

Customizing (Options)

1. Directories tab
2. Security Settings tab
3. Default Settings tab
4. Selection Lists tab
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Directories

Specifying the program directories

The WeldOffice® software holds all of the users data and settings in remote locations such as on a network. The path to these locations are held in the Directories tab in the Options. Additionally, the Directories tab also holds the path to the drawing program that the user prefers to use.

1 To access the **Directories** tab, click on **Tools / Options**. The Options window will automatically open to the Directories tab.

2 Three database directories will be listed:
Standard data - The path to the user's main records database.
Menu store - The path to the user's custom drop-down menus.
Configuration - The path to the user's custom settings.

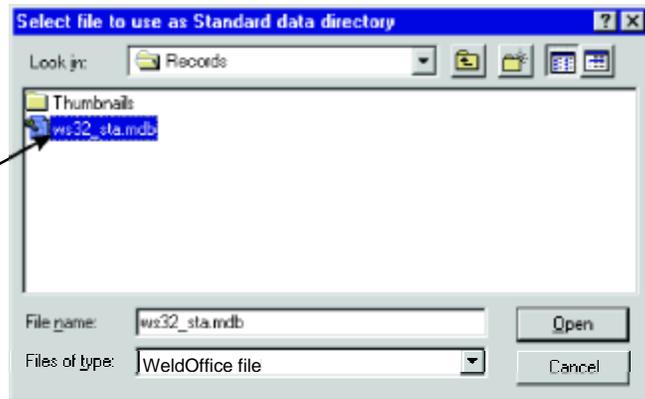
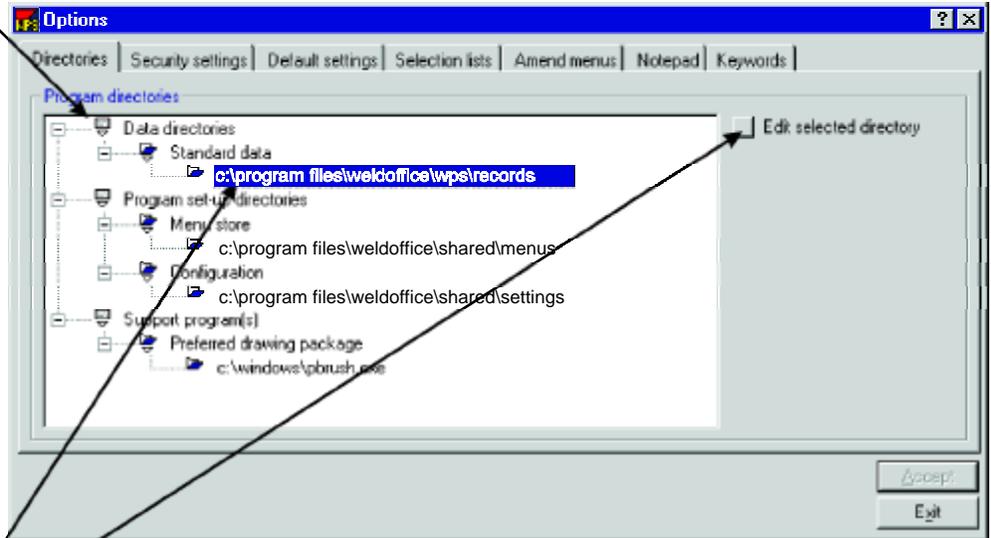
3 These three database must be shared by all users when the software is to be shared on a network. To do this, all three database will have to be placed in a network location that is accessible to all users. Then, the directories listed in this Options window will have to be edited in order to point to that network location.

4 To edit the directories, click on the data path to highlight it. Then click the **Edit selected directory** icon on the right hand side. This will bring up a **Select file** dialog box.

5 Assuming that a copy of all the databases have been place in a common location on the network, use this dialog box to locate the new database on the network. When it has been found, double click on the desired file and the new path will be set. Repeat these steps for each of the three main database directory paths.

6 When all of the new paths have been set, press the **Accept** button. Upon restarting the program, the software will then be supported by the network databases.

7 In addition to the main user databases, the Preferred drawing package may also be specified in the Directories tab. By default, the software will already be set to use standard Windows Paint. However, any other OLE compliant drawing package may be specified by the user.



Security Settings

Specifying the User details and security access

1 The Security Settings tab holds all of the details of each user that has access to the WeldOffice software. To create or edit a User profile, go to the Security settings by clicking on **Tool / Options**, and then select the **Security settings** tab.

2 With a new installation, one user profile is already established; the System administrator. This is a profile that holds the highest level of security clearance allowing the ability to make changes to critical system settings that no other user may change. The person(s) given access to the System Administrator password should be selected appropriately.

3 To add or edit a User profile, double-click on the desired **User number**. The following changes may be made:

1 Placing a red "x" in the **User active** box will make this profile an active user in the system.

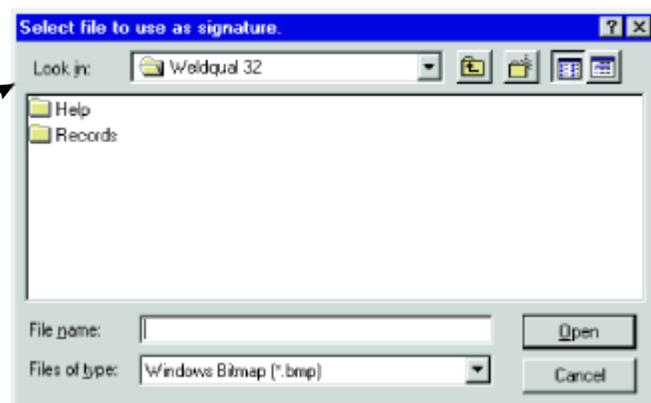
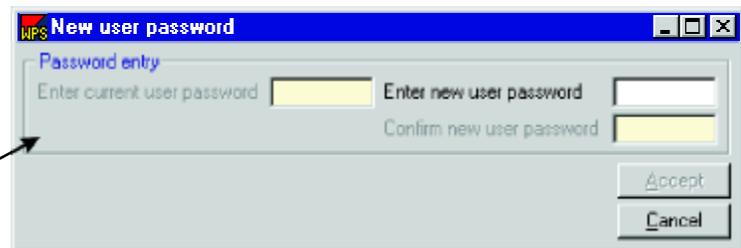
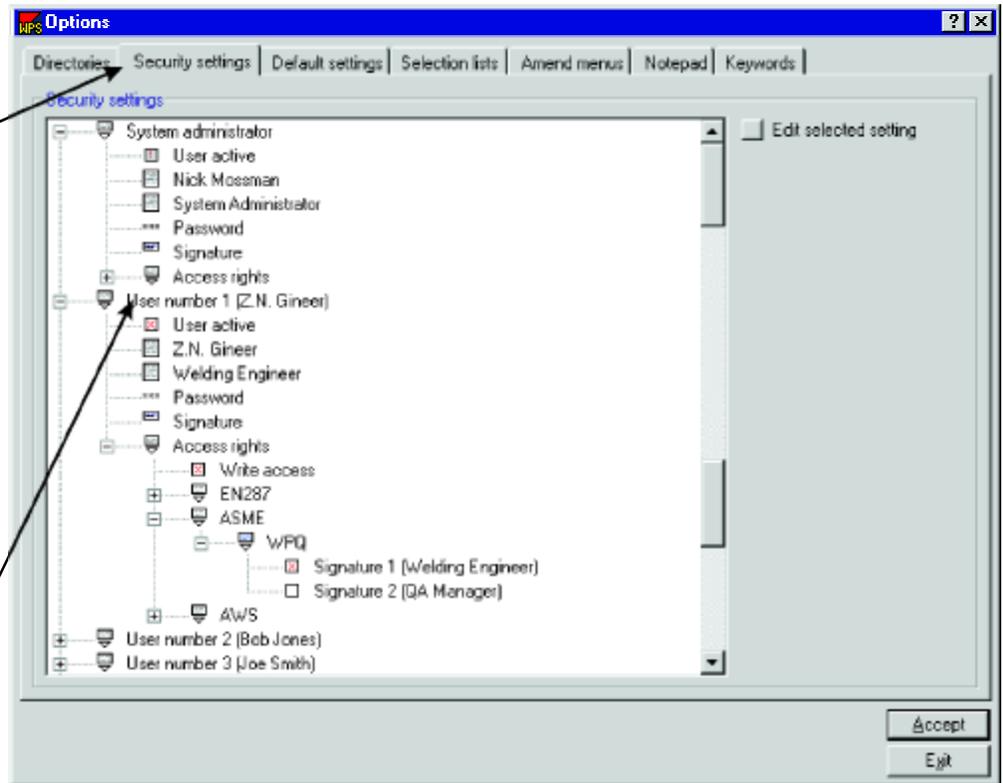
2- **Name of the user** may be changed by selecting that item and then clicking **Edit selected setting**.

3 **Description of the user** may be changed by selecting that item and then clicking **Edit selected setting**.

4 **Password** may be changed by selecting that item and then clicking **Edit selected setting**. This will bring up the **New user password** box. Enter a new password and then press the **Enter** key. Repeat this step to confirm the password and then press the **Accept** button. The new password will now be set.

5 **Signature** may be changed by selecting that item and then clicking **Edit selected setting**. This will bring up a standard Windows File-open box. Use this box to specify the location of a scanned bitmap file of the user's signature. When the file has been located, double-click on it and the new signature will now be set.

6 Within the **Access rights** folder are settings for Write access and Signature access. Place a red "x" next to all items appropriate for the current user.



Default Settings

Specifying the program default settings

The Default settings tab in the WeldOffice® software holds many of the settings that users will wish to change. Below are instructions for how to change some of these settings. The function of most of these settings are fairly obvious so the instructions below are intended for only those items that will likely need further explanation.

1 To access the Default settings, click on **Tools / Options**. Then click on the **Default settings** tab.

2 **Program wide settings** are system settings that apply to the function of the whole program. Several of these settings will only be changeable by the System Administrator.

3 **Navigation bar grouping** changes the grouping order of the records displayed in the Navigation bar. Specifying a desired grouping sequence will make the best use of finding records with the Navigation bar.

4 **Initial record settings** are default settings that will be applied to all new records created. These settings may also be changed on an individual record by utilizing the **Current record properties** tab on the Navigation bar (see page 1.3, Item 4).

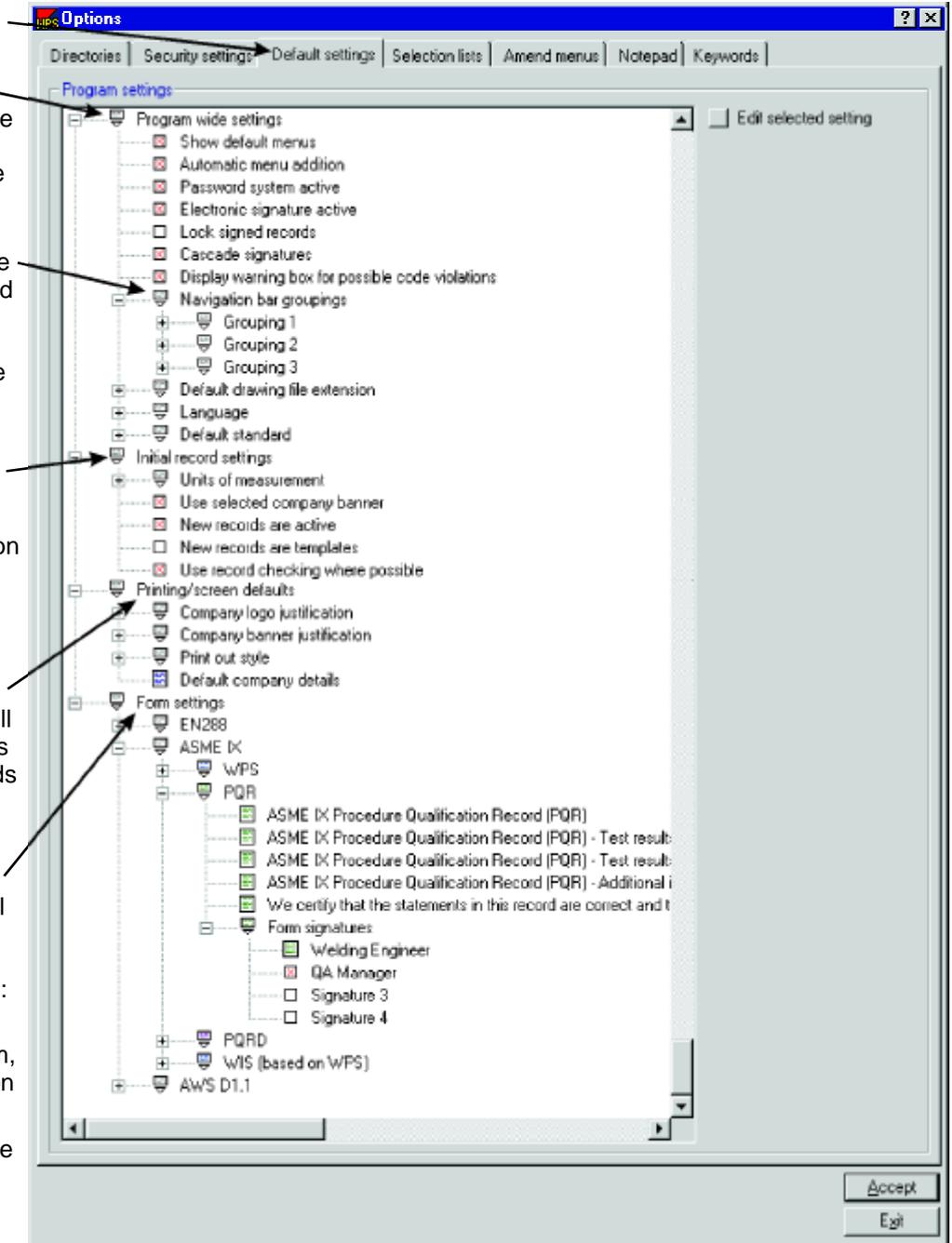
5 **Printing / screen defaults** contains much of the default information that will automatically appear on the records as well as the manner in which the records will display and print.

6 **Form settings** also contains settings that control default information that will appear on the records. There are a different set of form settings for each type of record. These settings include:

1 **Page titles** - To change the default title that will appear at the top of a form, select the desired title and then click on **Edit selected setting**.

2 **Certification statement** - To change this statement that appears near the bottom of most records, select the statement and then click on **Edit selected setting**. This setting may also be changed on an individual record by utilizing the **Current record properties** tab on the Navigation bar (see page 1.3, Item 4).

3 **Form signatures** - To change the title of a Signature box, select the desired signature and the click on **Edit selected setting**. A signature box may also be removed from the forms by removing the red check that appears next to it.



Selection Lists

Specifying the content of Selection lists and reports

1 The **Selection lists** tab in the Options is used to specify which columns will appear on various Reports and Selection lists in the WeldOffice® software. These include:

Record selection list - The “manager” window that appears when selecting a record to open, delete, print, export, etc.

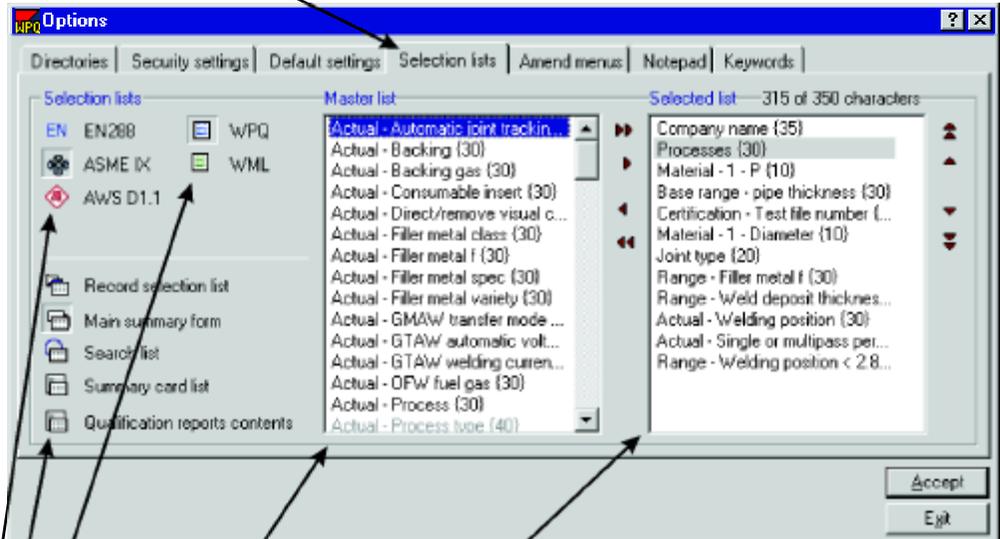
Main summary form - The form that prints out when creating a summary of one or more records.

Search list - The fields available to search upon when using the Record Search Manager.

Summary card list - The wallet-sized summary form that prints out when creating a **Summary card**.

Qualification report - The Qualified ranges report available in the Welder Profiles database.

Welder Instruction Sheet - The printout of basic WPS details that is provided to the welder.



2 To make changes to one of the Reports / Lists, first select the applicable code. Then select the desired Report / List to be edited. Next, select the applicable record type (i.e. WPQ, PQR, WPS, RT)

3 With these selections made, two lists of fields will appear:

Master list - This is the list of all fields available to be placed on the selected Report / List.

Selected list - This is the list of fields that are already included on the Report / List specified.

To add fields from the Master list to the Selected list, click on the desired field to select it and then press the red arrow pointing toward the right.

To remove a field from the Selected list, click on the field to select it and then press the red arrow pointing toward the left.

4 For all of the reports that are to be printed, the number of available characters on one page width is a consideration. For this, the amount of used space is listed just above the Selected list. In the example shown here, 315 of the 350 available characters have been used.

Amend Menus

Changing the content of the drop-down menus

1 The **Amend menus** tab allows modification of the content that the user adds to any drop-down menu available on all WeldOffice® forms.

2 To access this option, click on **Tools / Options** and then click on the **Amend menus** tab.

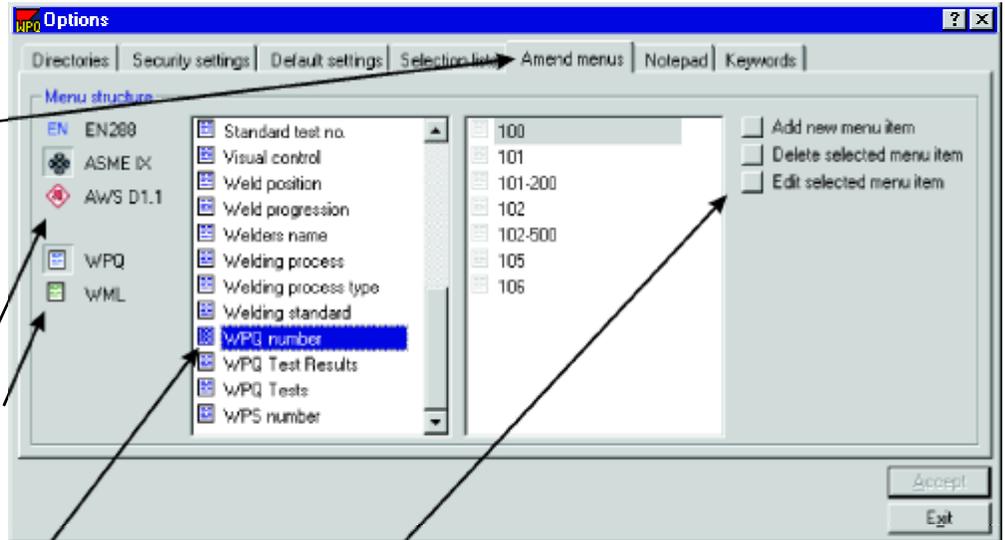
3 For each available code and record type in the software, a specific list of menu fields will appear. First select the applicable code and then select that applicable record type.

4 With a specific record type selected, all fields will appear that have user-definable drop-down menus. Select one of the fields in order to make changes to its menu content.

5 When a menu field is selected, the contents of that field (supplied by the user) will appear in the right hand window. To edit or delete one of the listed items, select it by clicking on the item. Then click on either: **Delete selected menu item** or **Edit selected menu item**.

6 To add an item to the menu list, click on the icon titled: **Add new menu item**.

7 When all of the desired changes have been made, simply press the **Exit** button.



Notepad & Keywords

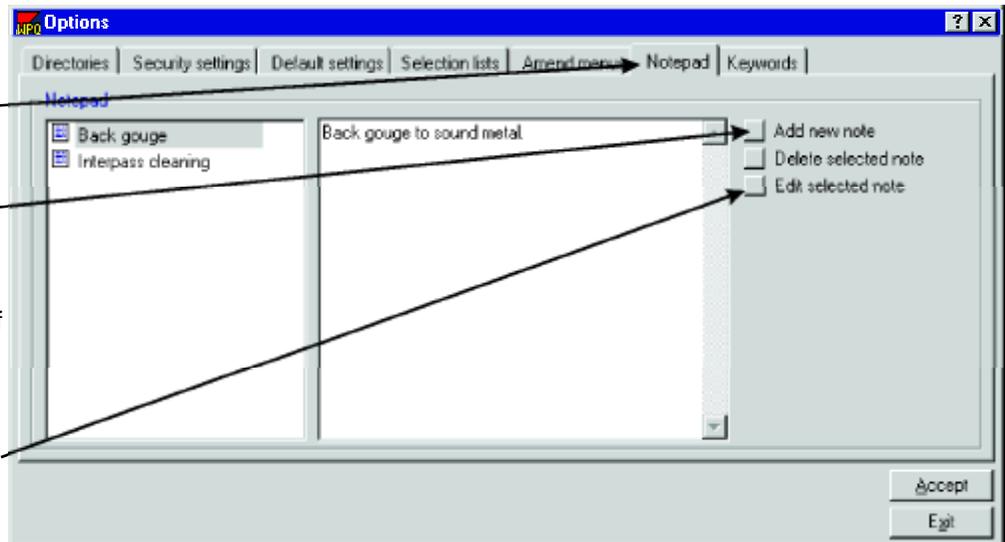
Specifying the content of the Notepad and Keywords databases

1 The WeldOffice® software allows the user to store typical notes and hard to find characters eliminating the need to produce these items more than once.

2 To access the Notepad, click on **Tools / Options** and then click on the **Notepad** tab.

3 To add a new note, click on the **Add new note** icon and then type the name of the new note. When the name of the note has been entered, the note must be edited in order to add the contents of the note.

4 To edit a new or existing note, click on the **Edit selected note** icon. Enter or edit the new contents of the selected note.



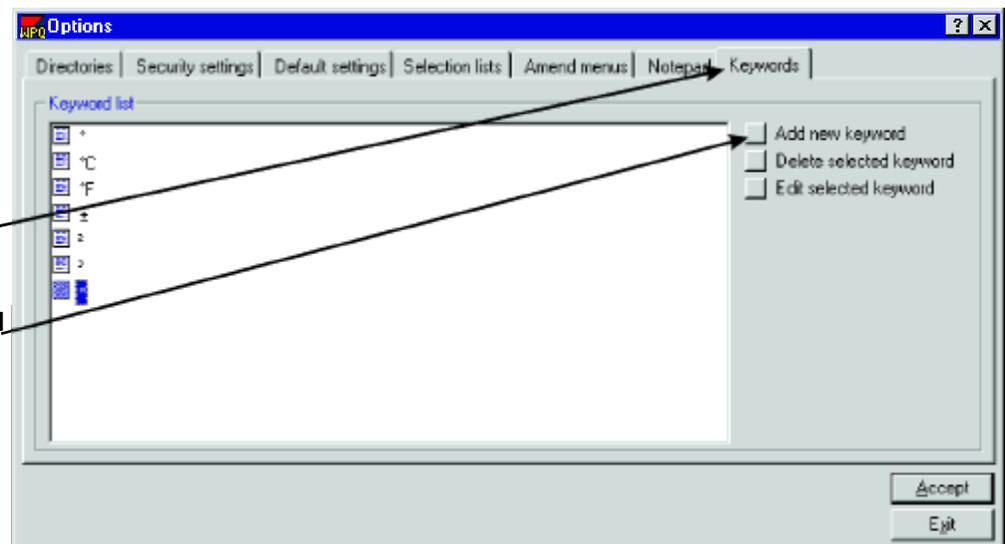
5 To delete a note, click on the note to select it and then press the icon titled **Delete selected note**.

6 When all desired changes have been made, press the **Accept** button.

7 Access the Keywords by clicking on **Tools / Options** and then click on the **Keywords** tab.

8 To add a new keyword, click on the **Add new keyword** icon. Enter the new keyword or character by using the Windows paste feature or by pressing the appropriate ASCII character code.

For more information on ASCII Characters, look up "Character Map" in the Windows help system.



9 To edit or delete a selected keyword, click on the icon entitled: **Delete selected keyword** or **Edit selected keyword**.

10 When all of the desired changes have been made, press the **Accept** button.