.

Relookup…
Looks up values based on a relationship using the current field. This command requires that your group have the Relookup privilege. Warning: this command alters data across all records in the found set. Use this command with great care.

Replace…
Replaces all values in the current field for all records with the value in the current field. This command requires that your group have the Replace privilege. Warning: this command replaces data across all records in the found set. Use this command with great care.

Spelling
Checks spelling for the current selection, current field, or current record depending on where your cursor is when you select this command. This button will be dimmed/inactive if your group does not have Edit privileges or there are no records in the found set.

3.4.4 View Menu

The View menu contains for changing the appearance of the current view. Commands here typically do not alter data in any way.

View as List
Changes the current window view to List view, the same as clicking on the List button in Form view.

View as Form
Changes the current window view to Form view, the same as clicking on the Form button in List view.

Back/Forward
In modules that keep a history of your record navigation this command will take you to the previous or next record in the list of records you have viewed.

Go to (record)
Go to the next, previous, first , last, or a specific record.

Next/Previous Tab
Changes the view to the next or previous tab.

Sort (records)
The Sort (records) menu item sorts the records in the found set by the default sort order for the module or the last sort order. The menu item will show an error dialog if your group does not have Sort privileges or there are no records in the found set.

In the Sort dialog you can specify which fields to sort on.

You may get a confirmation dialog if there are a large number of records that will take some time to sort.

You can also sort records in List view by clicking on the column headings in black text.

You can also sort records in any view by control-clicking (Mac OS) or right-clicking (Windows) on any editable field you would like to sort by and choosing Sort Ascending, Sort Descending, or Sort by Value List from the pop-up menu.

Zoom In/Out/100%
Changes the magnification of the current window.

3.4.5 Find Menu
The Find menu contains commands for searching for records in the current module.

Find...
Presents a dialog where you can type stings of text to search for at the beginning of words. Typically it is only necessary to short strings of 4 or 5 characters that appear at the beginning of words. You can type two or more strings separated by spaces. This type of find

Find Favorites/Recent/Marked
Finds your favorite, recent, or marked records.

Find All (records)
Finds all records.

Omit (record)
Omits (hides) the current record from the found set.

Omit Multiple (records)…
Omits (hides) the a number of records you specify from the found set starting with the current record.

Find Omitted (records)
Shows all records not currently in the found set.

Save (records) as Set…
Saves the current found set of records as a set with a name you supply. This command requires that your group have the Browse privilege.

Find Set(s)…
Shows a saved set of records previously saved with the Save Set… command. This command requires that your group have the Browse privilege.

Find Other…
The Find Other… command opens another window where you can specify criteria by which to find records in the current module. The criteria will vary from module to module. In the Find window select the tab representing the criteria you would like to use. After typing or selecting the criteria, click on the Find button to return to the module and view the records that meet the criteria you specified.

Other Tab
Under the Other tab in the Find window are buttons for some Find operations common to most modules. These are explained below.

All
Finds all records in the module.

Omitted
Finds all records not currently in the found set. In essence it reverses the found set.

Current
Finds only the current record. This is useful in some editing and printing operations where you only want to operate on the current record.

Locked
Finds all records that are locked.

Unlocked

Finds all records that are unlocked.

Marked
Finds all marked records.

Favorites
Finds records you have marked as your favorites.

History
Finds your recently viewed records.

Active
Finds all records that are marked active (if applicable).

Menu
Finds all records where the Menu field is checked (if applicable).

Created
Finds all records created after a date you specify.

Modified
Finds all records modified after a date you specify.

Other...
If you select Other in the Other tab of the Find window you can enter find criteria directly in the fields on the current tab in the module window. After you have specified find criteria, click on the Continue button on the left side of the window. In FileMaker 6 or later, if you Option/Alt-click on the button you can extend or constrain a previous search.

3.5 Editing Records

If your group has the Edit privilege you can make changes to editable fields on the current record in a module. If your group does not have Edit privileges or the record is locked you can enter enterable fields but cannot make changes to any editable fields. If you type or attempt to edit editable fields you will see an error dialog.

A solid black line appears around the current field. The current field is the field which contains any selected text or the text insertion point (blinking cursor). To see all fields that are editable in the current view click and hold the mouse down on the background. A dotted line will appear around all fields that are editable.

3.5.1 Saving Changes

Changes you make to a record while editing are not saved until you exit the record. Until you exit a record any changes you make can be undone by choosing Revert from the Records menu. A record is exited whenever you press the Enter key, click outside an enterable field (other than on some buttons), change views, select a different tab, or perform any other operation that causes the record to be exited. The data in the AIM system is changed as soon as you exit a record. These changes are normally immediately visible to other users in the system. In some instances it may be necessary to select the Save Changes command from the Edit menu, which will force changes to become visible.

3.5.2 Field Navigation

You can select a particular field by clicking in it or you can move from field to field using the Tab key. The order in which the fields are selected is by a predetermined tab order. You can move in the reverse order by holding down the Shift key and the Tab key at the same time. Not all fields can be tabbed into. Fields that are not enterable contain check boxes, radio buttons, a pop-up menu, or a pop-up dialog generally cannot be tabbed into.

When entering a field the text in the field is selected or the insertion point is placed at the end of the field. Within the AIM system entering small fields generally selects all the text in the field. When entering large fields the insertion point is placed at the end of the field as a safety precaution.

Text fields without scroll bars will expend to the limit of the window when entered if the amount of text is greater than what is visible in the field. To scroll a field that does not have a scroll bar, place the insertion point in the field and use the Up Arrow and Down Arrow keys on your keyboard.

Text fields with scroll bars do not expand but can be scrolled using the scroll bar on the right side of the field or by placing the insertion point in the field and using the Up Arrow and Down Arrow keys on your keyboard.

3.5.3 Field Labels

Field labels generally appear on the background in gray text above or to the left of the fields they label. Field labels indicate the type of information to be entered into the adjacent field. Field labels generally cannot be changed. However, your administrator can change field labels for some custom fields.

3.5.4 Editing Fields

You can only edit fields that are editable. Editable text, number, date and time fields generally have black text. Until you exit a field you can undo the last change you made by selecting Undo from the Edit menu. A field is exited whenever you move the selection or text insertion point to another field or exit the record.

Care should be taken when editing data in fields. The old adage "garbage in, garbage out" still holds. You should endeavor to make sure the data you are entering is accurate and up-to-date. Make sure your caps-lock key is not in a locked position when typing. When pasting data from other applications use the commands provided to paste the text without styling. As a general rule you should not style text within text fields unless you have a very good reason to do so.

3.5.5 Editing Number, Date and Time Fields

You can only enter a single line of information in number, date, and time fields. These fields have built-in validation that will prevent you from entering information other than the correct type but the validation may not prevent you from entering a value that does not make sense. When you press the Return key in these fields the selection/insertion point will be advanced to the next field in the tab order. See Figure 12 for keyboard shortcuts for entering date and time values.

3.5.6 Editing Text Fields

Text fields can contain up to 64,000 characters of text. You should, however, pay attention to how much text belongs in a field. Some fields will have validation options that will prevent you from entering more than a specific amount of text. Most text fields will not limit the amount of text you can enter. The amount of text expected in a field is generally indicated by the size of the field on the layout. However, you do not need to limit the amount of text in the field to the size of the field on the layout. There is no visible indication of how much text is contained in a field. It may be necessary to enter the field and scroll the text, if necessary, to see all the text in the field.

3.5.7 Drag & Drop Text Selection

You can select and then drag and drop text between fields if you have the enabled the preference in FileMaker's application preferences. In Windows, from the Edit menu, choose Preferences/Application… In Mac OS X in the FileMaker Pro menu choose Preferences/Application… In the General tab check the box for drag and drop text selection.

3.5.8 Text Styling

As a general rule you should avoid styling text in fields. However, in some modules, such as the Documents module, text styling may be desirable. You can style selected text or new text following the text insertion point using the commands in the Format menu. Using the commands in the Format menu you can change the font, size, style, alignment, line spacing and color of selected text. Commands in the Format menu are not available unless you are in an editable text field. Text styling you apply may not be visible in printed reports. Fields calculated using text from fields with styled text will not retain text styling. See Figure # for text styling keyboard shortcuts.

To set tabs within a field you can show a text ruler using the Text Ruler command in the View menu. While your text insertion point is within a text field you can change the margins, set the first line indent, and set tabs for the field. To set a tab marker in the field click once on the text ruler to set a left aligned tab or double-click on the text ruler to open the Tabs dialog. To remove a tab from the text ruler drag the tab off the ruler or use the Tabs dialog to delete the tab.

To insert a tab character in an editable field type Option-Tab (Mac OS) or Alt-Tab (Windows).

3.5.9 Spell Checking

You can check the spelling of text in any editable text field on records that are not locked. You can check the currently selected text, the current field or the current record depending on whether you have text selected. You can also check spelling as you type.

To check spelling select Edit/Spelling/Check Selection… or Edit/Spelling/Check Record… from the Edit menu. The Check Selection… command is not available unless you have text selected.

To check spelling as you type, the preference must be turned on in Edit/Spelling Options. In the spelling preferences click the "Beep on questionable spellings" option. You can also turn on or off the red underline that appears under misspelled words.

If you can edit the current record but the Spelling/Check Record… command is not available it may be because you do not have a main dictionary selected. Contact your administrator.

When checking spelling you will not be able to have FileMaker learn words you do not want flagged as misspelled unless you have selected a User Dictionary. Use the Edit/Spelling/Select Dictionaries… command to select a user dictionary. A user dictionary called USER.UPR was provided in your AIM installation.

3.6 Printing

To print from any module, click on the Print button in the Task Bar. In most modules the Reports window will appear. In the Documents module the current document will be previewed. You can also print the current view in the module window.

3.6.1 Printing the Current View

To print the current view, Option/Alt-click on the Print button. The page/print setup dialog will appear. Make any necessary changes to the page/print setup and click OK or Cancel. In the Print dialog you can print all records (in the found set), the current record, or a blank record. When printing a Form view the setting will default to the current record. When printing a List view the setting will default to all records (in the found set).

3.6.2 Printing Reports (Figure 8)

To print a report, click on the Print button in the Task Bar and select the Reports tab in the Reports window. The Reports tab lists reports for the current module your group has access to. Select the desired report from the list of reports. Select current, found, or all from the Report On options. To preview the report before printing select the Preview option. See Print Previewing below for information on previewing before printing. To display the total number of pages on the report, select the Total Pages option. In the Report Title field you can change the name of the report temporarily while printing. Your Administrator can change the name of the report permanently, if necessary. To preview or print the report, click on the Preview/Print Report… button. To cancel printing and return to the module window, click on the Cancel button.

3.6.3 Printing Envelopes & Labels (Figure 9)

To print an envelope or label, click on the Print button in the Task Bar and select the Envelope tab in the Reports window. The Envelopes tab lists envelopes and labels designed for printing single envelopes or labels. To print multiple envelopes or labels use the Envelope or Label reports in the Reports tab. Select the desired envelope or label from the list.

The default address for your organization appears in the Return Address field automatically. You can change this temporarily while printing. Your Administrator can change it permanently, if necessary. You can type an address in the fields provided or you can select a contact with the Contact button. The name field has a pop-up list of choices from the Contacts module to aid in addressing the envelope.

To preview the envelope before printing, click on the Preview… button. To print with a print dialog where you can specify the number of copies click on the Print… button. To print one without previewing or specifying the number of copies, click on the Print One button. To cancel printing and return to the module window, click on the Cancel button.

3.6.4 Print Previewing (Figure 10)

When previewing reports or envelopes the Print Preview window will appear. The Print Preview window contains commands for controlling the report or envelope while previewing.

Email PDF (menu)
Creates a PDF of the current report/document, saves it on your desktop and attaches it to a new email, then opens your email application.

Print
Presents the print dialog where you can specify print parameters, such as the number of copies, and print. Hold the Option/Alt key down to print without a dialog.

Setup
Presents the Page/Print Setup dialog where you can change the page orientation and page size for the report/envelope.

Prev (previous)
Goes to the previous page in the report. Hold the Option/Alt key down to go to the first page.

Page
Repaginates the report. Hold the Option/Alt key down to go to a specific page number.

Next
Goes to the next page in the report. Hold the Option/Alt key down to go to the last page.

In
Zoom in (enlarge) the image of the page. Click again to zoom in further. You can zoom up to 400% of the original size.

Zoom (100)
Zoom the page image to 100% (normal size).

Out
Zoom out (reduce) the image of the page. Click again to zoom out further. You can zoom out to 25% of the original size.

Up
Scroll the page up if the page is larger than the window.

Down
Scroll the page down if the page is larger than the window.

Save
Copies the image of the page to the clipboard for pasting into other applications.

Cancel
Cancels previewing and returns you to the Reports window.

3.7 Saving and Showing Sets

In most modules you have the ability to save arbitrary sets of records as a set. The way to think of this is as a snapshot showing those records you may want to recall at some point in the future. An example would be if you were making changes to a group of records and weren't able to finish before going home you could save the records as a set and recall them the next day.

3.7.1 Saving a Set

To save a set of records as a set choose Save Set… from the Find menu. A window will appear where you can name the new set. Set names must be unique. Enter a name for the set and click on the Save button.

3.7.2 Showing a Set

To show a set of records as a set choose Show Set… from the Find menu. A window will appear where you can select a set. Select the desired set and click on the Show button.

3.8 Keyboard Shortcuts

See Figure 7 for general keyboard shortcuts that apply to most modules.

4 Using Specific Modules

The follow section of this guide covers specific modules in the AIM system. Most if not all of the general features covered above are applicable to all modules. The information below is limited to that which is specific to a given module.

4.1 Projects Module

The Projects module is a comprehensive tool for storing information about an architectural project. The amount of information that can be stored is quite varied. Only a few of the key features are covered here.

4.1.1 Opening the Projects Module

The Projects module opens to the Summary tab in List by default. This tab is visible to all users who have access to the Projects module. See the Home Window section above for information on opening and closing modules.

4.1.2 Creating a New Project

When a new project is created, a window will appear where you can specify a new project number and project name. Specify a new project number and project name. Click on the Create New Project button to create the new project. The new project will be created and the view changed to the Project/General tab. Project numbers and project names must be unique for the AIM system to function properly. See the Task Bar section above for information on using the New button.

4.1.3 Duplicating a Project

Although projects can be duplicated it is generally not a good idea unless the projects are nearly identical. When duplicating a project be certain to change the project number and name to unique values. See the Task Bar section above for information on using the Dup button.

4.1.4 Deleting a Project

Be careful when considering whether to delete a project. As a general rule, projects should not be deleted, but kept for historical purposes. Rather than deleting a project uncheck the Active and Menu fields for the project. See the Task Bar section above for information on using the Del button.

4.1.5 Finding Projects

See the Task Bar section above for information on using the Find buttons.

4.1.6 Sorting Projects

The default sort order for projects is by project number. See the Task Bar section above for information on using the Sort button.

4.1.7 Printing Projects

See the Task Bar section above for information on using the Print button.

4.1.8 Add or Removing a Project from the Menus

Projects can be added or removed from the menus used throughout the AIM system by checking the Menu field on a tab with access to the menu field.

4.1.9 Specifying the Current/Default Phase

To specify the current phase for the project select the desired phase from the pop-up list in the Phase field. The phases in the list will be default phases unless phases have been defined for the project. The current phase for the project is used in modules such as the Timecard to speed entry.

4.1.10 Creating a Project Directory

A common practice in project management is to create a project directory containing contact information for all members of a project team. To create a project directory switch to Form view and select the Team/Contacts tab. Here you can add, duplicate and delete project contacts. Each project contact can be placed in a group and given a role using the pop-up menus. To link a project contact, click on the button in the Contact column. To quickly jump to the contact record in the Contact module click on the small Head icon that appears in the Contact column after a contact is selected. Add any notes about the contact in the Notes field. To print the project directory click on the Print button in the Task Bar and print one of the Directory reports.

4.2 Staff Module

The Projects module is a tool for storing information about each staff member in your organization. The amount of information that can be stored is quite varied. Only a few of the key features are covered here.

4.2.1 Opening the Staff Module

The Staff module opens to the Summary tab in List view by default. This tab is visible to all users who have access to the Staff module. See the Home Window section above for information on opening and closing modules.

4.2.2 Creating a New Staff Member

When a new staff member is created the view will be changed to the Staff/General tab in Form view. Staff IDs, first and last name combinations, and initials must be unique for the AIM system to function properly. Once you have begun the process of creating a staff member you will not be able to continue until you have entered a staff ID, last name and first name. If you aren't able to complete these fields you will have to delete the record and try again when you are ready to supply those values. See the Task Bar section above for information on using the New button.

4.2.3 Duplicating a Staff Member

Although staff members can be duplicated it is generally not a good idea unless the staff members are nearly identical. When duplicating a staff member be certain to change the Staff ID, first and last name, and initials to unique values. See the Task Bar section above for information on using the Dup button.

4.2.4 Deleting a Staff Member

Be careful when considering whether to delete a staff member. As a general rule, staff members should not be deleted, but kept for historical purposes. Rather than deleting a staff member uncheck the Active and Menu fields for the staff member. See the Task Bar section above for information on using the Del button.

4.2.5 Finding Staff Members

See the Task Bar section above for information on using the Find buttons.

4.2.6 Sorting Staff Members

The default sort order for staff members is by first and last name. See the Task Bar section above for information on using the Sort button.

4.2.7 Printing Staff Members

See the Task Bar section above for information on using the Print button.

4.3 Contacts Module

The Projects module is a tool for storing information about people and companies. It is one of the most important modules in the AIM system. All contact information throughout the AIM system, with few exceptions, is stored in the Contacts module.

4.3.1 Opening the Contacts Module

The Contacts module opens to the Summary tab in List view by default. This tab is visible to all users who have access to the Contacts module. See the Home Window section above for information on opening and closing modules.

4.3.2 Creating a New Contact

When creating a new contact the view will be changed to the Contact/Names tab in Form view. Fill in the necessary fields in the Contact/Names, Addresses, Telecom and Notes tabs. Be as complete and accurate as possible. See the Task Bar section above for information on using the New button.

4.3.3 Duplicating a Contact

Although staff members can be duplicated it is generally not a good idea unless the contacts are nearly identical. Duplicating a contact usually leads to incorrect information being left in the new contact record. See the Task Bar section above for information on using the Dup button.

4.3.4 Deleting a Contact

Be careful when considering whether to delete a contact. As a general rule, contacts should not be deleted, but kept for historical purposes. See the Task Bar section above for information on using the Del button.

4.3.5 Finding Contacts

See the section above on using the Find button in the Task Bar. See the Task Bar section above for information on using the Find buttons.

4.3.6 Sorting Contacts

The default sort order for contacts is by last name and first name if they exist or company name if they do not. See the Task Bar section above for information on using the Sort button.

4.3.7 Managing Contact Sets

In the Contacts module you can save and show sets just as you can in many other modules. In addition, the Contacts module has the facility to add contacts to and remove contacts from sets one Contact at a time. Under the Contact/Sets tab is a list of all saved contact sets in the left column. A typical saved set might be a holiday card list or a party invitation list. By clicking on the plus (+) button next to the set name you add the contact to the set. In the second column are the sets to which the current contact belongs. To remove a contact from a set, click on the minus (-) button next to the set name. Also see the AIM Menu section above on Saving and Showing Sets.

4.3.8 Categorizing Contacts

The Contacts module has a two-tiered hierarchical system for categorizing contacts. Under the Contact/Categories tab are two columns, Category 1 and Category 2. Category 1 represents major categories and Category 2 represents minor or sub categories. Categories can be edited using the Edit

Categories command in the AIM menu. When you check a major category in Category 1 the minor categories for that major category appear in Category 2. Check the boxes for the applicable minor categories. You can select more than one major category and more than one minor category. To edit the categories, select Edit Categories… from the AIM menu.

4.3.9 Navigating Recent (history) Contacts

One of the best productivity features of the Contacts module is the ability to move back and forth through your recent (history) contacts. The Contacts module automatically keeps track of any contacts you view in Form view in reverse chronological order. At any time you can view your recent (history) contacts by clicking on the Hist button in the Task Bar.

In addition, you can move backwards and forwards through your recent (history) contacts one at a time by using the "(" and ")" keys on your keyboard. To go back in your history, press Command-9 on Mac OS or Control–9 on Windows. To go forward in your history, press Command-0 on Mac OS or Control–0 on Windows. These commands also appear in the AIM menu.

4.3.10 Adding Projects to a Contact

You can add a project to a contact for use on a project directory under the Other/Projects tab. This is equivalent to adding a contact to a project under the Team/Contacts tab in the Projects module. To add a project click on the New button on the left side of the portal. Select a project number from the pop-up list in the project number field. For each project the current contact can also be assigned to a group and given a role on the project. You can jump directly to a project by clicking the small icon next to the project number.

4.3.11 Printing an Envelope or Label

You can quickly print an envelope or a label for the current contact by clicking on the Envelope or Label buttons to the left of the contact name on the Contact/Summary tab in Form view. Both of these buttons will take you directly to the Envelope tab in the Reports file and fill in the current contact information.

4.3.12 Getting a Map for the Contact Address

You can get a map to the current contact address by clicking on the Map button to the left of the contact name on the Contact/Summary tab in Form view.

4.3.13 Copying a Contact to the Clipboard

You copy the current contact to the clipboard by clicking on the Clipboard button to the left of the contact name on the Contact/Summary tab in Form view.

4.4 Documents Module

The Documents module is a tool for creating and managing routine correspondence such as transmittals, letters, memos, field reports, etc. It is quite different from using a word processor.

4.4.1 Opening the Documents Module
The Documents module opens to the Summary tab in Form view by default. See the Home Window section above for information on opening and closing modules.

4.4.2 Creating a New Document
When creating a new document a window will appear where you can select a template from which to create the new document. Select the desired template. A new document of the selected type will be created and the view will be changed to the To From tab in Form view.

4.4.3 Duplicating a Document
See the Task Bar section above for information on using the Dup button.

4.4.4 Deleting a Document
See the Task Bar section above for information on using the Del button.

4.4.5 Finding Documents
See the Task Bar section above for information on using the Find buttons.

4.4.6 Sorting Documents
The default sort order for documents is by document date in descending order. See the Task Bar section above for information on using the Sort button.

4.4.7 Printing Documents
By default clicking on the Print button in the Task Bar prints the current document rather than reports as in most other modules. To print reports for the Documents module click on the Print button with the Option/Alt key down. In the dialog that appears you can choose to print the current view or document reports.

4.4.8 Addressing a Document
You can address a document under the To From tab in Form view. Most documents have a single addressee but some documents such a memo intended for internal use only can have multiple attendees. To address a document you can either select a contact using the To button or type directly into the address fields. When you select a contact from the Contacts module, all the address information is filled in automatically. You can also copy up to 10 additional addressees in the Copy area near the bottom of the window. You can specify who the document is from in the upper right area of the window. The From fields will be automatically filled in with the name of the logged in user. If the user has a signature stored in the Staff module you can toggle the signature on and off using the Print Signature button. Depending on whether you are printing on preprinted stationery you also toggle the logo on or off using the Print Logo button.

4.4.9 Giving a Document a Subject, Project Number, Filing Code, and Label
Under the Subject tab in Form view you can give the document a subject, assign it a project number and give it a filing code. When assigning a project number to a document the project address will be filled in automatically if a project address is in the record for the project in the

Projects module. The filing code is optional but sometimes useful for coordinating you paper filing system with the Documents module. The filing code may appear in small text on the bottom of the printed document. Documents can be filtered in the Find window using the filing code. You can also label the document using the label fields. Labels are useful for labeling a document as “Confidential” or for “Internal Use Only” and other similar phrases.

4.4.10 Adding Notes to a Document

Also under he Subject tab in Form view, you can add notes to the document. Notes are intended for internal use and usually do not appear on the printed document.

4.4.11 Editing the Document Body

The Body tab in Form view contains fields that will appear in the body of the document. The document body may vary by document type. In some document types such as a memo or letter the document body contains a single field where all the body text will appear. In other document types the document body may contain many fields of varying types. In most cases you can style text in the large document body fields.

4.4.12 Editing Document Items

Many document types such as transmittals, meeting minutes, and field reports, in addition to document body fields, have repeating items. These repeating items are in a portal under the Items tab in Form view. If a document type does not have repeating items the Items tab will show the same fields as the Body tab. In some cases any text styling you apply in repeating items will not be reflected in the printed document because the fields on the printed document are calculated. Text styling is not preserved in calculated fields.

4.4.13 Using the Text Ruler

When editing larger fields in the document body it may be helpful to show the text ruler when adding tabs or adjusting paragraph indents. To show the text ruler, click on the Ruler button on the left side of the window under the Body or Items tabs.

4.4.14 Pasting Text without Style

When pasting text from other applications you wish to paste the text without styling applied in the other application. To paste text without styling click on the Paste/Insert button on the left side of the window under the Body or Items tabs.

4.4.15 Inserting Tabs in a Field

To insert a tab in a field click on the Tab button on the left side of the window under the Body or Items tabs. You can also type Option-Tab on Mac OS or Alt-Tab on Windows to insert a tab in a field.

4.4.16 Inserting Bullets in a Field

To insert a bullet in a field on Mac OS click on the Tab button on the left side of the window under the Body or Items tabs.

4.4.17 Printing on Blank Paper or Preprinted Stationery
Depending on whether you are printing on preprinted stationery or blank paper the logo for an individual document can be toggled on or off. Under the To From tab in Form view toggle the logo n or of using the Print Logo check box.

4.5 Timecard Module
The timecard module is a sophisticated time and expense-tracking tool. In the Timecard module multiple users can make timecard entries simultaneously. Administrators can run reports showing time and expense entries made right up to the moment the report is run without moving any data or any of the hassles normally associated with using spreadsheets.

4.5.1 Opening the Timecard Module
To open the timecard module click on the Timecard button in the Home window. The timecard module opens to the Time/Entry tab by default. The tabs visible in the window will depend on which tab your administrator has given your group access to.

4.5.2 Viewing Entries
In the Time/Entry and Expense/Entry tabs entries are listed in the portal for the date appearing in the Date field and the staff person identified in the Staff field just above the portal. The date field defaults to the current date but you can change the date by selecting a date from the pop-up list or by using the Date buttons on either side of the Date field. When the date is not the current date, the date in the upper left portion of the window will appear in red as a reminder. If the administrator has enabled the preference allowing you to change staff members, you can select a different staff person from the pop-up list in the Staff field. When the selected staff member is not the logged in staff member the staff members name in the upper right portion of the window will appear in red as a reminder.

Note that no entries will appear in the portal until some entries have been made for the selected date and staff member.

4.5.3 Viewing Entries in More Detail
You can view entries in more detail by clicking on the Form button on the upper left corner of the portal. The form view within the portal shows a single portal record with larger fields including a display of entry errors.

4.5.4 Time Entries
The Time/Entry tab displays time entries. Time entries are used for recording time worked on a project. You can make a single entry per day or as many entries as are required to describe the work. The portal on the Time/Entry tab shows the following fields.

Marked (checkbox)
Indicates whether the record is marked. Mar or unmark the record by checking the checkbox.

Label (text)
This field can be used for whatever purpose you wish. It can be used to sort records by the text placed in the field.

Project Number (text)
Select a project number from the pop-up list. Tabbing into or clicking in the field will display a pop-up list sorted by project number. Clicking on the menu arrow on the right end of the field will display a pop-up list sorted by project name.

Phase Number (text)
Select a phase from the pop-up list of phases for the selected project. If no project is selected a default set of phases will be shown. The default phase for the selected project is entered automatically but can be changed.

Task Number (text)
Select a task from the pop-up list. The tasks displayed may be a default set of tasks or tasks specific to the selected project and phase.

Description (text)
Type a text description of the work performed. Descriptions should generally be composed of properly formed sentences that a client would understand. The description may end up in an invoice.

Notes (text)
The Notes field is intended for internal use only such as making a note to yourself to review an entry later or entering a note for the bookkeeper.

Start (time)
This field is optional for entering the time the work started and will automatically enter the current time when the record is created. You can option click on the field to set it to the current time or edit the time to any value you desire.

Stop (time)
This field is optional for entering the time the work stopped. You can option click on the field to set it to the current time or edit the time to any value you desire.

Hours (number)
This field displays the hours worked if both the start time and stop time are specified. You can enter any number here and override the calculated value. The number of decimal places allowed is set by the administrator.

B (checkbox)
This field flags the record as billable.

E (text)
This field displays any entry errors in the record. Your administrator determines which errors are displayed. To view the errors either print a timecard report or toggle the portal view to Form.

4.5.5 Expense Entries

The Expense/Entry tab displays expense entries. Expense entries are for recording project expenses such as plotting, printing, shipping, mileage, etc. Some of the expense entry fields are similar to those for time entries.

Marked (checkbox)
Indicates whether the record is marked. Mar or unmark the record by checking the checkbox.

Label (text)
This field can be used for whatever purpose you wish. It can be used to sort records by the text placed in the field.

Project Number (text)
Select a project number from the pop-up list. Tabbing into or clicking in the field will display a pop-up list sorted by project number. Clicking on the menu arrow on the right end of the field will display a pop-up list sorted by project name.

Category Number (text)
Select an expense category from the pop-up list.

Item Number (text)
Select an item number from the pop-up list. The items in the list will be dependent on the selected expense category.

Description (text)
Type a text description of the expense. Descriptions should generally be composed of properly formed sentences that a client would understand. The description may end up in an invoice.

Notes (text)
The Notes field is intended for internal use only such as making a note to yourself to review an entry later or entering a note for the bookkeeper.

Quantity (number)
Enter the number of items such as plots, prints, miles, etc.

Unit (text)
Enter the units for the Quantity (plots, prints, miles, etc).

Rate (number)
Enter the unit cost of the item.

B (checkbox)
This field flags the record as billable.

O (checkbox)
This field flags the record as out-of-pocket.

E (text)
This field displays any entry errors in the record. Your administrator determines which errors are displayed. To view the errors either print a timecard report or toggle the portal view to Form.

4.5.6 Making a New Entry

To make a entry you must be on the Time/Entry or Expense/Entry tab. Click on the New button on the left side of the portal. A new blank entry will appear in the portal. The first entry may a take a few seconds to appear. Subsequent entries will appear quicker. Fill in the fields for the new entry by selecting from the pop-up lists or typing in each field. When you have finished press the Enter key on your keyboard.

4.5.7 Making Multiple Entries at One Time

You can make multiple blank entries at one time by option-clicking on the New button on the left side of the portal. Also see the sections below on copy and pasting entries.

4.5.8 Marking Entries

You can mark multiple entries by checking the box in the Marked column on the left end of each entry. Marking entries will allow you to perform actions such as copying or deleting on more than one entry at a time.

4.5.9 Saving Shortcuts

You can save entries you make regularly as shortcuts so you don't have to fill in all the fields each time. To save entries you must be on the Time/Entry or Expense/Entry tab.

You can save a single selected entry or multiple marked entries. To save an entry as a shortcut, select the desired entry by clicking on the line number on the left end of the entry. This will select the entire entry. Click on the Copy button to copy the entry. If you also have marked entries a dialog appear asking if you want to copy the selected or marked entries.

The entries are placed on a special clipboard so you can paste them into your shortcuts. Click on the Time/Shortcuts tab if you are copying a time entry. Click on the Expense/Entry tab if you are copying an expense entry. Click on the Paste button on the left side of the portal. The copied entries are pasted into the shortcuts tab. From here you can copy shortcut entries at any time and paste them into the Time/Entry or Expense/Entry tab to create new entries. You cannot paste time entries into expense shortcuts and visa versa.

4.5.10 Copying and Pasting Entries

You can copy and paste time entries from one day to another using the copy and paste buttons on the left side of the portal. Copying entries does not remove them from their original location.

If you need to move entries you will need to copy and paste them and then remove them from their original location. Do not remove them from their original location until you have pasted them. Once removed entries cannot be pasted.

You can also paste entries from one staff member to another if your administrator has enabled that option.

4.5.11 Sorting Entries

You can sort entries using the column heading buttons (with black text) at the top edge of the portal.

4.5.12 Spell Checking Entries

You can spell check your entries using the Spell button on the Task Bar. When spell checking only those fields that can be spell checked remain visible in the window. When finished spell checking click on the Done button in the Spelling window.

4.5.13 Printing Your Timecard (and Expense Report)

To print your personal timecard and/or expense report click on the Print button in the Task Bar. If you are on the Time or Expense tab and your administrator has enabled the option for users to print reports, you will be asked if you want to print your timecard (and expense report) or a report. Click on the Timecard button. You will then have the option to sort by date or project. Select the desired sort option. In a moment your timecard will be previewed, as it will appear when printed. If necessary you can choose Page/Print Setup… from the File menu to change the page size or orientation. To print the timecard, choose Print from the File menu.

4.5.14 Printing Reports

To print reports on timecard data click on the Print button in the Task Bar. If you are on the Time or Expense tab and your administrator has enabled the option for users to print reports, you will be asked if you want to print your timecard (and expense report) or a report. Click on the Report button. In the Reports window you must specify a date range, project number, or other criteria for the report before printing the selected report.

4.5.15 Setting User Preferences

Each user can change their personal preferences for the Timecard module under the Prefs/Personal tab. With the exception of the Project Menu option these preferences are set to the default values specified by the administrator each time the Timecard module is opened. The Project Menu option controls which projects appear in the pop-up list in the Time/Entry and Expense/Entry tabs.

4.5.16 Administering the Timecard Module

The following topics are usually only accessible to the administrator. They are covered in the AIM Admin Guide. A brief explanation is included here for reference. The tabs, which permit access to these functions, may not be visible to all groups.

Setting Timecard Module Preferences

Under the Prefs/System, preferences for the timecard module can be edited by the administrator.

Editing Staff Categories Rates
Under the Staff/Categories tab default staff billing categories can be set up. Project-specific staff billing categories can also be defined. Project-specific staff billing categories override the default rates.

Editing Staff Rates
Under the Staff/Staff tab staff members can be added or deleted and default billing rates for each staff member can be defined.

Editing Staff Project Rates
Under the Staff/Projects tab project-specific staff rates can be defined.

Editing Projects
Under the Admin/Projects tab projects can be added and edited.

Editing Phases
Under the Admin/Phases tab default and project-specific phases can be added or edited.

Editing Tasks
Under the Admin/Phases tab default and project-specific phases can be added or edited.

Editing (expense) Categories
Under the Admin/Categories tab expense categories can be added or edited.

Editing (expense) Items
Under the Admin/Categories tab expense items for each expense category can be added or edited.

Editing Time & Expense Data
Under the Admin/Data tab time and expense records can be filtered by a wide range of criteria and edited.

Exporting Time & Expense Data
Under the Admin/Export tab time and expense records can be filtered by a wide range of criteria and exported to other programs/applications.