

## New For 8.2 - Printing section with thumbnail gallery

One of the enhancements we've made to the software for the new 8.2 release is a new set of reports, featuring consistent header and footer sections for a more professional presentation pack appearance.

These reports are all now displayed in a Thumbnail gallery, so that you can quickly identify the report you want and then preview or print it.

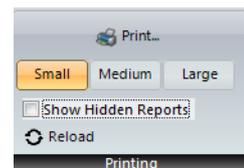
The reports can still be edited to suit your needs and can quickly be organised as you wish, by bundling into packs (previously known as quick-sets) or marking them as Favourites.

Updating to 8.2 will archive your existing reports to make way for the new printing section; you can however quickly add these back into your setup and generate a thumbnail for the gallery. This procedure is described in an additional helpsheet.

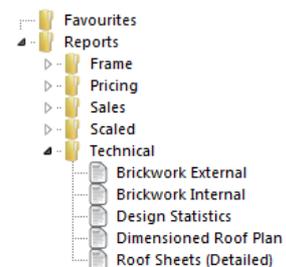
### The Interface

The Printing interface is split into four sections.

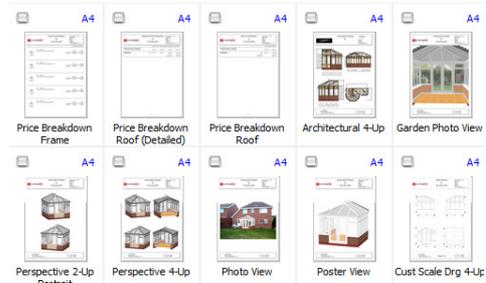
1. **Toolbar** – here, you can choose to print, once you've selected one or more reports. You can also choose how you want your thumbnail gallery to appear onscreen, showing either small medium or large tiles. You can also choose to display any reports that you've previously hidden.



2. **File Tree Explorer** – all the reports are organised into folders by their type (i.e frame, technical, sales etc...). There is also a folder for favourites and any packs you create will also appear here as a folder. You can double-click the folders to expand or collapse the file tree and see the names of all reports contained in that particular folder. A single click on any of the folders will display the thumbnails in the gallery pane.

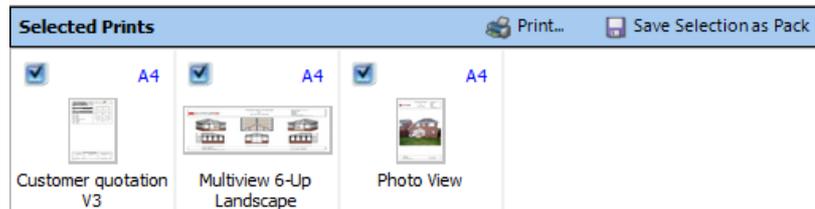


3. **Thumbnail Gallery Pane** – The main portion of your screen will display small images of each of your reports, allowing you to quickly identify the report that you want to carry out any actions on, such as editing, adding to favourites or printing. With Reports selecting in the file explorer, all reports will be displayed, if a sub folder such as **Technical** is selected, only those will be displayed.



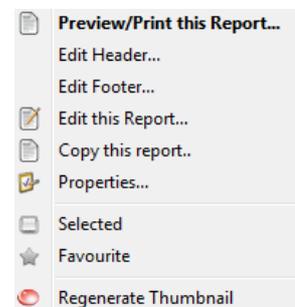
The size at which they are shown depends on what you have selected in the toolbar (Fig.1)

- 4. Selected Prints Pane** – In the gallery pane, click on a selection of reports that you wish to print, or make into a pack. As you click them, they appear in the **Selected Prints** pane at the bottom of your screen. From here, you can either print your selection or save to PDF, by clicking **Print**, or click **Save Selection as Pack** to create a new pack.



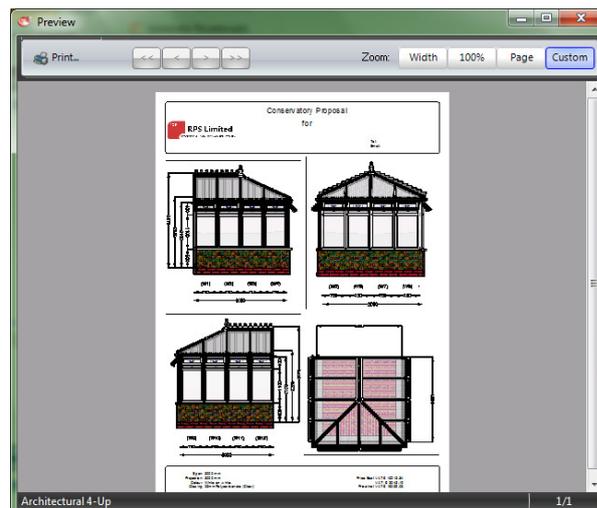
## Performing actions with your reports

The toolbar has very few options available. To perform any actions on a particular report, right-click the desired report, either in the thumbnail gallery or the file tree pane. The context menu contains a variety of options, many of which are self-explanatory, but are discussed below for clarity.



### 1. Preview/Print this report

Displays a full screen preview window of the selected report. From here you can progress by clicking **Print**, to send to printer, save to PDF, or email as a PDF to a client or supplier.

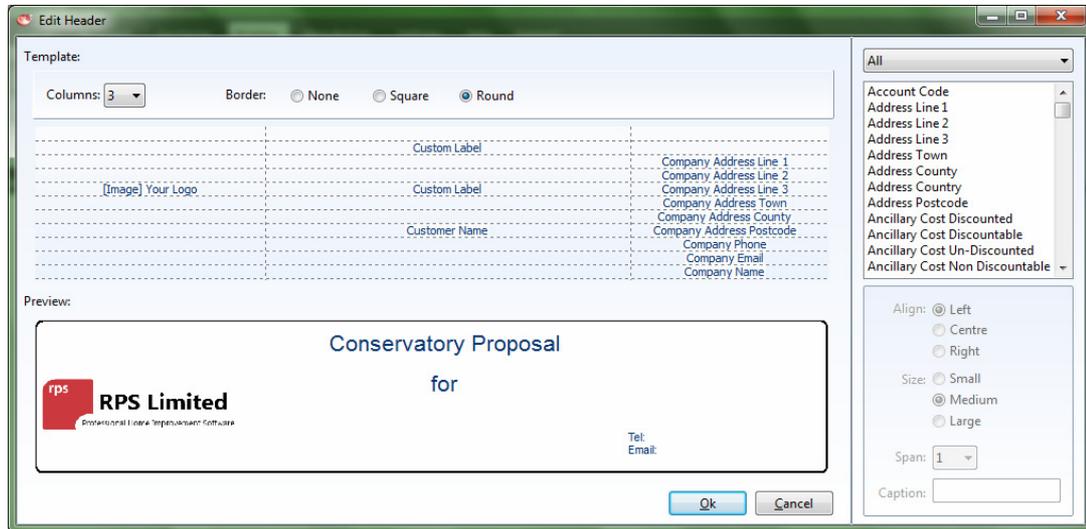


### 2. Edit Header/ Edit Footer

Quickly tweak the headers and footers of a report to choose which information you wish to display in them. You can add labels to say anything that you wish, and also pull in datafields

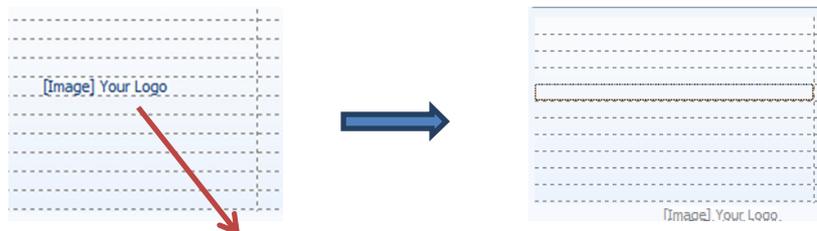
from the current job, such as the customer's name and address, which you've entered in orders details, or a whole host of statistics or dimensions of the current job, such as colour scheme, roof glazing material etc...

Clicking **Edit Header** or **Edit Footer** opens the editor window, which displays a preview of the header or footer, along with the design of your header and datafields selected

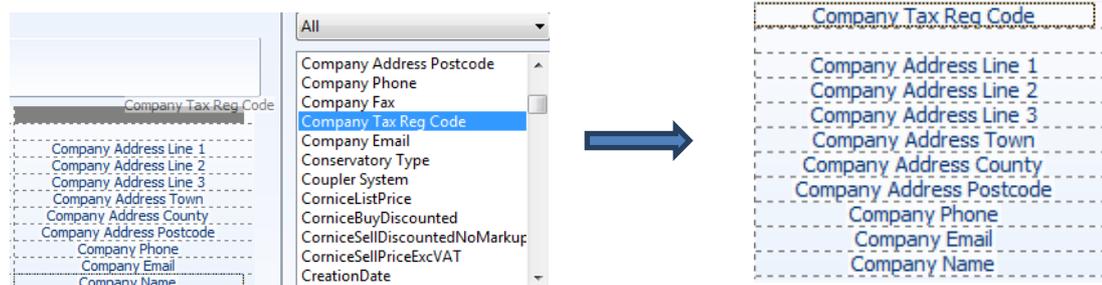


You can change the layout, by increasing or reducing the number of columns from the drop-down menu. A border can also be added if required.

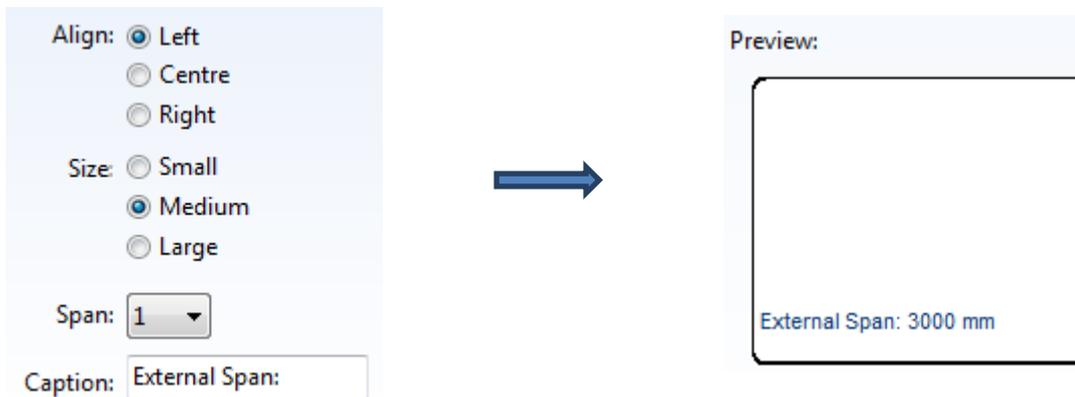
To remove any unwanted fields from the design, simply click and drag them beyond the limits of the header of footer section .



Similarly, to add new datafields onto your header of footer, scroll through the list in the right hand pane to find the data you want to display, then click and drag this into a position with which you're happy.



The data you choose to display in the header/footer can be formatted by changing the text size and also aligned left or right to suit. Also, you may wish to add a caption in front of the any data displayed, to denote what the value relates to, such as **External Span** for example. Simply type this into the caption field



### 3. Edit This Report

Clicking this option opens the currently selected report in Print Designer. Editing the main body of reports has not changed in version 8.2. Please refer to previous documentation regarding editing reports.

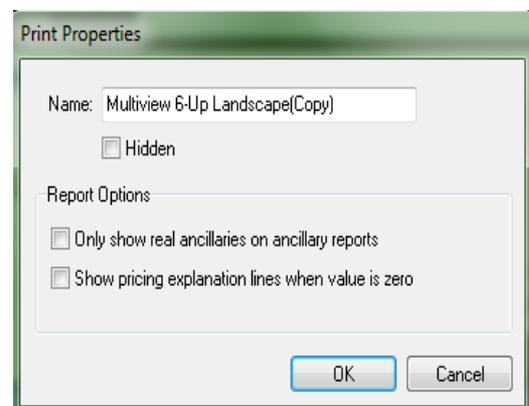
### 4. Copy This report

This creates a duplicate of the selected report. This option is ideal if you need two similar reports; just create a duplicate and make any minor adjustments to either the original or duplicate report. This saves you from having to create a new report from scratch.

### 5. Properties

There are few operations you can perform within this menu:

- A. You can rename reports
- B. Reports can be hidden; ideal if you don't wish to display a report in your gallery, but don't want to completely delete it, in case you require it in the future.
- C. You can choose whether only real ancillaries\* are displayed.
- D. You can choose whether or not pricing explanation is displayed for zero priced items.



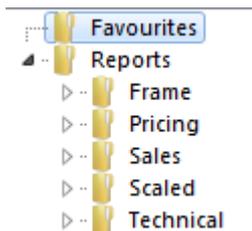
\*Real ancillaries are those that are priced under the Ancillary category.

## 6. Selected

Clicking this adds the current report into the **Selected Prints** pane. If the report is already selected, this will be denoted by a blue tick  **Selected** . Clicking this when already selected will unselect the report and remove it from your current selection.

## 7. Favourite

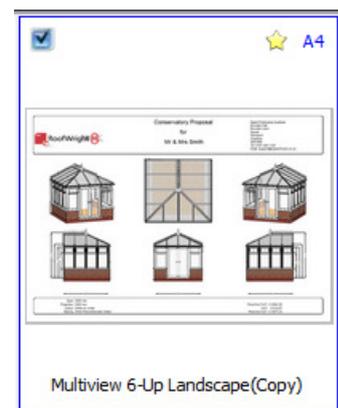
Just like the **Selected** option, the favourite option works in very much the same way. If you do make a report one of your Favourites, it'll appear in the Favourites folder.



In the thumbnail gallery and the context menu (Right click menu), a yellow star denotes that the report is part of your Favourites.



To remove a report from your favourites, right click on the report and then click **Favourite**, the Star will now be greyed out and the report removed from your favourites folder.



## 8. Regenerate thumbnail

If you change the design of a report drastically, you may want to update the gallery thumbnail image, click this to generate a new image.

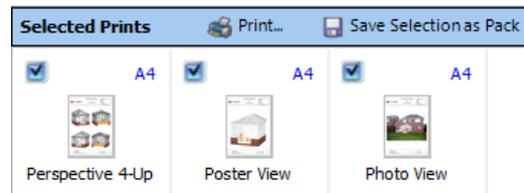
If you are wishing to use existing or custom reports from an earlier version, once you have imported them, you will need to create thumbnails for the reports, following this procedure

## Creating and editing packs (previously known as Quicksets)

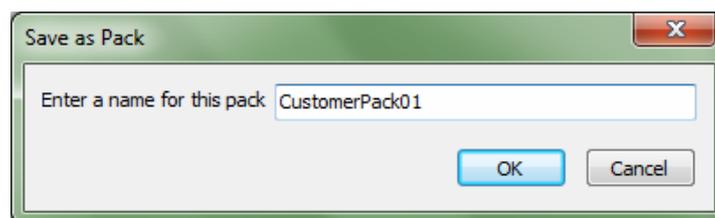
Packs of reports can be quickly created and can then be printed within a couple of clicks on any future jobs.

You may want to have a pack that you send out to your customer, this may include a 4-up drawing, a large 3D image and a report with the conservatory superimposed onto a house photograph.

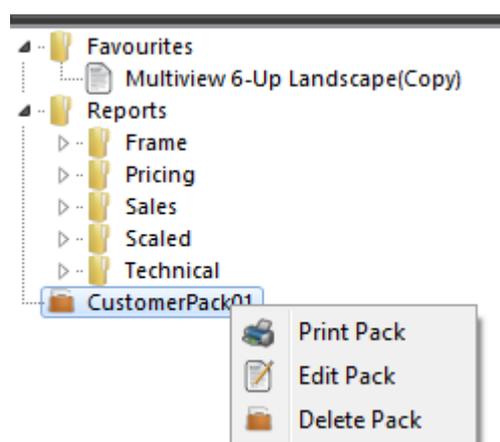
1. To set this up as a pack, just click the reports to add them to the **selected prints** pane.



2. Click **Save Selection as Pack**. Give the pack a name when prompted.



3. The new pack now appears in the **File Tree**. Each time you want to print this pack in future, just right-click on the pack and select Print Pack. From this menu, you can also edit the pack, to change the contents, or delete the pack completely.



The reports will remain in their regular folders; deleting a pack will not delete the contained reports from your system.