

InView & StockView™ 5 Sharing Guide  
HindSight Ltd.®

INVIEW & STOCKVIEW 5 SHARING DOCUMENTATION  
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In Acrobat Reader, choose Bookmarks to open a side panel displaying this list.

# I N T R O D U C T I O N

Sharing makes it possible to simultaneously run InView & StockView on multiple computers. As changes are made in shared files on one computer, the changes are immediately available to users on other networked computers. This is often referred to as a multi-user system.

Shared use is handy in any situation in which you are using InView & StockView on more than one computer and want the computers to have the same information available at all times. It's suitable for an individual working at various locations within the office or studio as well as for several people at work stations throughout a large studio or from multiple geographic locations

## REQUIREMENTS

Sharing requires a computer running Macintosh OS X 10.4 or later to be the server; the computer where the primary set of files is housed and synchronized. It's not necessary for it to be a "dedicated" server. The computer can be used simultaneously for other purposes.

The server needs a special version of Panorama, Panorama Enterprise 5.5 or later, to manage and coordinate the changes being made on multiple computers.

Computers that are going to be used with InView & StockView (referred to as a client computer) can be Windows or Macintosh computers. Each one needs its own registered copy of Panorama 5.5 or Panorama Direct 5.5 plus a license for the InView & StockView configuration being run.

Panorama, in any of these configurations is purchased directly from ProVUE. HindSight does not play a role in re-selling Panorama or Panorama Enterprise.

For InView & StockView, you need a current license for the primary copy of InView & StockView plus an additional user license for each and every client computer. Four users, for example, require one primary license, plus three additional users' licenses.

Note: Throughout this documentation are references to the InView & StockView folder. This is the folder containing your particular HindSight file set whether it be all or part of the InView & StockView package.

Your server and client computers must be able to reach each other over a network or the internet.

## SYSTEM ADMINISTRATOR

It's recommended that you appoint a system administrator; either your in-house expert or an outside consultant. This is a person who is familiar with the basic hardware and software of your networking system and can be responsible for the installation, maintenance and backing up of the shared files. They should be familiar with the Mac OS X operating system, how to access and set the System Preferences and especially with OS X Permissions. They should review this documentation, then install the software and make sure it's off on a good foot from the beginning.

## OVERVIEW

With updates and other changes, installation instructions may change over time. Please take note of the following but refer to the current documentation for Panorama Enterprise and for Panorama Direct for complete instructions on how to install those products.

The Panorama Enterprise documentation covers a few types of installations since it can be set to host web sites as well as shared databases over the internet or Local Area Network (LAN). Most likely, your use with InView & StockView is going to be over your LAN. See the Panorama Enterprise documentation on System Configuration (Local Database Sharing) for an outline with linked references to help you get your network set up. See Converting a Single User Database into a Shared Multi-User Database for the final steps. Note that for InView & StockView, the Panorama Sharing Wizards are very easily accessed through the Sharing Preferences window of Flow Chart.

If you intend to work with some of your client computers accessing via the internet, you must set up a static IP address as noted in Panorama Enterprise documentation. Firewalls and IP addresses are not for the uninitiated. These types of installations should be done by your local experts in order to properly provide access while maintaining protection from intruders. Aside from general advice, HindSight can not offer technical support for this part of your installation or set up.

Shared databases are simultaneously available to all configured computers on your network. Whenever a change is made on one, the master copy on the server computer is updated.

While being edited on one computer, a record within a database is locked and unavailable for editing on other computers until the first computer moves on to another record or is idle for a set number of seconds. Other records within the same database are available for editing even though one or more may be locked by other computers.

It's possible to physically disconnect from the network, add new records and synchronize with the Server when you next reconnect to your network.

### Licensing Note:

If you intend to use your server as a client too, this achieved only by adding it to the server's Panorama Enterprise license versus installing a separate Panorama license on the same computer. Be sure to advise ProVUE of you intention to use the server as a client when purchasing your licenses.

### Note:

Sharing over the internet requires a static IP address. A very satisfactory and free alternative is to use a service such as that offered via <http://www.no-ip.com>



Any shared file can be customized individually. Each client computer has its own copy of the shared file. This copy can be customized and modified in a number of ways. Screen colors and report formats, for instance, can be set one way on one computer and set differently on another. Only the data is shared.

L I C E N S E

The License Agreement at the start of this documentation provides a detailed description of the license for InView & StockView.

In short... a single license permits use on a single computer. A sharing license expands the use of the primary license to a specified number of additional computers.

T E C H N I C A L   S U P P O R T

We recognize that everyone has a different level of proficiency. Some struggle all the way. Others breeze through. Most of those who breeze also read and refer to this manual, but some won't. Even those who do, occasionally need help

HindSight has gone to great lengths to provide you with excellent, free support via the technical support forums on our web site at <http://HSLtd.us>. Using the Forums' Search mechanism, you may find your questions have already been answered there. If you don't find the answer to your particular question, it's extremely beneficial to everyone for you to post your question on the forum so others can also benefit from the answer. The forums are monitored constantly and questions are answered promptly.

If you require it, personal, fee-based support is available via email or telephone. Personal support is charged by the hour and requires a positive balance in your support account. Time is deducted from your account as it is used and once depleted, it's necessary to purchase additional time to receive additional personal support. Contact HindSight for current rates.

HindSight is not able to offer support for firewalls and sharing over the internet. For your security it's best to have a local expert set up and configure this portion of your system.

Support for Panorama Enterprise is available through ProVUE as well as through HindSight. ProVUE does not offer support for issues specific to InView & StockView.

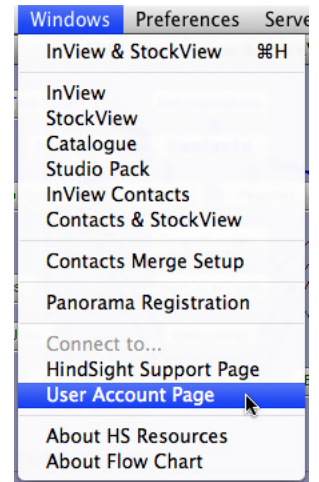
U P D A T E S

InView & StockView are always undergoing fine tuning and revisions. New features are added from time to time. By logging on to your HindSight account and choosing the downloads link, you can obtain a copy of the latest release as long as your license is current.

Easy access to your online account is available via the Windows menu in Flow Chart. Choose User Account Page to launch your browser and log in to your account automatically.

Information on installing updates to your shared system is located at the end of this documentation.

*Tip:*  
Use our web site!  
  
Visit the tech support forums at [www.HSLtd.us](http://www.HSLtd.us).



# I N S T A L L A T I O N S U M M A R Y

The steps in this Installation Summary are covered in more detail in the following chapters on installation and configuration. This is intended only as an abbreviated overview of the process and not as a substitute for reading the details.

Install and configure Panorama Enterprise on the server. Every client computer must also have a copy of Panorama or Panorama Direct installed.

You need a folder of fully up to date InView & StockView files already installed on any *one* client computer for configuring your shared InView & StockView system. “Fully up to date” meaning that the files have been updated to the most current version of InView & StockView to which you’re licensed and that they contain all of your most recent data. This folder can be on the server computer as long as its copy of Panorama is also licensed for use as a client.

Open the Flow Chart located in this InView & StockView folder. In Flow Chart, go to the Preferences menu and choose Sharing. Enter your separate HindSight Registration number for sharing. Once it’s entered, the Sharing Preferences does not require the number for future accesses.

Use the popup menu in the Sharing Preferences window to select a file to be activated as a shared file. Flow Chart itself is a quick and simple first file to activate and confirm that your server is properly configured. Click on the button to open the Database Sharing Options wizard.

Make your settings and activate sharing for the desired databases. Do not include files other than those listed in this documentation as “sharable”.

Once this is done, make backup copies of this complete InView & StockView folder and the contents of the Public Databases folder on the server computer. They are now a uniquely matched set.

The InView & StockView folder in which you’ve activated the shared files has several other files that are to be used one at a time as single user files, accessible over the network.

Re-locate this InView & StockView folder, if necessary, to the computer that will permanently hold your master set of files for access by your other computers. It does not necessarily have to be a client computer; in most cases it will be the server computer. Set the folder’s Permissions to Read & Write for the authorized users on your network. This folder is now your *master* data set and should be backed up frequently. If you configured the *master* folder on a client and are now re-locating it to the server or other computer, throw the copy of the folder on the previous computer into the Trash. You DID make a back up, right?

In this *master* folder, make aliases of Checkbook, Checkbook Resources (folder), Estimates, General Ledger, Open Jobs, Payables, Price List (text file), Receivables and Submissions,. Note that this is a suggested list. You may have reasons to prefer another configuration. See Shared Files, Local Files and Aliases for details.

Transfer a copy of this entire folder to a client machine. On the client, locate each file that has a like-named alias in the folder and drag the file, not the alias, to the Trash.

You now have one fully configured *client* folder. It contains the shared files, aliases to some files in your *master* InView & StockView folder located either on your server or a significant client computer, and it contains a few local files.

Quit Panorama and copy this *client* folder to every other client computer.

Make a backup copy of one of the InView & StockView client folders.

Routinely back up a *client* folder, the *master* folder and the Public Databases folder on your server.

That ends this summary. As stated above, it is intended only as an abbreviated overview of the process and not as a substitute for reading the details that follow.



# P R E P A R A T I O N

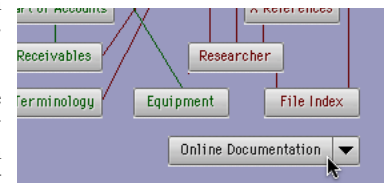
You must have a complete and up to date folder of your InView & StockView files which you're going to work from in establishing your shared file system. Install any InView & StockView updates to which you're entitled and be sure the folder contains your most up to date data.

Prior to activating the sharing, it's best to get certain preferences established. While files are in shared mode these settings cannot be changed as easily.

Any graphics alterations that you want all shared files to have in common should be made prior to activating the shared status. Although graphics changes can be applied after invoking sharing, it then has to be done individually for each client or the altered copies need to be distributed to all clients.

We strongly recommend setting up your files as completely as possible before distributing them to the client computers as local files. In most cases they can easily be updated by making modifications and then re-distributing copies of the updated file.

Details on InView & StockView files and their setup, aside from sharing, is documented in the InView & StockView Users Guide initially installed inside the PDF Documentation folder where it can be accessed via the primary Flow Chart window.



## C A T A L O G U E

Catalogue Serial Numbers must be established before Catalogue shared access is activated. See your InView & StockView User's Guide for serial numbering systems available. You cannot change serial numbering systems when the Catalogue file is in shared mode.

Note: If you're working with digital images and the Catalogue, you can install folders of images anywhere on your system. You may find it preferable though to locate folders of images on your Server computer where they'll be accessible by all client computers.

## O S X P E R M I S S I O N S

The master InView & StockView folder must be accessible by all client computers. On OS X this requires that the folder's permissions be set to allow Read and Write access for all those intended to have such access. The Permissions should then be set to Apply to All Enclosed Items so client computers can access and save the InView & StockView files.

If desired, specific files such as Checkbook or Receivables can be set individually to prevent access for those who have no need to see or alter their contents.

See Daily Use later in this documentation and/or your Apple documentation for more information on setting Permissions.

## W I N D O W S O S

On Windows, you must install Apple's Bonjour package for sharing on a network. It is not necessary for internet sharing. At this writing, see <http://www.apple.com/support/bonjour/>

In addition to installing Bonjour, you'll also probably need to make a change to the configuration of your Enterprise server. Internet sharing must be enabled to allow Windows clients to communicate with the server. See pages 40 and 55 of the Panorama Enterprise Handbook.

# SHARING FILES

## SHARING INVIEW & STOCKVIEW FILES

Once you have Panorama Enterprise installed and running on your server, you can put your InView & StockView on line.

Working from any of your computers, start with a fully up to date folder of your complete InView & StockView file set. You should have a registered copy of Panorama or Panorama Direct, version 5.5 or later, on the computer.

Note: If you're moving up from a past version of InView & StockView, be sure that you're starting with a fully upgraded, single-user set of InView & StockView 5 files.

Open Flow Chart, go to the Preferences menu and choose Sharing. The first time only, you're asked to enter your Registration number. This is the number issued to you by HindSight for sharing InView & StockView files.

Note: The HindSight Registration number must be entered precisely as noted in your emailed sales receipt. It is case sensitive and cannot have additional spaces.

Once a valid registration number has been entered, the Sharing Preferences window opens. Future access to the Sharing Preferences is unrestricted and does not require your registration code.

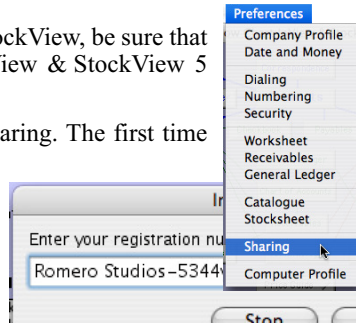
Sharing for InView & StockView files is set individually. You can share just those you prefer. See the following section on Shared Files, Local Files & Aliases and its table on file types to help you decide which files you want to share.

To start sharing a file, the file needs to be open on your computer. Flow Chart is a good one to start with and it's open.

If you want to start sharing another file, click on the Sharing Status popup menu and choose the file you want to start sharing. The file opens and you're given a message telling you about the file's sharing status. More important is that the file is now open.

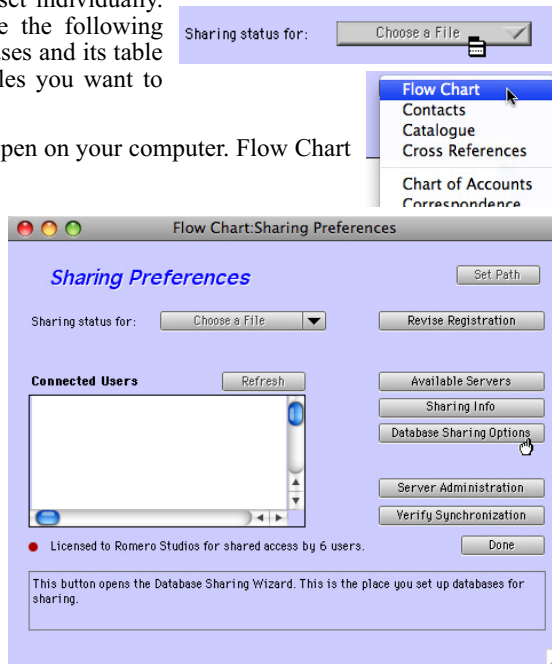
Leaving the file open, click back to the Flow Chart:Sharing Preferences window. If the Sharing Preferences window is hidden, or simply for ease, press Command-H to get back to the Flow Chart:Sharing Preferences.

Click on Database Sharing Options to open the Panorama Wizard for initiating or controlling sharing.



**Note:**  
Panorama Enterprise does not by default include a Panorama Direct registration. Sharing must be setup on a computer with a registered copy of Panorama or Panorama Direct.

If the server is to be used simultaneously as a client, versus a dedicated server, the Enterprise license should include a Panorama Direct license.



## DATABASE SHARING OPTIONS

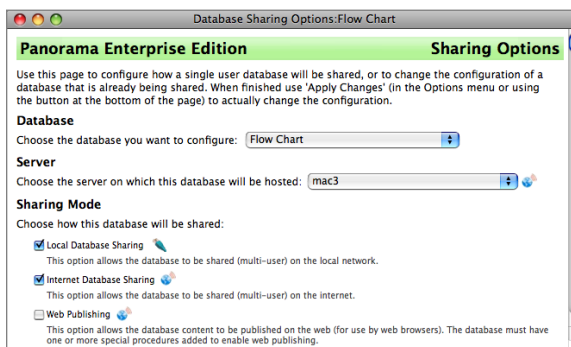
In the Database Sharing Options window, choose the database you want to configure. The popup menu lists all open databases. That should include the file you just opened.

Use the next menu to choose the server.

If your server is not listed, see Trouble Shooting near the end of this documentation.

Click on Local Database Sharing.

If you intend to access the shared files over the internet, be sure to also click on the Internet Database Sharing check box.



**Warning!**  
The Database Sharing Options allows you to establish sharing for any InView & StockView file. However, the internal data structure of many files is not compatible with sharing.

Stick to sharing ONLY the files listed within this documentation and in the Flow Chart Sharing's Choose a File popup menu.



Scroll downward as necessary in the Database Sharing Options window to access the additional sharing options.

Auto unlock should be already set, but feel free to over ride or adjust the lock out time to your preference.

Changes can be made later so don't be overly concerned about the seconds involved in the Auto Unlock.

Under Offline Sharing Options, we suggest that you choose Data in Existing Records May be Modified.

Allow adding new records means you can still make new entries while offline and have them synchronized when you rejoin your network.

Automatically Connect sets the database to try to connect to your network every time the file is opened.

Automatically Synchronize tells the software to match up the data in the server and your client file once it connects in accordance to your other settings.

Although Panorama Enterprise can be set to synchronize favoring the network or the client, we recommend the network as your choice. Synchronization that favors the client allows you to work and make changes in an off line copy, such as when you're traveling with a laptop. The downfall is when you re-connect, any changes to the same records made in your office are replaced. Ultimately this setting is up to you and your circumstances.

Skip over the Database Web Publishing Options. These only apply for use on a web server, serving up web sites such as HindSight's searchLynx.

Once all your settings have been made, you've reached the bottom of the window. The database name should be displayed. If you have reason, you can change the name here, but the InView & StockView files on the client computers must remain named as they are.

When you're ready, click on Apply Changes. A confirmation window opens listing the settings you've chosen. Click on Apply Options to proceed.

Depending on the size of the database being processed, the software spends from several seconds to several minutes building the new shared file on the server.

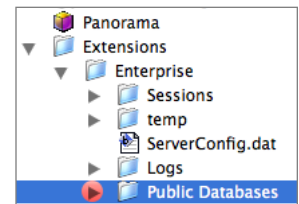
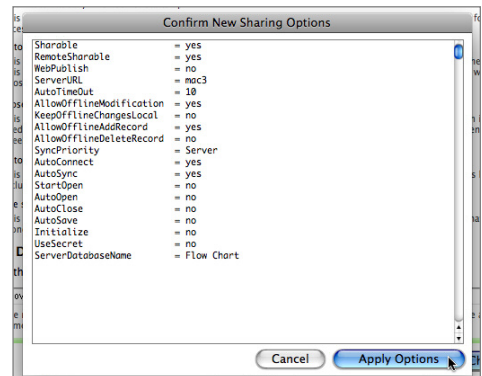
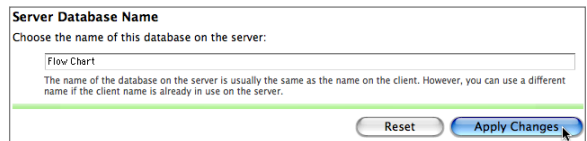
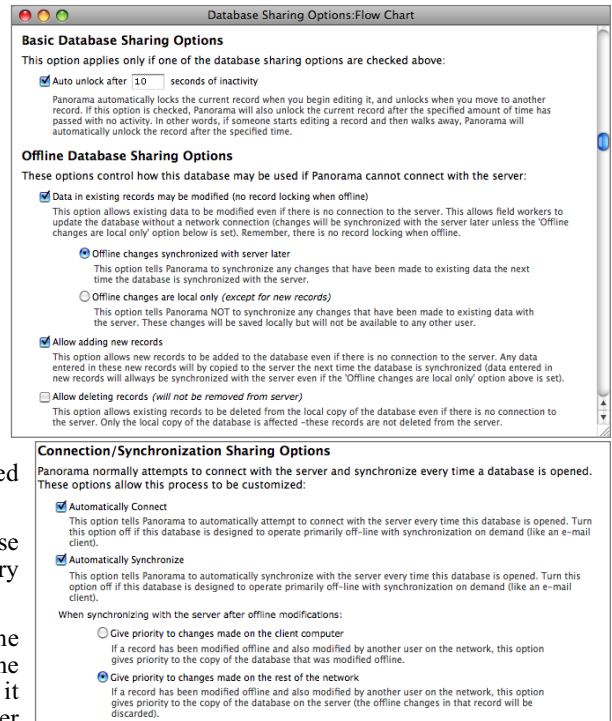
Repeat the process of selecting a database and sharing it until you've done all the files you intend to share at present.

Specially formatted copies of shared files are saved inside the Public Databases folder, nested inside the Panorama folder. Be sure to note it and back up the Public Databases folder regularly.

Once you've shared all of the files intended for sharing, you're ready to go on to the next section, Shared Files, Local Files and Aliases.

**Note:**  
The Panorama Enterprise documentation offers a much more complete description of the process and options, and should be referred to as your primary guide to file sharing with Panorama.

**Note:**  
You can actually share any and all InView & StockView files using the Database Sharing Options. Only those listed in the Flow Chart Sharing Preferences window have built in features to utilize sharing.  
  
Sharing of financial files is not advised since it can lead to data integrity issues regarding balances and numbering systems. HindSight advises you to stick to the files designed for sharing and cannot be responsible for errors caused by sharing other files.



# D I S T R I B U T I O N

## S H A R E D F I L E S , L O C A L F I L E S & A L I A S E S

Details for each of the following steps are in the following sections of this documentation. You should be working in a folder that contains all of your InView & StockView files. If this is not a new InView & StockView installation, the files should contain all of your current data.

IN THE FOLDER YOU'RE USING FOR CONFIGURATION, YOU HAVE ALREADY:

1. Set your Preferences in the Flow Chart within the master InView & StockView folder.
2. Set the folder's Permissions for all of your authorized users to Read & Write.
3. Activated sharing for the desired files.
4. Made Backup copies of the master InView & StockView folder and of the Public Databases folder on the server.

NOW YOU ARE GOING TO:

5. Make aliases of the files that are to be "aliased" files.
6. Transfer a copy of the master folder from the server to a client computer.
7. On the client, Trash the files for which there is a corresponding alias connecting to the server.
8. Move copies of the entire client folder to each of the other client computers.
9. On any appropriate clients, Trash files like Checkbook and General Ledger, that are to have access only on selected clients.

## T H E C L I E N T F O L D E R

Each client computer has its own InView & StockView folder. There are three types of files that belong in that folder. In the following Files & Status section are recommendations for how you should set up each file. You'll have some decisions to make based on your day-to-day operations.

### F I L E T Y P E S

1) **Shared file:** Each client computer has an actual copy of the file that is attached to a server file in the Public Databases folder. This type of file allows multiple users, or client computers, access at the same time. These are limited to the InView & StockView files listed in the Flow Chart Sharing Preferences popup menu to Choose a File.

Changes made in a shared file are immediately available to all other client computers.

The preceding Sharing InView & StockView Files chapter tells how to activate and deactivate shared files.

2) **Aliased file\:** An aliased file is a single user file located in the master InView & StockView folder and requires an Alias on each client computer. Any client computer can access an aliased file, but only one client computer can access an aliased file at a time. Changes saved in an alias become available to all other clients once the file is closed.

Aliases are useful for files that are quickly accessed, then closed again such as Price List or Tax Codes. Aliases are especially useful for files that should not have multiple changes taking place simultaneously, such as the writing of checks.

3) **Local file:** A Local file exists on each individual client computer. Local files do not share data with their counterparts on other client computers. Usually Local files are reference files or report generators, like Worksheet and Stocksheets that do not store data but instead assemble data which is then posted to other files.

You may find it desirable to make graphics modifications to local files prior to distributing them on your network. That way, each copy can have matching report formats already in place. On the other hand, the copies can be graphically individualized on each client after distribution.

Local versions of Checkbook, Estimates, Receivables and others allow client computers to maintain their own separate records. This is useful in studios with multiple reps doing their own estimates and invoices, for instance.

HS 5 Resources provides menus and dialog windows for the software and must exist as a local file on every client computer.

*Note:*  
If you move or rename the folder containing the original files, from which the aliases were made, the aliases need to be re-established.



The exact combination of files and types of files in the client folder is largely up to you. For security and/or privacy, you may prefer to keep financial files such as Checkbook, Checkbook Resources (folder), General Ledger, Payables and Receivables as local files on a limited set of computers.

**SETTING UP THE CLIENT FOLDER**

Using the table below as a reference, create aliases within the master InView & StockView folder for those files you intend to use in that manner. Do not delete files from the master folder.

Copy the entire master folder to a client computer. On the client, delete files for which there is also an alias. If all clients are to have the same configuration, copy this new client folder to all client

This table shows the InView & StockView files and their possible file types within the client folder. The System Administrator should review this list and configure each client folder as desired.

**Shared** files allow many users access to the same file at the same time. A change in one makes matching changes to all other shared copies.

**Aliased** files in the client folder connect to the actual file in the master InView & StockView folder. Aliased files provide access, to all computers but *only one computer can open and access an aliased file at a time*. Changes affect the one and only actual file - in the master folder - making such changes available to all.

**Local** files are actual files in a client InView & StockView folder. Local files do not share data with their counterparts on other client computers. Changes to a local copy are not noted whatsoever on other client computers or in the master InView & StockView folder. Local copies allow that client to maintain unique or individualized information.

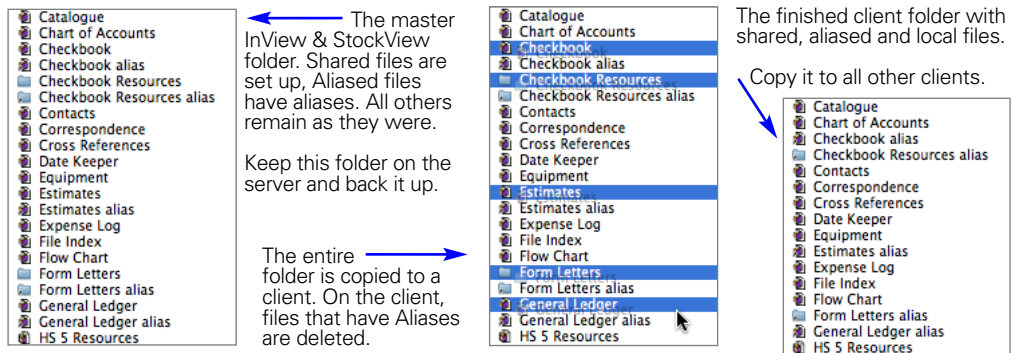
The symbols in each column have the following meanings:

- ✓ Suggested
- Ω Optional
- = Problematic

File	Shared	Local	Aliased	Comments
Catalogue	✓	Ω		
Chart Of Accounts	✓	Ω	Ω	
Checkbook	=	Ω	✓	
Checkbook Resources	=	Ω	✓	
Contacts	✓	Ω		
Correspondence	✓	Ω		A good candidate for Local to allow individual correspondence
Cross References	✓	Ω		
Date Keeper	✓	Ω		
Equipment	✓	Ω	Ω	
Estimates	=	Ω	✓	
Expense Log	✓	Ω	Ω	
File Index		✓	Ω	
Flow Chart	✓	=	=	
Form Letters		Ω	✓	Must be Local if Correspondence is Local
General Ledger	=	Ω	✓	
HS 5 Resources	=	✓	=	Must be in every client folder as well as the master folder
Logo		✓		If you have a logo graphic to be utilized in forms
Open Jobs	=	Ω	✓	
Payables	=	Ω	✓	
Price List		Ω	✓	
Receivables	=	Ω	✓	
Researcher		✓		
Stocksheet	=	✓		
Submissions	=	Ω	✓	
Tax Codes	✓	Ω	Ω	
Task Timer	✓	Ω	Ω	
Terminology	✓	Ω	Ω	
Terms & Conditions		✓		Be sure to distribute updated copies
Theorizer	Ω	✓	Ω	
Worksheet	=	✓		

**Note:**  
Permissions on the "Master" InView & StockView folder must be properly set for Read & Write access for all computers intended to have access to the aliased files.

computers.



**SET PATH** (Obsolete on Flow Chart versions 5.5 or later)

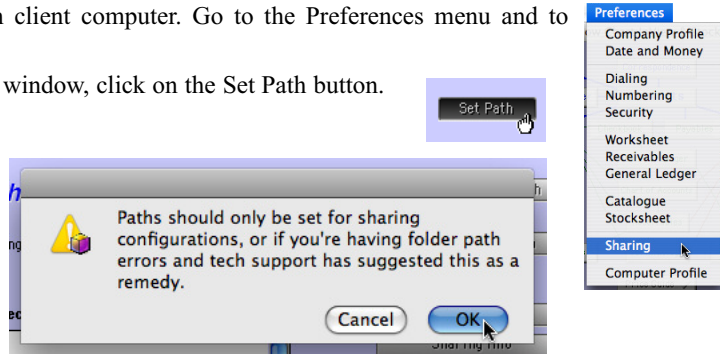
Once a client folder is moved to any client computer, a final and important step is necessary.

Open Flow Chart on each client computer. Go to the Preferences menu and to Sharing.

In the Sharing Preferences window, click on the Set Path button.

Click OK.

These steps provide the software with the name and location on your network of the client computer. Failure to do this on each client results in error messages that files cannot be found.



You are now ready to use your shared InView & StockView system. See the following section on Daily Use for other tips and information about sharing.



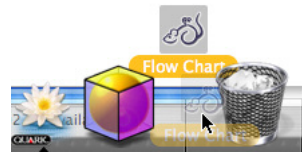


# DAILY USE

On any client, your InView & StockView files are accessed and used just as they are in single user mode. For instance, double-click on any file within the folder to launch it or highlight a file and choose Open from the File menu.

You may find it more useful to use an icon on the OS X Dock.

Any file, such as Flow Chart, can be added to the Dock simply by dragging it onto the dock. Note that Files, versus Applications, can only be added to the same side of the Dock's divider line as the Trash. Applications added to the Dock, such as Panorama or Photoshop, go on the opposite side of the divider line.



*Note:* When used in Shared mode, it's recommended that you make it a habit to start your work sessions by launching Flow Chart. to properly establish your connections.

Whenever you open a shared file it automatically links with the network and to the server. If the client computer is dis-connected from the network, the files are temporary stand-alones. Depending on your how you initially set your sharing options, a stand-alone file may allow you to work and save while off the network. It can then provide the server with updated information when re-connected.

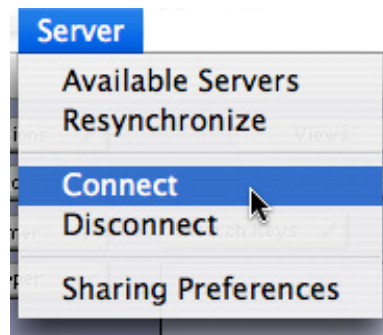
The bottom of shared windows displays a green or red dot to indicate that it is or is not connected to the server. If a server connection has been made, the dot turns green.

When a shared database is opened and synchronizes with the server, the records are restored to the order in which they were originally saved on the server.

## THE SERVER MENU

Some files designed by HindSight for sharing have an additional menu; Server.

Available Servers is the quickest access to a remedy in the event that a file fails to connect on launch and the server is thought to be available. If a shared file cannot find the server when launched, use the Server menu to access the Available Servers wizard. If the server is not showing the Available Servers wizard, click on the Refresh Server List button. Once the server appears in the list, return to the non-connecting file and choose Resynchronize.



Resynchronize tells the local copy to talk with the server and get up to date. It's the same process that takes place whenever you open a shared file.

Connect is intended for those times when you've lost your network connection or were temporarily off line with your database. It re-establishes the connection with the server.

Disconnect lets you take the client copy of the database off line without Quitting. It logs off the server much more gracefully than if you simply unplug from the network. When re-connected, the file synchronizes according to your settings in Database Sharing Options.

Sharing Preferences opens Flow Chart and goes directly to the Sharing Preferences window.

## NEW RECORDS

When a new record is added to a file, it is not pushed across the network to other computers and does not automatically appear in copies already opened on other clients. For a client computer to display records just added on another client, it's necessary for the client to request an update from the server. This is accomplished by choosing Resynchronize in the Server menu, or by closing, then re-opening the file.

## DELETING RECORDS

The only way to delete records from a shared database is one record at a time. There is no ability to use Remove Unselected or other mass deletions in a shared file.

## PERFORMANCE

Behind the scenes, whenever you access a record in a shared database, such as to modify a Contact record, the software checks to see if someone else is currently accessing that very same record. If so you get a message that the record is currently being used. If not, the system locks the record for access by others as you work on it. When you move to another record or if you're idle for the number of seconds set in the Auto Unlock of the Database Sharing Options, the record becomes available again to others on the network. This is referred to as Record Locking.

On most networks this happens quickly enough that you barely notice more than a slight delay as



you click to edit data.

There are some tasks that can keep a file busy for several seconds or even minutes. This occurs if you're making a change to numerous records at once, such as adding a Mailing Memo to hundreds of Contacts. The software needs to check each record one by one to see if it's busy elsewhere on your network. If available, it locks the record, makes the change, unlocks the record and moves on to the next one. Be aware when making mass changes that it may be a moment or two before you can resume working with the software.

Some features, such as Tagging numerous records, allow you to make the changes locally versus over the network. This is useful when the Tag does not need to be permanently applied to the selected Contacts but is simply being used by you for short term purpose. This shortcut activates automatically to ask which way you want the Tags applied.

## G R A P H I C S

Changes made to the graphics in any of your shared or local InView & StockView files are unique to the client on which they were made. If you want graphics changed on one computer to be available on others, copy the file containing the new graphics to replace the like-named copy on other computers. Be aware that any unique graphics in that computer's file are also replaced by the new graphics.

Note: The external Custom Forms feature introduced in 2005 makes it very easy to move forms between computers without disrupting or replacing the inView & StockView files on the other computers. Custom Forms must be a local file. Each computer can readily have its own forms, or graphics changes intended for all can quickly be copied to all client folders by placing the updated Custom Forms file on each one.

See Printing & Editing Reports in the InView & StockView Users Guide.

## C L O N E C A T A L O G U E S

Clone Catalogues can be created for individual use as local files, or they can be created for shared use. Either must be created from a single user Catalogue and not from a shared Catalogue. A copy of a shared Catalogue can be converted to single user, then re-shared as a new differently named Catalogue clone.

See Updating Shared Files for information on changing a shared file back to single user mode.

## THE SHARING PREFERENCES WINDOW

The Sharing Preferences window is the InView & StockView access and control for shared files.

Open Flow Chart, go to the Preferences menu and choose Multi-user. The first time in, you're asked to enter your Registration number. This is the number issued to you by HindSight for sharing InView & StockView files.

The HindSight Registration number must be entered precisely as noted in your emailed sales receipt. It is case sensitive and cannot have additional spaces.

Once a valid registration number has been entered, the Sharing Preferences window opens. Future access to the Sharing Preferences is unrestricted and does not require your registration code.

Access to the window is very low risk. The controls in the Sharing Preferences are either informational or lead to password protected controls.

As you move the mouse across items, the interactive help system provides brief descriptions of each at the bottom of the window.

More often than not, your use of the window is going to be as a conduit to one of Panorama's Sharing wizards.

Note: InView & StockView suppress the Wizards menu in Panorama Direct. In a full version of Panorama, these same Wizards can be reached via the Wizards menu. In either case, they're located in the Wizards folder which is inside the Panorama folder.

The **Sharing Status** popup menu lists the files that are configured for sharing within InView & StockView. Choosing any one of them from the menu gets you a quick report on the file's sharing status.

A shared file can be instantly unshared by holding the Option key as you select the file from this menu, making it a Local file. Only the file on the specific client in use is affected; other clients continue to operate in shared mode. Once unshared, the file cannot rejoin the shared copies. Instead a shared copy from another client is needed to resume sharing. Or the unshared file can be re-shared; orphaning all other client copies. This requires a copy of the newly shared file to be distributed to all clients needing shared access to it.

**Connected Users** lists the names of currently connected users and their computers. The list does not update automatically, but requires that you click on the **Refresh** button in order to see changes that have occurred since the window was opened.

Below the Connected Users there might be a colored dot. The dot only appears if Flow Chart itself is set up for sharing. If Flow Chart has not been configured for sharing, there is no dot. If the dot is green, Flow Chart has a good connection to the server. If the dot is red, Flow Chart is configured for sharing, but is not connected to the server.

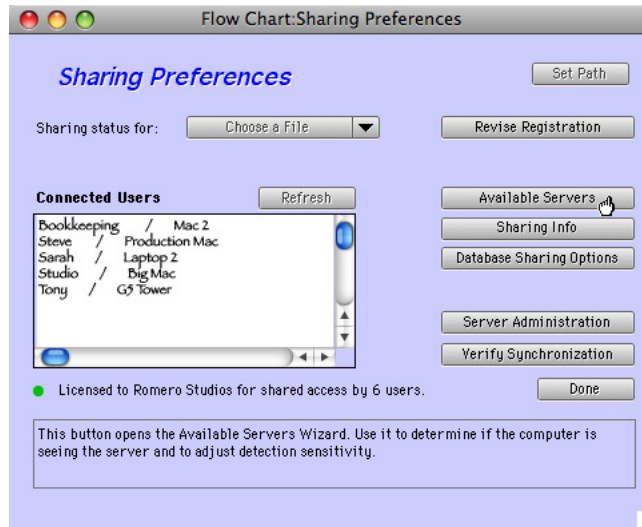
The line of text next to the dot displays the sharing license for this copy of InView & StockView.

**Revise Registration** opens the registration window you encountered the first time you accessed the Sharing Preferences. The only reason you should need to use it is if you have increased the number of users on your system and have a new registration number to enter.

The next five buttons provide direct access to the Panorama Sharing Wizards. The name of the button identifies the Wizard it opens. The Panorama Enterprise documentation covers the use of these wizards in more detail.

**Available Servers** is likely to be your most used button of the set, especially any time you need to trouble shoot a connection. Available Servers checks your network and lists the servers it can find. See the section on Connecting for more information on using this Wizard.

**Sharing Info** combines and expands on features in the Flow Chart Sharing Preferences. It lists all open databases, whether they're single or multiple and if they're connected.



*Note:*  
The Set Path button shown here is obsolete as of Flow Chart version 5.5.

*Note:*  
Flow Chart provides quick access to the Panorama Sharing Wizards.  
  
Information on how to utilize these wizards is provided in the Panorama documentation.



Database Sharing Options is the wizard used to set up and initiate sharing for any database. It's also the wizard used to modify a given database's sharing options or to restore a database to single user mode.

Server Administration is the wizard you use to remotely monitor and manage all of the shared databases on the server, memory usage, logged on users, activity logs and backup.

Verify Synchronization allows you to select a file and have it compared with the copy on the server. You can see what differences, if any, exist in the records. You also have the choices on what to do about any differences.

Done exits the window.

## BACKUPS

No matter how careful you are or how reliable your computer equipment appears to be, the day will come when you will experience some sort of data loss.

Murphy's Law #1 says data loss occurs when you're least prepared for it, and #2 says he who laughs last had good backup files.

Backing up your data should become a daily habit. Don't replace your only backup with the next day's backup. Keep as many levels as you can.

Caution: Dragging an alias of a file or folder to a backup disk does not back up your files in the folder. It only copies the alias. You must open an alias folder and drag the files from within to your backup disk.

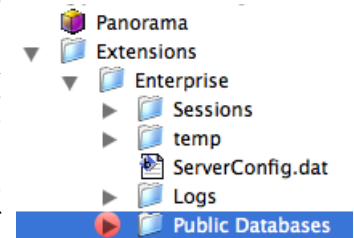
Make back ups of the the Public Databases folder and the Client files. If anything should happen to your files and/or data it's best to have both parts to make them work again. Make new back ups regularly.

## BACK UP THESE FOLDERS :

The Public Databases folder nested inside in the Panorama Folder stores the sharing information and preferences. Without it, your shared files cannot communicate with one another. If you placed an alias of this folder in a handy place, be sure to back up its contents, not just the alias.

The master InView & StockView folder is your most critical folder. You can loose everything else and still recover fully as long as your master folder is intact and available. Back it up to other computers, drives or ejectable disks.

Each client computer's InView & StockView folder should also be backed up to ensure easy recovery for that user or other clients.



## PERMISSIONS

We can promise you that working with OS X, sharing files and moving files between computers, you are going to experience problems with OS X Permissions.

If you get messages that a file can't be found, that the file is busy or locked or you experience crashes when trying to open a file, OS X Permissions may be the issue.

Permissions are especially a problem with files transferred from one computer to another (see below). The permissions remain as they were on the originating computer, so the second computer doesn't recognize its right to open or save the files.

On OS X you need to be sure you have properly set access privileges to all files and folders. It's set via Get Info. OS X is not reliable in this setting and even if you tell it to apply the setting to all of a folder's contents, it doesn't necessarily happen.

You should also be sure to Repair Permissions frequently using Disk Utility. It's located inside the Utilities folder that is inside the Applications folder.

A very useful, shareware utility for repairing OS X Permissions is Cocktail:  
<http://www.maintain.se/cocktail/index.html>

On Apple's site see Troubleshooting permissions:  
<http://docs.info.apple.com/article.html?artnum=106712>.

And a bit more detail:

As you may know, OS X runs on UNIX. UNIX was originally built when it was inconceivable that

there would be two computers within the same building, never mind a handful within each of our offices. The idea of moving files from one computer to another had no place in that model. Permissions were created to control who could access particular files on the computer.

When you move files from one computer to another, the permissions as set on the first computer carry over. You may have had permissions set with your name on the first computer, but to the computer they come over as user #501 or something like that. On you second computer, even though your name appears as the owner, you may be user #634. The computers see it that you're not the same as #501.

You may set Permissions on a folder to allow yourself to Read and Write, but if you go file by file through the folder, you may find that some are set to only allow you to Read or to not even have access.

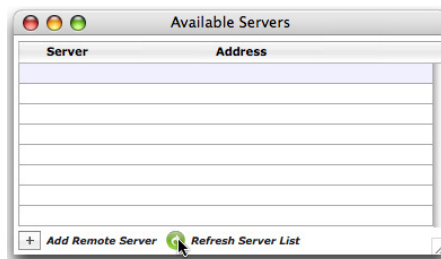
The best measure we've found so far, is to set Permissions to allow everyone to Read and Write. On your second computer you may not be able to since you don't have permission. Grrrr. It may be necessary to go back to the first computer to assign these more liberal permissions.

If that still fails, use a good utility to repair permissions, flush caches and so on. Restart the computer and try again.

Permissions is one of the most irritating aspects of OS X and multiple computers.

## TROUBLE SHOOTING

**Server is Unavailable:** If a shared file cannot find the server when launched, use the Server menu to access the Available Servers wizard. If the server is not showing, click on the Refresh Server List button. If the server is still not listed, be sure it's running and connected to your network and/or contact your system administrator. If the server shows, return to the non-connecting file and choose Resynchronize from the Server menu.



If the server fails to show in the Available Servers window, be sure that the server is running and that Panorama Enterprise is launched. Confirm that Remote Apple Events is activated on the server.

**Unreliable Connections:** If a file has frequent trouble connecting, in the Available Servers wizard, click on the Servers menu and choose Bonjour Threshold. Increase the threshold to force your computer to look a little harder. This does lengthen the time required to launch a file by as much as several seconds but increases the reliability of connecting on launch.

**File Not Found:** If the File Not Found is an alias, see if you can view the contents of the folder containing the original file on your Desktop. If you're unable to find and view the folder, be sure the server's permissions are properly set to allow your client computer Read & Write Access.

**File is Busy:** Frequent File is Busy messages on an aliased file indicates that the file may serve you better as a local file on each client computer. Be sure to keep all clients updated whenever a local file needs to utilize new information.

*Note:*

It's very helpful to use specialized utility software to see if the server is broadcasting to your network.

Bonjour Browser is a useful and free utility:  
<http://www.tildesoft.com/Programs.html>





# UPDATING & UPGRADING

InView & StockView files can be updated as a whole, when installing a complete upgrade or individually to install an update to a single file.

## INSTALLING A FULL UPGRADE

### PREPARATION

Back up a complete set of your InView & StockView files; the Public Databases folder, a client folder and the master set of files on your server.

If changes are made on any client computer during the update process, they will be lost, so it's advisable to be sure that everyone is off line and not working in any InView & StockView component until the upgrade is completed.

Typically upgrading should not require more than several minutes.

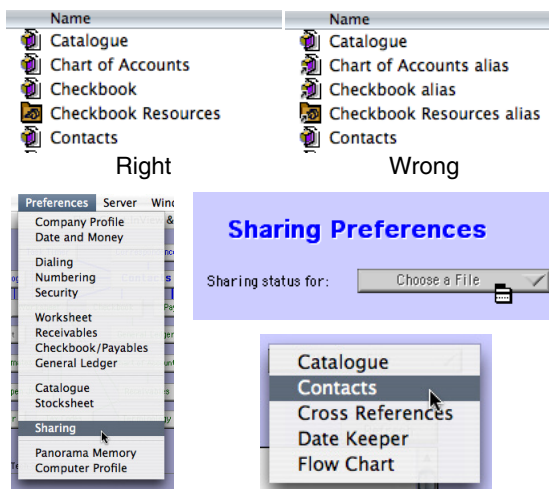
Before upgrading your InView & StockView files, it's necessary to have a folder containing all of your files and for the shared files to be converted to single user mode.

The updating can be done on any client computer, but it must be done using your master set of files, or a complete copy of that folder. It should have actual files within versus the aliases used on the client machines.

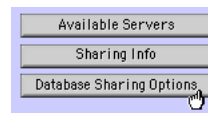
Start by opening Flow Chart. From the Preferences menu, choose Sharing.

In the Sharing Preferences, choose one of your Shared files, such as Contacts. The file will open and provide an onscreen report of its shared status.

Without closing the file, click back to Flow Chart or press Command-H.



Back in Flow Chart Sharing Preferences, click on the button for Database Sharing Options and the Database Sharing Options window opens.

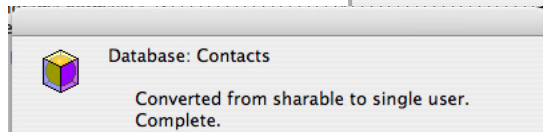
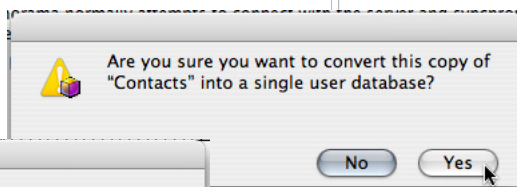
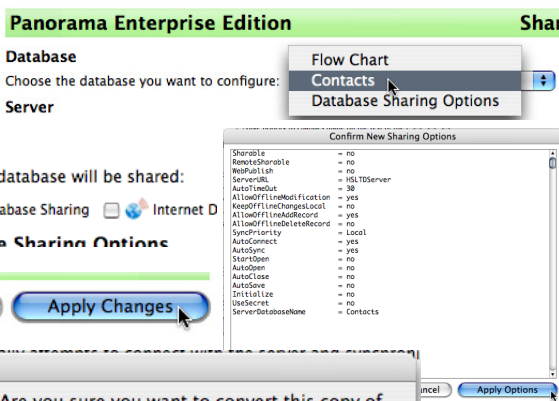


## CONVERT TO SINGLE USER

Choose the file you're converting to single user mode, Contacts in this example, and if asked, enter the password for your Panorama Enterprise software.

Uncheck Local Database Sharing under Sharing Mode, scroll to the bottom of the window and click on Apply Changes. A dialog window opens to confirm your settings. Click on Apply Options.

You'll be asked to confirm your intent to take the file off line followed by a confirmation that the process has been completed.



**Note:**  
In Flow Chart version 5.5.7 or later, a shortcut is available for un-sharing.  
  
Hold Opt/Alt, then click and choose a file from the Sharing Status popup menu, and the selected file is instantly converted to single user.



NOTE: The file is still on the server and all clients and continues to operate in shared mode as it did prior to these steps. Only the very copy you're working on has been converted to single user mode. Changes made by any client at this point will not be included when sharing is re-enabled.

Repeat this process for each of your shared files in order to get a single user copy of each one.

## U P D A T E

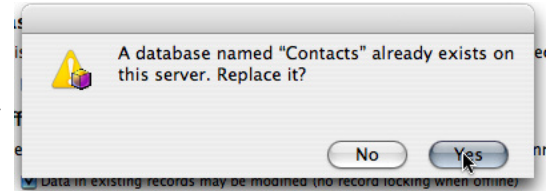
Once all files are in single user mode, you should have a complete folder of InView & StockView files, no aliases and no shared files. You can now use the HindSight Installer to update files to the latest version. See the instructions there for updating files and any graphics.

## R E S H A R E

When your files are all updated, you can re-share the shared files using the same process as originally applied when your shared system was first set up.

The one difference is that when you initiate sharing of each file, you'll be asked if it's okay to replace the copy on the server - the one located in the Public Databases folder. It is okay - of course you have back ups of everything just in case.

Once sharing is re-established, you're presented with a confirmation dialog.



At this point you have one folder of shared and updated files. As long as this folder is your master files folder on the server, or if its contents are used to replace the files in the master InView & StockView folder, all established aliases should continue to work on client computers.

You will however, need to move a copy of each shared file to each client folder to replace the copies already existing there. Unless local files have unique information, they should be similarly replaced on the clients with their updated equivalent in the master folder. Once done, the update is complete.

You can, of course, create a new client folder as detailed in the sharing manual and distribute the whole folder to each client computer, replacing the folder already existing on each one.

## S I N G L E   F I L E   U P D A T E S

HindSight frequently issues updates for single files versus the entire InView & StockView file set.

Typically single file updates use the (new) installation process built into InView & StockView files. These updates are downloaded with the (new) already added to their name.

Drop the (new) file into the same folder as the file it is to update and double click to launch it. The (new) file makes a numbered backup copy of the file its updating, absorbs the data and renames itself to replace the original file.

Once you're satisfied that the update has been performed satisfactorily and that you need nothing in the way of graphics from the old file, you can delete the numbered backup from the folder.

To update a shared file, a copy of that one file needs to be converted from shared use to single user mode as described above. Update the individual file and then reshare it as described above. Drag copies of the updated and reshared file to all client folders to replace the older version copy there.

To update an aliased file, update the actual file within the master InView & StockView folder. All client folder aliases will continue to find it so no other actions are necessary.

To update a local file perform the update on the file in the master folder, then move a copy to each client to replace the older file already there. The exception is if local files contain unique information as noted below.

## U N I Q U E   L O C A L   F I L E S

If you have local files containing unique or individualized information on various clients, those files can be separately updated using the (new) installation process built into InView & StockView files.

When performing complete upgrades, from within the HindSight Installer files, locate the file(s) you wish to individually update and move copies to a convenient location. Add exactly " (new)" including the space to the end of the file name so it becomes Checkbook (new) or Equipment (new), etc. Then follow the steps above for the (new) installation process.

For individual file updates, just drop the (new) file into the client folder with the unique local file and launch the (new) file as described above.

# GETTING OUT OF BUTLER

Butler is the OS 9 sharing system for InView & StockView.

For those upgrading from a Butler system there are a few extra steps to get your data prepared for upgrading to InView & StockView 5 for OS X.

Back up your Butler system; all files and folders.

On a client computer, gather a full set of your InView & StockView files. Aliases don't count, you need the real thing.

In this gathered Butler file set, open your shared files and from the Server menu choose Select All from Server.

Open Flow Chart and use the Preferences menu and your access code to get to Multi-user Preferences.

The pop-up menu in the middle of the Multi-user Preferences window lists the five files that can be deactivated. They can only be deactivated one at a time. Select the file you wish to change, then click on the Deactivate button.

Before the change is made, you're asked to confirm your action with a warning.

“CAUTION: Deactivating a file is NOT a temporary action. Once deactivated, reactivation can only be made by deleting the corresponding SQL database in the Public Databases folder. Unless all records are selected from the server before Deactivating multi-user mode, any unselected records may become permanently unavailable to you.”

When you get the dialog asking to select all records from the server, even though you should already have done it, you usually want to click on YES. (at this point all records must fit in the memory of the computer you're using) Save the file. You now have a stand alone copy of the file containing only the data that was selected at the time of deactivation.

Note: Deactivating a file does NOTHING to the SQL file in the Public Databases folder. It only breaks the link from the Client with which you're working. As long as at least one Client remains in Multi-user mode you can still access the corresponding SQL files and select any or all records. Copies of a still-connected Client can be redistributed to any other Clients to create or restore their connections to the SQL database.

You may find it desirable to keep your Butler system running until you're ready to fully move into the new system.

Back up your newly assembled stand alone folder of InView & StockView files. This is the folder that you're going to upgrade.

