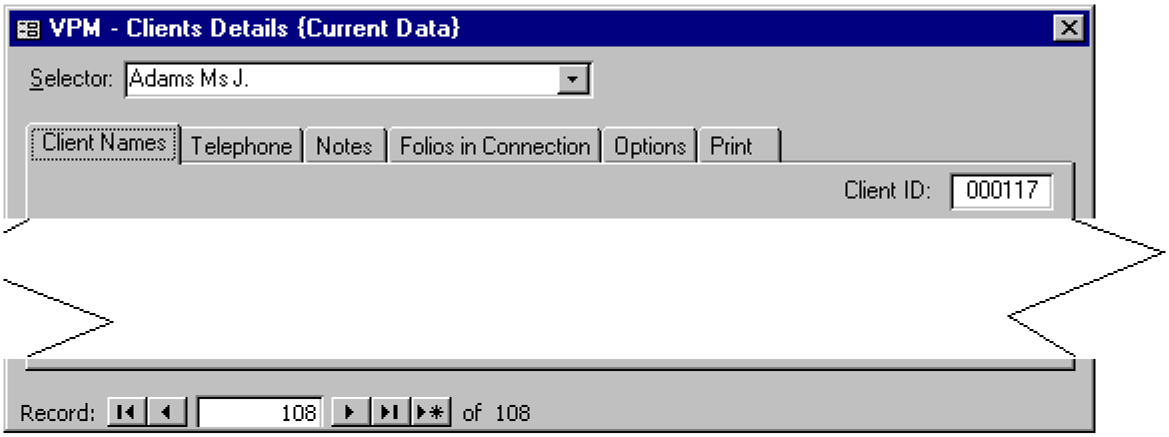
Client Details Form

Purpose - Viewing and management of stored Client details.

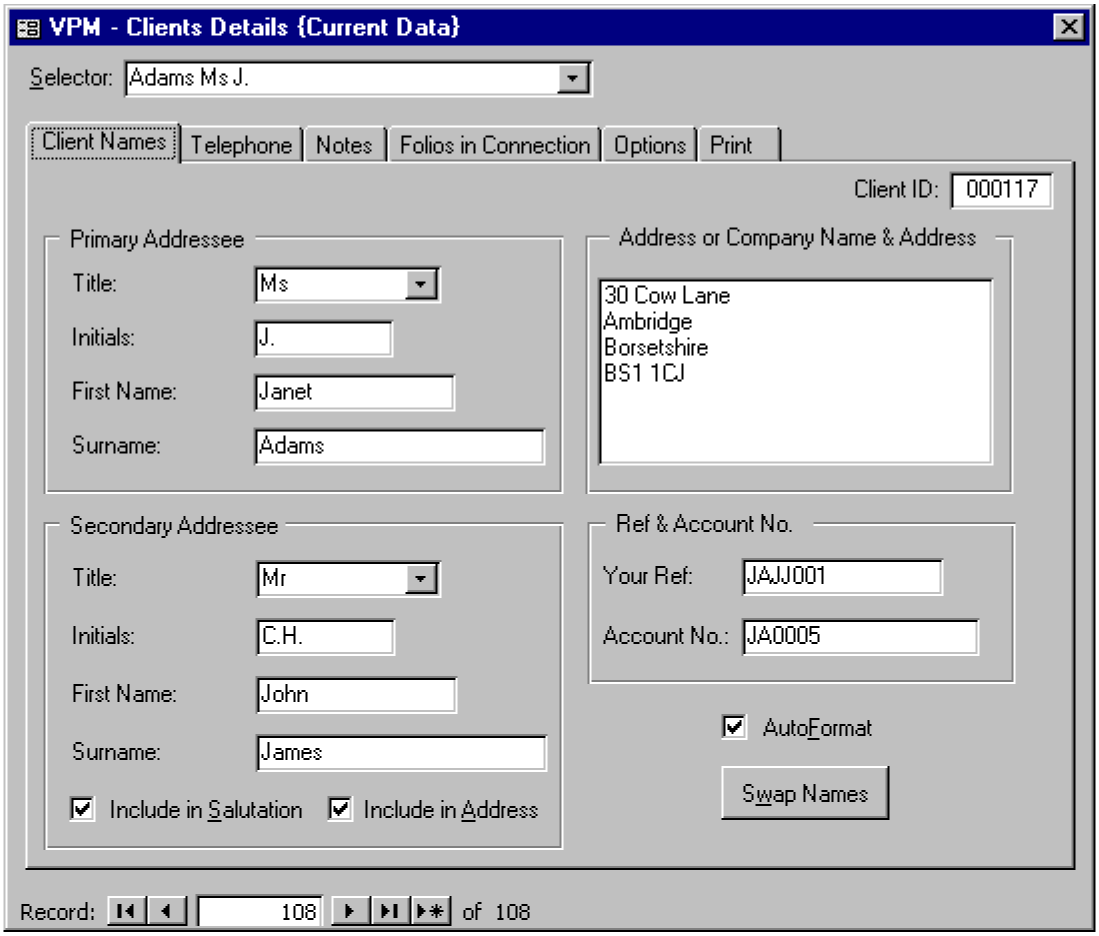
Please click on the page tab that you require help for in the picture below:-



The Client Details Form is a Tabbed Dialog with a Client Selector combobox above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 6 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Client Details data as well as ancillary functions, such as printing.

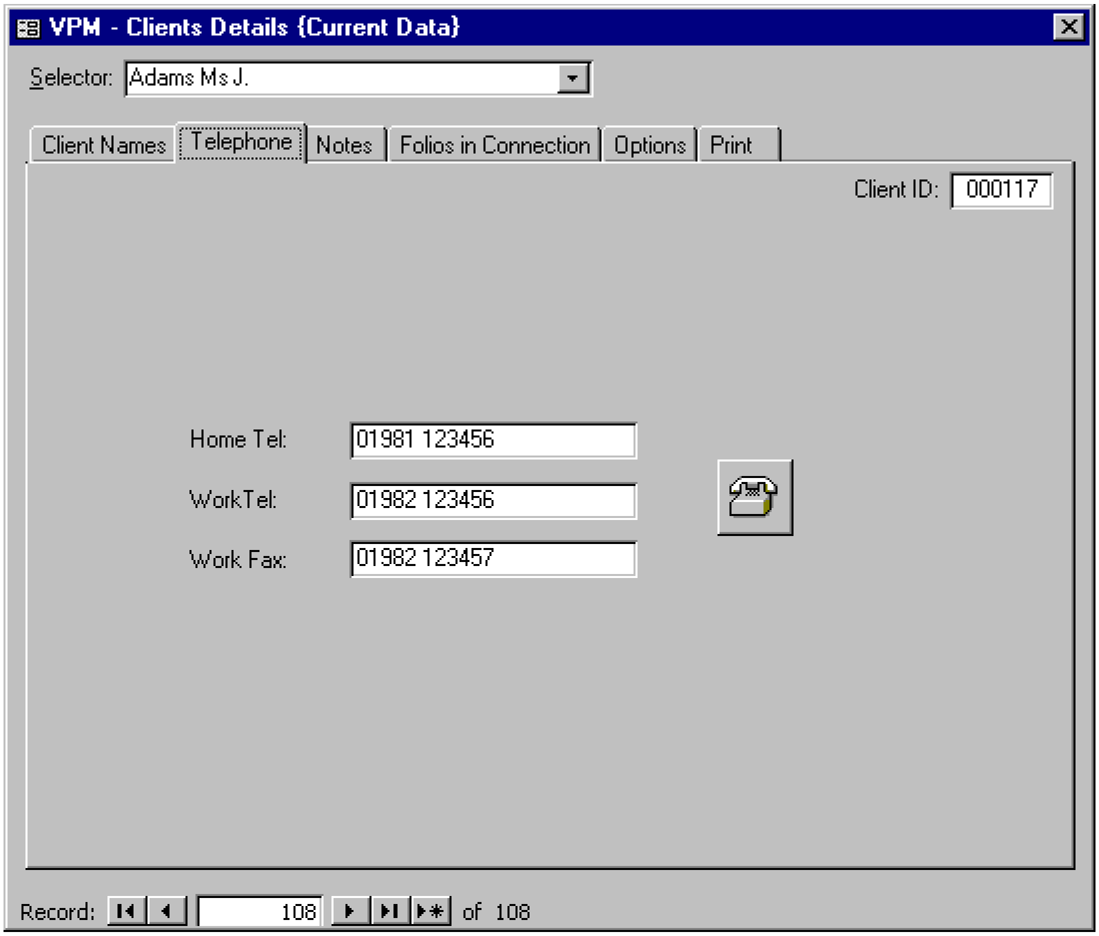
Client Details Form - Client Names and Addresses, Tab

Please click on the item you require help for in the picture below:-



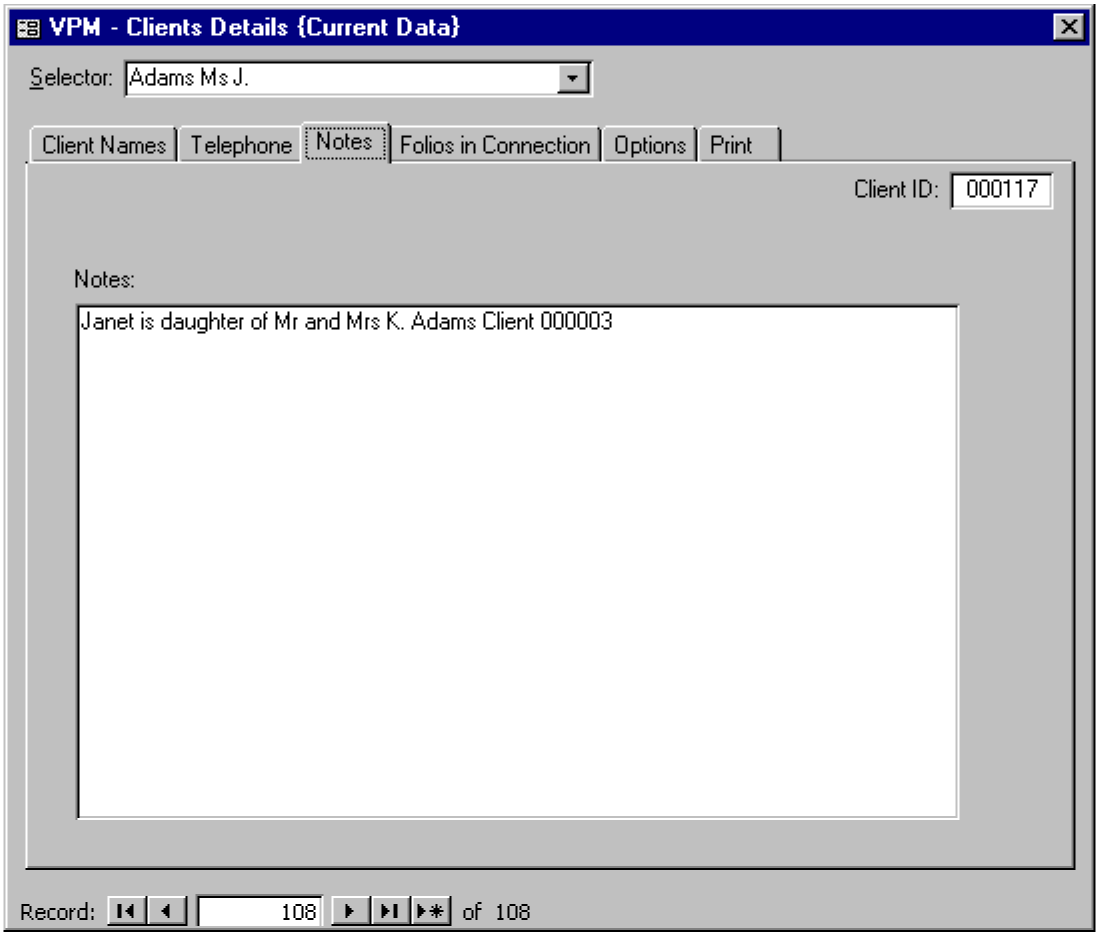
Client Details Form - Telephone, Tab

Please click on the item you require help for in the picture below:-



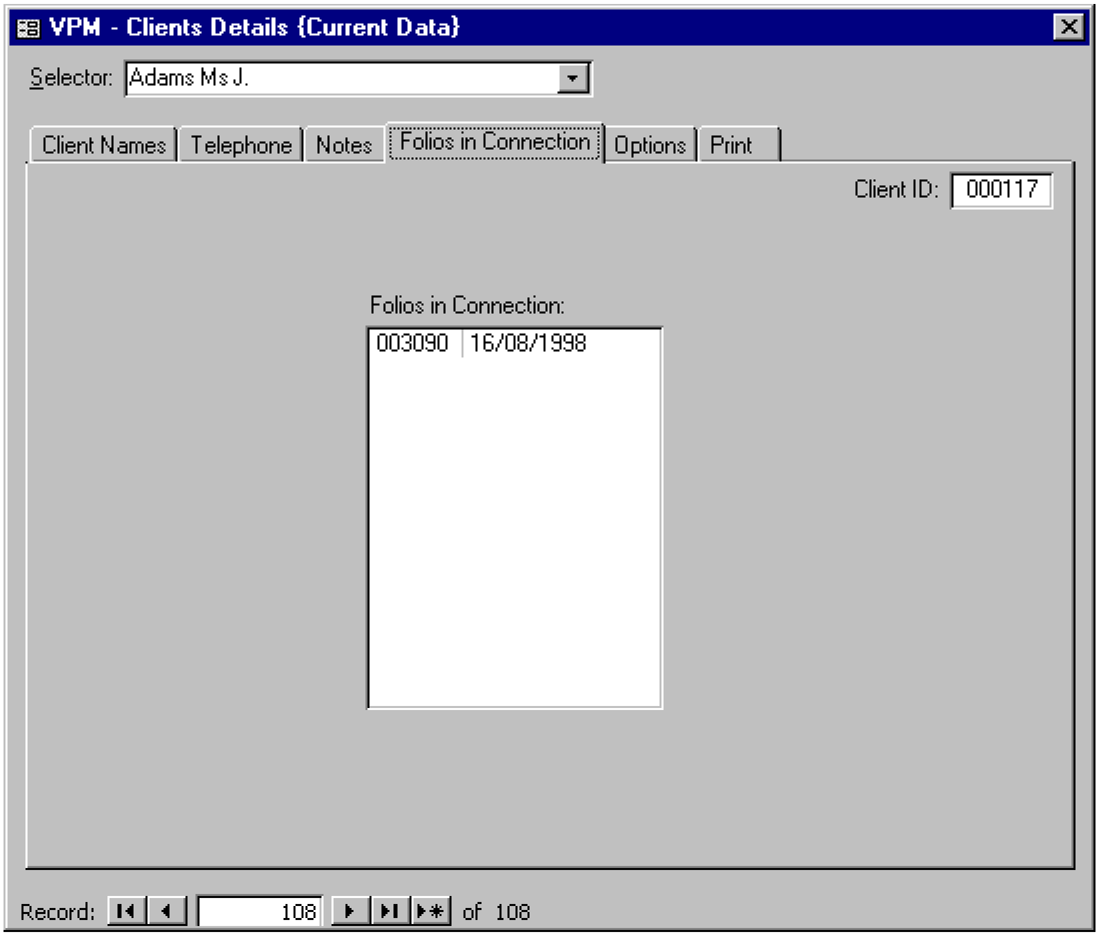
Client Details Form - Notes, Tab

Please click on the item you require help for in the picture below:-



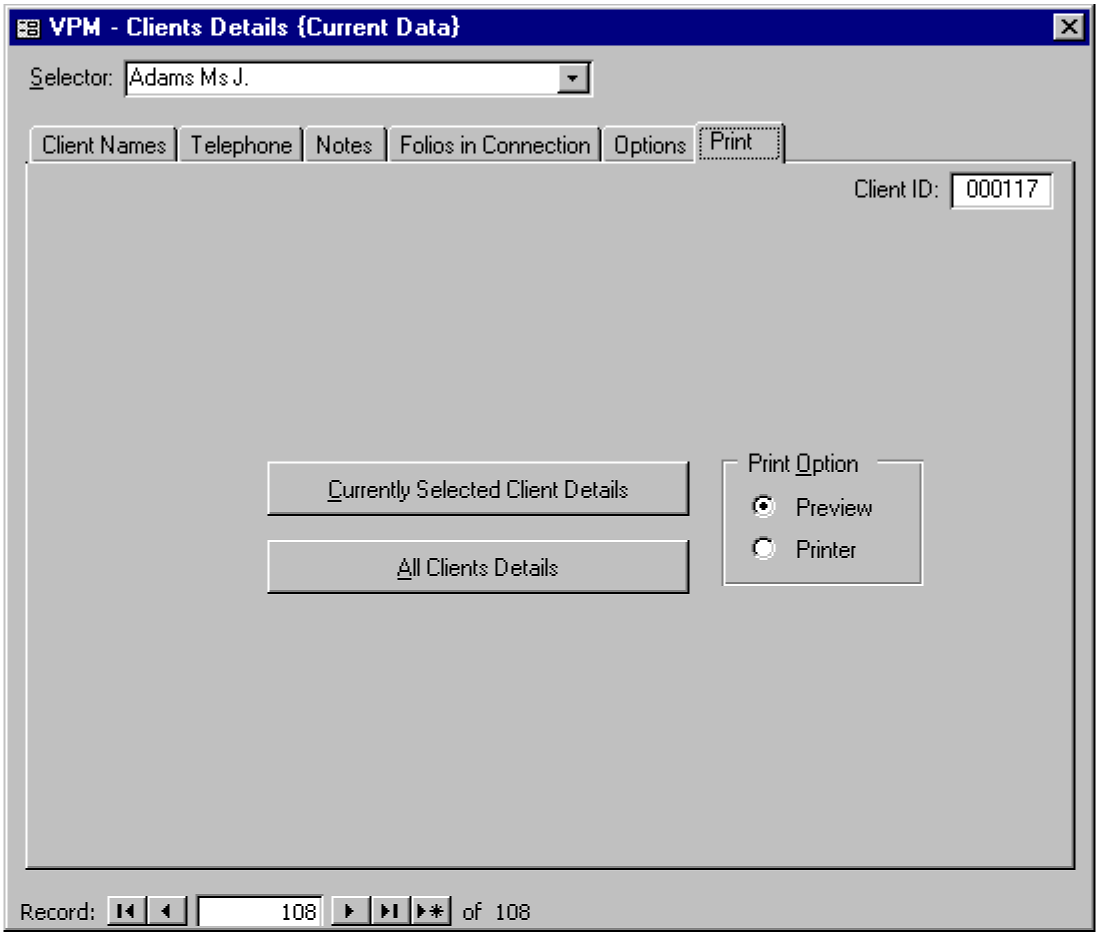
Client Details Form - Folios in connection, Tab

Please click on the item you require help for in the picture below:-



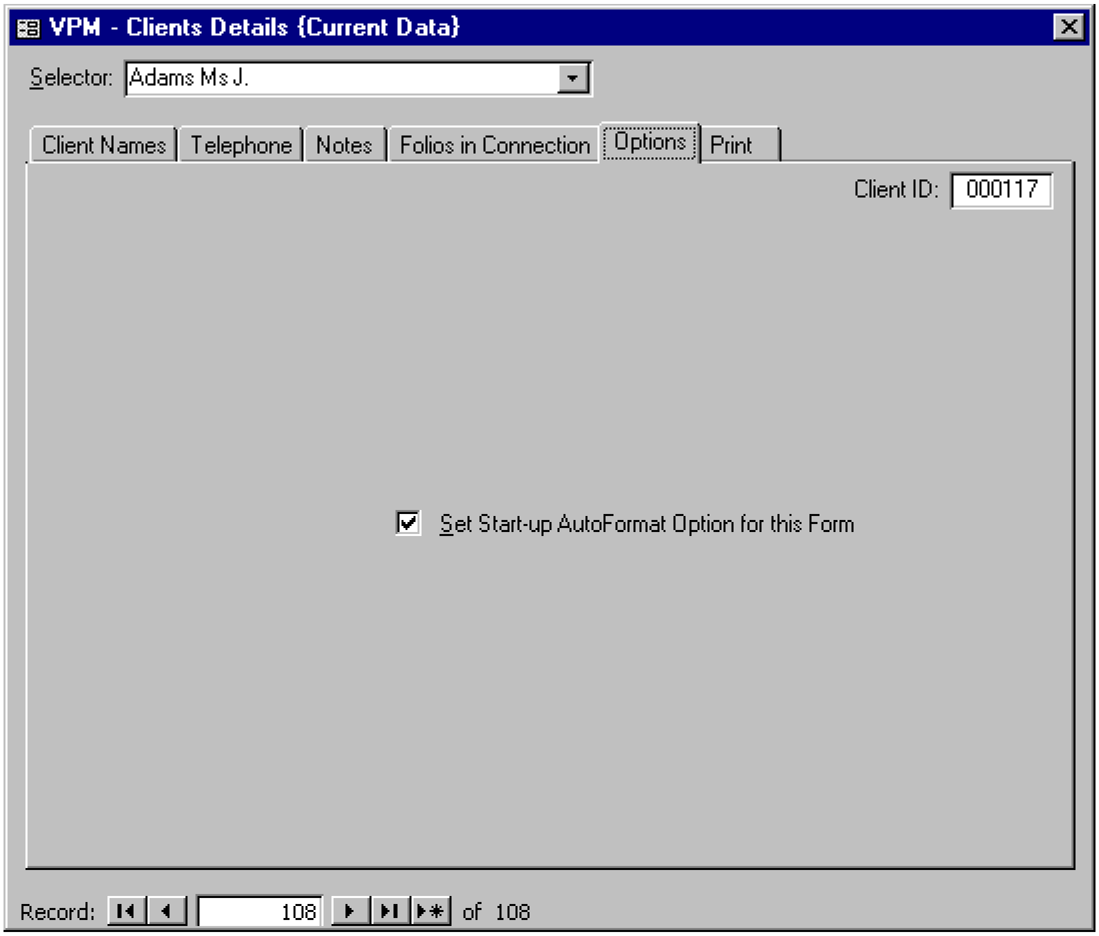
Client Details Form - Print, Tab

Please click on the item you require help for in the picture below:-



Client Details Form - Options, Tab

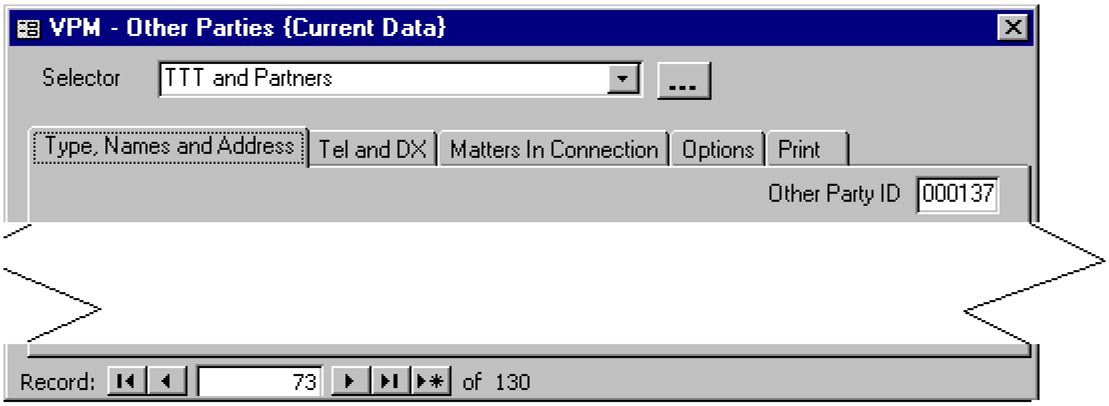
Please click on the item you require help for in the picture below:-



Other Parties Form

Purpose - Viewing and management of stored Other Party Destination details.

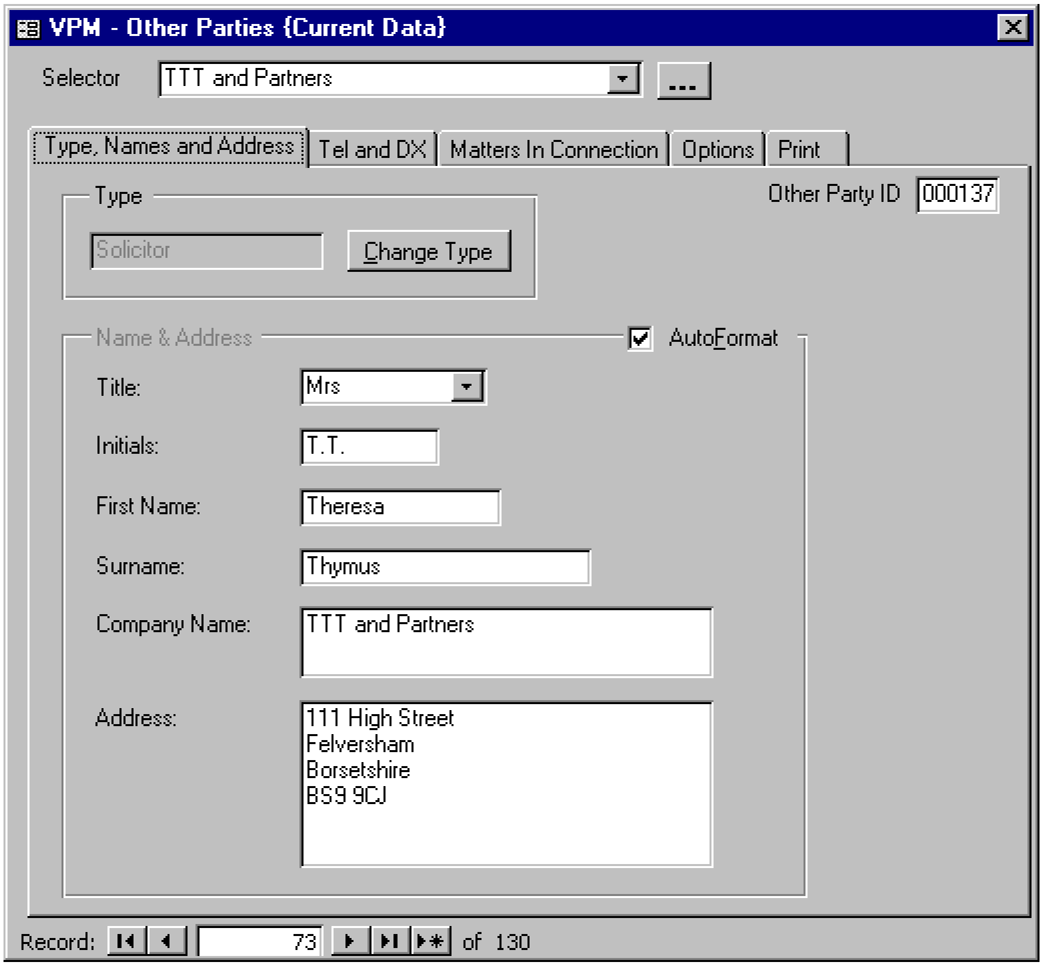
Please click on the page tab that you require help for in the picture below:-



The Other Parties details form is a Tabbed Dialog with an 'Other Party' Selector combobox above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 4 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Other Party details data as well as ancillary functions, such as printing..

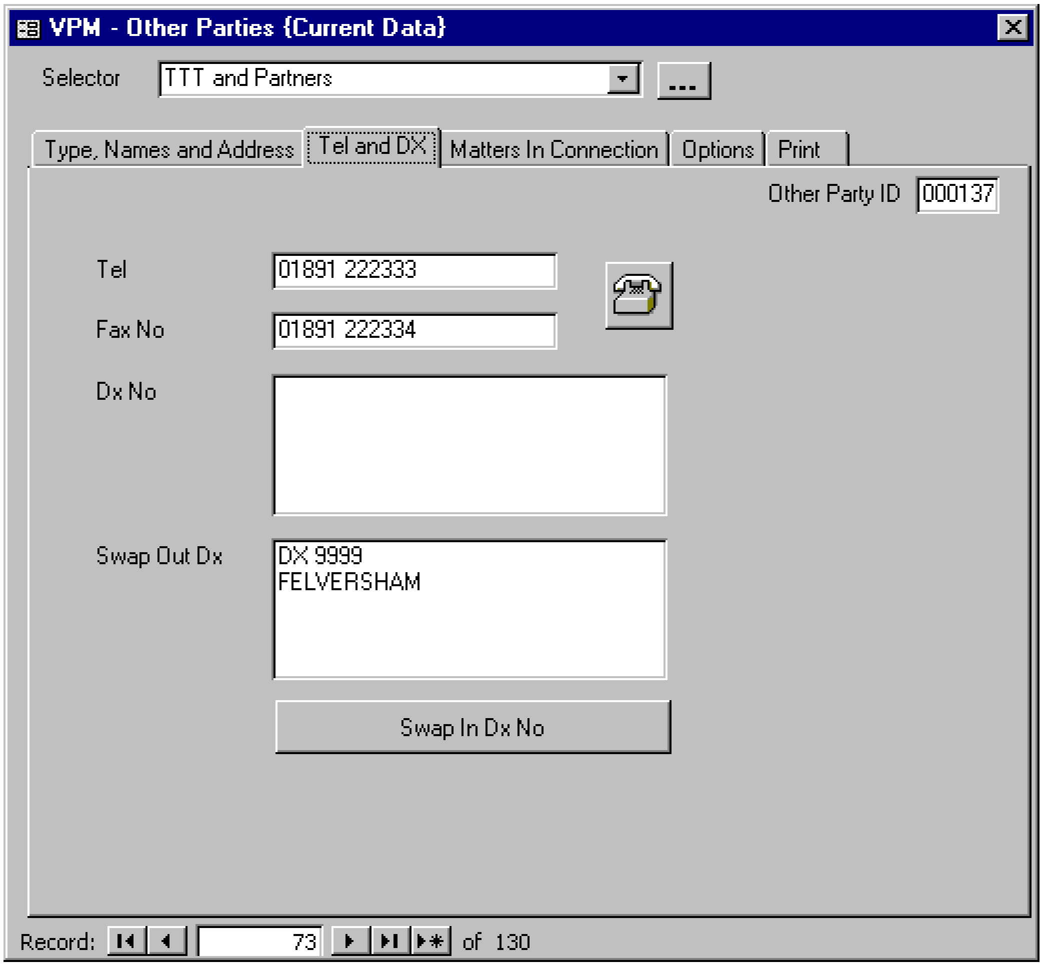
Other Parties Form - Type, Name & Address, Tab

Please click on the item you require help for in the picture below:-



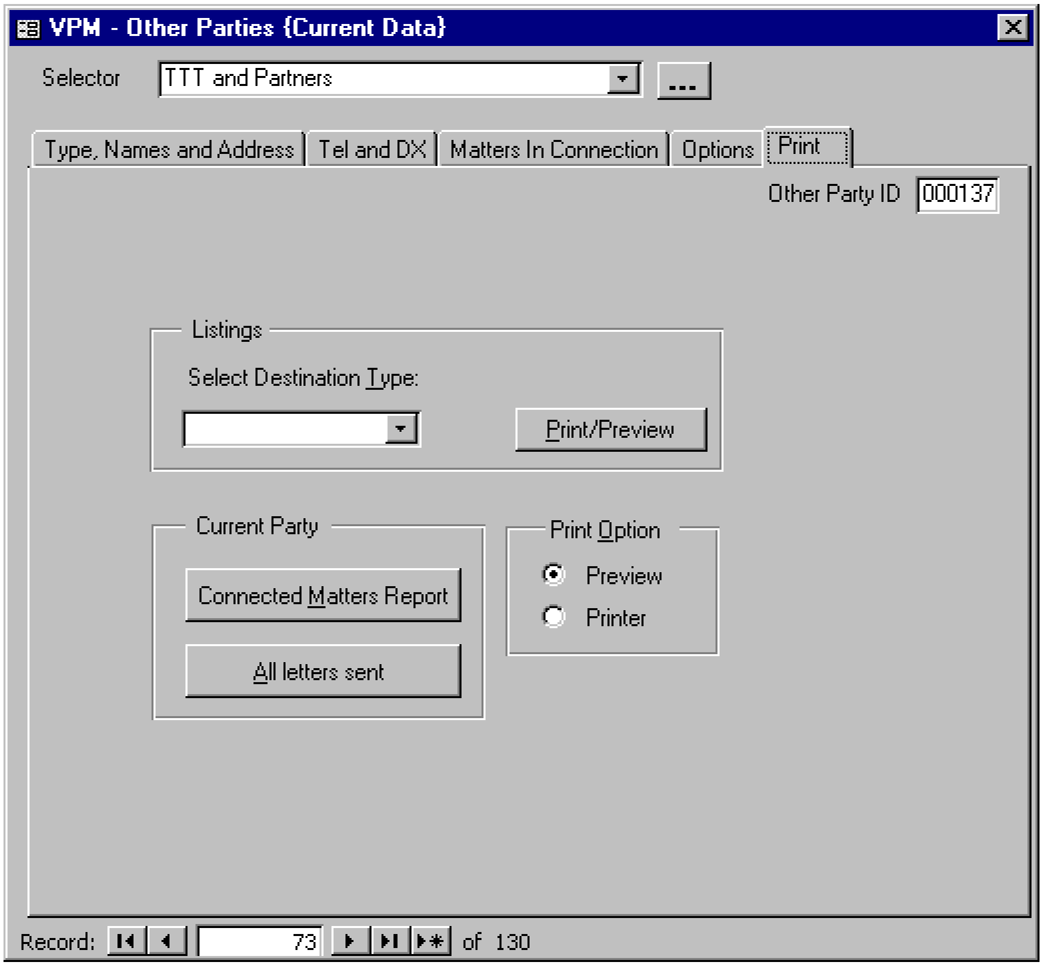
Other Parties Form - Telephone and Dx, Tab

Please click on the item you require help for in the picture below:-



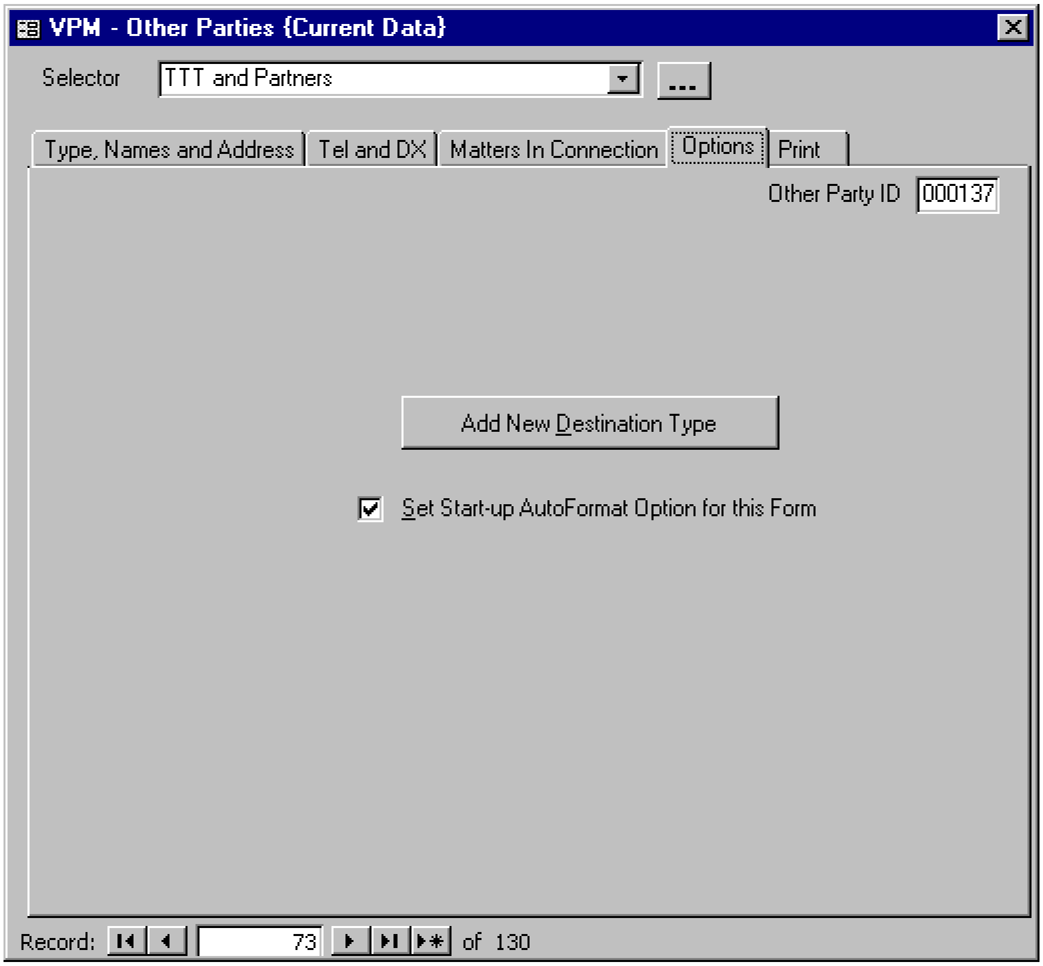
Other Parties Form - Print, Tab

Please click on the item you require help for in the picture below:-



Other Parties Form - Options, Tab

Please click on the item you require help for in the picture below:-



Client Details Form - Client Selector, Combobox

This combobox offers a simple means to select an existing Client.
The drop-down list displays one column containing the Client's Surname and Initials.
Either select from the drop-down list or use the combobox's quick-search facility.

See also - General Help on Searching for Records and Controls, Listboxes and Comboboxes.

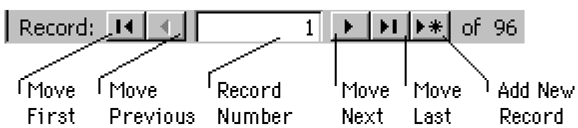
Client Details Form - Swap Names, Button

This command button will swap the Primary and Secondary Addressee details. This may be used for quickly and easily alternating addressees for letter generation purposes.
Tip: This might also offer added flexibility when choosing how to address letters to some married and partnered clients.

General Controls - Data Control style record selectors

Purpose - To allow direct navigation through a set of records attached to a form.

This style of record selector is found at the bottom of most forms that are connected to one or more tables in VPM's database. Whilst most forms involving data management have specialised in-built controls for browsing and navigating through their records the data control always keeps track of the current record's fundamental position within the database tables. They permit easy navigation through a form's records (using the current sort order) and a means for adding a new record ready for data entry. The various elements that make up the control are illustrated below.



- **Move First Button** - Moves the current record to the first in the database.
- **Move Previous Button** - Moves the current record back one (the one previous to that displayed).
- **Record Number TextBox** - Displays the current record number and allows the user to select a specific record by typing into the box.
- **Move Next Button** - Moves the current record forward one (the one next on from that displayed).
- **Move Last Button** - Moves the current record to the last in the database.
- **Add New Button** - Moves to a new record and clears the display ready for data entry.

The control also displays the total number of records in the database.

N.B. These buttons are duplicated on VPM's Custom Toolbar.

See also - General Help on Searching for Records and Sorting Records.

General Controls - AutoFormat, Checkbox

Purpose - Provides automatic formatting capabilities for some text controls.

AutoFormat - Checkbox. These are found on the pages of those forms that contain name & address details. Check the box to have name and address text converted in the following ways:-

- Capitalises the first character of each word (Title Case)
- Initials are capitalised and full stops inserted where required.
- Post codes are converted to upper case in multi-line address text boxes.

N.B. Auto-format occurs upon exit from the textbox and only if text has been updated.

Tip: Un-check this checkbox temporarily when this feature makes undesirable changes to text entries e.g. when entering names such as McKinsey

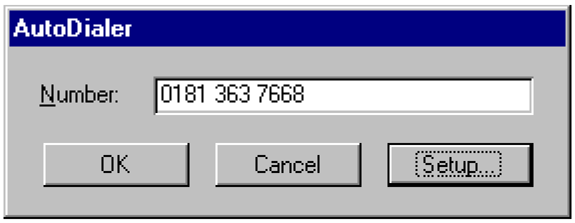
The Options Tabs of these forms will contain a checkbox for setting the default startup state of the AutoFormat checkbox. This allows the user to have the form startup with any AutoFormat options turned off if so required.

See Help on Set Startup AutoFormat Option for this Form.

General Controls - Auto-Dial, Button

Purpose - Dials a telephone number for you 'hands-off'.

When found adjacent to telephone number textboxes, click anywhere in the required phone number textbox first and then Click the auto-dial button to have it entered for you in the resulting pop-up dialog (shown below) You can enter or change the number in the Auto-dial dialog's textbox to before Clicking its 'OK' button to initiate dialing.
Pick-up the phone when you hear the phone being answered through the PC's loudspeaker.



The Setup button takes you directly to Microsoft's modem configuration wizard should your modem not be installed.

N.B. Requires the PC to have a suitably configured modem installed and configured.

Client Details Form - Notes, Multi-line textbox

Displays and allows entry of notes and memos pertaining to the current client.
The scrollable multi-line text box can hold approximately 30,000 characters, wraps text automatically and supports most of Windows' standard mouse and key press actions. The default font cannot be changed.
Tip: Use the {ENTER} key to form a new paragraph.

See also - General help on Text Editor Controls.

Client Details Form - Folios In Connection, Listbox

This listbox displays those folios that are connected to the current Client record.
To go to any of the listed folios, just action the item in the list (Double Click). The Client Details form will still be available upon return.

See also - General Controls - Listboxes and Comboboxes

Client Details - Print, Mixed Controls

Currently selected client details - Command Button. This will send the current client details to the printer or the print-preview window, dependent upon the selected Print Option.

All Client Details - Command Button. This command button will send the client details for all clients on file to the printer or the print-preview window, dependent upon the selected Print Option.

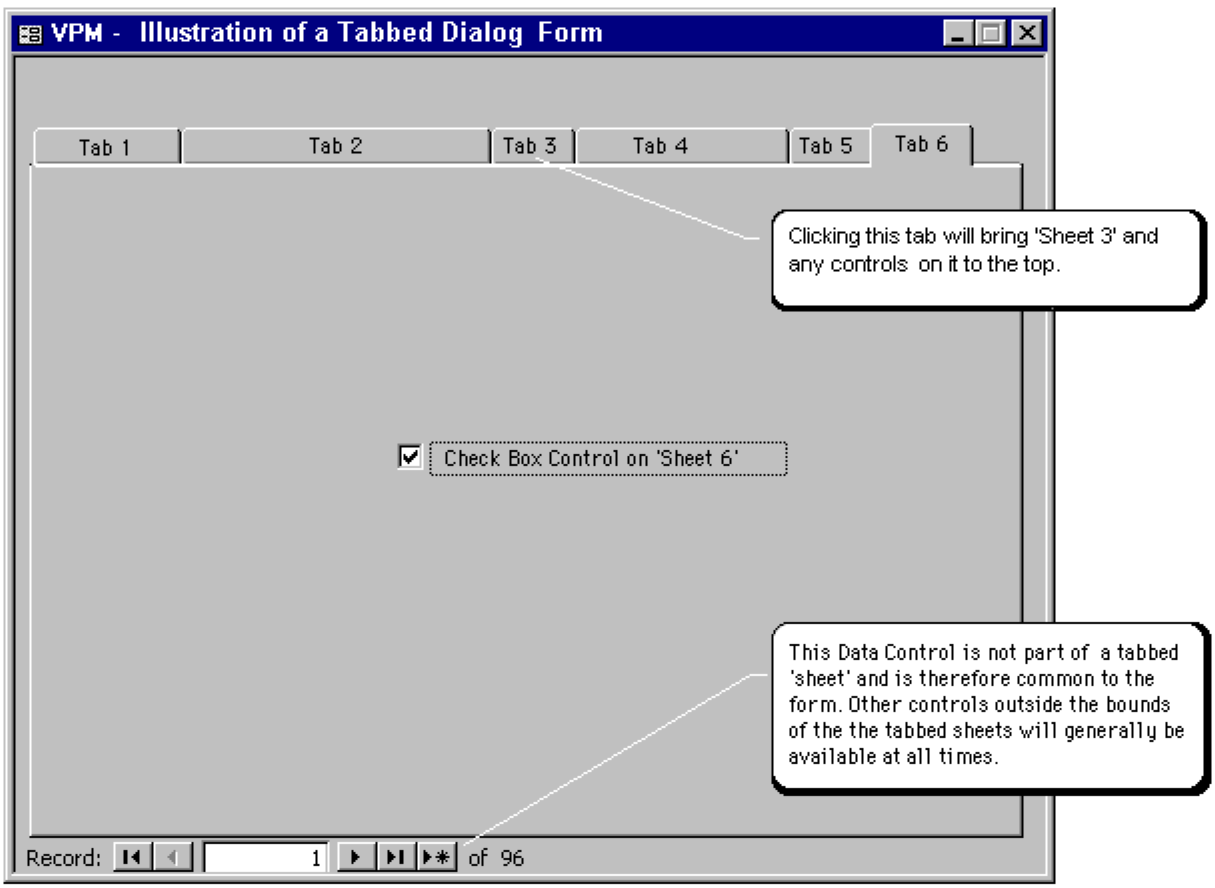
Print Option - Option Button Group.This group determines whether the print output is sent to the Print Preview window or directly to the default printer.

General - Tabbed Dialog Forms

Purpose - Presents the user with a series of related pages (or 'sheets') on one form. Each page contains program controls to manage a particular task.

The tabbed dialog portion of a form will usually contain several tabbed pages that have a common theme or purpose, each page effectively being a grouping of a set of controls. Typically, the first tab will contain controls for detail data entry. Simply go to the sheet that suits the current task by clicking its tab or switch through them successively using the keyboard [CTRL] + [TAB] keys. Usually, the first sheet (leftmost tab) will contain the most important controls or data fields and those to the right general form options, utilities and lastly printing.

See also - General Help on Filling in Forms



Client Details Form - Telephone Numbers, Text Controls

Displays and allows user input/editing of the following data items:-

Home Telephone No. - Textbox.
Work Telephone No. - Textbox.
Work Fax. No - Textbox.

These numbers can generally be entered to suit in-house standards for formatting without compromising the Auto-Dial facility's ability to interpret them correctly. i.e. spaces and brackets will be ignored.
(See also - Help on Auto-Dial button)

Client Details Form - Reference and Account No., Grouped Controls

Two textboxes display and allows user input/editing of the following data items:-

Your Ref. - Textbox. The clients reference for letter generation pruposes, if known.
Account Number - Textbox. The client's account number.

Client Details - Primary Addressee, Grouped Controls

Displays and allows user input/editing of the following data items:-

Prefix - Combobox. Type in or select the required prefix *.
Initials - Textbox. Type the required initials *.
Firstname - Textbox. Type in the addressee's first name *.
Surname - Textbox. Type in the addressee's surname or leave blank if a company name is to be added to the Address textbox (see Address or Company Name & Address textbox) *.

* Supports AutoFormat for all controls (see Options Tab controls).

See also - Swap Names button

Client Details Form - Secondary Addressee, Grouped Controls

Displays and allows user input/editing of the following data items which are principally used in the salutations and addressing of letters to the client:-

Prefix - Combobox. Type in or select the required prefix *.
Initials - Textbox. Type the required initials *.
Firstname - Textbox. Type in the addressee's first name *.
Surname - Textbox. Type in the addressee's surname or leave blank if a company name is to be added to the Address textbox (see Address or Company Name & Address textbox) *.

The following two controls are relevant to the addressing of letters.
Include in Salutation - Checkbox. Checking this control will ensure that the secondary addressee name will be included in the salutation of any letters to the client, the style of salutation determining which part of the name is used.
Include in Address - Checkbox. Checking this control will ensure that the secondary addressee name will be included in the addressing of any letters to the client, the style of addressing determining which part of the name is used.
Tip: If following traditional convention when addressing a married couple consider setting the primary addressee prefix as Mr. and Mrs. and leaving this box unchecked.

N.B. The options provided above and the ability to use any prefix, initials and names in the primary addresee combine to offer the user almost unlimited flexibilty when writing to clients. Note that the Swap Names button can also contribute to this flexibility.

* Supports AutoFormat for all controls (see Options Tab controls)

Client Details Form - Address or Company Name & Address, Multi-line Textbox

Displays and allows user input/editing of the Client's address:-

This is the only mandatory field for a new client record. Type in the the Client's Address or their Company Name and Address *.
N.B. The primary addressee's name will be prefixed to the address for letter generation purposes. If this is not required for a company address simply include the company name as the first line of the address and leave the Primary Addressee's Surname blank.

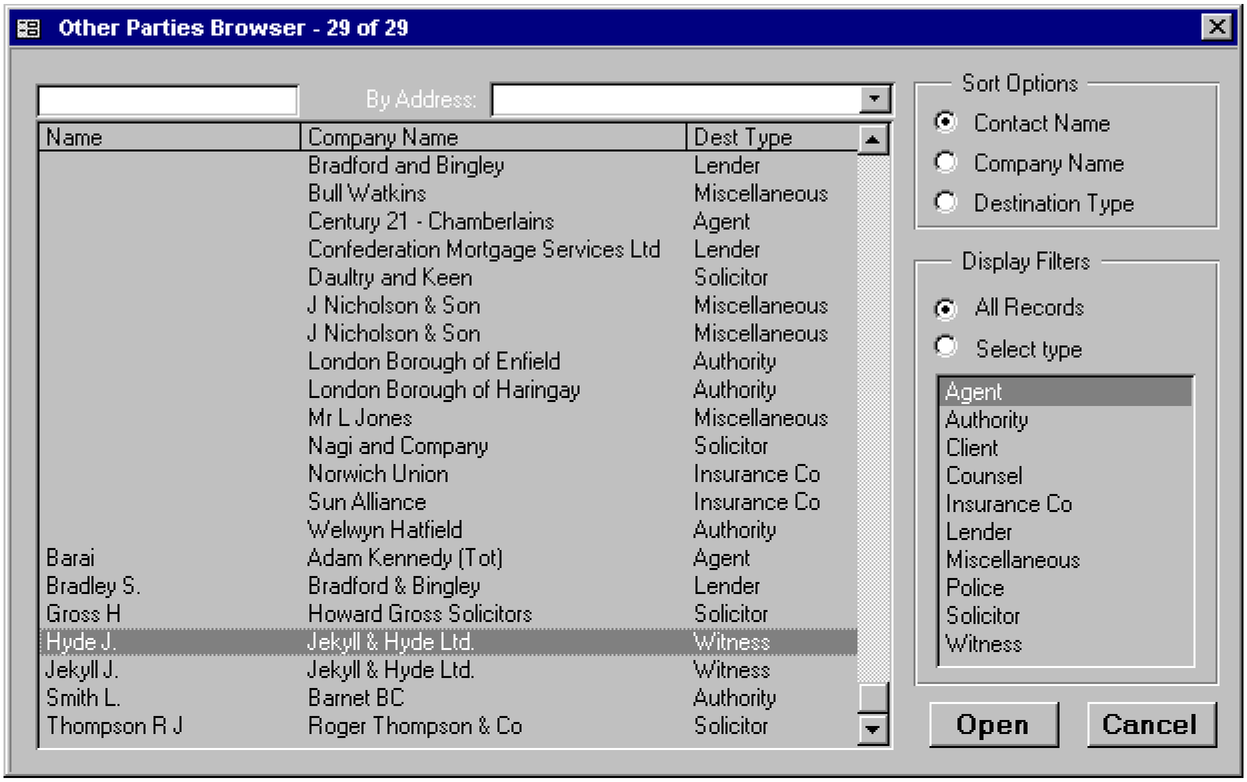
* The address text editor supports AutoFormat (see Options Tab controls).

See also - Swap Names button, General Controls - Text Editor Controls

Custom 'Other Parties' Browser Dialog

Purpose - This Custom Browser Dialog allows all the 'Other Party Destinations' on file to be perused in a more comprehensive way than the Selector combobox on the Other Parties form. See VPM Custom Browsers.

Please click on the item you require help for in the picture below:-



Other Parties Browser - Quick Search By Name, Textbox

Rather than browsing the listbox a quick search can be done should the party's contact **name** be known. A *Find-first* part-search can be accomplished - simply type as many characters as are known or might distinguish the required person into the textbox and press the {ENTER} key. Subsequently pressing the {F3} key will initiate a further search, *Find-next*, which can be repeated until no further 'match' with your input text can be found within the remaining records. If found the listed item will be selected, ready for you to click the 'Open' button which closes the browser and selects the corresponding record in the details form.

N.B. The name is made up of the surname first, followed by the initials and is displayed in the first column of the browser's listbox (below this search textbox).

See also - General Help on Searching for Records.

Other Parties Browser - Quick Search by Address, ComboBox

Rather than browsing the listbox a quick search can be done should the ***first line of the Party's address*** be known. A find-first part-search can be accomplished - simply type as many characters as are known or might distinguish the required address into the combobox **OR** select from its drop-down list and then *Double Click* or press the {ENTER} key.

N.B. The address is not a displayed column in the browser's listbox.

See also - General Help on Searching for Records and General Controls, ListBoxes and Comboboxes

Other Parties Browser - Browser Main Listbox

The listbox is the main component of the browser, displaying three columns of information for each record (listed item). These are:-

- Name (the Party's contact name, if any)
- Company Name (the Party's company name, if any)
- Destination Type (the Party's destination typed description)

Displayed items can be restricted using the Display Filters and sorted using the Sort Options to facilitate browsing when a large number of 'Other Party' records are stored in the database.
If the required item is not visible scroll the listbox until it can be selected. Simply click once to select the item and then click on the Open button to view the details back in the 'Other Parties' form.
N.B. The listbox supports standard keyboard keys for rapid scrolling e.g. Page-Up/Dn, Home/End and the cursor arrow keys.
Tip: *Double Clicking* a list item both selects and operates the Open button.

See also Help on General Controls - Listboxes and Comboboxes

Other Parties Browser - Sort Options, Option Group

To sort the items displayed in the listbox simply select the required option button. These are:

- By Contact Name (1st column)
- By Company Name (2nd column)
- By Destination Type (3rd column)

This will result in an alphanumeric sort on the chosen column. By default the listbox is sorted on the 1st column.
N.B.. If no surname for the contact is stored this column will sort ahead of those with surnames - simply scroll down the list.

Other Parties Browser - Display Filters, Grouped Controls

The two option buttons in this group allow restricting the display in the following ways:

- Display All Records - No filters applied.
- Select Type - Select the subset to display from the Destination Type listbox.

Using the second of these options allows much easier browsing when many records of different destination types are stored in the database.

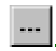
Other Parties Browser - Open/Cancel, Command Buttons

Both these buttons close the browser dialog and return to the callee form (Other Parties).

Open - Command Button. Makes the selected list item the current record back in the callee form.
Cancel - Command Button. Will not change the callee's current record, ignoring any selected list item.

Other Parties Form - Other Party Selector ComboBox/Browser Button Pair

Other Party Selector - Combobox. This is the preferred control to quickly select an 'Other Party' (destination) should the Party's Company name/Surname be known. The listbox displays two columns, Name (Company name **or** Surname if Company name is blank) and Address. Either select from the drop-down list or use the built-in quick-search techniques.
See also - General Help on Searching for Records and Listboxes and Comboboxes.

Custom Other Parties Browser - Command Button .
The Custom Other Party Browser can be accessed using the 3-dot button to the right of the Folio selector combobox. This pop-up dialog offers very comprehensive folio browsing and includes several quick search controls, as well as several sort and filter options for organising the display.

Other Parties Form - Type, Mixed Controls

(Destination) Type - Display-only Textbox. When Adding New records this control is changed to a Destination Type selector combobox which allows selection of the required Type for the new record from the drop-down list. The choice is limited to those in the list, though this can be added to should it be necessary (see Add new Destination button*).
Change Type - Command button (changes the Type control to a selector combobox).
Use this should it be necessary to change the original Destination Type assignment for this record.
N.B. - It is not usual to change the Destination Type unless an entry error has been made or the Other Party radically changes their business practice.

* See also - Options Tab, Add New Destination Type Button.

General Controls - Types of Controls

These are standard Windows controls, found on main windows or dialogs. They permit the display, editing and creation of data; the setting of program options and navigation through forms and throughout the application.

Data Controls

Grid Controls

Text Editor Controls

Checkboxes and Option Button Groups

Listboxes and Comboboxes

General Forms - Types of Forms

Tabbed Dialog Forms

Pop-up Dialogs - These are generally small dialog windows containing simple controls for gaining information from the user e.g. selection of data from lists or options or for redirecting program flow.

Message Boxes - The simplest of small windows, these contain a message or question for the user and can have various combinations buttons e.g. OK, OK/Cancel, Yes/No, Yes/No/Cancel etc.

See also General Help on Filling in Forms

Other Parties Form - Name & Address Details, Grouped Controls

Displays and allows user input/editing of the following data items:-

Prefix - Combobox. Type in or select the required prefix.
Initials - Textbox. Type the required initials with spaces between.
Firstname - Textbox. Type in the addressee's first name.
Surname - Textbox. Type in the addressee's surname.
Company Name - Textbox. Type in the addressee's company name if appropriate.
Company Address - Textbox. Type in the addressee's company address if appropriate.

N.B. Supports AutoFormat for all controls (see Options Tab)

Other Parties - Telephone Numbers, Textbox Controls

Displays and allows user input/editing of the following data items:-

Tel. No. - Textbox. Telephone number.
Fax No. - Textbox. Fax number.

See also Auto-Dial button.

Other Parties - Dx No. Controls

Displays and allows editing of the Other Party Destination Dx No. and allows the Dx No. to be swapped with postal address easily for letter generation purposes.

If a Dx number is present in the Dx No. textbox, then letters will be automatically generated to that Dx number address. If empty, letters will be generated to the postal address.

The 'Swap Out Dx No.' button enables the user to quickly 'Swap-out' (remove) the Dx number from the Dx textbox. It is then displayed in the 'Swap Out Dx' textbox for reference purposes only until activated again.

N.B. The Dx No. cannot be edited when 'Swapped Out'.

Other Parties Form - Print, Grouped Controls

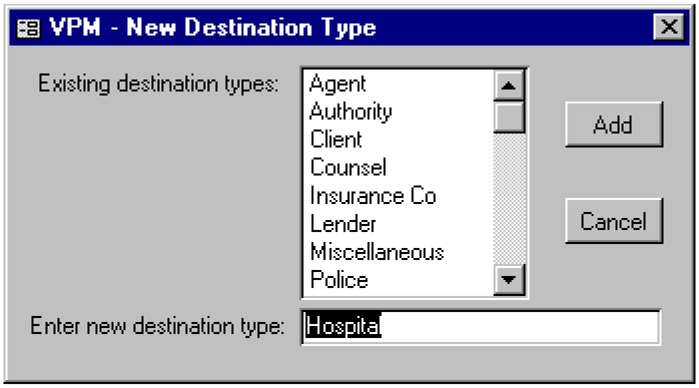
Listings, Control Group
This group provides the facility for printing a **list** of Other Parties for any chosen Other Party Destination Type.
Select Destination Type - Combobox. Simply select the destination type from the choices in the drop-down list before printing with button described below.
Print/Preview - Command button. This initiates the listings print process, sending output to whichever Print Option device is chosen.

Current Party, Control Group
This group offers printing of two different styles of report.
Connected Matters Report - Command button. Prints a report of *Matters Connected* to the selected party record.
All Letters Sent - Command button. Prints a composite of All Letters Sent to the selected party record.
N.B. Select the required Print Option first and then *operate* the required button above.

Print Option, Option Button Group
This option button group determines whether the print output is sent to the Print Preview window or directly to the default printer for the above print actions.

Other Parties Form - Add New Destination Type, Command Button

This command button will bring up the dialog pictured below which allows the user to customise the Other Party Destination Types by Adding a New Type. Simply type in the description that the new type will be referred to and *Click* the Add button.



Custom VPM Functions

`AutoDial`

`AutoFormat`

General Controls - Text Editors

Purpose - To allow the display, editing and formatting of text character strings.

Windows' text editor controls can support a wide variety of editing functions:-

N.B. When a text editor *first* becomes the active control on a form any text displayed is highlighted (depending on cursor behaviour settings on the Options tab of the Switchboard). To use the following navigation keys either click in the control or press {Esc}.
Text navigation keys e.g. Backspace, Home, End, Cursor keys (arrow keypad), Enter etc.
Editing key combinations e.g. {Ctrl} + Z, X, C, V (Undo, Cut, Copy, Paste)
Mouse commands e.g. *Double Click* on a word selects it, *Right Click* in a text editor might pop-up a shortcut context menu.

Selection (highlighting) of part or whole of their content demarcates the character string for the required next action e.g. Deletion, overtyping, clipboard functions - cut, copy & paste.

Restricting input e.g. limiting maximum number of characters or lines entered, limiting the keyboard characters that can be entered (e.g. numbers only).

Automatic functions e.g. AutoFormat, password textboxes that display substitute characters.
Undo function {CTRL+Z}

There are three types of text editor control:-

Single line textboxes

These are the most common and are found on the majority of forms and tabbed dialog sheets usually being connected to a single database text field e.g. firstname. Only a single line of text without line return or any form of text wrapping can be displayed. Each textbox would normally be connected to a particular stored database field and be accompanied by an adjacent descriptive caption.
Special cases of this control - See General Controls - Date Entry Textboxes

Multi-line textboxes

These are mainly used for the address of an individual or company and for Notes/Memos. To produce a new line use the {ENTER} key. Since they will be prefixed by Name and possibly Company Name for [printing purposes, addresses are limited to five lines such that they may always be fully displayed when used with 'window envelopes'.]
Tip: - Put the post code on the same line as the postal district if five lines in not sufficient.
The default font cannot be changed within this style of text editor. It is normally set to MS Sans Serif 8-point within VPM.

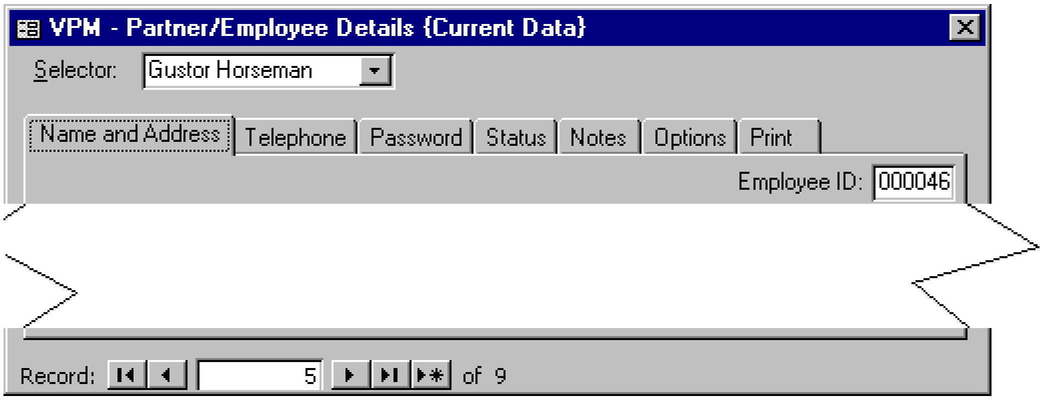
Rich-text editors

VPM will support rich text editing of letters in future versions.

Partner/Employee Details Form

Purpose - Viewing and management of stored Partner/Employee details.

Please click on the page tab that you require help for in the picture below:-



The Partner/Employee Details Form is a Tabbed Dialog with an Employee Selector combobox above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 7 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Employee Details data as well as ancillary functions, such as printing.

N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Details - Employee Selector, Combobox

This Combobox offers a simple means to select an existing employee record.

Select an employee record from all those on file either by typing into the box or using the drop-down selection.

General Controls - Record ID, Textbox

ID - Read-only textbox. This control displays the form's current record ID (index) for reference purposes and information purposes.
It can be used for sorting purposes by selecting it (making it the active control) and then using either the sort ascending (A>Z) or sort descending(Z>A) buttons on VPM's main toolbar.

See also - General Help on Filling in Forms, Sorting Records.

VPM Custom Toolbar

Purpose - This built-in VPM toolbar provides a range of functions which are accessible from its buttons whichever form is displayed.

The VPM toolbar is normally 'docked' against the upper edge of VPM's main container frame window. It can be re-docked against any other edge or set to 'float' within the container window if required. Individual buttons are automatically enabled and disabled as determined by the current state of the form's records. Its 16 component buttons and their functions are illustrated below:-

They are further described below as they are grouped in the above illustration :-

Data Control style record selectors - 5 buttons. These duplicate those found at the bottom left of each of the main forms and offer a permanently accessible set of buttons for moving through the records on a form and adding a new record (should this button be enabled). Function - Moves the record on the *currently active* form within the *current sort order* or prepares for a new record entry
Tip: Use this set of record selector controls when the form's are not currently visible.
See also - help on General Controls - Data Control style record selectors

Spelling-checker - 'ABC' button. This is only functional when the user has a full copy of Microsoft™ Office 97®. Working on the currently selected control's data, it will check the spelling if the data records are text format.

Undo last edit - Back-arrow button. This will reverse the effects of the last edit action in a control. It is equivalent to using {CTRL} + Z from the keyboard.

Cut/Copy/Paste - 3 buttons. This performs standard clipboard cut, copy and paste. These are equivalent to using {CTRL} + X, C and V respectively, from the keyboard.

Find/Find Next - 2 'binocular symbol' buttons. This is a powerful find facility that first pops-up a dialog which requires completing. Please see the specific topic on the Find/Find Next Dialog.
N.B. The standard shortcut key for Find Next is [F3].

Re-sort - 2 sort icon buttons. Re-arranges the order that the records appear in when stepping sequentially through them. Records within a given (form's) data can usually be sorted in order based on any of their fields, the active control prior to choosing either of these two buttons will determine the basis for re-arranging.

Delete Record - 'X' Icon button. If enabled this will ask for confirmation before deleting the current record.
N.B. Note that many forms do not allow the user to delete records.

Remove Filter - 'X' icon button. When a form's records are not all being displayed, as when the

form appears pre-configured for adding a new record or a 'type' of record is just shown, this can be used to remove any filters, ensuring that all the records from the form's data set are navigable.
Tip: When a form's records are 'filtered', the Data Control style record selector's caption has the word (Filtered) appended. A quick glance will establish whether the Remove Filter button will achieve anything.

Calculator - 'Calculator' icon. This offers rapid acces to the Windows' calculator, which has been set as a pop-up 'Stay-on-top' dialog; that is, the calculator window will always be visible when it is open, avoiding the need to switch* between applications when copying and pasting to/from it.

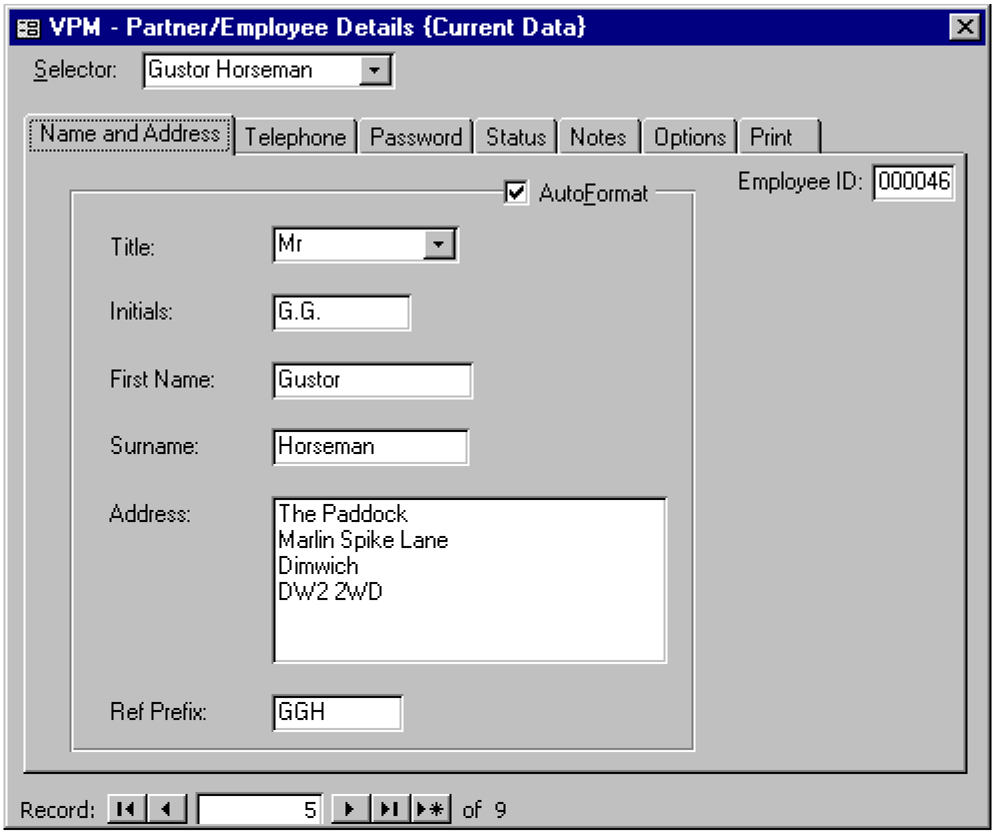
Open/SwitchTo MS Word - 'Word' icon. This toolbar button will start MS Word or switch* to it if already running, without leaving the VPM environment.

Close - Text icon. This will close the active form or report window. Subsequent use will close any forms that are open until the Switchboard is displayed again. At this point the button will emulate the action of the Switchboard's Quit button.

*Switching between windows programs (activating a running program).
a) If visible, click the program's icon on the Windows Task Bar (not all program windows appear on the task bar).
b) To hot-switch between Windows programs hold down the [ALT] key and press the [TAB] key repeatedly until the required program icon is selected in the popup display - then release the [ALT] key.

Partner/Employee Form - Name and Address, Tab

Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Details - Name and Address Details, Mixed Controls

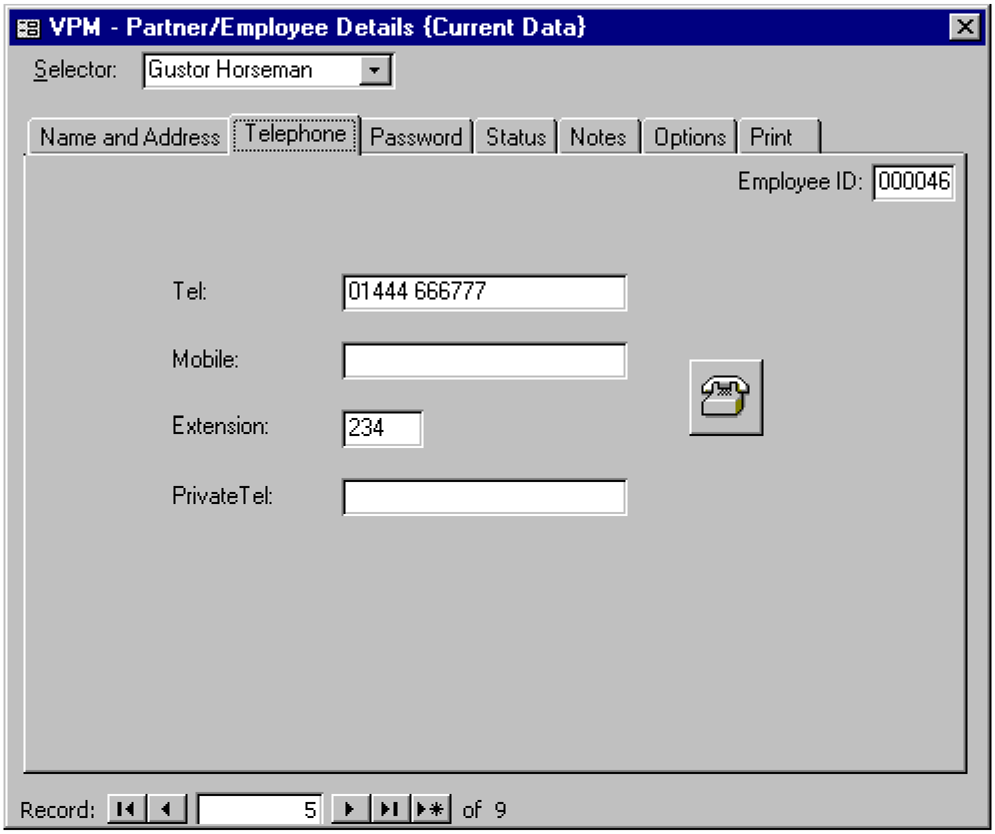
Displays and allows user input/editing of the following data items:-

Title - Combobox. Type in or select the required prefix.
Initials - Textbox. Type the required initials with spaces between.
Firstname - Textbox. Type in the employee's first name.
Surname - Textbox. Type in the employee's surname.
Address - Multi-line textbox. Type in the employee's address.
Ref. Prefix - Textbox. Type in the required 3 character Ref. to be used in letter references and to easily identify an employee. AutoFormats to upper case and limits to 3 characters.

N.B. Supports AutoFormat for all controls.

Partner/Employee Form - Telephone, Tab

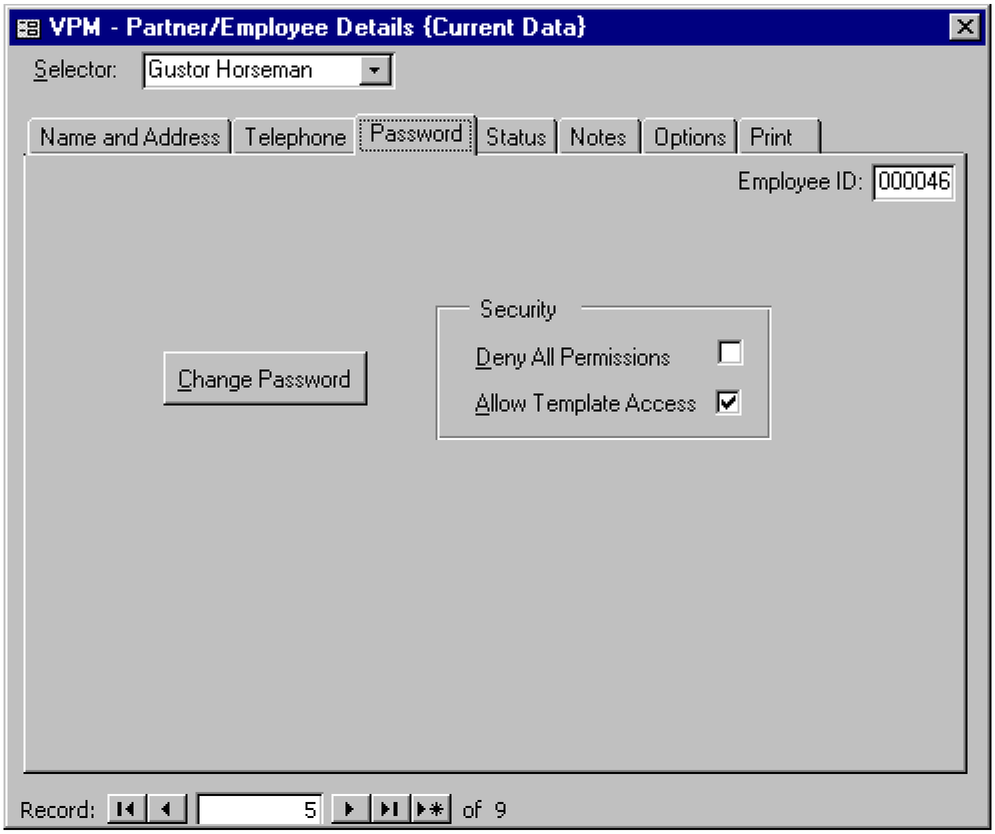
Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Password , Tab

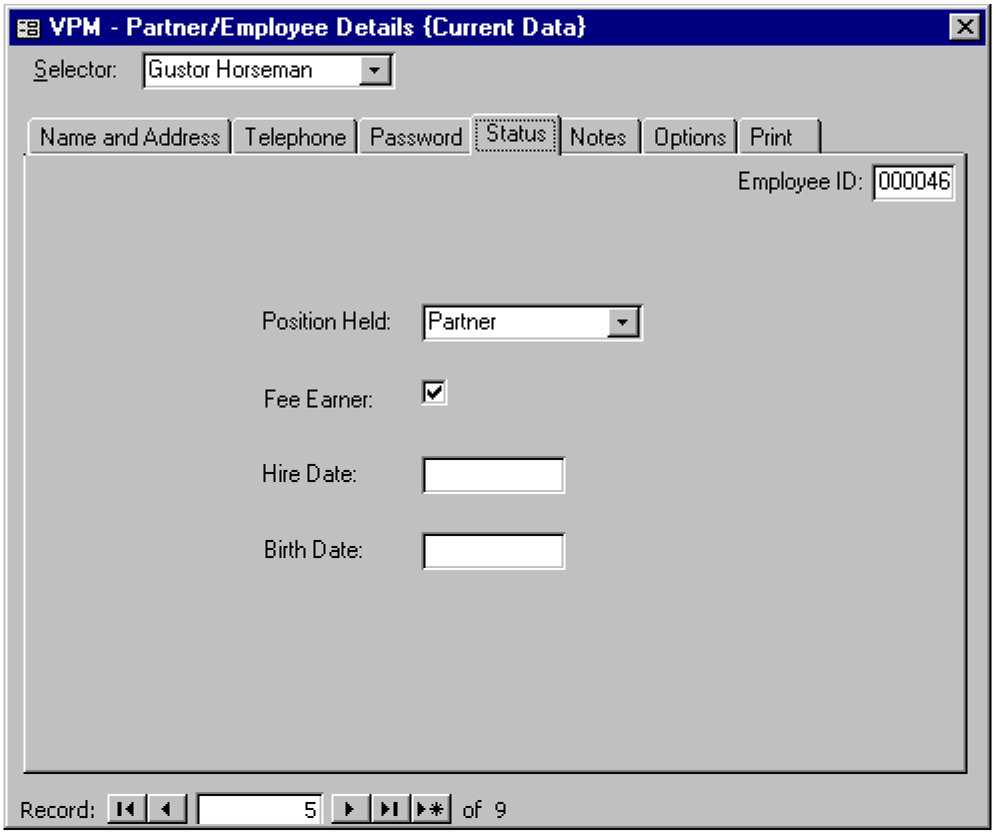
Please click on the control you require help for in the picture below:-



N.B. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Status, Tab

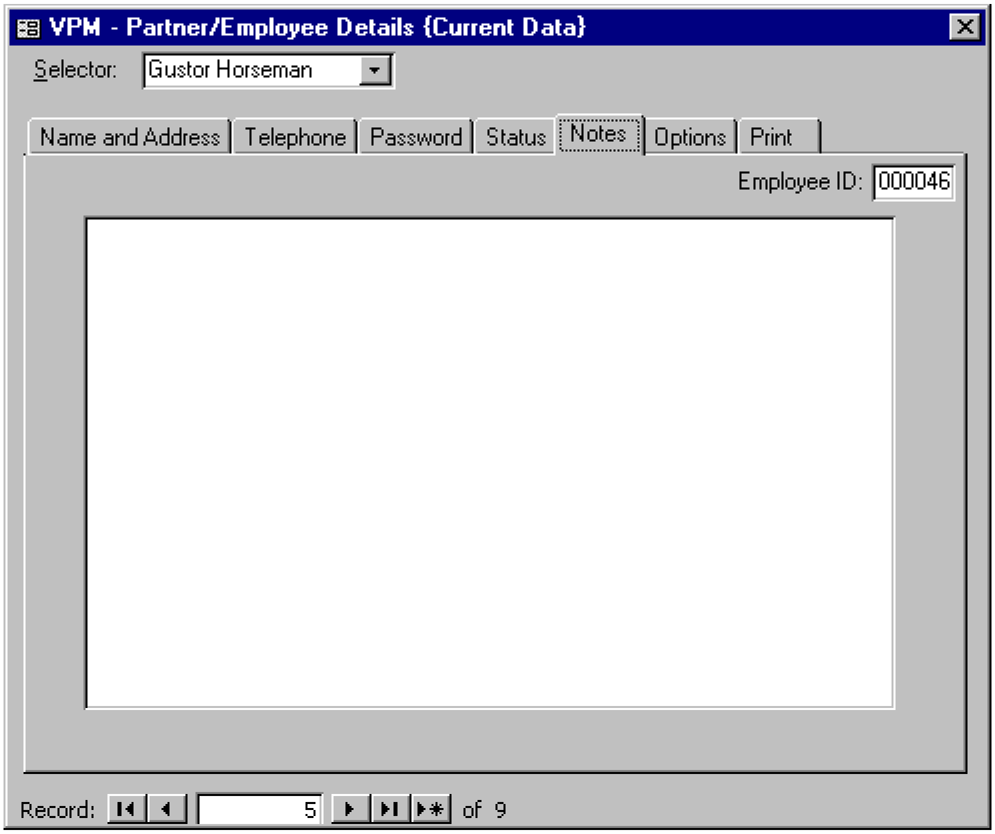
Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Notes, Tab

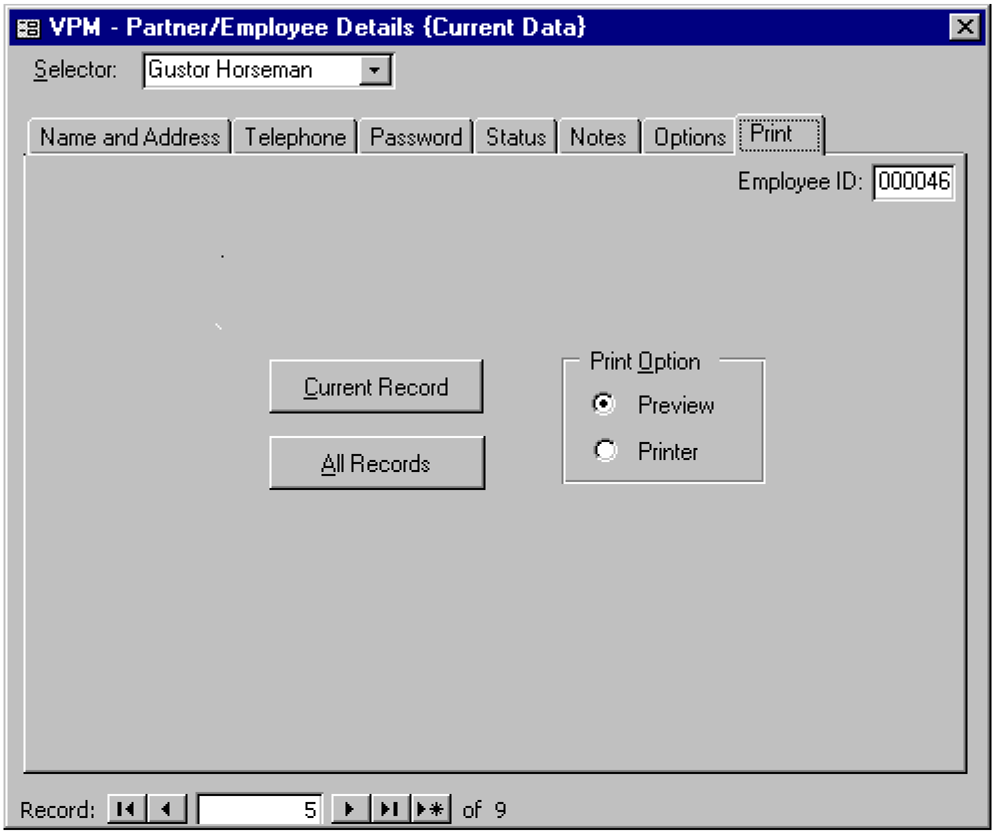
Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Print, Tab

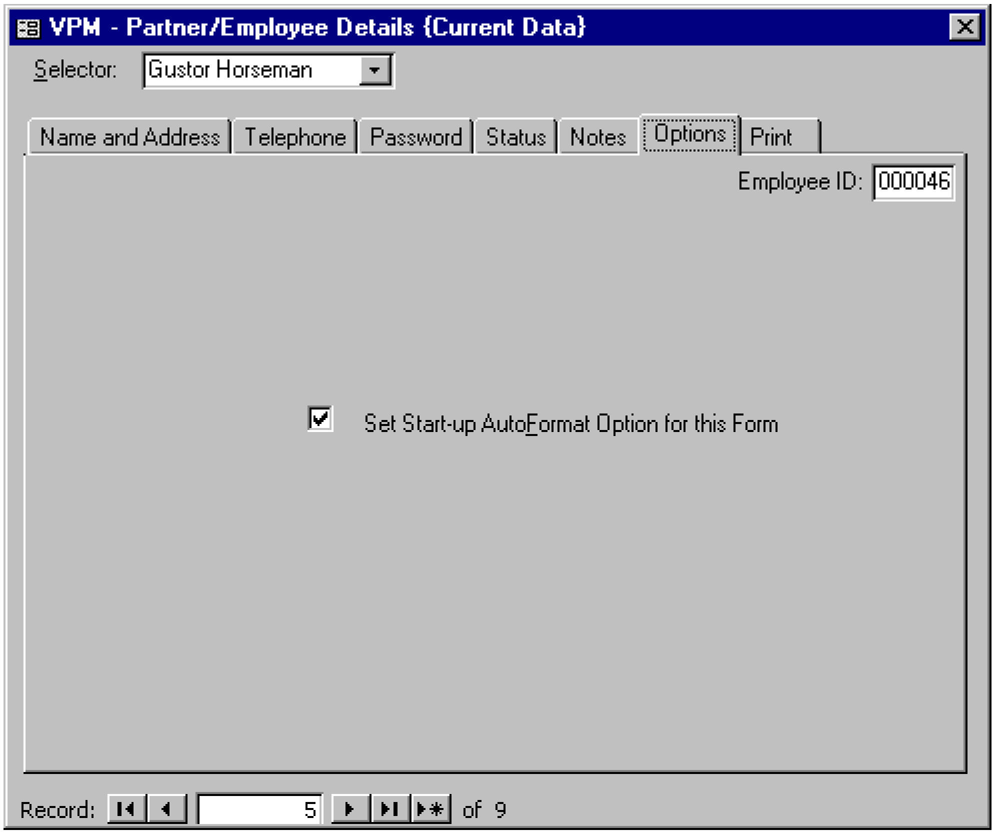
Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Options, Tab

Please click on the control you require help for in the picture below:-



N.B. Access to this form is restricted to those having knowledge of the VPM Administrator's password. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee i.e. individual pages of the form are not password protected.

Partner/Employee Form - Telephone Numbers, Textbox Controls

Displays and allows user input/editing of the following data items:-

Telephone No. - Normal telephone number.
Mobile No. - Mobile telephone number.
Extension No. - e.g. Internal company extension number.
Private Tel No. - e.g. Restricted access telephone number.

If used, formatting including bracketted area codes and spaces will be ignored by the Auto-Dial utility.

See Also Auto-Dial button.

Partner/Employee - Change Password, Command Button

Change Password - Command Button. This button allows an administrator to change employee passwords. The standard VPM Password Dialog is popped up which displays the current password in an editable textbox.

N.B. Note that to prevent inadvertent misuse of employee security details the Partner/Employee Details form is password protected upon entry. Once a user has access to the VPM Main Administrator password they have the ability to view and edit password and security details for any partner or employee. i.e. individual pages of the form are not password protected.

Partner/Employee Form - Security Options, Checkbox Controls

This group of two checkboxes allows changing an employee's access rights to the VPM program.

Deny All Permissions - Checkbox. This is provided to allow the VPM Main Administrator to deny **all** access rights to the program for an employee/user whilst still retaining their details on file. This will be the chosen course of action for security reasons **a)** when an employee ceases to be employed by your company or has their working duties/remit changed to not require access to VPM **b)** on a temporary basis for administrative reasons.

Allow Template Access - Checkbox. This can be used to grant an employee permission to add/edit template details. It does not over-ride the option described above, Deny All Permissions.

Simply check or uncheck either of the checkboxes to set the required options.

The other main access right within VPM is the built-in requirement for access to this form, Partner/Employee details, which requires knowledge of the VPM Main Administrator's password.

See also - General Controls - Checkboxes and Option Button Groups.

N.B. Employees cannot be deleted form the database. However, their details can be changed on the understanding that all previous records related/connected in any way to the employee in question will be re-assigned to the new details entered. Generally, this will not be a chosen course of action.

General Controls - Checkboxes and Option Button Groups.

Purpose - Both of these styles of controls allow program or data options to be set 'On' or 'Off'. Checkboxes and Option Button Groups differ in the way they work and hence the situations in which they are used.

Three checkboxes An option button group

Key points:

- Checkboxes are square controls that contain a tick *Or* a check mark [X] when set 'On'.
- Option Buttons are round controls that contain a bold dot when set 'On', looking like a 'bulls eye'.
- Checkboxes can be used individually, whereas option buttons are only found in groups of at least two.
- Checkboxes, *even when found within a group* can always be operated independently of others. That is, any checkbox can be set 'On' or 'Off' regardless of others.
- Option Buttons always require at least one within a group to be set 'On' and only by setting another within the same group can it be cleared. Hence they are often referred to as 'radio buttons', analogous to a group of tuning buttons that pop all others out when pressed. *This is technically referred to as being mutually exclusive with their group.*
- Generally will have an adjacent caption describing their purpose. Pay particular attention to the wording of the caption to avoid confusion with 'On/Off' states e.g. 'Deny Access' requires to be 'Off' to 'Grant Access'.

Setting Options:

All these controls are set by 'toggling' them 'On/Off' , each successive operation reversing their state. This is achieved either by a) *Clicking* directly on the centre of the control or b) Ensuring the control is the active control on the form and then using the keyboard {Spacebar}.

Terminology:

The 'On' state of checkbox controls is referred to as 'Checked' in U.S. literature and sometimes as 'Ticked' in the U.K. Microsoft ® generally refer to checking or un-checking these controls even when they display ticks rather than check marks.

Option Buttons are either 'On' or 'Off'.

Partner/Employee Form - Status, Mixed Controls

The employee status controls display and allow user input/editing of an employee's general status information.

Position Held - Combobox. Select from the drop-down combobox e.g. Senior Partner.
Fee Earner - Checkbox. Tick this box if the employee is a fee earner within the company.
Hire Date - Textbox. This can be used to record the date of first employment if required.
Birth Date - Textbox. This can be used to record the employee's date of birth.

See Also - General Controls - Date Entry Textboxes

General Controls - Date/Time Entry Controls, Date & Time Masked Textboxes

Purpose - To allow quick entry of correctly formatted and verified dates and times.

Date masks
These are single line text controls that are masked to accept dates in the following format:-

dd/mm/yyyy e.g. 03/11/1997

When empty the textbox mask will display as _ _/_ _/_ _ _ _ indicating the required character positions. The mask will restrict entry to a given pattern of characters and in this case only numbers will be accepted, the forward stroke need not be typed and the year can be typed in 4-digit full century fashion or 2-digit decade only for speed provided the correct pivot-date / roll-over year is taken into account.

Time Masks
These are single line text controls that are masked to accept times in the following format:-

hh:mm e.g. 09:30 (*this is 24-hour clock format, but may be re-displayed as am/pm style elsewhere).*

When empty the textbox mask will display as _ _**:**_ _ indicating the required character positions. The mask will restrict entry to a given pattern of characters and in this case only numbers will be accepted, the semicolon (**:**) need not be typed.

Combined Date/Time masks
These are single line text controls that are masked to accept date and time in the following format:-

dd/mm/yyy hh:mme.g. 24/03/1997 15:30 (*this is 24-hour clock format, but may be re-displayed as am/pm style elsewhere).*

The cursor (arrow) keys can be used to move within the control and the {Delete} key clears the control allowing a fresh attempt at typing in a date or time.

Upon moving off of the control it checks and corrects the format if possible and if it cannot be validated as a real date or time in the required format a warning message is displayed -

Dismissing the message box will return the user to the erroneous textbox character. Either correct the date/time entry and resubmit by moving off of the control (making another control active) **or** use the {Esc} key to cancel any changes and move to the next operation.

See also - General Help on Date & Time Formats, The Calendar Control

Partner/Employee Form - Notes, Multi-line Textbox

This text editor can be used to enter general notes applying to the current employee record.

See also - General Controls - Text Editors

Partner/Employee - Print, Mixed Controls

Print Currently Selected Employee Record - Command Button. This will send the current client details to the printer or the print-preview window, dependent upon the Print Option check box selected.

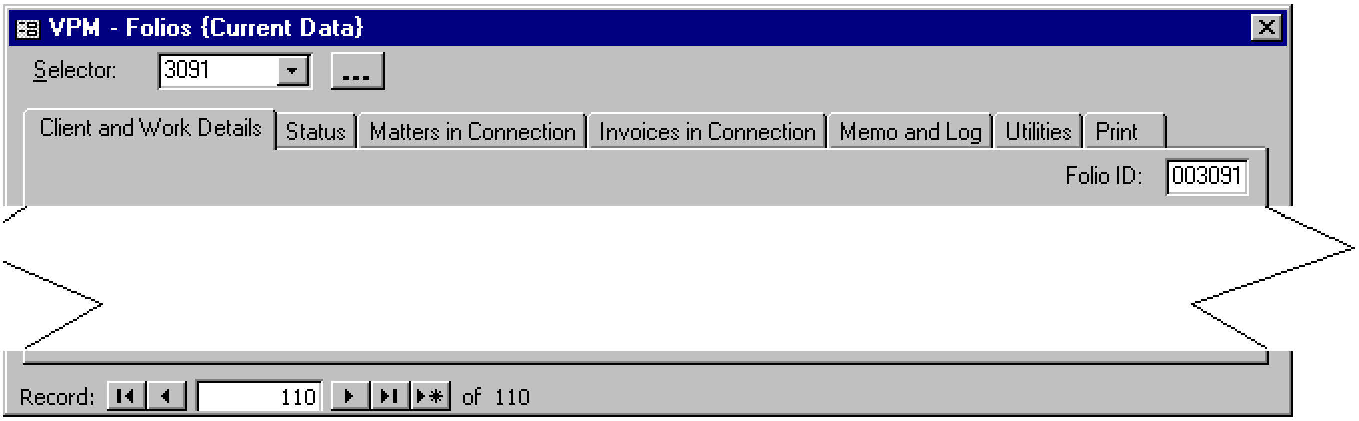
Print All Employee Records - Command Button. This will send the client details for all clients on file to the printer or the print-preview window, dependent upon the Print Option check box selected.

Print Option - Option Button Group. This group determines whether the print output is sent to the Print preview window or directly to the default printer.

Folio Details Form

Purpose - Viewing and management of stored Folio details.

Please click on the page tab that you require help for in the picture below:-

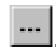


The Folio details form is a Tabbed Dialog with a Folio Selector combobox / Folio Custom Browser button control pair above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 7 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Folio details data.

VPM Custom Browsers

Purpose - Used from VPM's Main Switchboard View Tab these Custom Browser dialogs allow comprehensive browsing and pre-selection of a record before their corresponding forms are opened. Used from their forms they allow records to be perused in a more comprehensive way than the adjacent record selector comboboxes.

These controls are accessed either directly from the View Tab of the Main VPM Switchboard or from their related form, where they will be found adjacent to the form's main record selector combobox at the top left.

They are always accessed by using the custom browser button .

Folios - Portfolio Browser

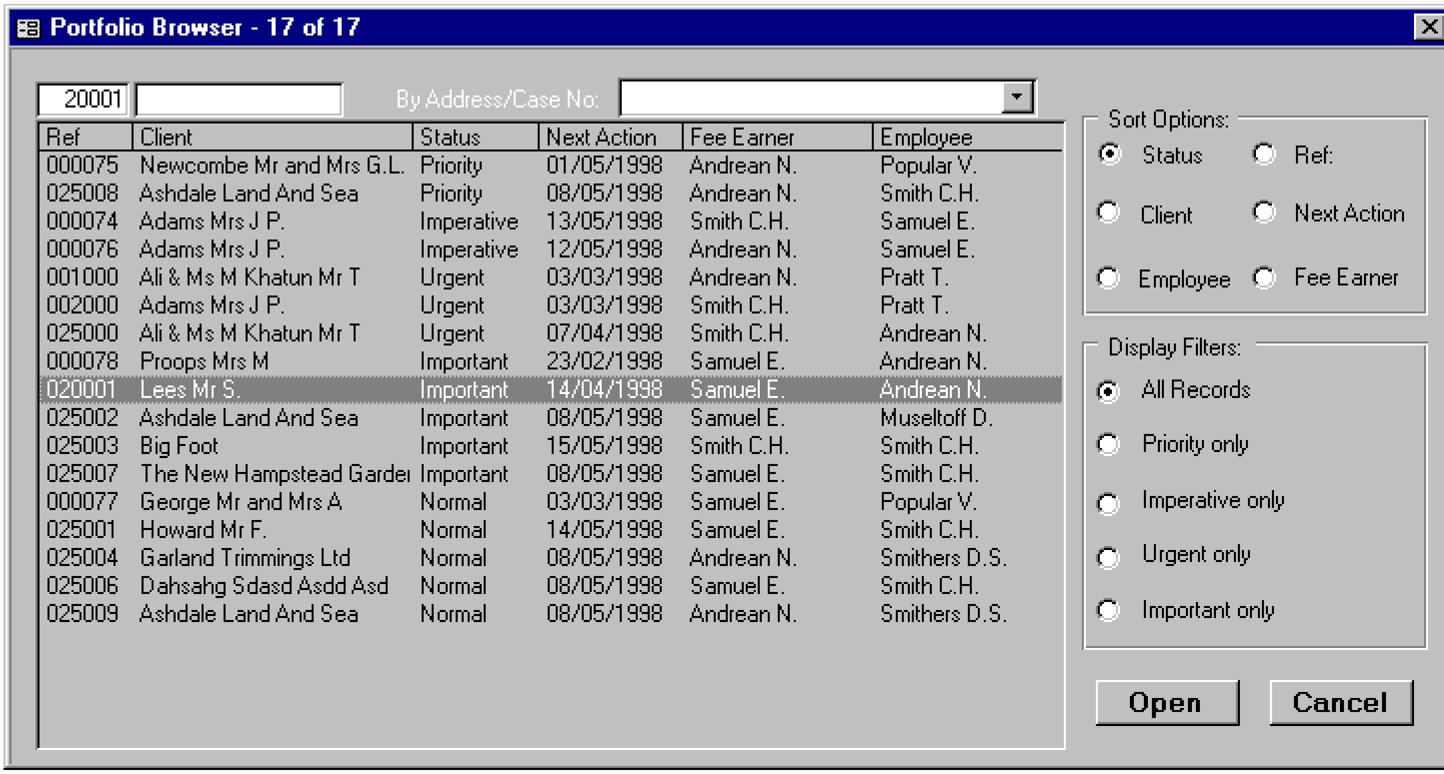
Templates - Template Browser

Other Parties - Other Party Destination Browser

Custom Portfolio Browser Dialog

Purpose - This Custom Portfolio Browser allows all the 'Folios' on file to be perused in a more comprehensive way than the Selector combobox on the Folios form. See VPM Custom Browsers.

Please click on the item you require help for in the picture below:-



Portfolio Browser - Quick Search by ID or Client, Textbox controls

Quick Part-search Folio ID, Textbox
Quick Part-search Client name, Textbox

Rather than browsing the main listbox a quick search can be done should the Folio's **ID** or **Client Name** be known. A 'Find First' part-search can be accomplished - simply type as many characters as are known or might distinguish the record into the textbox and press the {ENTER} key. Subsequently pressing the {F3} key will initiate a further search, 'Find Next', which can be repeated until no further 'match' with your input text can be found within the remaining records. If found the listed item will be selected, ready for you to *Click* the 'Open' button which closes the browser and selects the corresponding record in the Folios form. Pressing the {Enter} key at this time will duplicate the 'Open' button action.

Folio ID's are 6 digit numbers. The ID format includes leading zeros. Together with the way that the part-search logic works, this may require several leading zeros to distinguish a particular ID number.

The client name is made up of the surname first, followed by the initials and is displayed in the second column of the browser's listbox (below this search textbox).

See also - General Help on Searching for Records.

General - Searching for Records

Using quick search controls - techniques.

Quick search Textboxes (mostly found above VPM Custom Browser columns).
Keywords: Find First, Find Next, Part Search

A quick search can be done should the required value or the **beginning part** be known. A 'Find First' part-search can be accomplished - simply type as many characters as are known or might distinguish the record into the textbox and press the {ENTER} key. Subsequently pressing the {F3} key will initiate a further search, 'Find Next', which can be repeated until no further 'match' with your input text can be found within the remaining records.
If found the listed item will be selected, ready for you to *Click* the 'Open' button which closes the browser and selects the corresponding record in the details form. Pressing the {Enter} key at this time will duplicate the 'Open' button action.

Searching for ID Numbers.
Folio ID's are 6 digit numbers. The ID format includes leading zeros i.e. 000256. Together with the way that the part-search logic works, this may require several leading zeros to distinguish a particular ID number.

For instance, typing **25** and pressing {Enter} would find the first record that matched this part-string which could be:-
00000**25**; 0000**25**6; 000**25**91; **25**00000 *if for example these ID's existed .*
Typing **0025** would find the first matching number, which would be the lowest ID number i.e. 000**0025**
To distinguish **2500000** from **2500001** would require the whole ID number to be typed in.

Searching for Names.
The client name is made up of the surname first, followed by the initials. Type in the beginning part or as much as will distinguish the required record before pressing the {Enter} key.

Comboboxes
Keywords: AutoExpand feature

Comboboxes support the AutoExpand feature as standard.
'AutoExpand' automatically fills the text box portion of a combo box with a value from the combo box list that matches the characters you enter as you type in the combo box. This lets you quickly enter an existing value in a combo box without displaying the list box portion of the combo box.
N.B. Note that some form's Selector comboboxes list more than one column, for easier list browsing - th*e AutoExpand features only apply to the first (leftmost) column.*

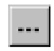
Listboxes
Keywords: Type-down-the-list feature

Listboxes often support a simpler form of AutoExpand sometimes commonly referred to as 'Type-down-the-list'. Simply make the listbox active and type into the listbox's list. The list's row/item selection will change as the user's keystrokes assemble the beginning part of the required list item.

See also - Help on General Controls - Listboxes and Comboboxes

Folio Form - Folio Selector Combobox/Browser Command Button

Folio Selector - Combobox
This is the preferred control to quickly select a Folio should the Folio ID be known. The list displays two columns which are Folio ID and Client name. Either select from the drop-down list or use the built-in quick-search techniques.
See also - General Help on Searching for Records and Controls - Listboxes and Comboboxes.

Custom Portfolio Browser - Command Button 
The Custom Portfolio Browser can be accessed using the 3-dot button to the right of the Folio selector combobox. This pop-up dialog offers very comprehensive folio browsing and includes several quick search controls, as well as several sort and filter options for organising the display.

General Controls - Listboxes and Comboboxes

Purpose - Both these controls are used for displaying a list of items from which a quick selection can be made. Comboboxes can also allow the user to input values not in the list or can restrict the user's choice to those listed as with listboxes.

Listbox component:-

- The basic component of all these controls consists of a list of items displayed in columnar fashion.
- Having a fixed vertical size, the listbox component can only display a set number of items, a scroll-bar automatically appearing when the contents (rows) exceed this number, allowing the viewable row range to be moved up or down.
- The list's first (top) row can be a descriptive caption of the items in the column, in which case its selection has no meaning.
- Lists can contain more than one column, providing additional information on the listed item.
- The normal state of the list component can be hidden, in which case it can be dropped-down by the user to view its contents and is then called a 'drop-down' list.
- Lists can support an extended selection mode which allows more than one item to be selected.

Textbox component: -

- Comboboxes are so named because they have a textbox *combined* with the listbox, allowing the user to type in their chosen value. However, they can be programmed to 'limit-to-list', which prevents them accepting keyboard input that doesn't match any of the listed items.
- When comboboxes utilise a 'drop-down' style listbox component, they incorporate a small embedded button to the right hand edge of the textbox component captioned with a down-arrow icon that is used to 'open' the listbox (drop it down).

VPM's Listboxes and Comboboxes.

VPM incorporates simple listboxes and drop-down style comboboxes. They may both display one or more columns in the list component of the control. None of VPM's lists support extended mode selections. VPM's browser dialogs utilise special multi-column listboxes - see General Help on VPM Custom Browser Dialogs.

General Use - Mouse/Keyboard commands.

Listbox component

Clicking an item will select it. Sometimes a default double click action is supported, this frequently being to both select and then action an OK or Close button (simple dialogs) or to move to the next control (general multi-control form).

Up/Dn cursor keys - moves the current selection up or down in the list by one item.

Home/End keys - moves the current selection to the top and bottom item respectively

Page Up/Dn keys - moves the selection up or down by the number of viewable items each time they are pressed

Enter key - simulates the default action when an item is *Double Clicked.*

Quick-search features

Comboboxes

Keywords: AutoExpand feature

Comboboxes support the AutoExpand feature as standard.
'AutoExpand' automatically fills the text box portion of a combo box with a value from the combobox list that matches the characters you enter *as you type* into the text component. This lets you quickly enter an existing value without using the drop-down-list component of the combo box.
N.B. Note that some comboboxes list more than one column giving the user additional information for each list item - th*e AutoExpand features only apply to the first (leftmost) column.*

Listboxes

Keywords: Type-down-the-list feature

Listboxes often support a simpler form of AutoExpand sometimes referred to as 'Type-down-the-list'. Simply make the listbox active and type into the listbox's list. The selected item in the list will change as the keystrokes progressively assemble the beginning part of the required item.

Advanced functionality

Comboboxes

Some VPM comboboxes implement an 'Add-to-list' function, explained below:-
When a user specified entry has been typed into the textbox component of a combobox that does not enforce the 'limit-to-list' restriction, some comboboxes will query the user with a message dialog as to whether they would like the entry to be stored in the database. If this is confirmed, the entered value will then added to the items in the drop-down list component of the combobox, thus becoming available permanently as list choice rather than a user entered value. This allows users to add to the pre-set list of contents, cutomising them to an extent. The advantages are not just speed of selection but that consistency and accuracy of selected iitems can be guaranteed across all users.
N.B. It is not possible for users to delete listed items from comboboxes, whether pre-set or user-defined, so ensure that the value entered is exactly as required before confirming the permanent addition within the query dialog illustrated below:-

Portfolio Browser - Quick Search by Address, ComboBox

Rather than browsing the listbox a quick search can be done should the ***first line of the Client's address*** be known. A find-first part-search can be accomplished - simply type as many characters as are known or might distinguish the required address into the combobox **OR** select from its drop-down list and then *Double Click* or press the {ENTER} key.

N.B. The address is not a displayed column in the browser's listbox.

See also - General Help on Searching for Records and General Controls, ListBoxes and Comboboxes

Portfolio Browser - Browser Main Listbox

The listbox is the main component of the browser, displaying six (6) columns of information for each record (the listed item). These are:-

- Ref (The Folio ID)
- Name (The Folio Client's name)
- Status (The current status setting for the folio, e.g. Normal, Important etc.)
- Next Action (The next action date as set in the Folio Form)
- Fee Earner (The fee earner for the folio)
- Employee (The employee assigned to the folio)

Displayed items can be restricted using the Display Filters and sorted using the Sort Options to facilitate browsing when a large number of Folio records are stored in the database. The default settings upon entry are sort by Status and display All Records.
If the required item is not visible scroll the listbox until it can be selected. Simply click once to select the item and then click on the Open button to view the details back in the Folio form.
N.B. The listbox supports standard keyboard keys for rapid scrolling e.g. Page-Up/Dn, Home/End and the cursor arrow keys.
Tip: *Double Clicking* a list item both selects and operates the Open button. Pressing the {Enter} key whilst a list item is selected also operates the Open button.

See also Help on General Controls - Listboxes and Comboboxes

Portfolio Browser - Sort Options, Option Group

To sort the items displayed in the browser main listbox simply select the required option button. These are:

- By Status (3rd column)
- By Client (2nd column)
- By Employee (6th column)
- By Ref (1st column, Folio ID)
- By Next Action Date (4th column)
- By Fee Earner (5th column)

This will result in an alphanumeric sort on the chosen column. By default the listbox is sorted on the 3rd column, by Status.

Portfolio Browser- Display Filters, Option Group

The five (5) option buttons in this group allow restricting the display to the following:

- All Records - No filters applied.
- Priority Only - Displays only Priority Status Folios.
- Imperative Only - Displays only Imperative Status Folios..
- Urgent Only - Displays only Urgent Status Folios.
- Important Only - Displays only Urgent Status Folios.

Using the second of these options allows much easier browsing when many records of different destination types are stored in the database.

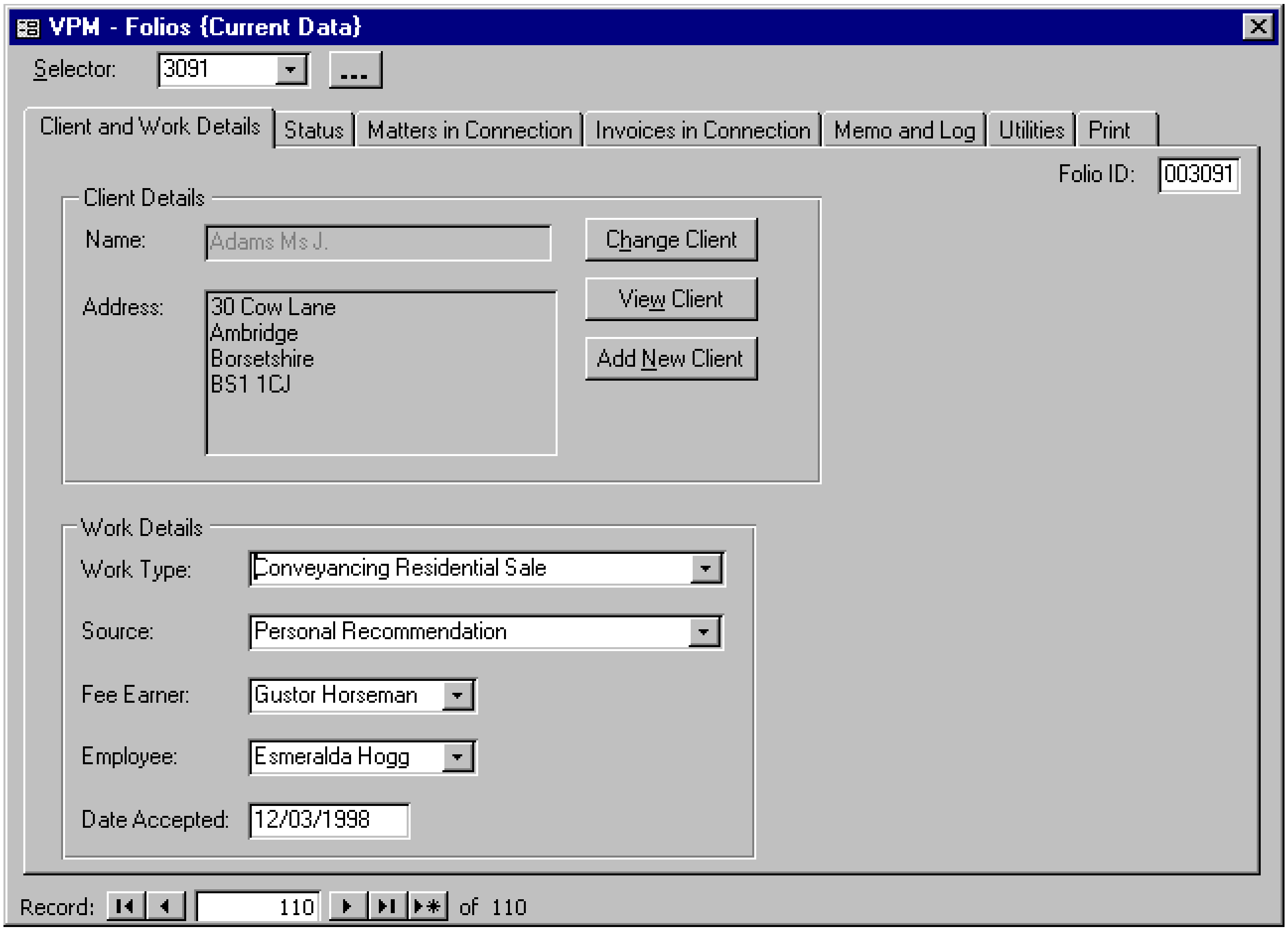
Portfolio Browser - Open/Cancel, Command Buttons

Both these buttons close the browser dialog and return to the callee form (Folios).

Open will make the selected list item the current record back in the callee form.
Cancel will not change the callee's current record, ignoring any selected list item.

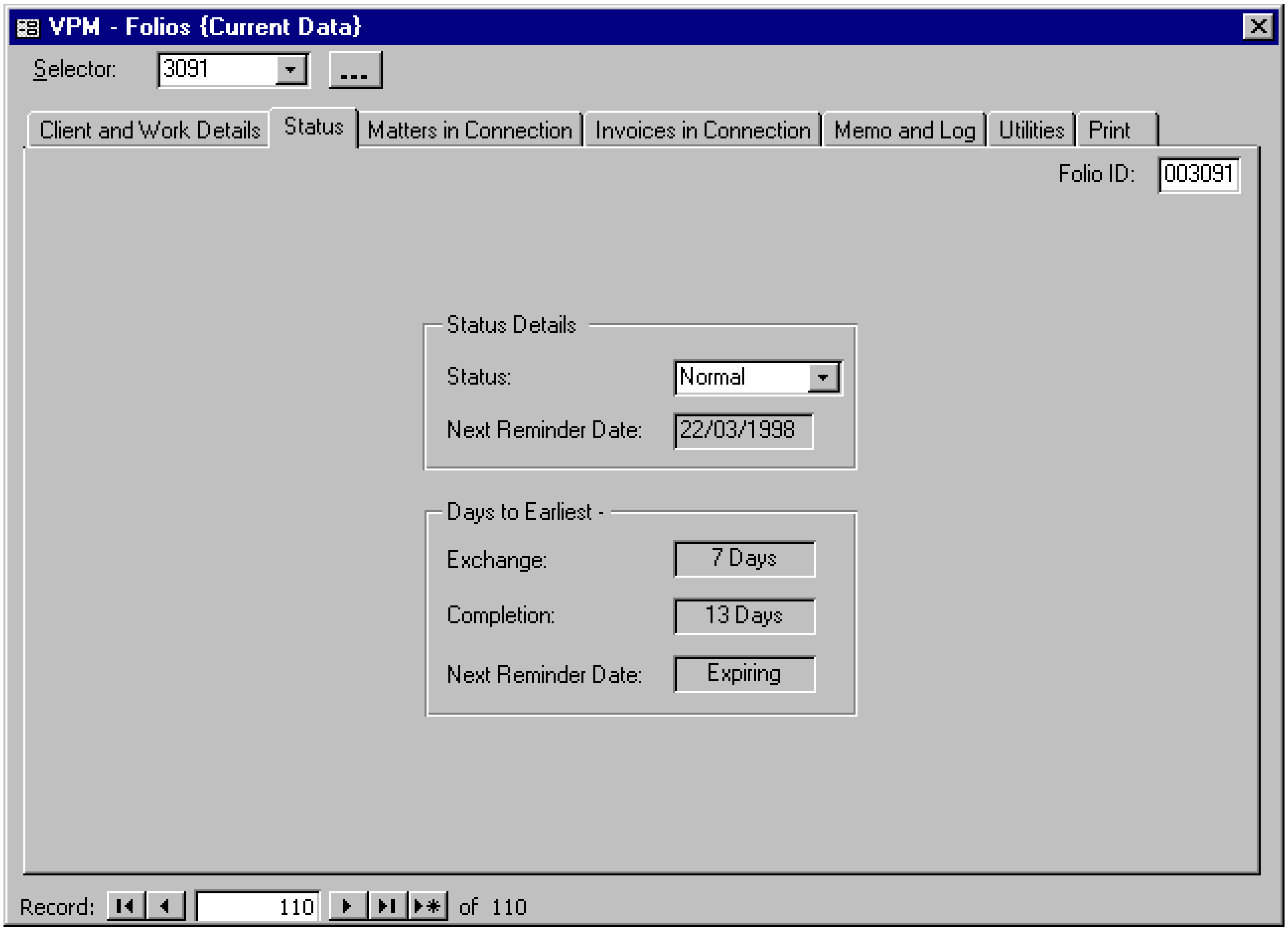
Folios Form - Client and Work Details Tab

Please click on the item that you require help for in the picture below:-



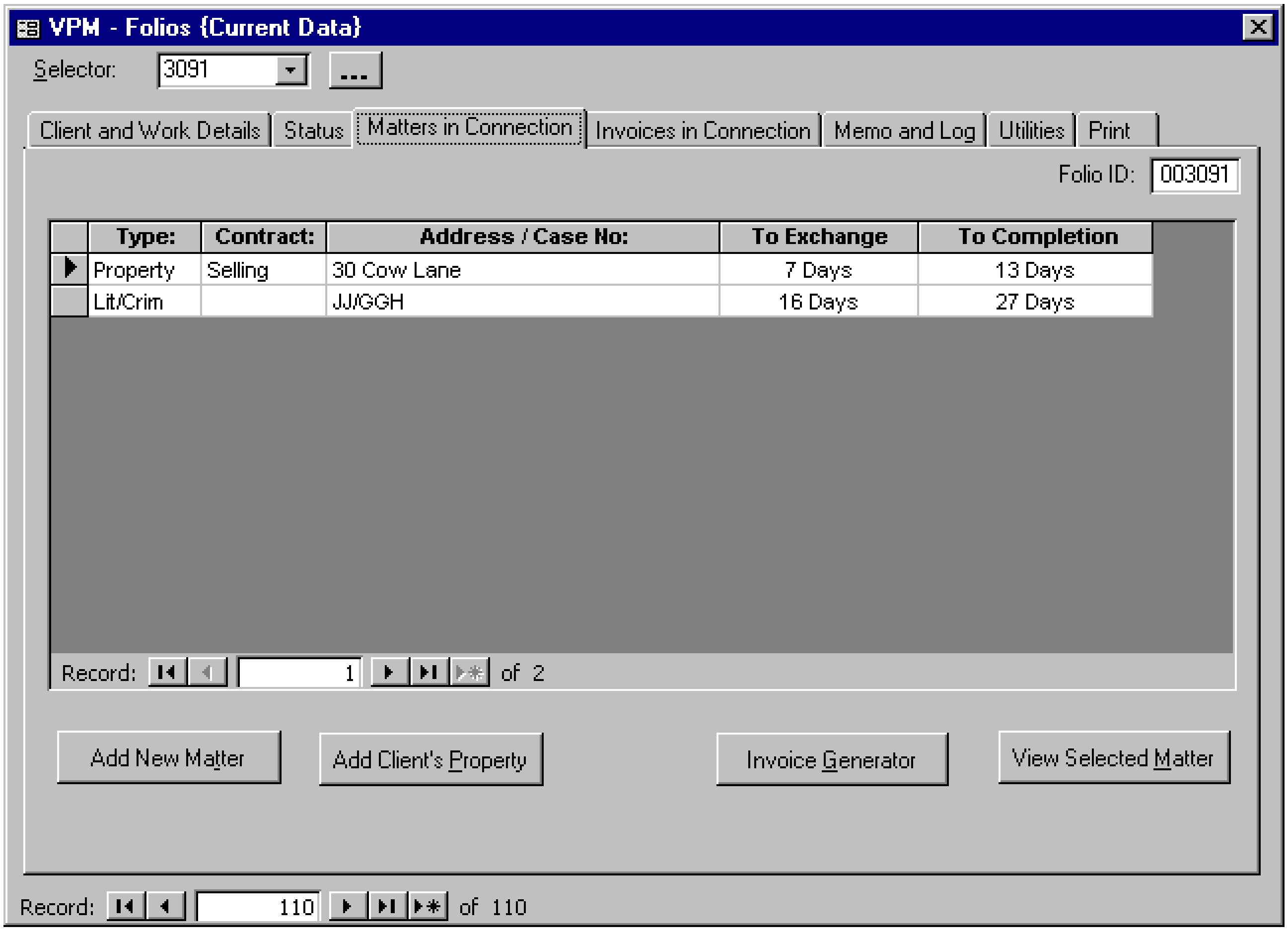
Folios Form - Status Tab

Please click on the item you require help for in the picture below:-



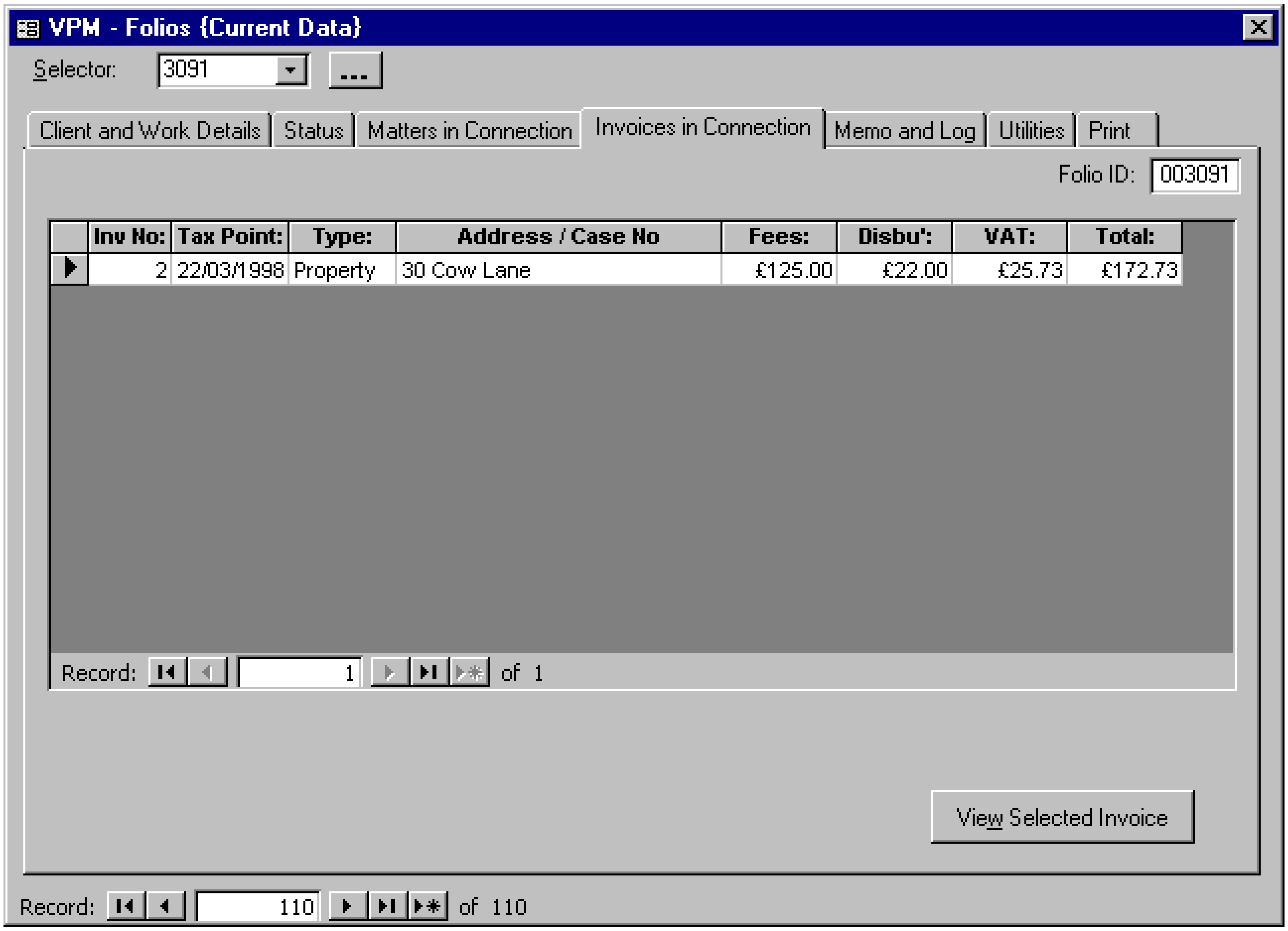
Folios Form - Matters In Connection Tab

Please click on the item you require help for in the picture below:-



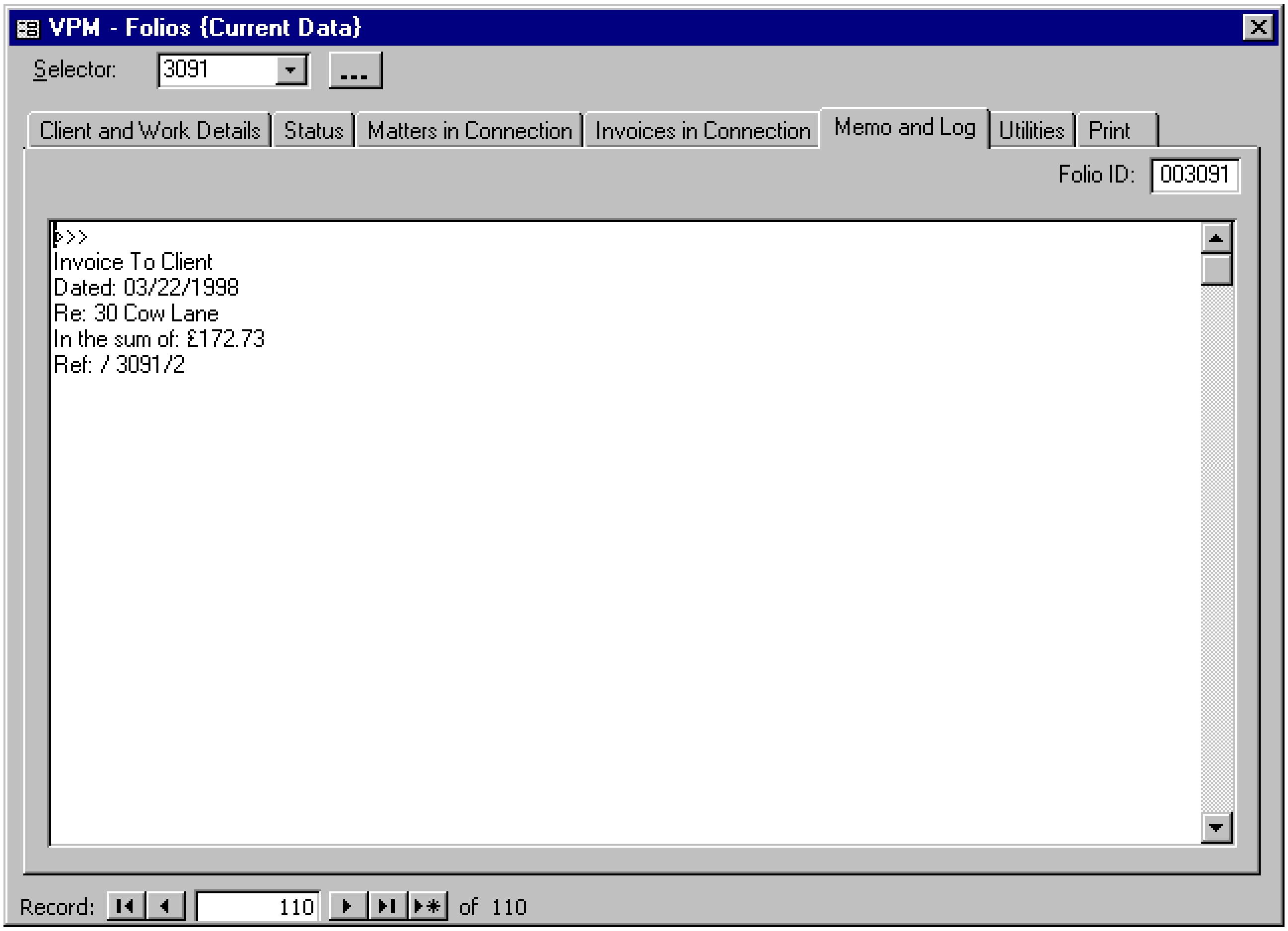
Folios Form - Invoices in Connection Tab

Please click on the item you require help for in the picture below:-



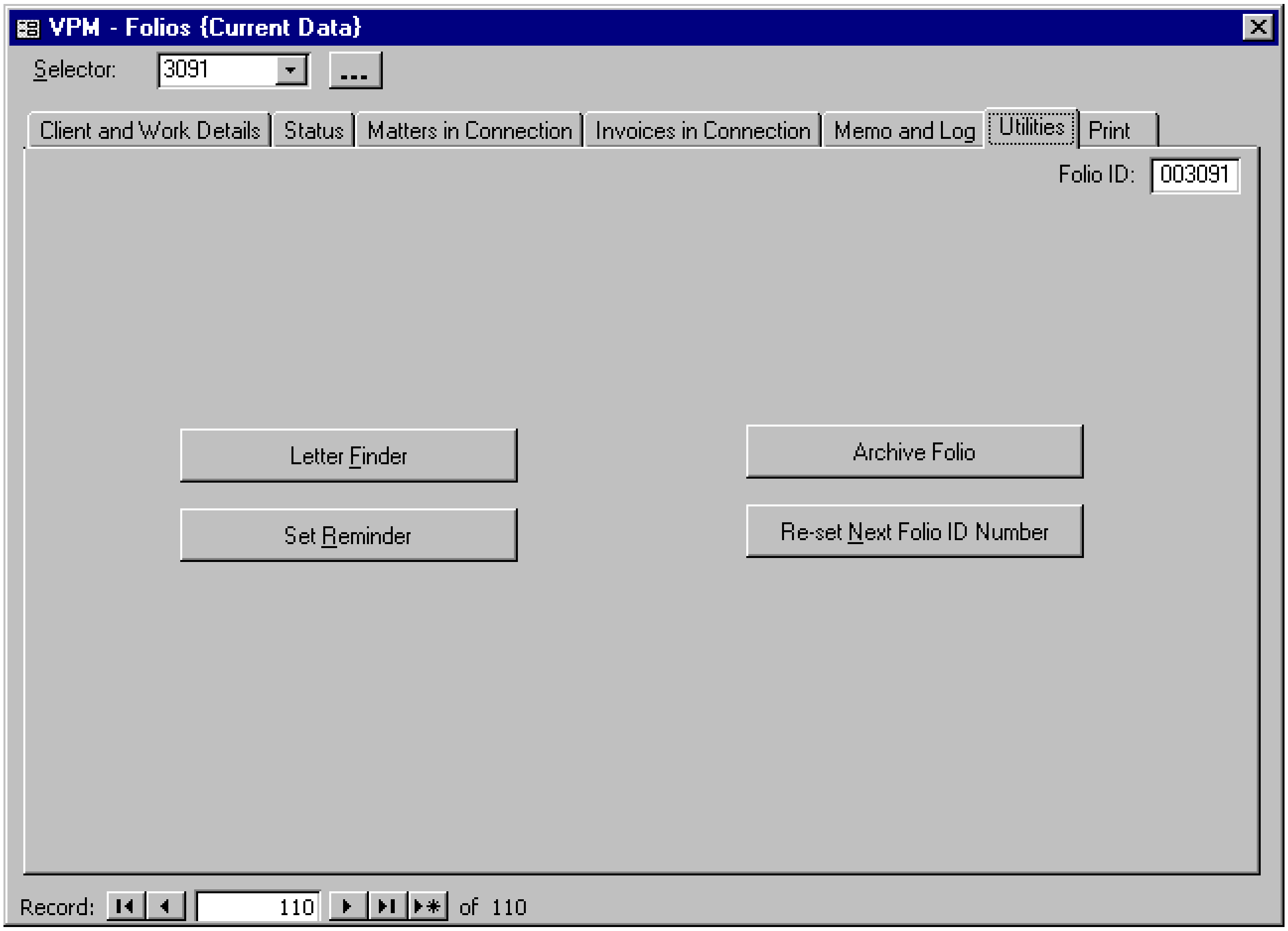
Folios Form - Memo and Log Tab

Please click on the item you require help for in the picture below:-



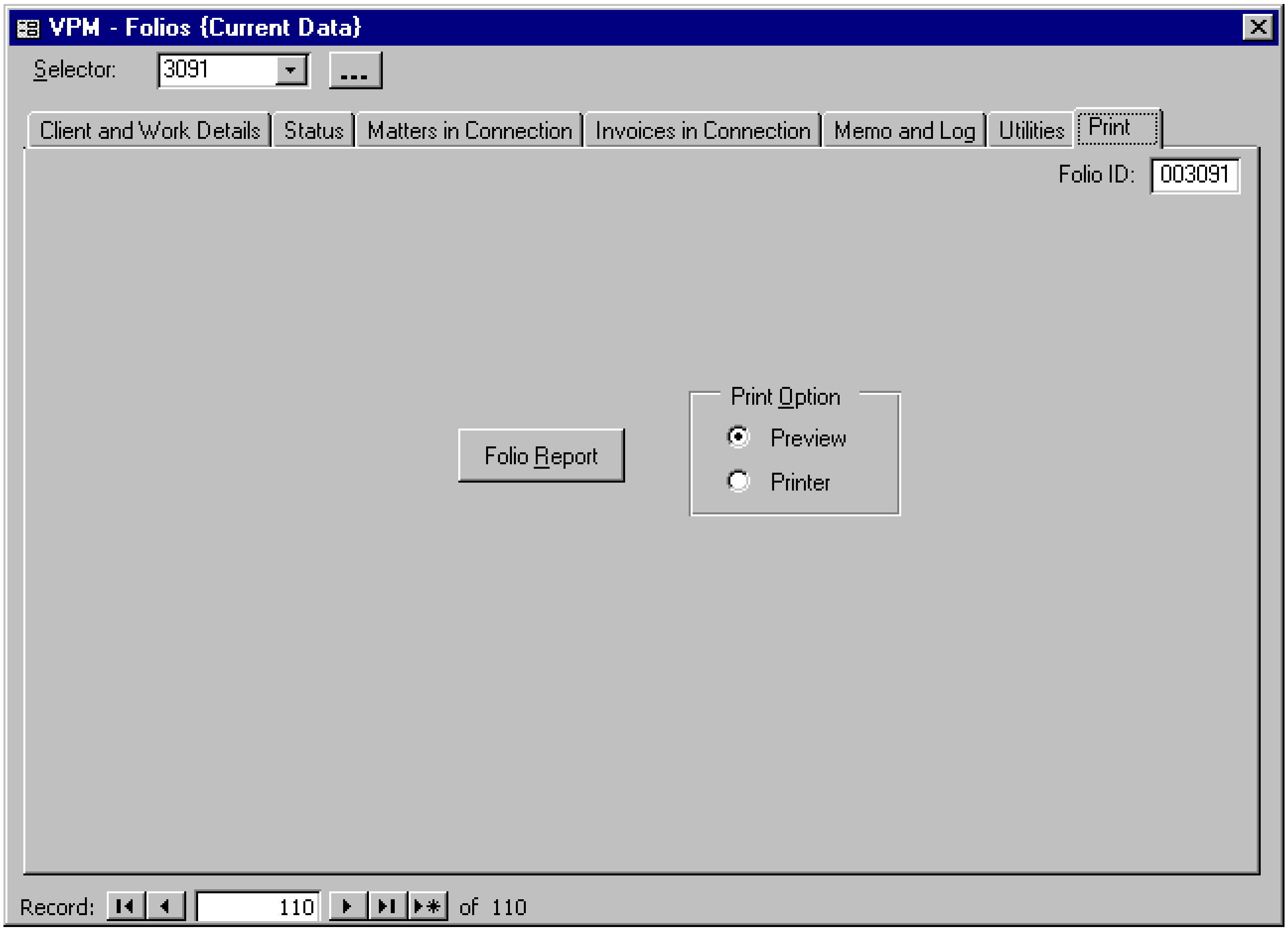
Folios Form - Utilities Tab

Please click on the item you require help for in the picture below:-



Folios Form - Print Tab

Please click on the item you require help for in the picture below:-



Folio Form - Client Details, Grouped Controls

This control group displays the Name and Address of the Client, allows changes to the Client if required* or a New Client to be created.

Name - Display-only textbox/Combobox. When adding new records the combobox is displayed for selecting the client. For existing records the default control is a textbox displaying the client's name unless the Change Client button has been used (see below).
Address - Display-only multi-line textbox.

Change Client - Command button. This will change the Name control to a Client Selector combobox. Use this should it be necessary to change the original Client assignment for this Folio.
View Client - Command Button. Will open the Client Details Form with the client's record selected.
Add New Client - Command Button. Opens the Client Details Form preconfigured for adding a new client. Upon return, it is necessary to reselect the new client using the 'Change Client' button described above.

*N.B. - It is not be necessary to use the 'Change Client' facility in normal use unless an entry error has been made.

Folio Form - Work Details, Grouped Controls

This group offers display and quick selection from four combobox controls and a date-masked textbox control:-

Work Type (brief folio description) - Combobox. Select from the drop-down list the main type of work that the folio has been initially opened for. This textual description is used in several places throughout VPM to help in identiifying the folio i.e. comboboxes for selecting or filtering folios.
Source - Combobox. The origin of the folio's work.
Fee Earner - Combobox. The Fee Earner responsible for the folio.
Employee - Combobox. The key employee responsible for maintenance of the folio. This person may be the Fee Earner above.
Date Accepted - Date-masked Textbox.   Enter a date into the date-mask provided.

See also - General Help on Date and Time formats, Controls - Date Entry Textboxes, Listboxes and Comboboxes and Filtering Records.

General - Date Formats

Microsoft has recently extended the pivotal decade controlling the automatic formatting of dates in its application products. This is now the year 2030.

Pivot-date - The year Microsoft ® chooses to set the roll-over of dates into the next century when entering and displaying 2 digit year formats. Currently, this is 1931/2030. That is, typing in 30 results in 2030 being stored, typing in 31 would result in the date being interpreted as 1931. To explicitly 'force' the century in the last of the above examples, to be other then the 20th century a full 4-digit year must be entered.
Conversely, when displaying 2 digit years, 11 would imply 2011 whereas 45 would imply 1945.

VPM uses the first of the following two date formats, the UK standard representation:-

dd/mm/yyyy (UK)   mm/dd/yyyy (US)   i.e. 20/01/1991 represents the 20th of January, 1991.

N.B. VPM currently forces the input of date years to 'full century notation' to avoid any confusion as we approach the year 2000!

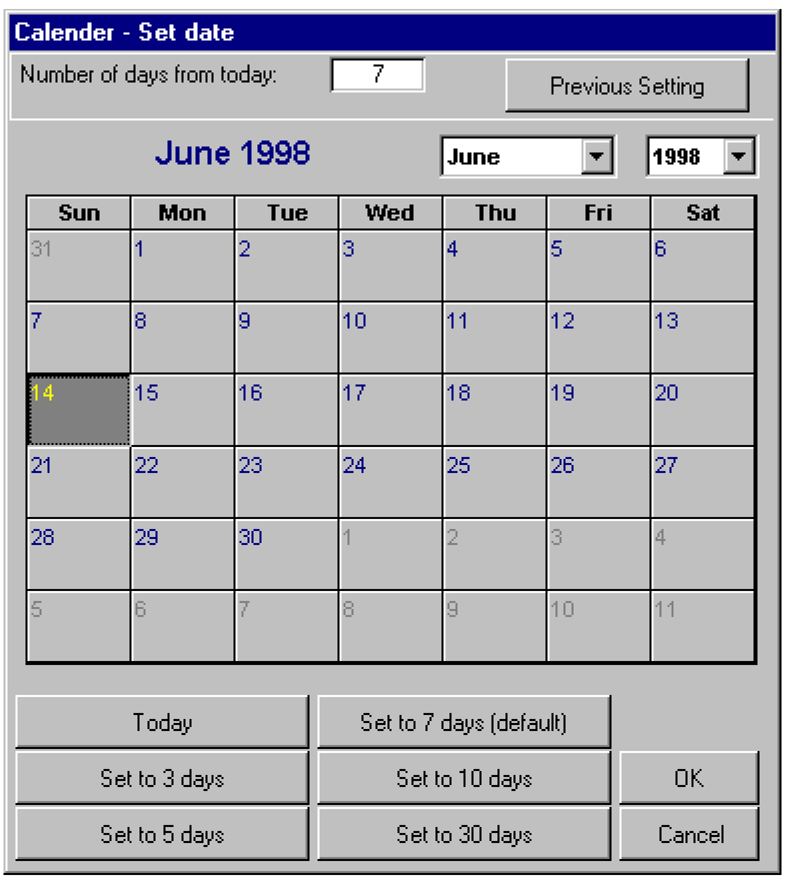
See also - Date & Time Entry Textboxes and The Calendar Control

General Controls - Date Entry Controls, The Calendar Control (Dialog)

Purpose - The Calendar Control Dialog utilises a Microsoft ® Custom Control specifically programmed to meet VPM user's needs. It offers the user an easy way of choosing and entering a valid date.

The calendar control button () is generally found in association with an adjacent control that accepts and displays the chosen date, this usually being a date-masked textbox.
When first displayed, the control is pre-configured with its default date typically set 7 days ahead of *today's* date. The user can choose from one of the command buttons offering pre-set date-difference options, or select from the month and year comboboxes and then *Click* the required day-of-month button in the main Calendar panel.
Pressing the OK button will close the dialog and enter the chosen date into the Form's associated field control. Pressing the Cancel button will close the dialog without changing the date in the associated field's control.

A typical Calendar Control Dialog configuration is shown below:-



Folios Form - Status Details, Grouped Controls

Status - Combobox. This displays the VPM status of the folio's next reminder date as set automatically from the earliest of 'Days to Exchange' and 'Days to Completion'. This value is calculated upon starting VPM or using the 'Requery Status' button on the Utilities Tab of the Switchboard form using the following rules:-

Days left	Status
0	Imperative
1-3	Urgent
4-6	Important
More than 6	Normal

If it is required to temporarily raise the status of folios a re-selection can be made from the drop-down list portion of the combobox. An additional emergency status of 'Priority' is offered should it be necessary to raise a job to the top of the list.
N.B. Any job status manually set in this way will always be reset to the calculated setting upon VPM start up or by use of the Requery Status button on the Utilities Tab of the Main Switchboard.

Next Reminder Date - Textbox. This displays the earliest of the Exchange and Completion dates.

Folios Form - Days to earliest, Grouped Controls

This group contains three display only textboxes summarising the number of days until the important action dates:-

Exchange - Display-only textbox. Days remaining to Exchange.
Completion - Display-only textbox. Days remaining to Completion.
Next Reminder Date - Display-only textbox. Days remaining to the lesser of the above two dates.

N.B. 0 days is today!

Folios Form - Matters In Connection, Grid Control

Matters in connection - Display-only Grid Control. This lists all the Matters currently 'connected' to the selected folio, where each row is a different Matter which can be either Property or Litigation. The grid data items are read-only but can be deleted.

The grid displays five (5) columns which are:

Type (of matter)
Contract (selling/buying/transferring)
Address/Case No.
Days to Exchange
Days to Completion

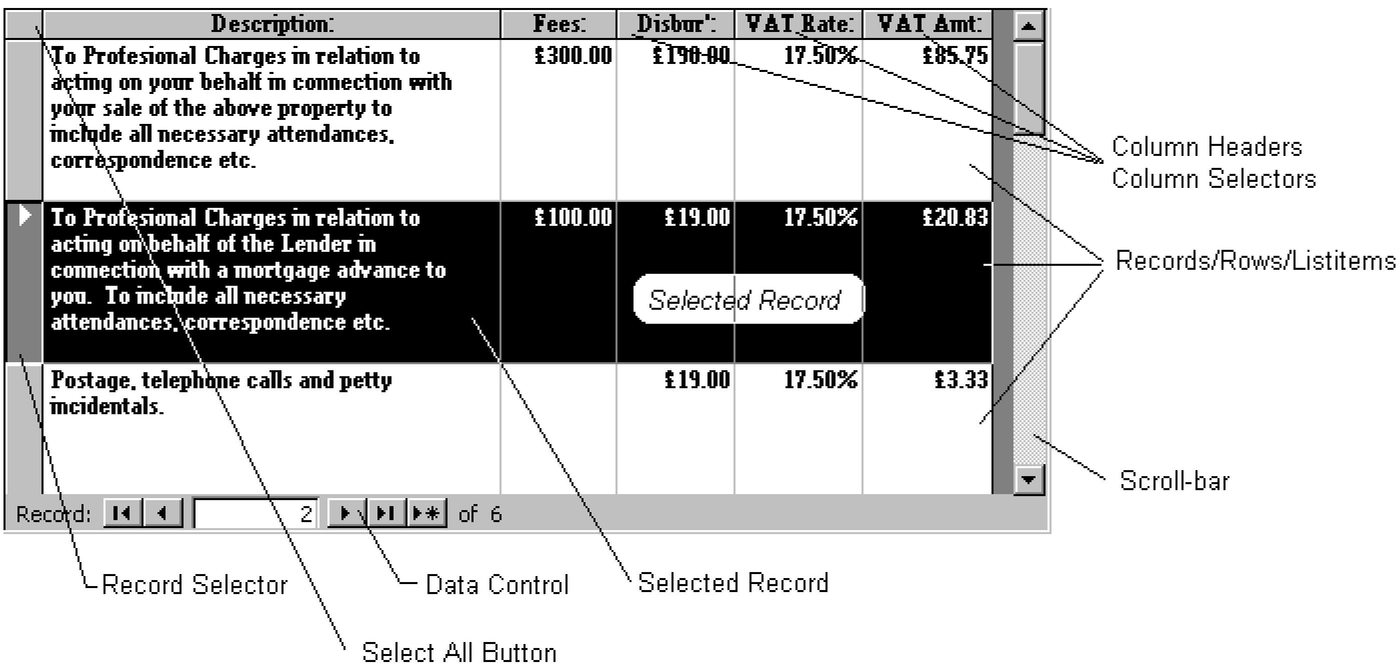
Deleting a connected Matter - Simply select the required Matter in the grid by *Clicking* its selector and pressing either the {Delete} key or VPM's menu Delete button.

Viewing a connected Matter - *Double Click* the 'Type' column for the chosen Matter. The requisite Property or Litigation Form will open with the correct record selected into it. Other Parties can then be added to the matter.
This action is identical to selecting the required matter and Clicking the View Selected Matter button beneath the grid control.

Adding a connected matter - Please see - Matters In Connection, Command Buttons

General Controls - Grid Control (Datasheet)

The grid control or datasheet is an editable multi-column list control, normally used for displaying sub-sets of records which expand a main record selection. Showing a set of detailed records for each record selected on the main form, they are often referred to as sub-form datasheets. Whether connected or not to a master record displayed elsewhere, the data grid is an effective control for viewing and if permitted, editing, an entire database table.



The Headers and Selectors can be *Clicked* to select entire columns or rows, respectively. Editing operations can thus be carried out on these selections e.g. deletion. (if not set to read-only)
Each intersection of a row and column is referred to as a grid cell; to navigate between cells use the {Tab} and/or arrow keys or simply *Click* in the cell.
Cells consist of either a textbox or an embedded combobox. Once the cursor/caret is positioned within a cell the contents can be edited in the same manner as a text control or if displayed, using the embedded combobox.
The data grid control supports *Double Click* actions within individual cells or whole rows, which might for instance, pop-up a dialog displaying *all* the record's fields, allowing them to be edited/updated.
By scrolling down to the last record/row (indicated by the selector icon) a New record can be added, if the grid is not set to be read-only. Alternatively, Click the Add New Record button on the Data Control at the bottom.

Because this control supports an independent data control for navigating its own set of records, in situations where this constitutes a sub-set related to a main form's display, it is possible to have two 'nested' data controls on one form.

Tip:- {Ctrl} + {@} will copy an item from the cell above that currently active.

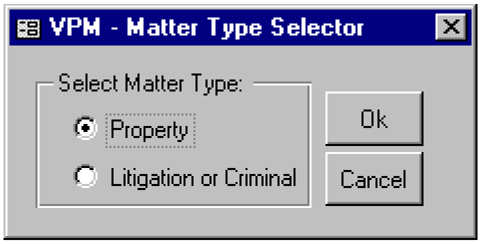
Restrictions - May be read-only, or allow edit/updates but not Add New

See also - General Controls, The Data Control and Text Editors

Folios Form - Matters In Connection, Command Buttons

Four command buttons found beneath the grid control on this page give access to useful related functions.

Add New Matter - Command button. This allows Adding a Connected Matter - This will open the Add Matter Type Selector pop-up dialog illustrated and described below:-



Simply select the matter type option as Property or Litigation and operate the OK button. This will then open the corresponding form, pre-configured for creating a new Matter. Subsequently closing the form will enter the new matter in the Folio form's Matters grid control.

Add Client's Property - Command button.This allows quickly adding the Folio Client's own property to the current folio. It circumvents having to add this *special* property using the Add Matter button.

Invoice Generator - Command button. Since Invoices are raised on a per matter basis this facility is provided on this page tab where links to both to the Folio and Connected Matter are found. Select a matter in the grid control and operate this button. The Invoice Generator dialog will pop-up pre-configured for creating an invoice for the chosen matter.

View Selected Matter - Command button. This will open either the Property or Litigation Matters form with the selected Matter displayed. Select a matter in the grid control and operate this button. This action can also be accomplished by *Double Clicking* the chosen Matter's row in the grid control.

See also - Matters In Connection, Grid Control, General Controls - The Grid Control, The Invoice Generator Form

Folios Form - Invoices In Connection Controls, Mixed Controls

Grid Control - The grid control lists all the Invoices currently connected to the selected folio, where each row is a different Invoice. The grid control contains its own Data Control which will only be used for navigation when a large number of records are present and cannot be used to add new Invoices. The grid data items are read-only but can be deleted.

The grid displays eight columns which are:

Invoice No.
Tax Point
Type
Address/Case No.
Fees
Disbursements
VAT
Total

View Selected Invoice - Command Button. Use this button to view the invoice record currently selected in the grid control. This action is identical to *Double Clicking* the 'Type' column for the chosen Invoice.

Folios Form - Memo and Log, Multi-line Textbox

This text editor displays and allows edit/updates to the Folios' Log of incoming messages and subsequent memo actions, letter generations etc. The log textbox allows editing - you may wish to add comments and annotations to certain items.

N.B. Deleting items will, of course, destroy the record keeping integrity of the log.

See also - General Controls, Text Editor Controls

Folios Form - Archive/Un-Archive Folio, Command Buttons

Archive Folio (Un-Archive Folio) - Command button. VPM allows archiving and un-archiving of Folios, principally to remove older work from VPM's current environment, thus making the workspace easier to manage. Each Folio must be archived separately since no facility for bulk archiving is provided.
The caption and function of this button changes depending upon VPM's current view. When viewing the Archive database rather than the Current database, this button offers an 'Un-Archive' operation.

N.B. Due to archivng constraints, past employees cannot be deleted from the database.

See also -General Help, Archiving and Partners/Employees, Security Options.

Folios Form - Print, Mixed Controls

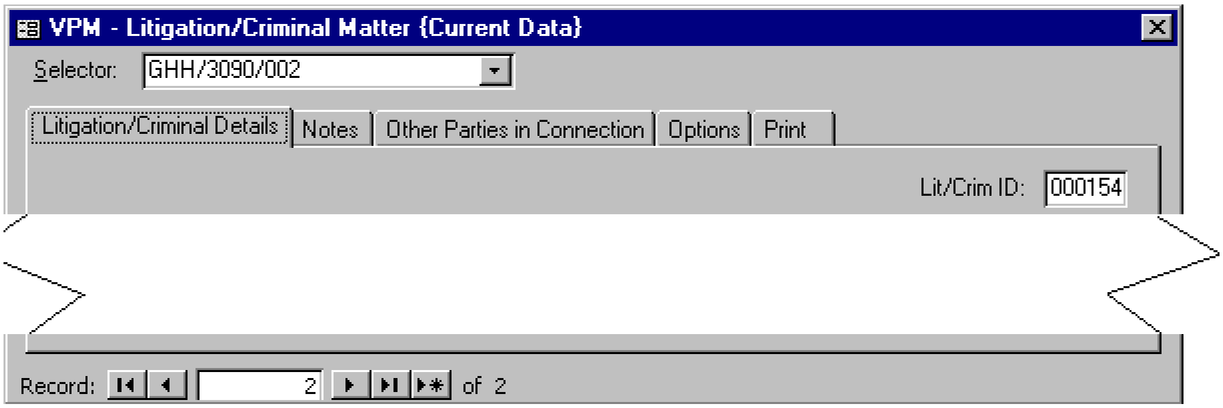
Folio Report - Command Button. This will send a full report of the current Folio details to the printer or the print-preview window, dependent upon the Print Option.
When preview is chosen (recommended) a separate Object report window is opened for each matter object connected to the folio as well as a Portfolio report window allowing the folio details to be printed.
See also Help on Preview/Report Window.

Print Option - Option Button Group. This group determines whether the print output is sent to the Print Preview window or directly to the default printer.

Litigation/Criminal Matters Form

Purpose - Viewing and management of stored Litigation/Criminal matter details.

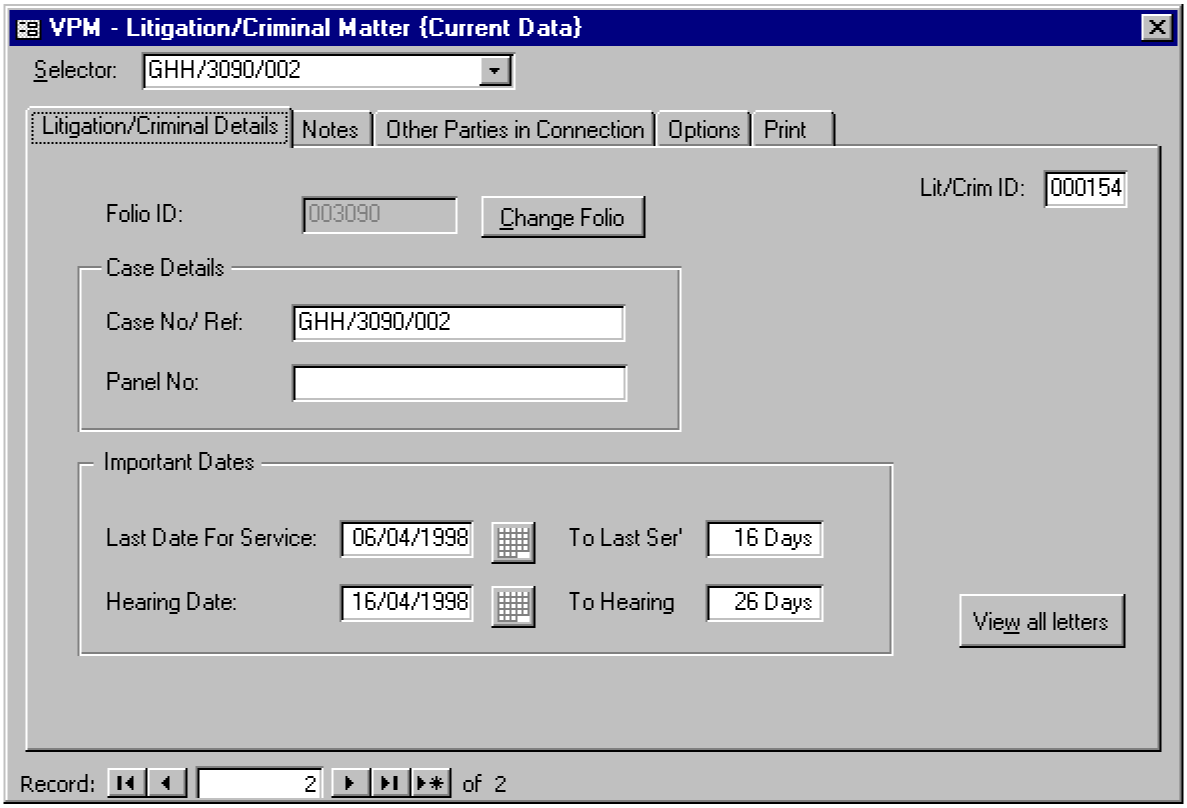
Please click on the page tab that you require help for in the picture below:-



The Litigation/Criminal matters form is a Tabbed Dialog with a Lit/Crim ID Selector combobox above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 5 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Lit/Crim matters data as well as ancillary functions, such as printing.

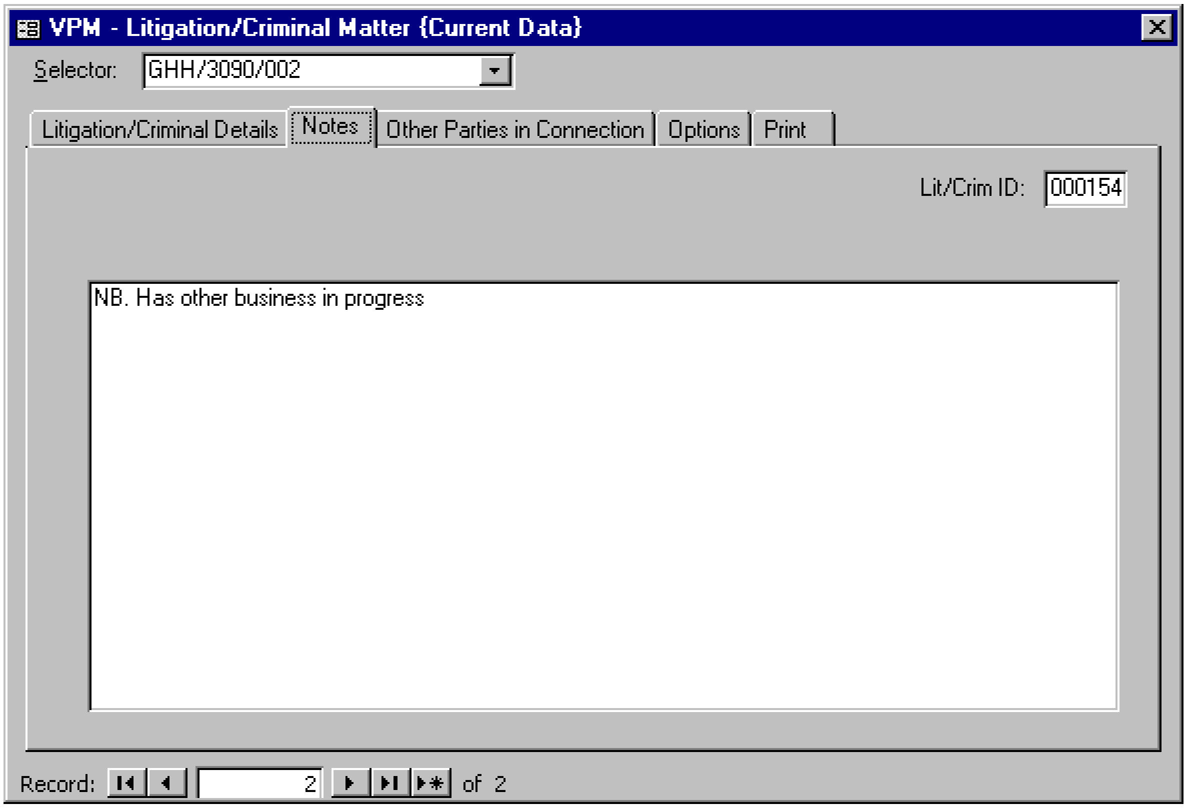
Litigation/Criminal Form - Property Details, Tab

Please click on the control that you require help for in the picture below:-



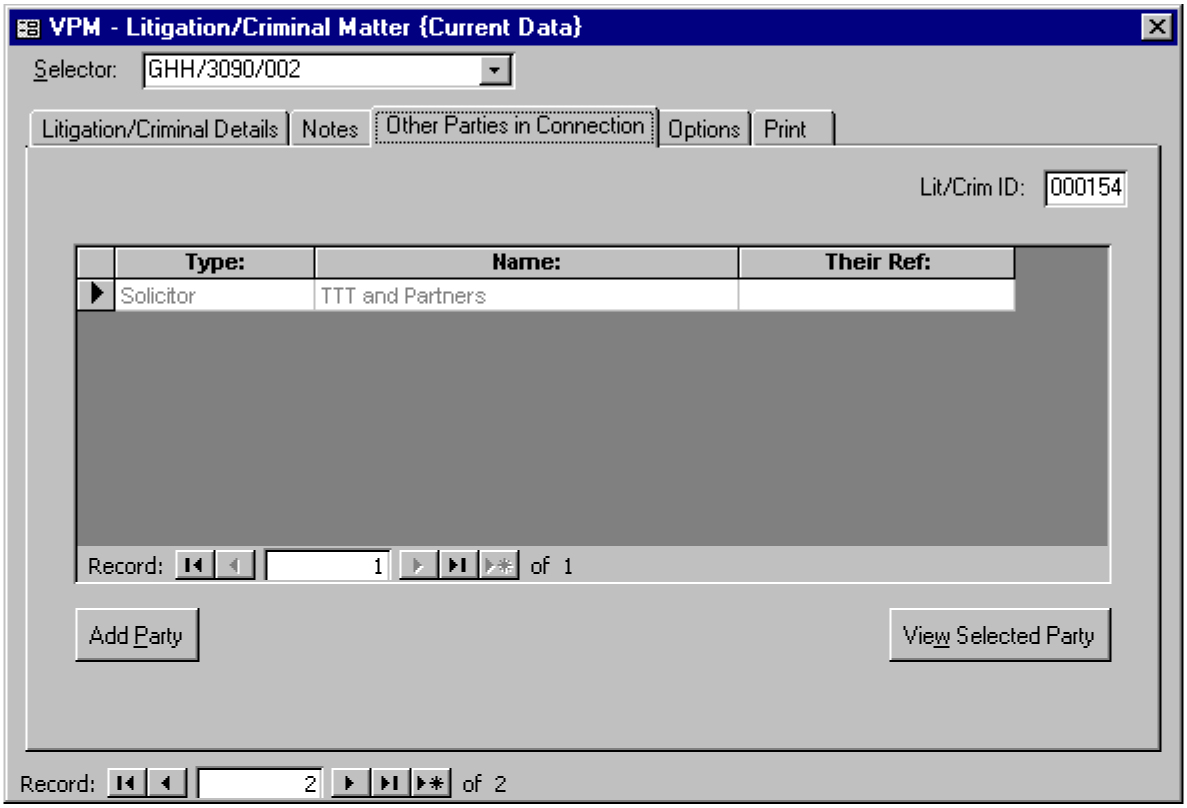
Litigation/Criminal Form - Notes, Tab

Please click on the control that you require help for in the picture below:-



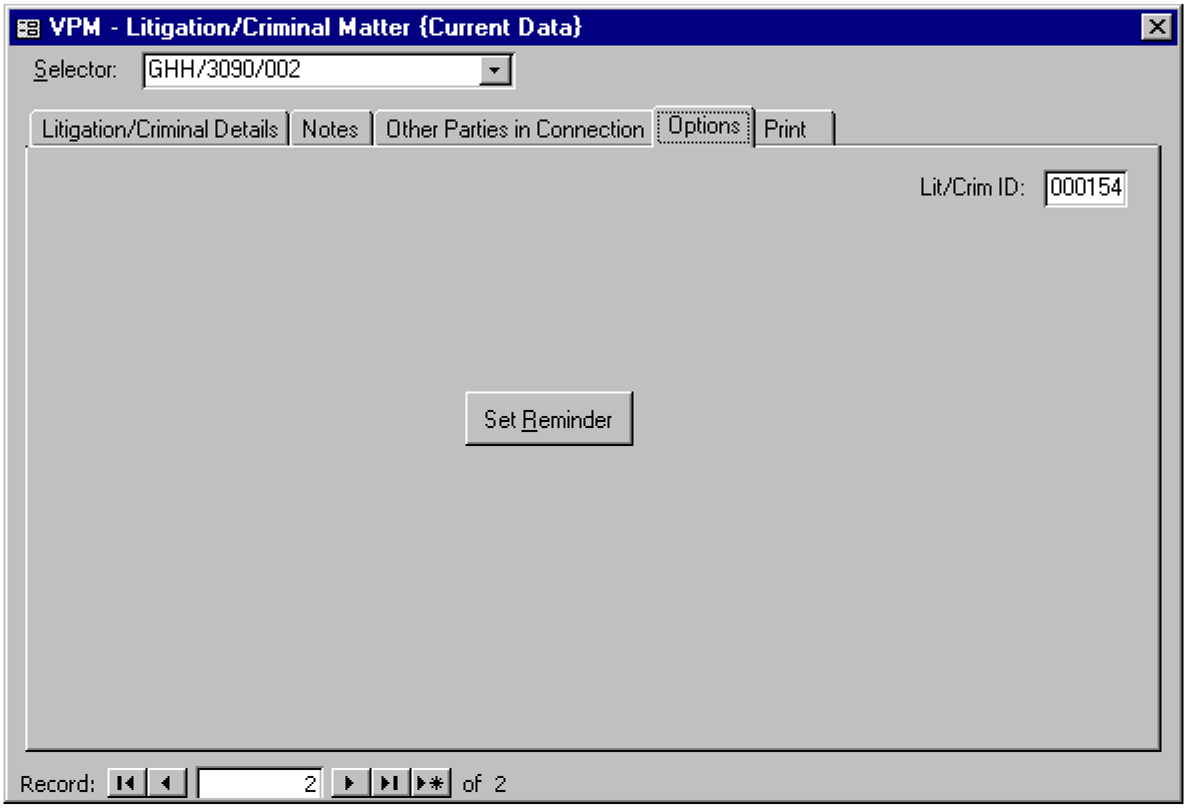
Litigation/Criminal Form - Other Parties In Connection, Tab

Please click on the control that you require help for in the picture below:-



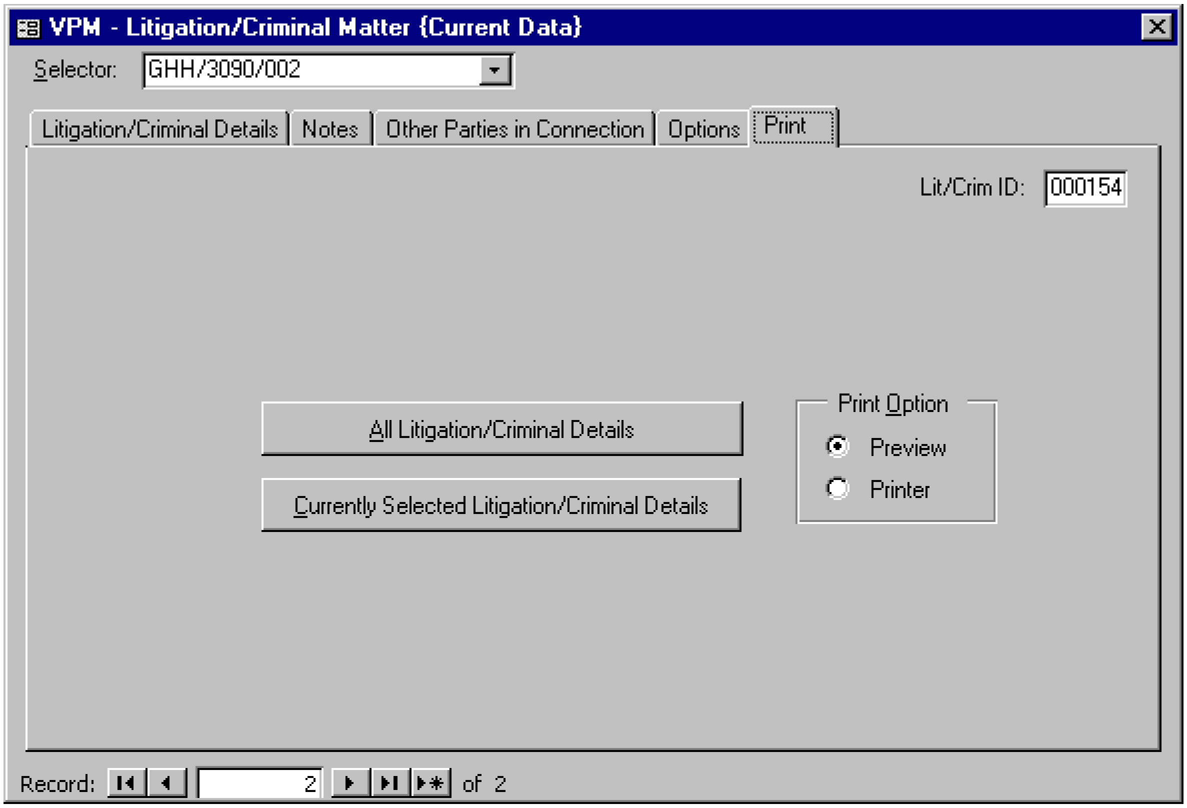
Litigation/Criminal Form - Options, Tab

Please click on the control that you require help for in the picture below:-



Litigation/Criminal Form - Print, Tab

Please click on the control that you require help for in the picture below:-



Litigation/Criminal Form - Selector, Combobox

Selector - Combobox. This combobox offers a simple means to select an existing Litigation/Criminal matter.
The drop-down list displays one column, the Litigation/Criminal matter's Case No/Ref. Either select from the list or use the built-in quick-search techniques.

See also - General Help on Searching for Records and Listboxes and Comboboxes.

Litigation/Criminal Form - Print, Mixed Controls

All Litigation/Criminal Matters - Command Button. This will send a full report of **all** Litigation/Criminal matters on file to the printer or print-preview window, dependent upon the Print Option selected.
N.B. This may be a lengthy report.

Currently Selected Litigation/Criminal Details - Command Button. This will send a full report of the **currently selected** Litigation/Criminal matter to the printer or print-preview window, dependent upon the Print Option selected.

Print Option - Option Button Group. This group determines whether the print output is sent to the Print-preview window or directly to the Default Printer.

Litigation/Criminal Form - Details, Mixed Controls

Two control groups and a standalone command button are on this page.

Case Details - Control group. Contains two controls described below:-
Case No/ Ref. - Textbox. Enter or edit the Case No/ Ref. for the current matter. *Mandatory*.
Panel No. - Textbox. Enter the Panel No. if known or edit the existing if necessary.

Important Dates - Control group. Contains two controls described below:-
Next Exchange - Date-masked Textbox, Calendar Control button pair. These controls allow the Next Exchange date to be entered for the matter. Enter directly into the date-masked textbox or use the Calendar control provided. The date is validated to be today's date or later.
To Exchange - Display-Only Textbox. Displays the number of days to the exchange date or 'Passed' if this has expired.

View All Letters - Command Button. This will open the Letter Viewer Form and filter the records to those produced for the current Litigation/Criminal record.

Litigation/Criminal Form - Notes, Text Editor

This text editor can be used for making notes petaining to the current Litigation/Criminal matter.

See also - General Help on Text Editor Controls.

Litigation/Criminal Form - Other Parties in Connection, Mixed Controls

The following controls are to be found on this page:-

Other Parties in Connection - Data Grid Control displaying the following three columns:-
Type - Displays the Other Party Type - read-only.
Name - Displays the Name of the Other Party - read-only.
Their Ref. - Displays the Other Parties Reference - editable.

Add Party - Command Button. Opens the 'Other Party Type Selector' dialog which offers two ways of adding a new party:-
Please see separate Help Topic on Other Party Type Selector Dialog.

View Selected Party - Command Button. Opens the Other Parties Form and displays the selected record.

Litigation/Criminal Form - Set Reminder, Command Button

Set Reminder - Command Button. This opens the Set Reminder Form pre-configured for 'Add New' with the current Litigation/Criminal matter details. However, you may subsequently add *any* reminder.

General - Sorting Records

General - When using the data control to move through a form's records the order that they will be traversed is that of it's current sort order.
By default a form's records are sorted in ascending order of their unique ID* Number i.e. using the 'Move Last' button on the data control will display the record with the highest ID number (which will also be the last record input.by the user).
Sometimes it is more convenient to display records in an alternative sort order e.g. descending ID Number order, ascending order by a text field such as a key name, descending order by a quantity number field so that the first record is the largest quantity etc.

VPM's forms can have their records resorted to be ascending or descending on almost any field. Simply put the cursor in the control (representing the database field) that should be used to base the sort order upon and using the VPM Toolbar, click the A>Z or Z>A button. The form will be quickly resorted with the current record remaining the same.
N.B. Notice that although the record number on the data control still goes from 1 to Total no. of records, the Form ID Number will not move sequentially from lower to higher numbers as Move Next is used to navigate the records.

Typical sort secenario - It is required to view the Client Details form's records in Ascending order of Client Surname.

1) Put the cursor in the Client Surname textbox control (giving it the focus).
2) Click the VPM Toolbar's A>Z sort button.
3) Click the data control's Move First button and inspect the client surname displayed.
4) Click the data control's Move Last button and inspect the client surname displayed.

To return to the default sort order (database sort order), put the cursor in the form's ID textbox (top right of page) and click the toolbar's A>Z sort button.

See also - Help on the Data Control, Custom VPM Toolbar and Filtering Records.

General - Filling in Forms

Keyboard keys or mouse pointing devices?

Navigating through the VPM program

Navigating Tabbed Dialog Forms

Navigating through a form's records.

All forms that require them offer the standard Microsoft Data Control for navigating records, which allows moving through records in their current sort order (and it's buttons are duplicated on VPM's custom toolbar). Additionally, most forms have a record selector combobox positioned to the top left which is customised to offer an easier way of finding any record in the form's record set by perusing key details. Three forms have VPM Custom Browsers which extend the functionality of the selector, existing as separate self contained browser dialogs.

Navigating the tabbed pages and controls.

These forms contain two or more pages accessed through their respective tabs, being arranged such that the first (leftmost) page tab is selected when first opened. The order of precedence for form filling is intended to be from left to right on the page tabs with some of the later tabs only being required in special circumstances e.g. Utilities. If printing is available then this is always to be found on the rightmost page tab.
Changing from one page to another is accomplished either by clicking on the required page tab or by using the key combination [CTRL] + [TAB] or [CTRL]+[SHIFT]+[TAB] to move backwards* through the tabset. When changing tabs the user will sometimes be queried with a standard 'Save record?' Message Box, when changes on a previous page have to be consolidated first.
Each page has its own 'Tab Order' which is the preset sequence that controls are moved through naturally using the [TAB] key. 'Tabbing' through a page's controls whilst entering or editing each control's contents should be the normal means of filling in a form because very often the data content of controls is interdependent, the natural tabbing order preventing inadvertent 'Data Validation' warning messages.
Other means of moving through a page's controls is by using the mouse pointing device (clicking in or on a control) and by using hot keys, which consist of the control's underlined character (if any) used in combination withe the [ALT] key. By either of these means the user can give any control the current focus.
In some cases (e.g. Generators) the user is guided through a form filling sequence because subsequent controls on the page are disabled initially and only enabled when appropriate. If a control is unexpectedly disabled look at the data content of prior controls or explicit and implicit option choices made earlier in the form filling process.

The Escape key [Esc], clearing changes, cancelling repetitive validation warnings.

When data cannot be validated or the user knows that a mistake has been made the it is necessary to use the [Esc] key to clear the changed control content such that repetitive data validation messages are prevented. Sometimes it is necessary to use the [Esc] key **more than once** to 'move back' to a previous valid data state for the page controls. The [Esc] key is used after dismissing the warning dialog.

Save Record? - Warning Message Box Dialogs.

When closing forms or sometimes when moving from tab to tab (as described above) after

adding or editing control contents a Save Record? Message box will be popped-up. These should be self explanatory.
If they contain Yes, No and Cancel buttons then Yes will confirm the Save and continue the operation that initiated the warning, No will not Save the record but will continue the operation and Cancel will ignore the operation entirely returning the user to the form page.

Cursor Behaviour Entering Fields (text controls).

When using the [TAB] key method for navigating around a form page the cursor can behave differently when first tabbing into a text control, when using the arrow and [Enter] keys.The default settings are sufficient for new users. Please see Help on Cursor Behaviour Entering Fields and Advanced Field Navigation Options found on the Switchboard's Options Tab.

Adding New Records

If the form has been arrived at pre-configured for adding a new record then simply enter data content in at least the mandatory fields. Either moving off of the record using the data control or closing the form whilst responding in the affirmative to the Save Record? Message Box will ensure the record is saved.
If currently viewing an existing record then use the data control's new button (>*) to prepare the form for entering a new record, saving as described above.
See Help on The Data Control

Deleting Records

Use the VPM toolbar Delete Record button. If this is disabled then the user is not in a delete record situation. If use of this button produces a message that the data cannot be deleted it is likely that links to other data prevent this action due to data integrity e.g. attempting to delete a Client record that is the client of one or more Folios would not be allowed.
VPM folios can be deleted when viewing the folio record in the folio form.
Where deleting connected items is possible the help topic for the form or control will mention this. In some cases it is possible to reuse records by changing their details since they cannot be deleted.
See also General Help on Removing Duplicate Records.

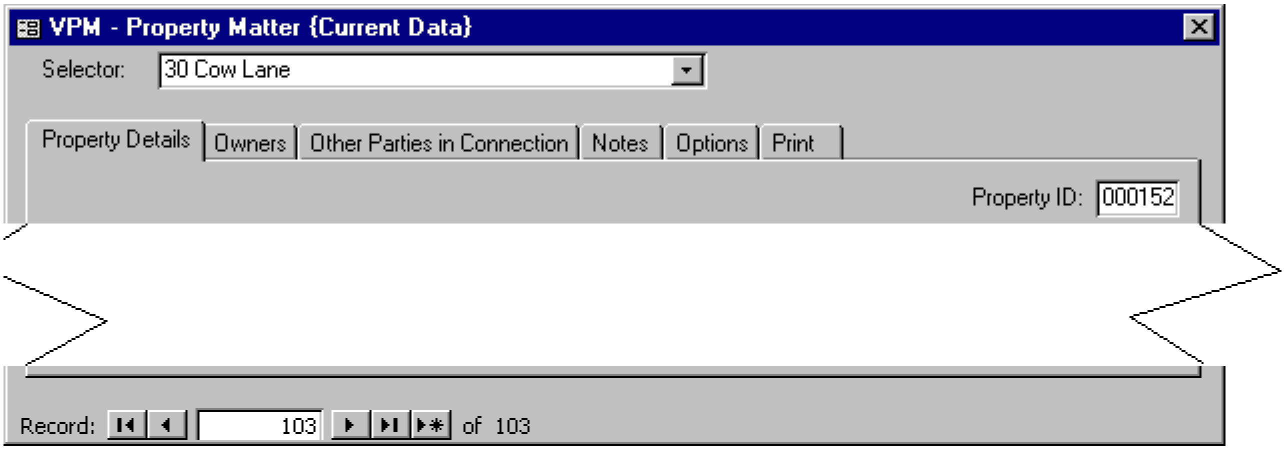
* The [SHIFT] key is often configured to reverse the sense of a standard key combination.

See also - General Help on the Preview/Report Window for information on Listings and Reports available in VPM.

Property Matters Form

Purpose - Viewing and management of stored Property matter details.

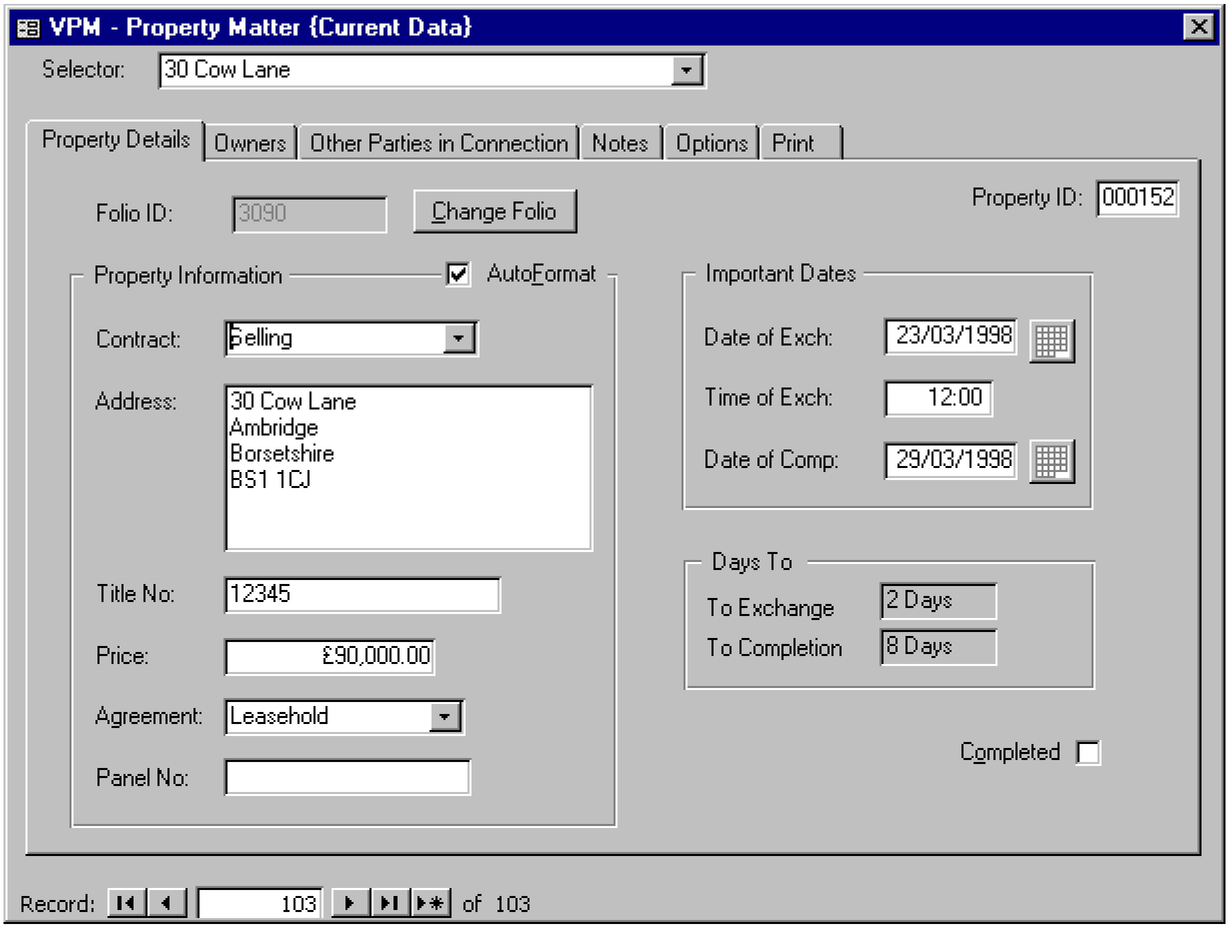
Please click on the page tab that you require help for in the picture below:-



The Property matters form is a Tabbed Dialog with a Property ID Selector combobox above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 6 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Property matters data as well as ancillary functions, such as printing.

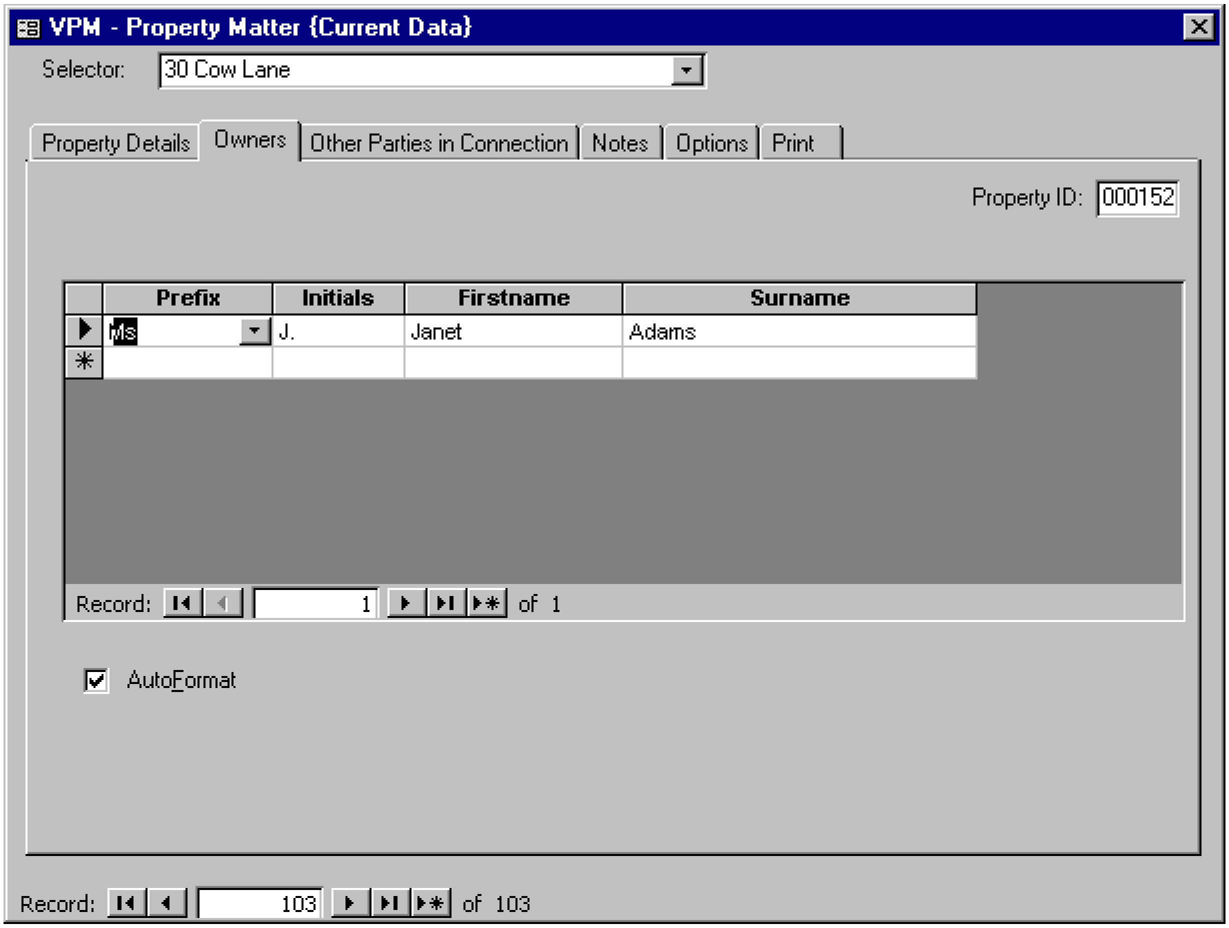
Property Matters Form - Property Details, Tab

Please click on the control that you require help for in the picture below:-



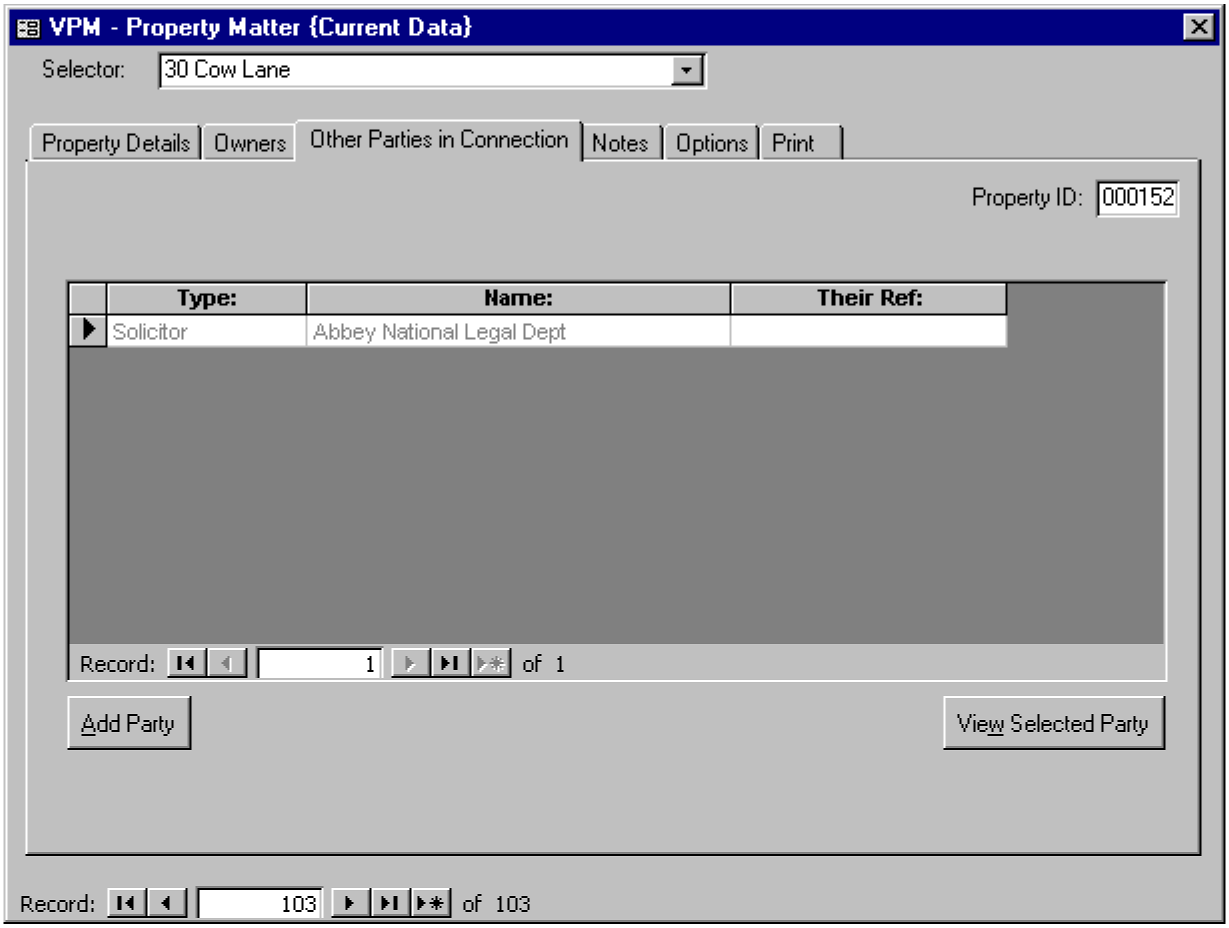
Property Matters - Owners, Tab

Please click on the control that you require help for in the picture below:-



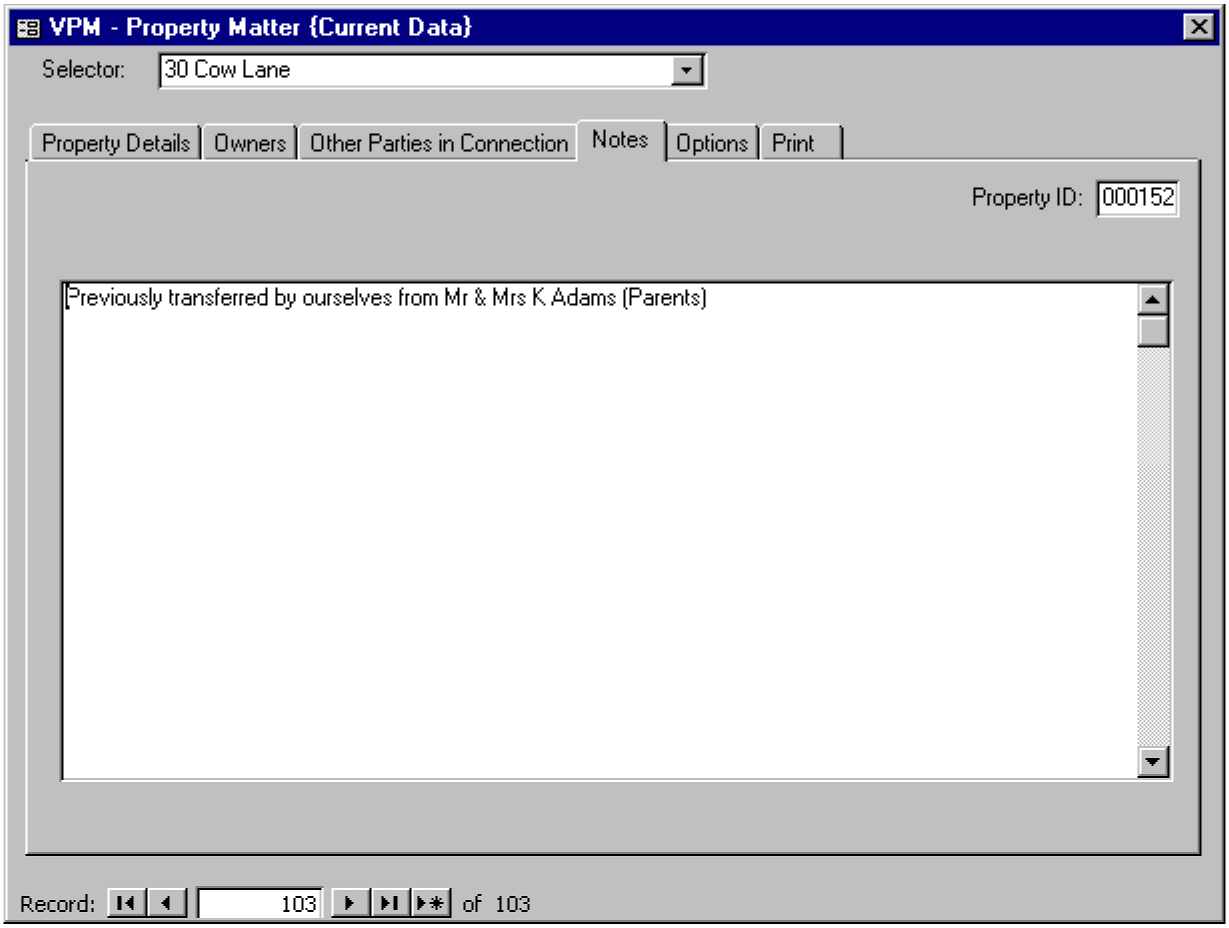
Property Matters - Other Parties in Connection, Tab

Please click on the control that you require help for in the picture below:-



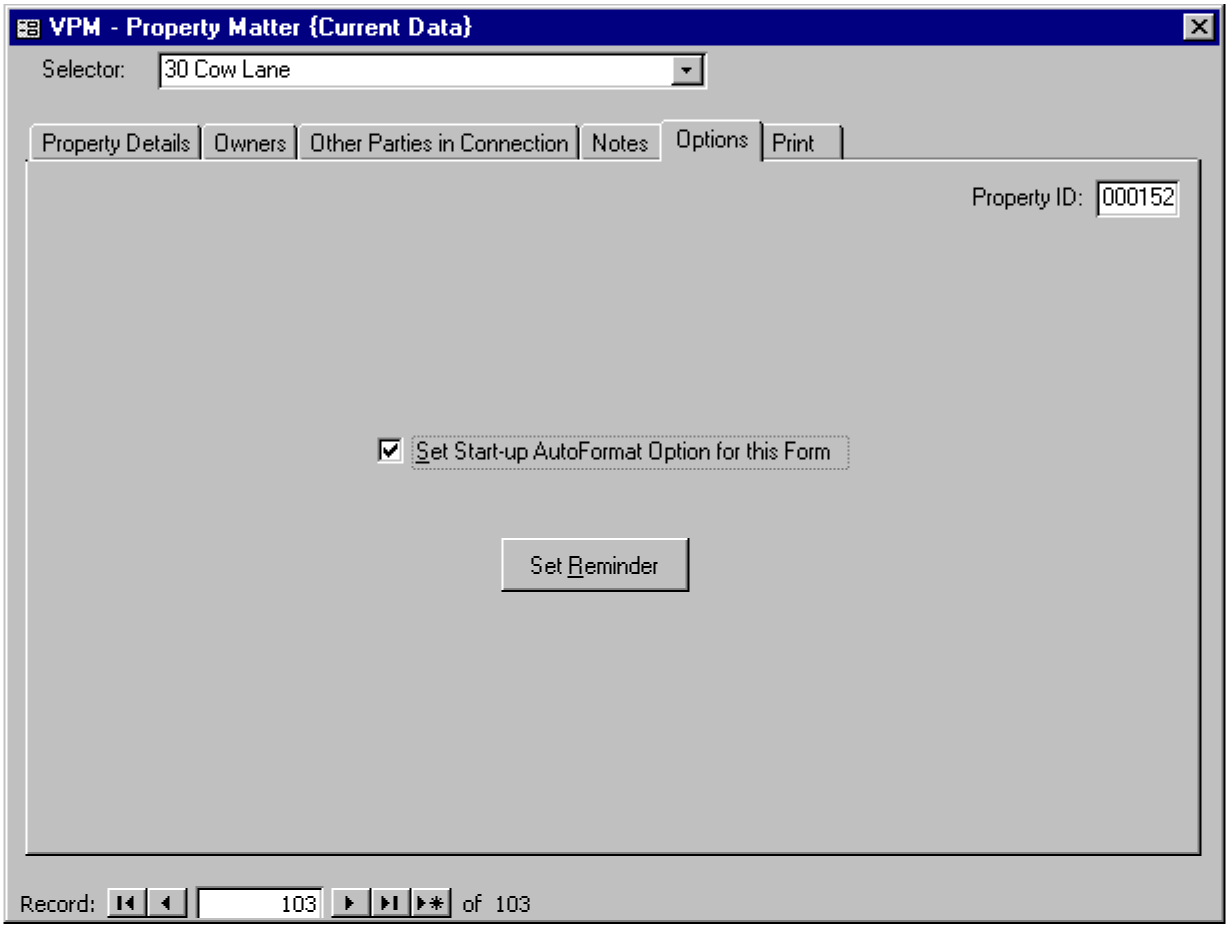
Property Matters - Notes, Tab

Please click on the control that you require help for in the picture below:-



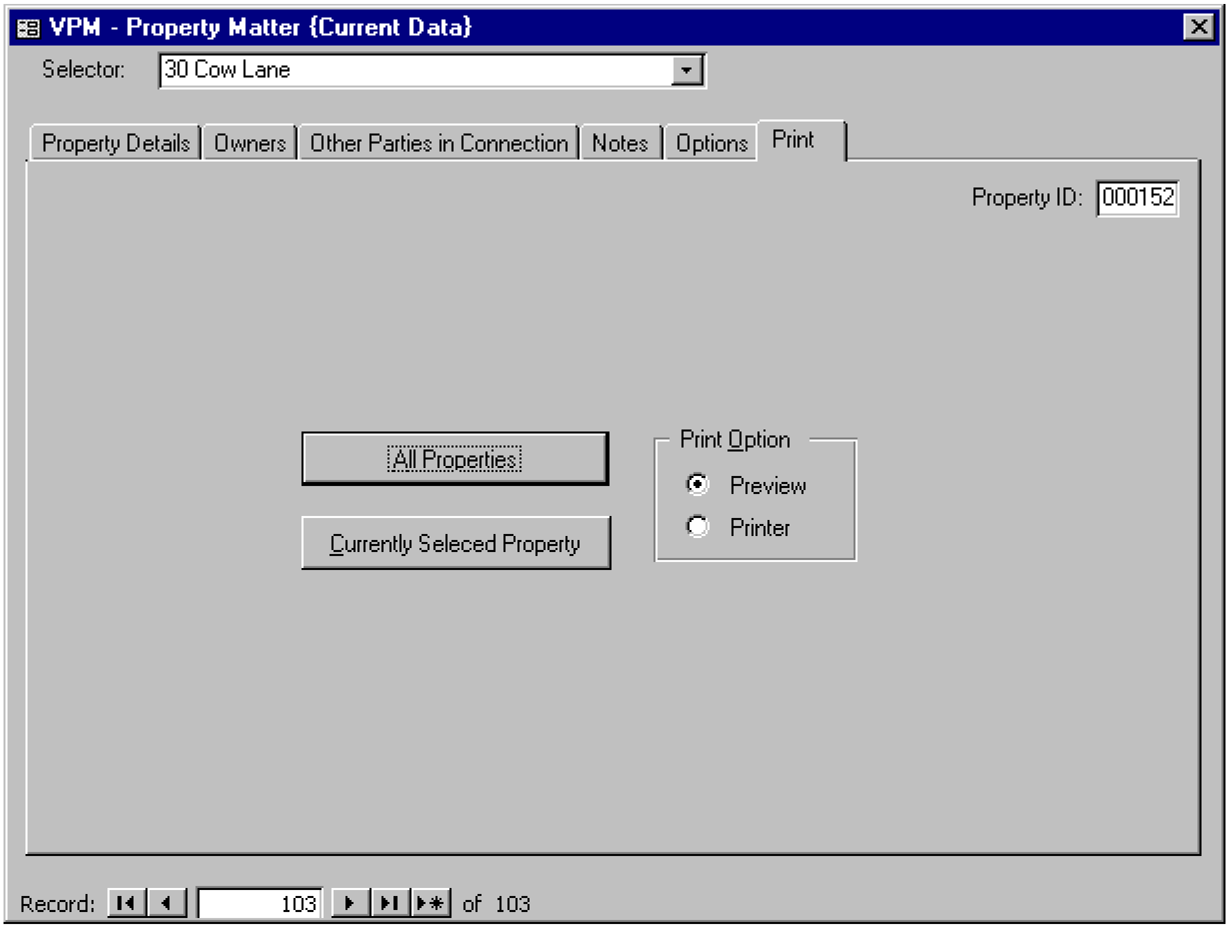
Property Matters - Options, Tab

Please click on the control that you require help for in the picture below:-



Property Matters - Print, Tab

Please click on the control that you require help for in the picture below:-



Property Matters Form - Selector, Combobox

This ComboBox offers a simple means to select an existing Property matter.
The drop-down list displays two columns for easy reference, the first line of the Property's address and the Contract Type (Buying, Selling, Transferring).

Select a record from all those on file either by typing into the box or using the drop-down list selection.

Property Matters Form - Folio ID, Mixed Controls

Folio ID - Display-only textbox/Combobox. When viewing existing records this control will display their associated Folio ID. When adding new records this control is changed to a Folio ID selector combobox. Select the required Folio for the new matter from the drop-down list.

Change Folio - Command button. This control will change the Folio ID control to a Folio ID selector combobox should it be necessary to change the original Folio assignment for this matter.

Property Matters Form - Property Information, Mixed Control Group

This group displays or allows editing/adding new property information and consists of the following controls:-

AutoFormat - Checkbox. The controls in this group support the AutoFormat function. This control can be used to switch this behaviour on and off.

Contract - Combobox. Select from the drop-down list which offers Buying, Selling or Transferring.
Address - Multi-line textbox. 5 lines max.
Price - Textbox. Currency formatted textbox. Input the appropriate figure.
Title No. - Textbox (25 characters). Input the property's title if known.
Agreement - Combobox. Select from the drop-down list which offers Freehold, Leasehold, Other or Unknown.
Panel No. - Textbox (25 characters). Panel No. If required.

Property Matters Form - Important Dates & Days To, Control Groups

Important Dates - Control group. This group displays and allow editing/adding of the following information:-

Date of Exchange - Date Masked Textbox/Calendar Control Button pair.
Time of Exchange - Time Masked textbox.
Date of Completion - Date Masked Textbox/Calendar Control Button pair.
See also - General Help on Date & Time Entry Textboxes and The Calendar Control

Days To - Control group. This group displays the following information:-

To Exchange - Display-only textbox. The number of days to Exchange.
To Completion - Display-only textbox. The number of days to Completion.

N.B. 0 days is today!

Property Matters Form - Completed, Checkbox

Use this checkbox as an aide-de-memoir to indicate that a transaction has been completed.

Tip - Agree an in-house definition of 'completed' status for use of this checkbox.

VPM Custom Generators

Purpose - To help the user through a routine task of generating, easing the work flow.

These forms are accessed directly from the View Tab of the Main VPM Switchboard, adjacent to their associated Viewer buttons.

They are always accessed by using a custom generator button .

Letter - Letter Generator

Incoming - Incoming (Message) Generator

Reminders - Reminders Generator

Property Matters Form - Owners, Mixed controls

Owners - Grid Control. This is a grid control which displays and allows editing/adding new Owners for the property and supports AutoFormat. The four columns are:-

Prefix (Title) - Embedded combobox. Select required prefix from the drop-down listbox.
Initials - Embedded Textbox. Type in the owners initials.
First name - Embedded Textbox. Type in the owners first name.
Surname - Embedded Textbox. Type in the owners last name.

To add a new owner *Click* in the bottom row  or use the grid's own data control button .
Autoformat - Checkbox. The AutoFormat function applies to all columns. Can be used to toggle this feature on/off.

See also General Help on The Grid Control.

Property Matters Form - Other Parties in Connection, Mixed Controls

The controls on this page offer management of Other Parties connected to the property.

Other Parties Display - Grid Control. The 3 columns in this grid control are:-
Type - Read-only grid column. The Other Party Destination Type.
Name - Read-only grid column. The Other Party's Name.
Their Ref. - Editable grid column. Since this data item is specific to the current Property Matter it can only be added/edited here and not within the Other Parties Form. *Double Clicking* on a cell in this column activates the View Selected Party button described below.

Add Party - Command Button. Opens the 'Other Party Type Selector' dialog which offers two ways of adding a new party:-
Please see separate Help Topic on the Other Party Type Selector Dialog.

View Selected Party - Command Button. This will open the Other party Form pre-configured with the record currently selected in the grid control.

See also - Help on General Controls - The Grid Control

Property Matters Form - Notes, Text Editor

This text editor can be used to make notes and comments pertaining to the current property.

See also - General Help on Text Editor Controls.

Property Matters Form - Set Reminder, Command Button

To set a reminder for a Property Matter press this button.
The Reminder Generator form will be displayed, pre-configured for adding a new reminder of 'Type' Property for the currently selected property.

See also - Reminder Generator

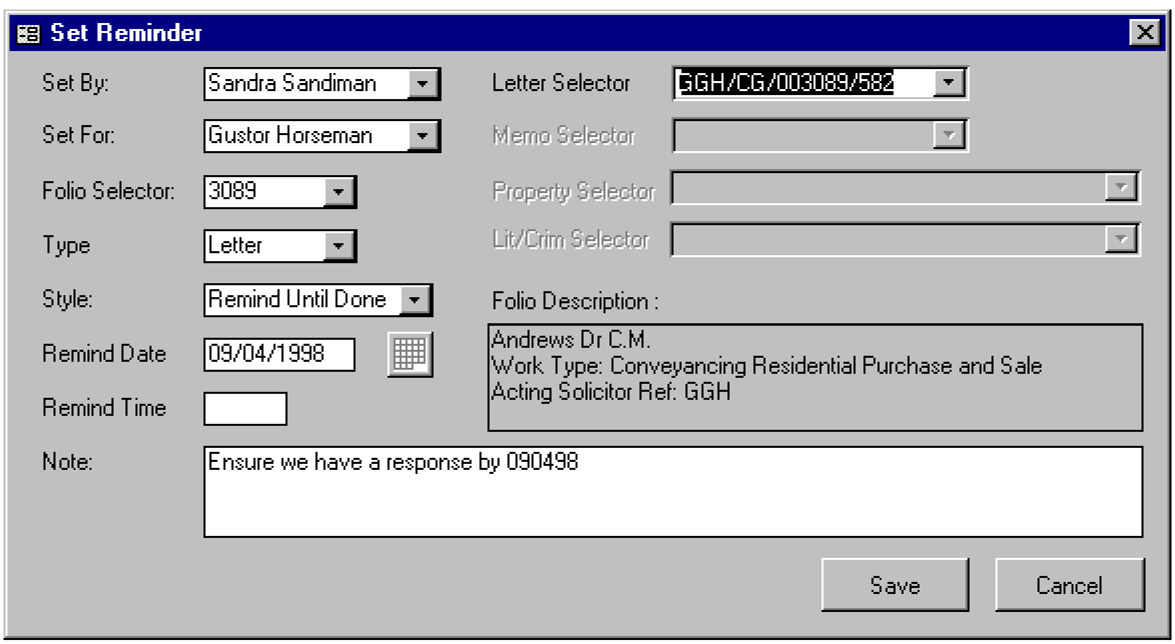
Reminder Generator Form (Set Reminder)

Purpose - This form allows the user to generate a reminder within VPM 's system. To view reminders see also Reminders Viewer.

This form is accessed from various places within VPM, directly from the Main Switchboard's View Tab and from the Letter, Lit/Crim, Property, Folio and Memo forms. Reminders are classified by Type (Letter, Incoming (Memo), Lit/Crim, Property, Folio and General) and Style (Remind until Done and Remind On (date).

Reminders have the following general properties that require setting:-
Who they are **Set by** and **Set for**. Some companies may wish to restrict them to be set for fee earners only.
The **Folio** they relate to - this is a mandatory field.
The **Type** of reminder; Letter, Incoming, Memo, Property, Lit/Crim or General. Choosing any of the first four will allow the particular object of that type to be specified e.g. a specific letter. Thus reminders can be created that apply to specific previously stored records within VPM or to general matters.
The **Style** of reminder; Remind Until Done or Remind On (a given date/time).
If the above details are not sufficient then a **Note** can be appended to the reminder.

Please click on the control that you require help for in the picture below:-



Property Matters Form - Print, Mixed Controls

All Properties - Command Button. This will send a full report of **all** Litigation/Criminal matters on file to the printer or print-preview window dependent upon the chosen Print Option.
N.B. This may be a lengthy report.

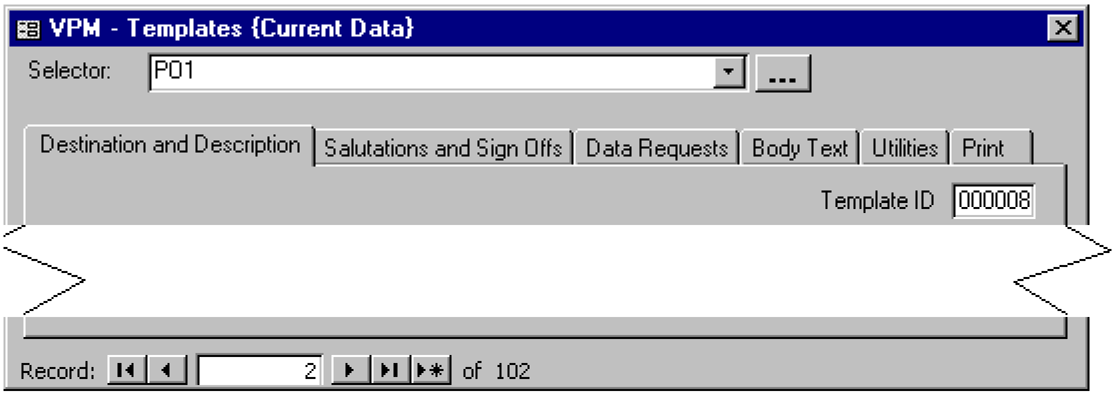
Currently Selected Property Details - Command Button. This will send a full report of the **currently selected** Litigation/Criminal matter to the printer or print-preview window dependent upon the chosen Print Option.

Print Option - Option Button Group. This group determines whether the print output is sent to the Print Preview window or directly to the Default Printer.

Templates Form

Purpose - Viewing and management of stored Template details.

Please click on the page tab that you require help for in the picture below:-

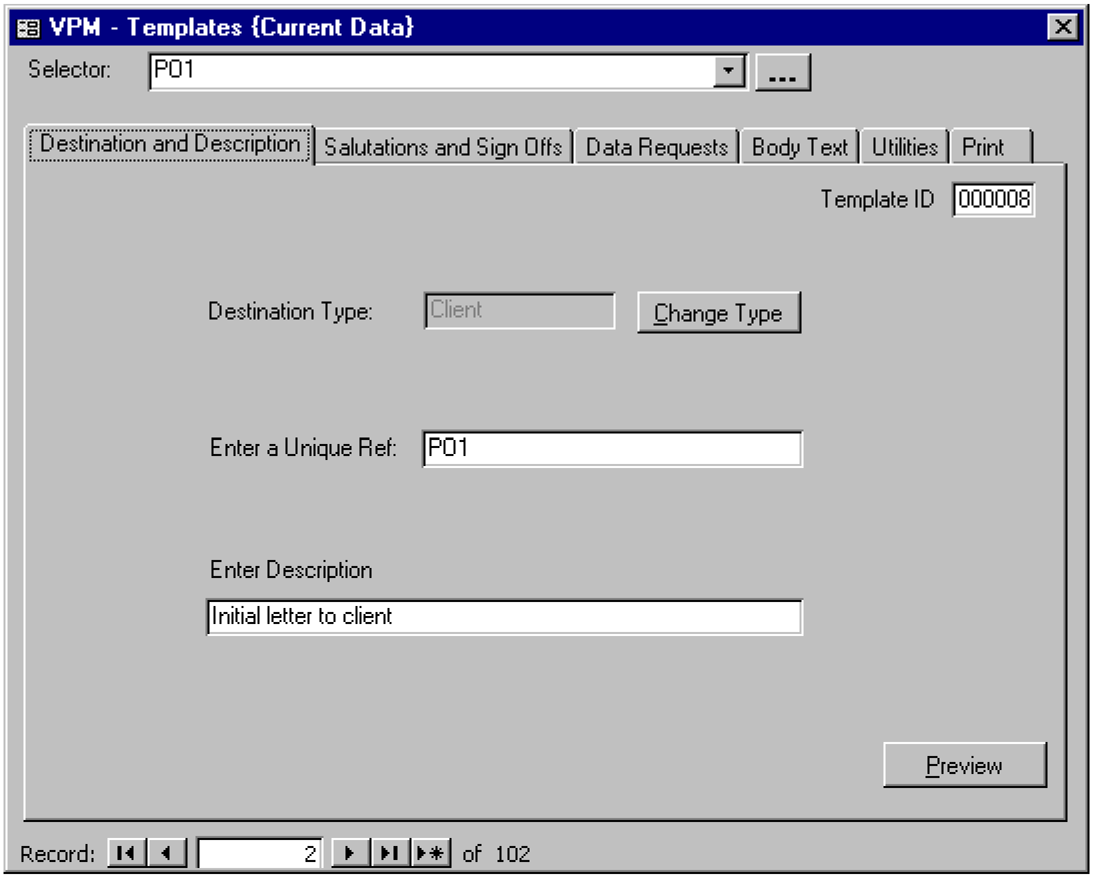


The Templates form is a Tabbed Dialog with a Template ID Selector combobox/Browser button pair above the tabs and a Data Control style record selector at the bottom left. Clicking on any of the 6 tabs displays a different dialog sheet containing standard windows controls, which allow viewing and entry of Template data as well as ancillary functions, such as printing.

N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Destination and Description, Tab

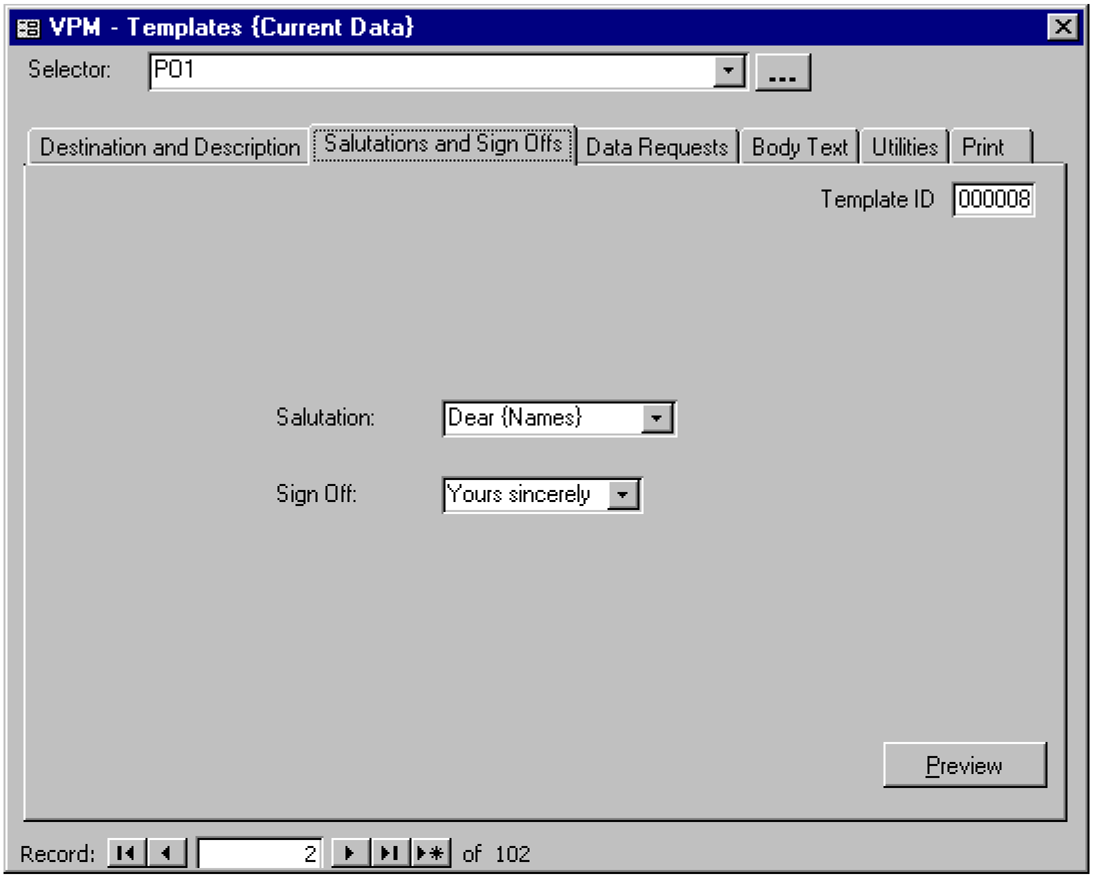
Please click on the control that you require help for in the picture below:-



N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Salutations and Sign Offs, Tab

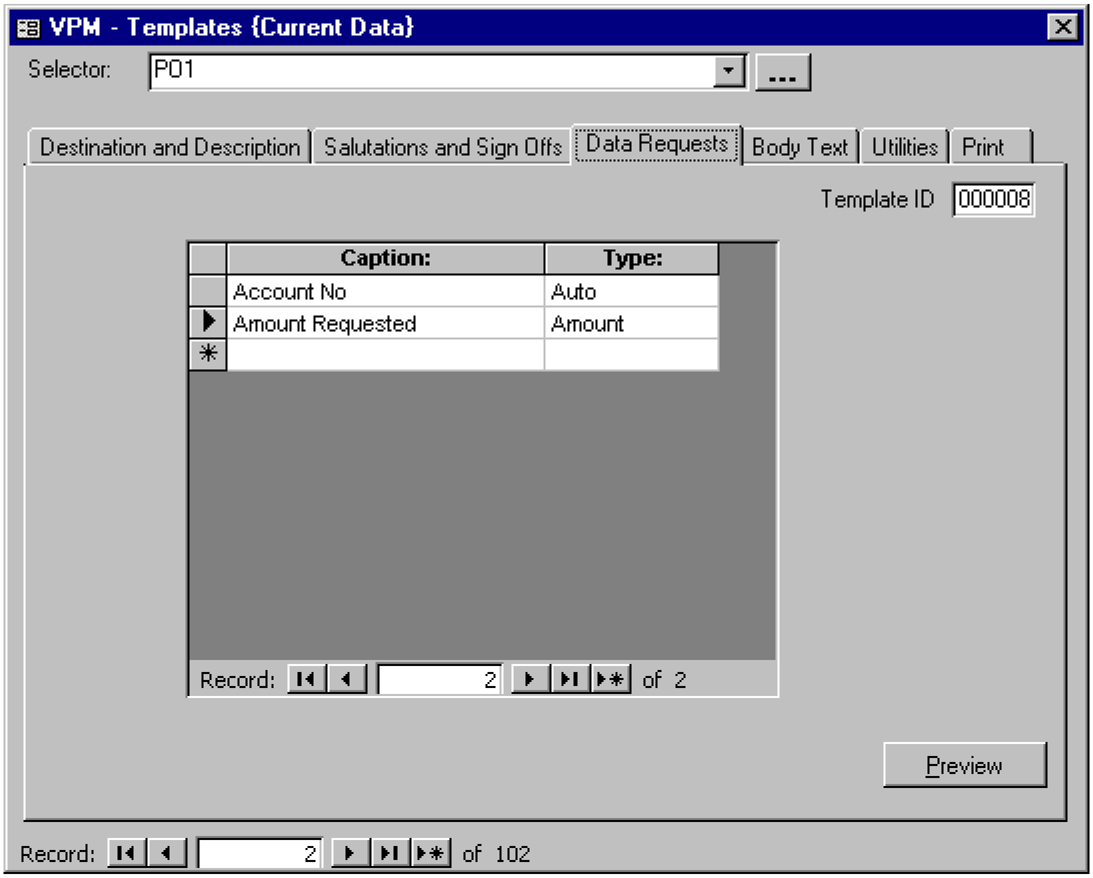
Please click on the control that you require help for in the picture below:-



N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Data Requests, Tab

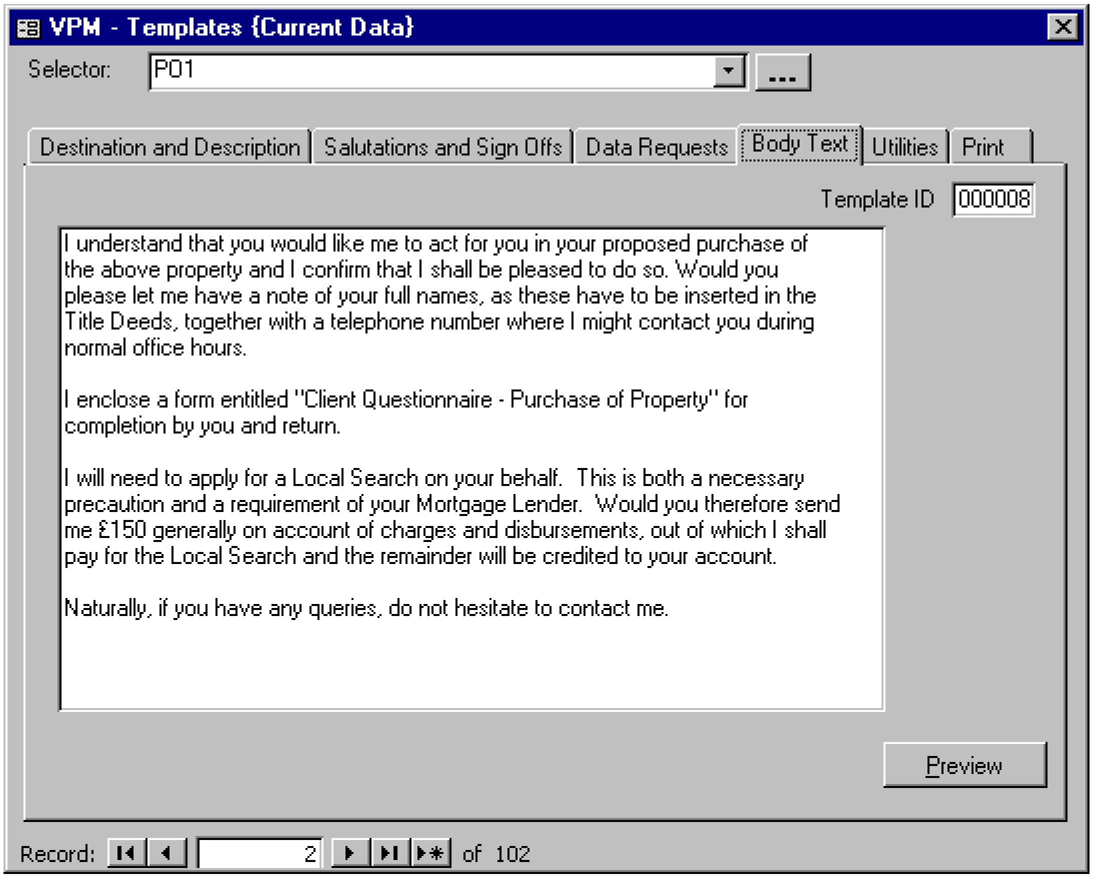
Please click on the control that you require help for in the picture below:-



N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Body Text, Tab

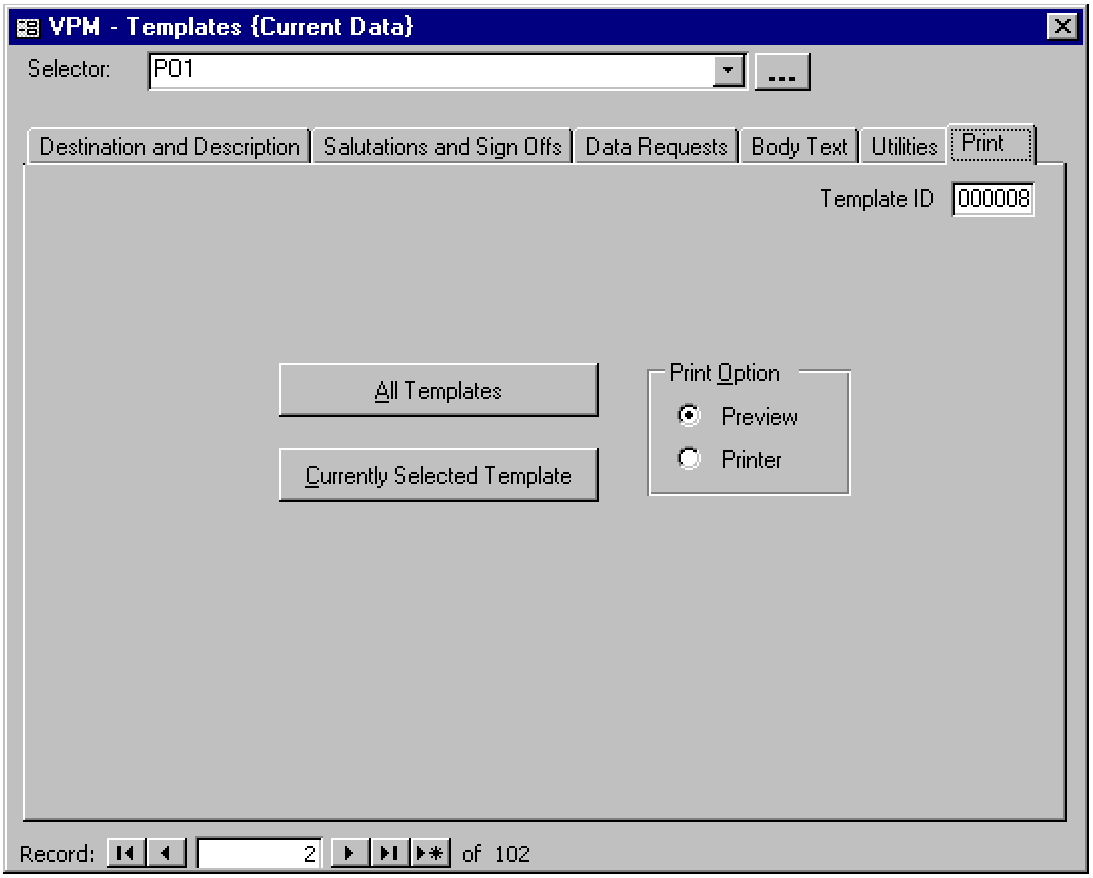
Please click on the control that you require help for in the picture below:-



N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Print, Tab

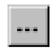
Please click on the control that you require help for in the picture below:-



N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.
See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Template Selector, Combobox/Template Browser, Command Button

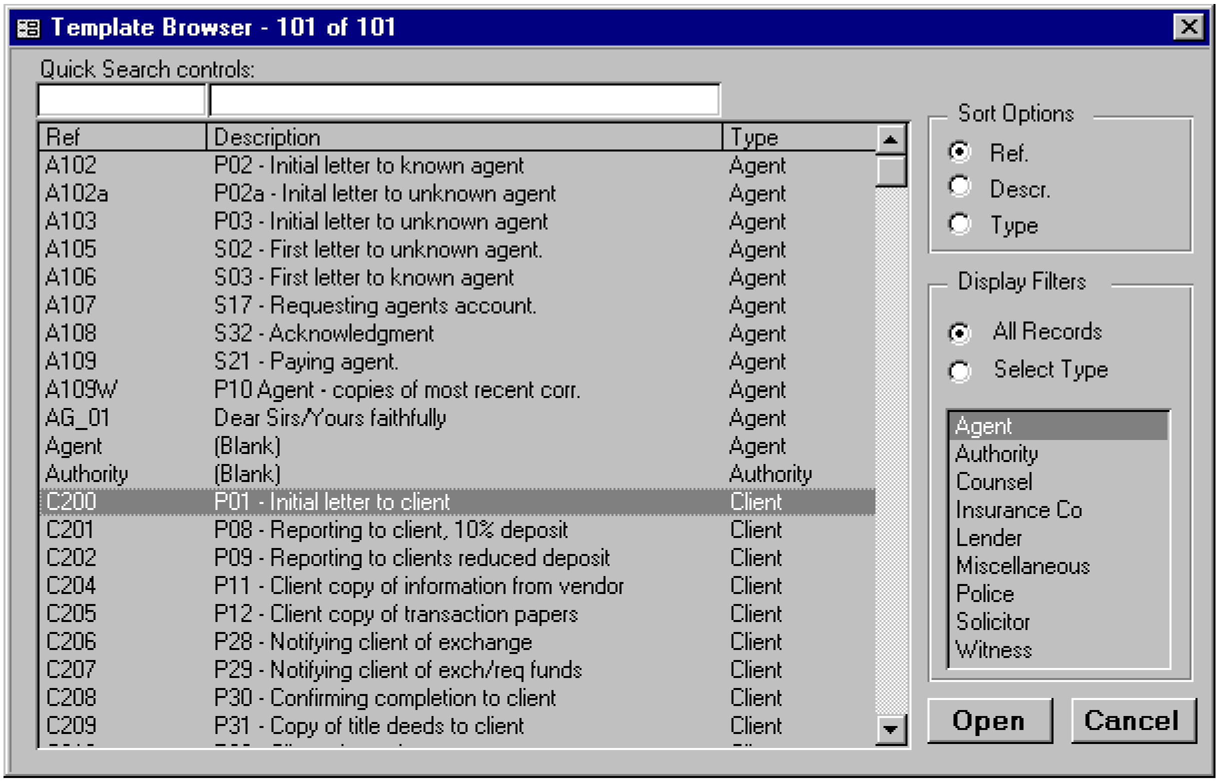
Template Selector - Combobox This is the preferred control to quickly select a Template should the Unique Ref. be known. The list displays two columns; Unique Ref. and Template Description. Either saelect from the drop-down list or use the built-in quick search techniques.
See also - General Help on Searching for Records and Controls - Listboxes and Comboboxes.

Template Browser - Command Button 
The Custom Template Browser can be accessed using the 3-dot button adjacent to the Template Selector combobox. This pop-up dialog offers very comprehensive template browsing and includes several quick-search controls, as well as several sort and filter options for organising the display.

Custom Template Browser Dialog

Purpose - This Custom Template Browser allows all the Templates on file to be perused in a more comprehensive way than the Selector combobox on the Templates form. See VPM Custom Browsers.

Please click on the item you require help for in the picture below:-



Templates Browser - Sort Options, Option Group

To sort the items displayed in the browser main listbox simply select the required option button. These are:

- By Ref.
- By Description
- By Type

This will result in an alphanumeric sort on the chosen column. By default the listbox is sorted on the 1st column, by Ref.

Template Browser - Quick Search by Ref. or Description, Textbox controls

Quick Part-search Ref. - Textbox
Quick Part-search Description - Textbox

Rather than browsing the main listbox a quick search can be done should the template's **Ref.** or **Description** be known. A 'Find First' part-search can be accomplished - simply type as many characters as are known or might distinguish the record into the textbox and press the {ENTER} key. Subsequently pressing the {F3} key will initiate a further search, 'Find Next', which can be repeated until no further 'match' with your input text can be found within the remaining records. If found the listed item will be selected, ready for you to *Click* the 'Open' button which closes the browser and selects the corresponding record in the Template form. Pressing the {Enter} key at this time will duplicate the 'Open' button action.

See also - General Help on Searching for Records.

Templates Browser - Display Filters, Grouped Controls

The two option buttons in this group allow restricting the display in the following ways:

- All Records - No filters applied.
- Select Type - Select the subset to display from the destination type listbox.

Using the second of these options allows much easier browsing when many records of different destination types are stored in the database.

Templates Browser - Browser Main Listbox

The listbox is the main component of the browser, displaying three(3) columns of information for each record (the listed item). These are:-

- Ref. - Template Ref.
- Description - Template Description
- Type - Type of Template

Displayed items can be restricted using the Display Filters and sorted using the Sort Options to facilitate browsing when a large number of template records are stored in the database. The default settings upon entry are sort by Ref. and display All Records.
If the required item is not visible scroll the listbox until it can be selected. Simply click once to select the item and then click on the Open button to view the details back in the Templates form.
N.B. The listbox supports standard keyboard keys for rapid scrolling e.g. Page-Up/Dn, Home/End and the cursor arrow keys.
Tip: *Double Clicking* a list item both selects and operates the Open button. Pressing the {Enter} key whilst a list item is selected also operates the Open button.

See also Help on General Controls - Listboxes and Comboboxes

Templates Browser - Open/Cancel, Command Buttons

Both these buttons close the browser dialog and return to the callee form (Templates).

Open - Command button. Will make the selected list item the current record back in the callee form.
Cancel - Command button. Will not change the callee's current record, ignoring any selected list item.

Templates Form - Preview, Command Button

This button will preview the currently selected Template. It is available on all except the Print Tab of the Templates Form. It is provided as a facility to avoid the need to change tabs before quickly previewing the current template.

Templates Form - Destination And Description, Mixed Controls

This page tab contains controls for defining the Destination Type, its Ref. No. and General Description.

Destination Type - Display-only textbox (default) **or** Combobox.
When an existing template is selected as the current record the Destination Type is displayed in a read-only textbox. *When a new record is selected this control will be replaced by a combobox, allowing selection of an appropriate Type.*

Change Type - Replaces the default textbox with a combobox, allowing the re-selection of a Destination Type (N.B. This facility is primarily for use when an error assigning a template type has been made and saved).

Unique Ref. - Textbox (15 characters max.) View, edit or enter a new Unique Reference for the template.
Tip:- An agreed internal company notation should be adhered to, since this can be used for rapid access in the selector and browser *.

Description - Textbox (50 characters max.) View, edit or enter a new Description for the template.
Tip:- An agreed internal company *prefix* notation might be used, followed by a more verbose description, since this is displayed in the selector and browser *.

* Bear in mind that some VPM users build a library of several hundred templates.

Templates Form - Salutation And Sign Off, Comboboxes

Salutation - Combobox. Changes and new entries are restricted to those in the drop-down list.

Sign Off - Combobox. Entries can be selected from the drop-down list only.

Templates Form - Data Requests, Grid Control

This grid control is used for displaying, editing and adding to the collection of Template Data Requests, which allow 'special' items to be inserted into letters generated from the template. These consist of a fixed Caption and an inserted value which is determined at *the time of letter generation* by evaluation of the data request Type. The Type determines the source and format of the data value and can be one of the following:-

Type	**Data value source/format**
Auto	VPM determines the source of the data value
Date	Input a date after letter generation
Time	Input atime after letter generation
Number	Input a number afetr letter generation
Anount	Input a currency amount after letter generation
Text	Input a date after letter generation

The grid contains the two columns required for displaying and adding Data Requests:-

Caption - Combobox embedded in grid cell. Two columns are displayed 1) The Caption 2) A Yes/No column indicating whether 'Auto' is supported for the corresponding data source. Select the required Caption from the embedded combobox; the choice is restricted to those displayed in the drop-down list. The list can be extended by adding 'User defined' Data Requests should this be necessary. (See also Templates - Add New Request Caption)

Type - Combobox embedded in grid cell. Select a Data Request Type from the embedded combobox appropriate to the chosen Caption. The choice is restricted to the drop-down list.
* Choosing 'Auto' from this list for a Caption that doesn't support it will prevent the record being saved, raising a validation message; simply reset the Type to an appropriate format other than 'Auto'.

Add new data request rows into the grid control or edit existing rows until the template matches user requirements.
Tip:- It is often easier to remove an item at the time of Letter Generation than to add one manually. The limit to the number of Data Requests that can be added is set by that practical for the letter format.
See also - General Help on Grid Controls.

Templates Form - Body Text, Multi-line Textbox

Body Text - Multi-line textbox. The main or 'body' text for the letter is displayed and can be entered/edited here if it is to be used for all letters generated from this template. It is possible that text will be entered here that may occasionally be partially or fully deleted from the final letter as when it is used for prompting the user i.e. as a guide to the content.

See also - General Help on Controls - Grid Controls and Text Editor Controls

Templates Form - Print, Mixed Controls

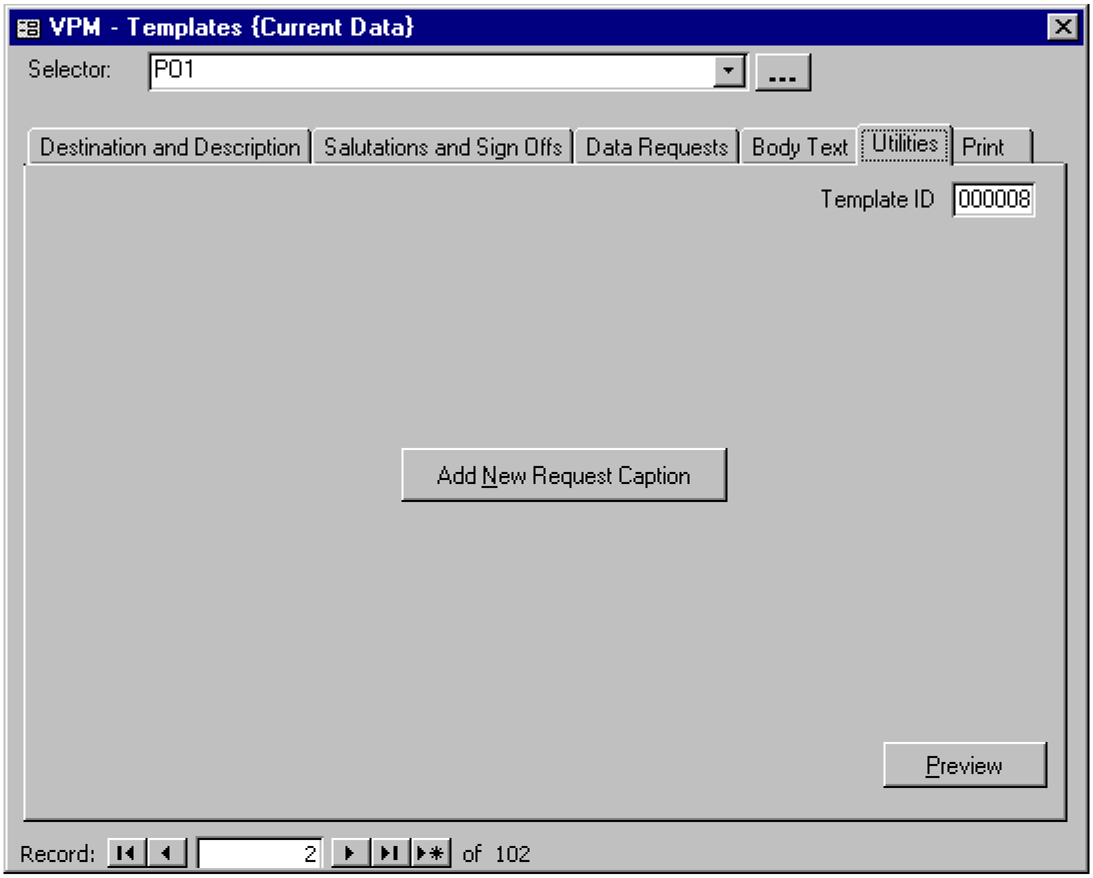
All Templates- Command Button. This will send a full report of **all** stored Templates to the print-preview window or directly to the printer dependent upon the upon the Print Option selected. N.B. This may be a lengthy report.

Currently Selected Template - Command Button. This will send a full report of the **currently selected** Template to the print-preview window or directly to the printer dependent upon the upon the Print Option selected.

Print Option - Option Button Group. This group determines whether the print output is sent to the Print-preview window or directly to the default Printer.

Templates Form - Utilities, Tab

Please click on the control that you require help for in the picture below:-



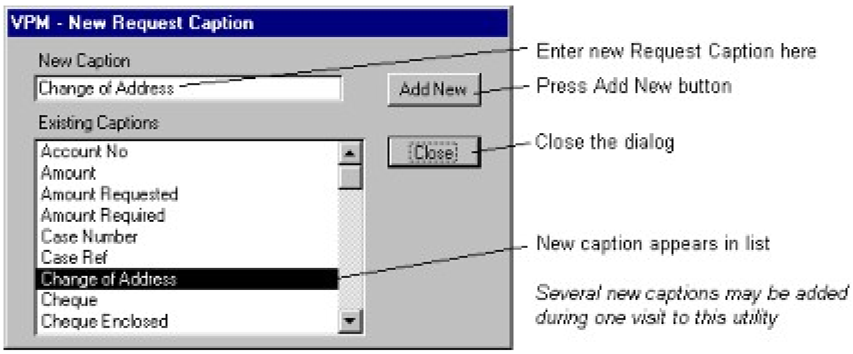
N.B. Access to this form is restricted to those specifically given rights to edit templates. This prevents inadvertent alteration of company templates by untrained personnel.

See Partner/Employee Details - Password Tab, Security Option Controls.

Templates Form - Add New Request Caption, Command button

This utility allows the list of Data Request Captions to be extended, by adding user-defined ones.
The 'Type' of the new Caption can be chosen in the normal way when adding a Data Request to the template (see also Templates - Data Requests Grid)
N.B. It is not possible for the user to add a Caption that utilises the 'Auto' data source Type.

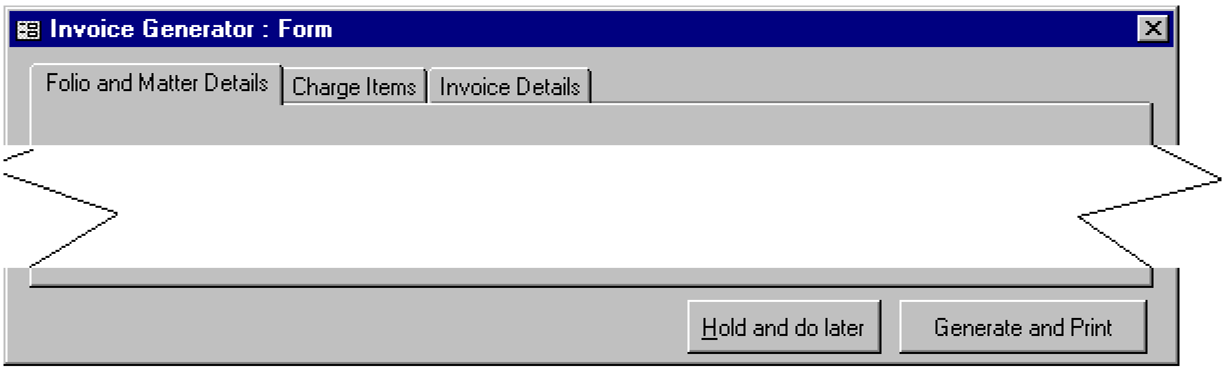
The Add New Request Caption command button pop-ups the dialog illustrated below:-



Invoice Generator Form

Purpose - Generates a printable invoice for a particular Folio Matter. This form is not accessed from the 'Matters in Connection' tab of the Folio form and cannot be opened from the VPM Switchboard.

Please click on the page tab that you require help for in the picture below:-

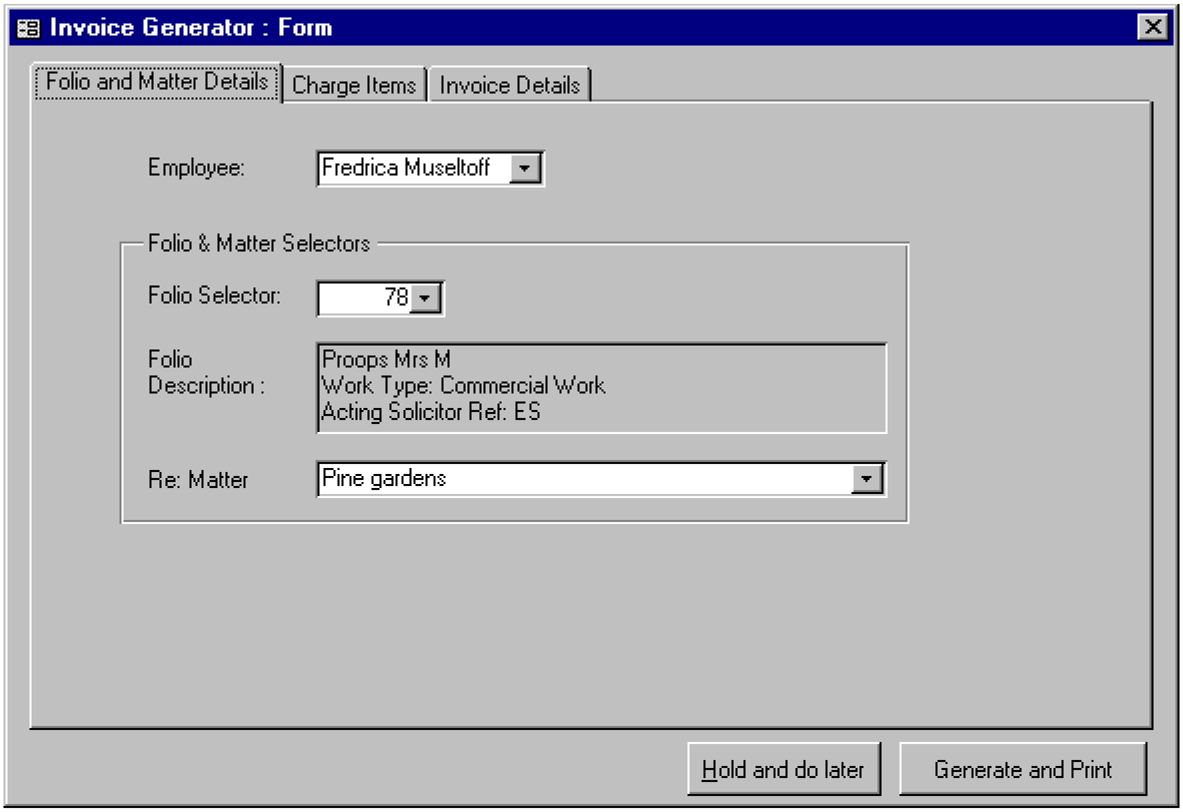


The Invoice Generator Form is a Tabbed Dialog Form. Clicking on any of its 3 tabs displays a different dialog sheet containing standard windows controls, which allow entry of Invoice Details data. Invoices are finalised by generation and printing.

N.B. Invoices are produced on a per matter basis - thus each folio will ultimately have the same number of matters and invoices.

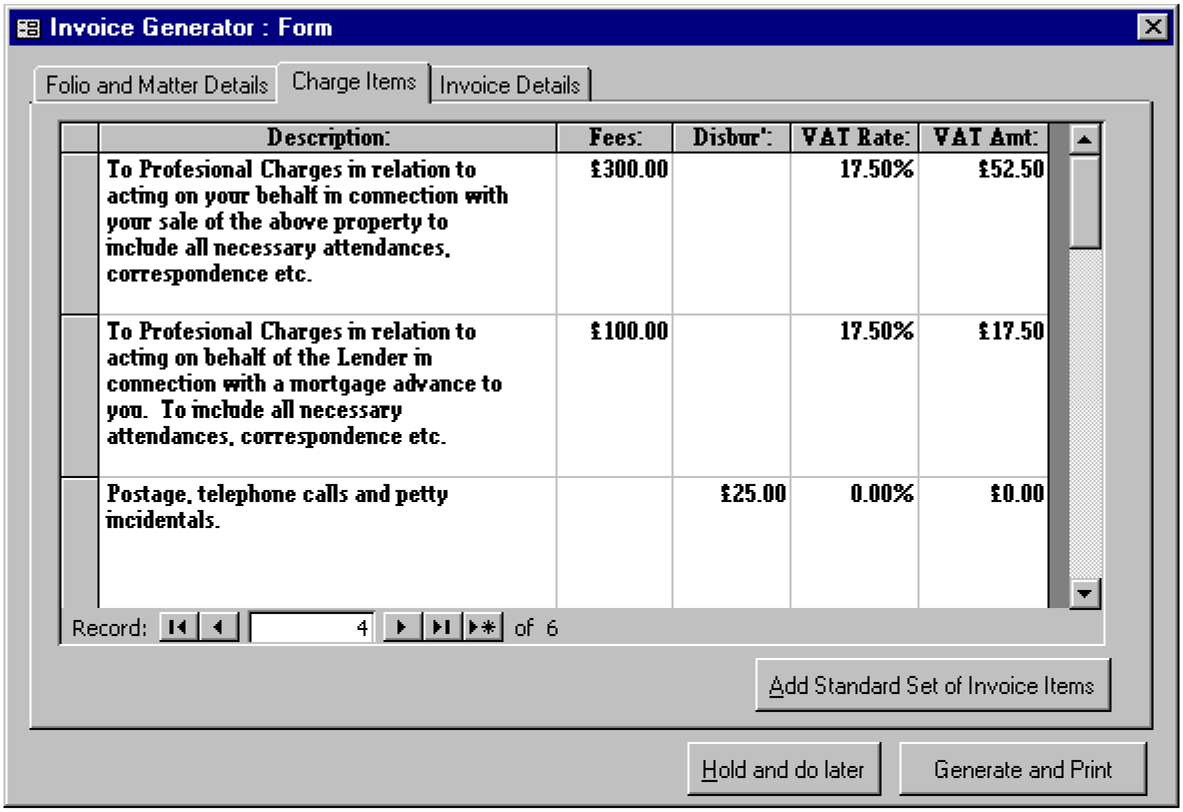
Invoice Generator - Folio and Matter Details, Tab

Please click on the item you require help for in the picture below:-



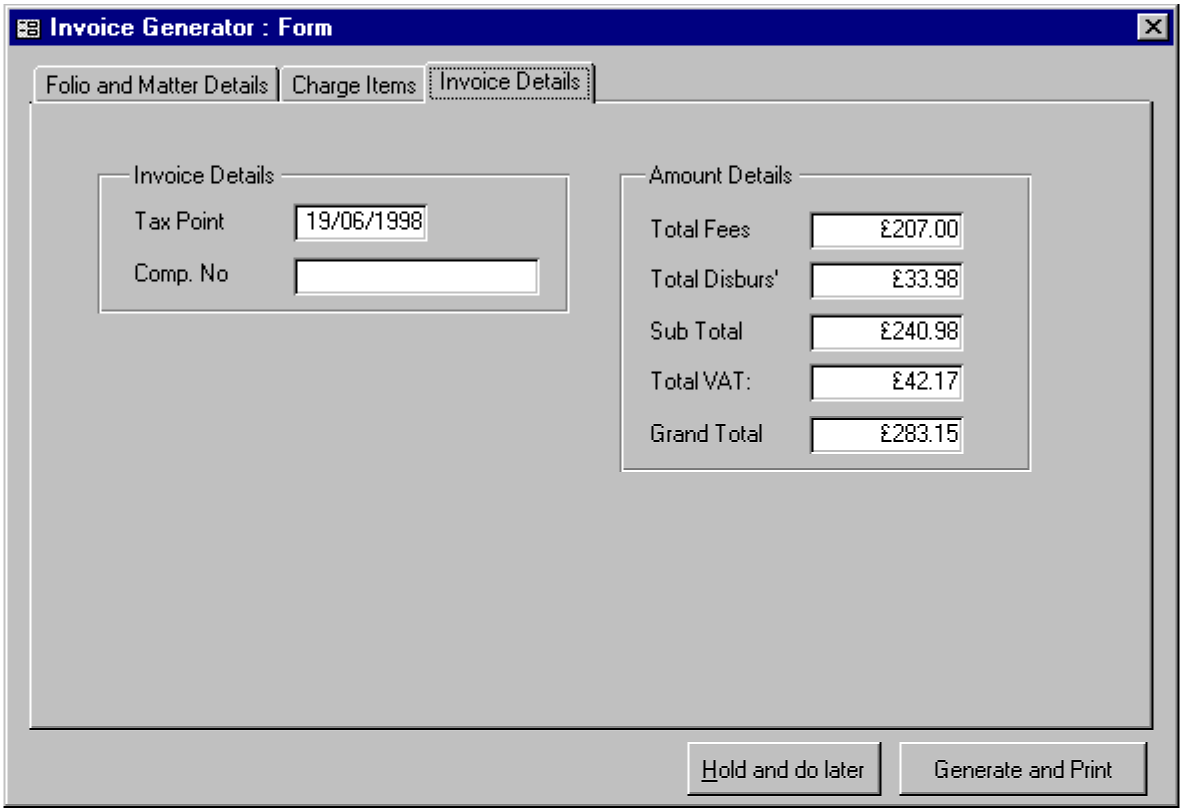
Invoice Generator - Charge Items, Tab

Please click on the item you require help for in the picture below:-



Invoice Generator - Invoice Details, Tab

Please click on the item you require help for in the picture below:-



Invoice Generator - All Tabs, Two Command Buttons

There are two command buttons that are available whichever tab sheet is currently displayed, positioned lower right of the form. These are described below:-

Hold and do later - Command Button. This can be used to defer completion of an invoice by hiding the Invoice Generator and returning to the callee, which is the Matters in Connection Tab of the Folio Form. Any attempt to produce another invoice will activate the Invoice Generator Form with the details as they stood at the time process was suspended. This is not intended to be used as a normal or regular practice but VPM *will* warn the user before closing if the Invoice Generator has been held for later completion.

Tip: This facility may be used if it is not possible to print the invoice at the time details are finished or if all the invoicing detail is yet to be furnished to the user.

Generate and Print - Command Button. This will attempt to generate and subsequently print the invoice.

N.B. An invoice is not considered complete until it has been printed, hence any attempt to close the dialog without printing will pop-up a standard message dialog asking if the user wants to abandon the invoice i.e. it is not possible to save invoices prior to printing.

Invoice Generator - Employee, Combobox

Employee - Combobox. This displays and allows changes to the employee creating the invoice (used for **Our Ref**: on the invoice and logging purposes).

Invoice Generator - Folio and Matters Selectors, Mixed Controls

Folio Selector - Combobox. This will normally be pre-configured with the current Folio ID from the callee. Can be changed here if required.

Folio Description - Display-only multi-line textbox. This displays a compounded reference to distinguish the folio.

Matter Selector - Combobox. This will normally be pre-configured with that matter chosen for invoice generation in the callee. Can subsequently be changed to generate an invoice for a different matter if required.

Invoice Generator - Charge Items, Mixed Controls

The data grid on this page allows the charge items for the invoice to be specified. The associated command button allows a standard set of Invoice items for a property conveyance to be added automatically into the grid control.

Charge Items - Grid Control. Each row of the grid corresponds to a specific charge item.
The grid has 5 columns, described below:-

Description (of charge item) - Embedded combobox. Choose from the drop-down list or type in the required description. If the latter is used then when moving-off of the control the user will be asked whether they would like the new descriptive caption added to the list *.

Input an amount for one or other of the next two columns i.e. either enter a fee or a dibursement.
Fees - Currency-formatted textbox. Enter the amount of fees charged for the charge item described.
Disbursements - Currency-formatted textbox. Enter the amount of disbursements for the charge item described.

VAT Rate - Percentage-fomatted textbox. Repeatedly *Double-Clicking* will toggle the VAT rate between the VPM default** to 0%. To enter any other VAT rate enter the corresponding fractional value **or** the actual percentage rate followed by a '%' character.
VAT - Currency formatted textbox. This will calculate and display the VAT amount on the sum of the Fees and Disbursements automatically, using the VAT rate provided.

* i.e. permanently available from the combobox for future selections. This facility can be used to customise lists to in-house requirements and also aids accuracy and consistency across all users of VPM.
** to modify the default VAT rate see Help on Switchboard Utilities Controls.

Add Standard Set of Invoice Items - Command button. Operate this button to add a standard set of items into the Invoice Items grid control. These are preset within VPM and cannot be customised by the user.

See also General Help on the Grid Control and Listboxes and Comboboxes.

Invoice Generator - Invoice Details,   Grouped Textboxes

Tax Point - Date-masked textbox. Ensure the correct tax point date is displayed here before attempting to generate an invoice. *This field is mandatory.*

Comp No.- Textbox. Displays and allows editing of a Completion No. if required.

Invoice Generator - Amount Details, Grouped Controls

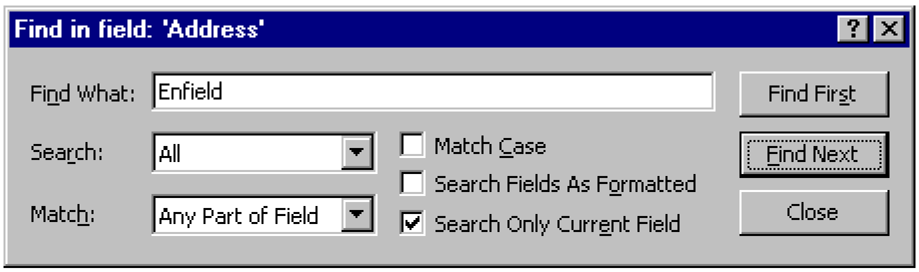
This is a group of display-only currency-formatted textboxes for showing the calculated sums of the Invoice Items (data grid control). They are itemised below:-

Total Fees - Total Fees
Total Disburs' - Total Disbursements
Sub total - The sum of all fees and disbursements
Total VAT - VAT amount total for the fees and disbursements
Grand Total - The sum of the sub-total and VAT

General Controls - Find/Find Next, Dialog

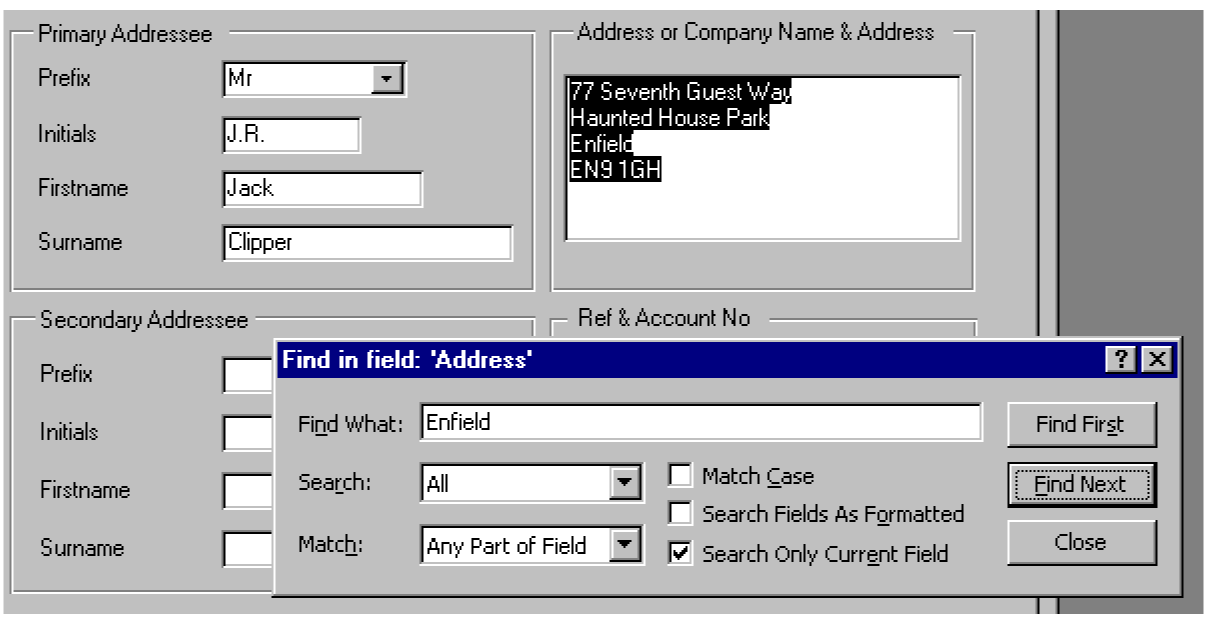
Purpose - This dialog is the control centre for searching and finding data within the current form's records. Setting the criteria to search for a known set of characters can be used to locate the first or any subsequent records containing that character set.

Please Click on the control that you require help for:-



N.B. It is important that the user chooses the correct options and criteria before initiating a Find operation from this dialog. Changing the defaults may result in not finding a text string and therefore a not finding a record that does exist..

The following is an illustration of the Find Dialog in action:-



General Controls - Find/Find Next Dialog, Mixed Controls

These controls are used to set the 'criteria' used for search and find operations.

Find what - Textbox. Type the character string that you want to search for and find.

Search - Combobox. All, Up or Down options are presented in this drop-down list.
Tip: Use 'All' by default. Search back 'Up' or 'Down' at the user's discretion.

Match - Combobox. All (anywhere), Any Part of Field, Start of Field are presented in this drop-down list. This can be used to specify where the user expects the text string to be found within the search field. All will find the string anywhere in the the chosen field(s) - see last control item*.

Match Case - Checkbox. When checked this requires the exact case of each character in the 'Find What' text string to be matched.

Search Fields As Formatted - Checkbox. Checking this takes into account the presence of line feeds and carriage returns, as well as other formatting characters, before selecting the text as found. Tip: Leave this unchecked by default.

Search Only Current Field * - Checkbox. Checking this will limit the search to the active control's data field, otherwise all the fields on the form are searched in order to find the required 'Find What' text string.
N.B. If this control is checked the required search field (control) must be made active by selecting it *before* the search is initiated.

General Controls - Find/Find Next Dialog, Command Buttons

Find First - Command Button. This initiates a search to find the **first** occurrence of the 'Find What' text string, using the search criteria entered in the dialog's main controls.

Find Next - Command Button. This initiates a search to find the **next** occurrence of the 'Find What' text string (if any).
Tip: The Windows' standard keypress for Find Next is <F3>.

Close - Command Button. Closes the Find/Find Next dialog. If subsequently re-opened from the toolbar the dialog will have retained the criteria that were last used.

N.B. After the dialog has been closed using the Toolbar's own Find Next button can then be used to move sequentially through records that are succesfully matched.

Reminder Generator - Mixed Controls

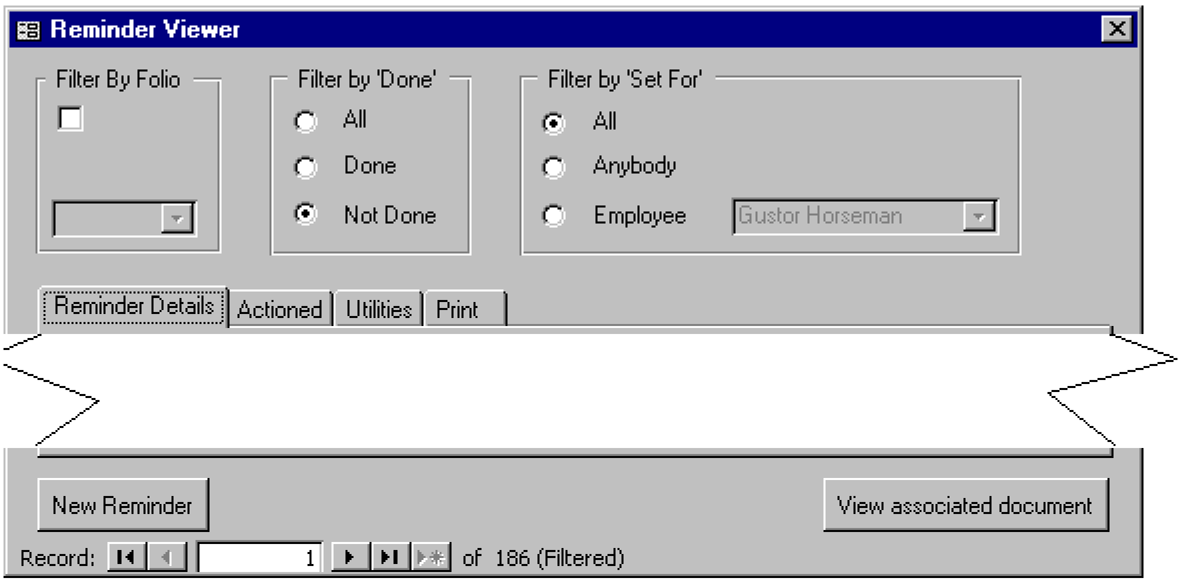
The controls on this form and their purpose are defined and described below:-

Set By - Combobox. This defaults to the current employee but can be re-selected if required.
Set For - Combobox. Select the employee/fee earner for whom the reminder is being set for.
Folio Selector - Combobox. Reminders have to be associated with a particular folio. Select.
Folio Description - Display-only multi-line textbox. This will confirm the selected folio's details.
Type - Combobox. Reminders can be one of six different types. Select one of the types listed which will enable the corresponding combobox (described below) unless a Folio or General type is chosen which require no further selection.
    Letter Selector - Combobox. If this is the type choice then select the Letter the reminder is for.
    Memo Selector - Combobox. If this is the type choice then select the Incoming memo the reminder is for.
    Property Selector - Combobox. If this is the type choice then select the Property matter the reminder is for.
    Lit/Crim Selector - Combobox. If this is the type choice then select the Lit/Crim matter the reminder is for.
Style - Combobox. Reminders can be one of two styles. Remind Until Done or Remind On (a date/time).
Remind Date - Date masked textbox/Calendar control pair. If the style is 'Remind On' then select a date
Remind Time - Time-masked textbox. If the style is 'Remind On' then input a time *if this is required.*
Note - Multi-line textbox. As an 'aide de memoir' a   short note can be typed in here if required. Generally the reminder itself combined with the above selections is often sufficient to adequately documnet the reminder.
Save - Command Button. This will save the reminder unless a mandatory data item has been omitted and then close the reminder generator dialog.
Cancel - Command Button. This will cancel any input and close the reminder generator dialog.

Reminders Viewer Form

Purpose - Accessed from the Main Switchboard, this form offers sorting and filtering of reminders for selective viewing and actioning of reminders. Additionally, deleting of 'Done' reminders, selective printing of reminders and other relevant utility functions are available.

Please click on the page tab that you require help for in the picture below:-



The Reminders Viewer Form is a Tabbed Dialog Form. Clicking on any of its 4 tabs displays a different dialog sheet containing standard windows controls, which offers viewing details, actioning, deleting and printing of reminders. Once filtered suitably navigate the records using the data control record selectors at the bottom of the form.

Reminder Viewer - Filter Groups

These three groups of controls are available regardless of which page tab has been selected. They allow the filtering (restriction) of reminders in the forms records for easier selection and viewing.
N.B. The three distinct filter groups work in unison, that is the filter restrictions are combined with AND as opposed to OR e.g. This restriction AND that restriction AND the other restriction.

Filter by Folio:
Checkbox - To filter the displayed reminders down to a subset for a specified folio toggle the checkbox 'On' (ticked). This then enables the combobox in this group (see below). To remove the filter restriction uncheck this box.
Combobox - Once enabled and active, a specific folio can be selected from this combobox, restricting the reminders that can then be selected with the data control.

Filter by 'Done':
This group consists of three option buttons. Select the button that best suits your filtering requirements.
All - This effectively removes the 'Done' filter, allowing display of reminders regardless of their 'Done' status.
Done - This restricts reminders to those that have been actioned as 'Done'.
Not Done - This restricts reminders to those that have not been actioned as 'Done'

Filter by 'Set For':
This group consists of three option buttons and an associated employee selection combobox. Select the button that best suits your filtering requirements.
All - Option Button. This effectively removes the 'Set For' filter, allowing display of reminders regardless of who set them.
Anybody - Option Button. This restricts reminders to those set for anybody e.g. General reminders.
Employee - Option Button. This restricts reminders to a specific employee, that employee being the one currently displayed in the employee combobox (see below).
Employee - Combobox. This is only enabled when the employee option button is selected. Initially this will display the current employee but can be changed by reselection. This combobox is also used to define the 'Done By' employee when actioning a reminder as 'Done'; warnings are given if it has be changed from the original (current employee) setting. See also - Set Reminder Done Command Button on the 'Actioned Tab'.

Reminder Viewer - ID's, Textboxes

Reminder ID - Display-Only Textbox. Displays the Reminder ID. Can be used to re-sort the records (see General help on Sorting Records).

Folio ID - Display-Only Textbox. Displays the associated Folio ID for information only..

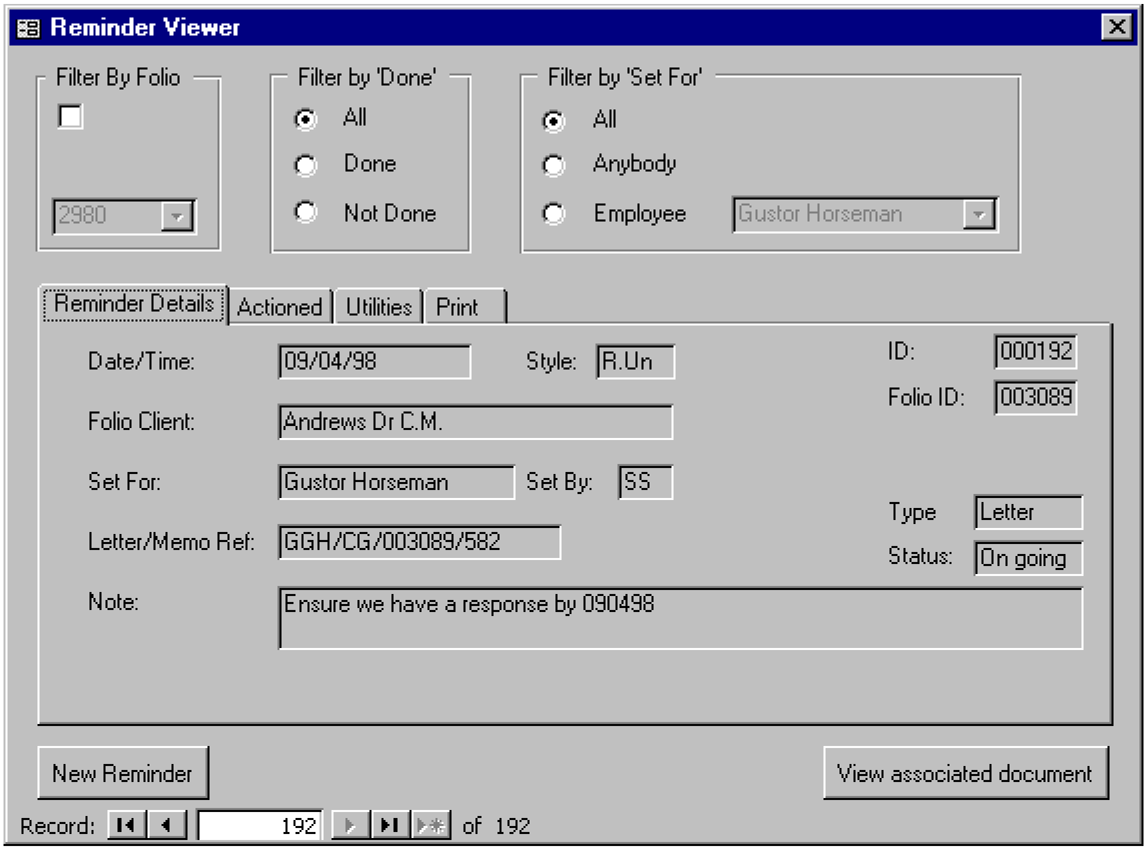
Reminder Viewer - Utility Functions, Command Buttons

New Reminder - Command Button. This will open the Set Reminder (Reminders Generator) Form.

View Associated Document - Command Button. This attempts to open the document associated with the currently selected reminder. This can be a Folio, Letter, Memo (for an Incoming event), Property or Litigation Matter.
N.B. A general reminder does not have an ssociated document.

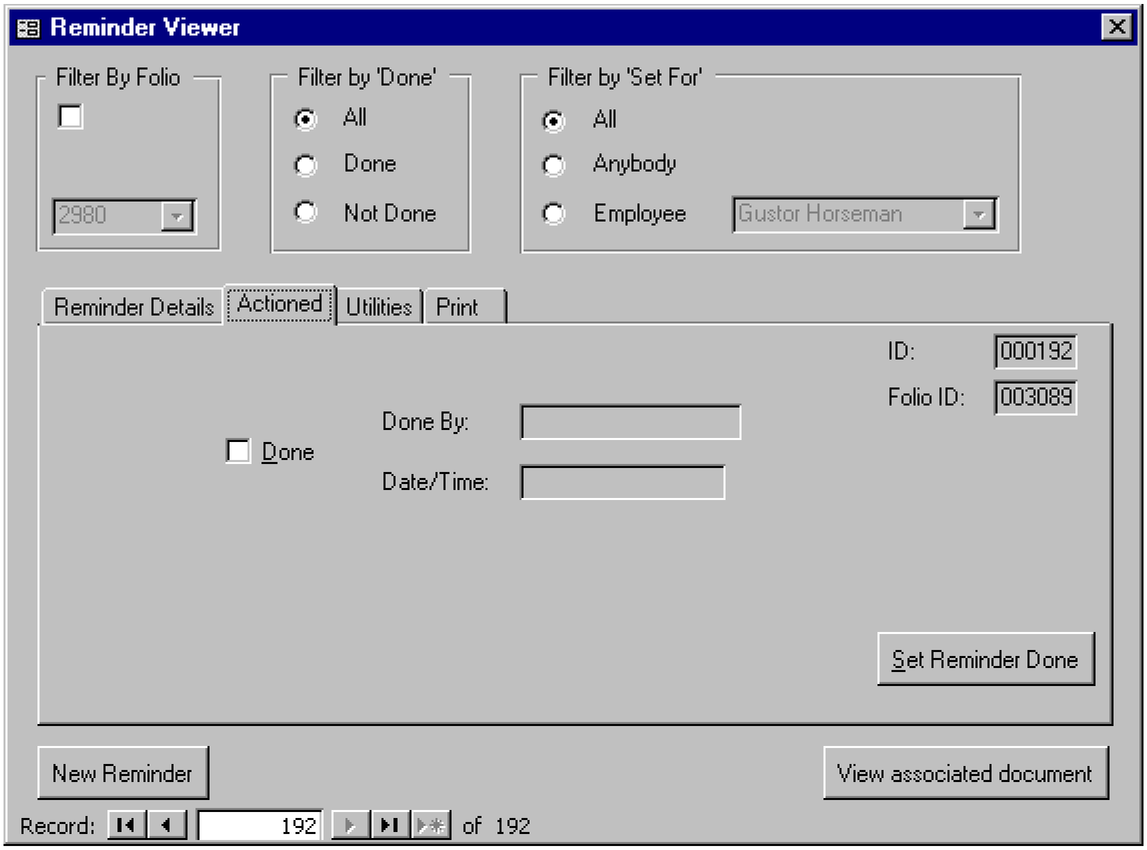
Reminder Viewer - Reminder Details, Tab

Please click on the item you require help for in the picture below:-



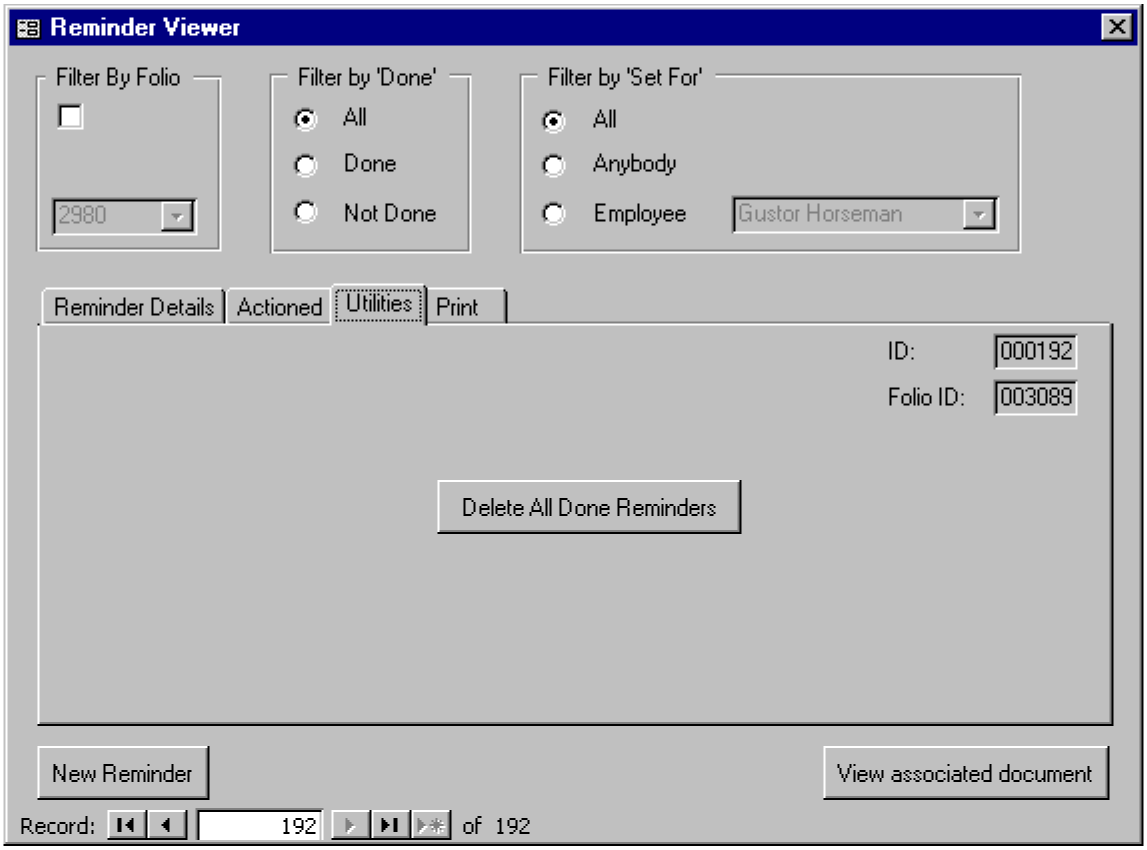
Reminder Viewer - Actioned, Tab

Please click on the item you require help for in the picture below:-



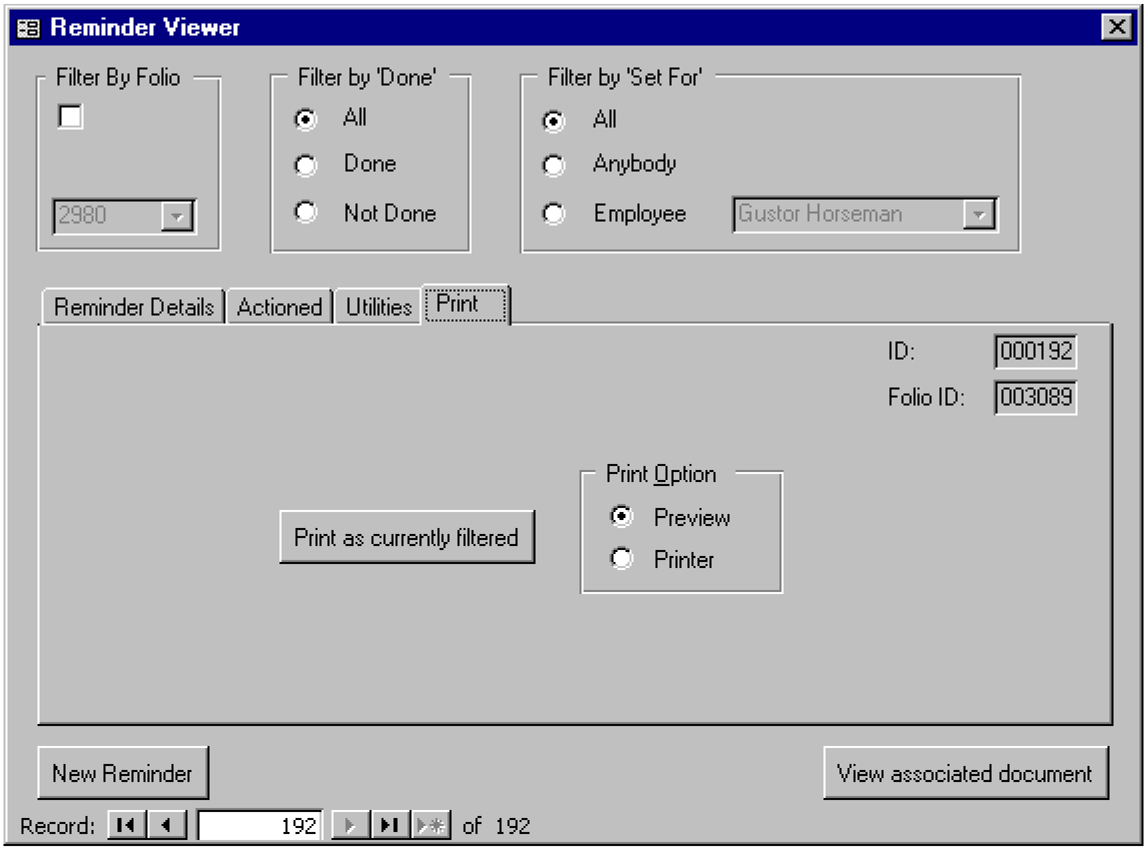
Reminder Viewer - Utilities, Tab

Please click on the item you require help for in the picture below:-



Reminder Viewer - Print, Tab

Please click on the item you require help for in the picture below:-



Reminder Viewer - Reminder Details Tab, Mixed Controls

This page displays the main details of the currently selected reminder for viewing/reference purposes.
N.B. All controls on this page are display-only textboxes.

Date/Time - Displays the date or date and time the reminder was set.
Folio Client - Displays the client's name for the associated folio.
Style - Displays the style. Either Remind Until Done/Remind On (a given date/time)
Set For - Displays the employee/fee earner that the reminder has been set for.
Set By - Displays the employee who originally set the reminder.
Letter/Memo Ref. - Displays the reference of the associated letter or memo (or property/lit crim matter).
Type - Displays one of the reminder types from Folio, Letter, Incoming (memo), Property, Litigation or General.
Status - Displays the status. Either On-going or Expired.
Note - Displays any notes made at the time the memo was set.

Reminder Viewer - Actioned Tab, Mixed Controls

This page allows the currently selected reminder record to be actioned as 'Done'.

Done - Display-only checkbox. If this box displays as checked then the reminder has been 'Done'. Note that if the current filters are set for 'Not Done' then no records will show this as checked.
Done By - Display-only textbox. This displays the employee that actioned as 'Done' the reminder.
Date/Time - Display-only textbox. This displays the date or date/time that the reminder was actioned as 'Done'.

Set Reminder Done - Command Button. When displaying reminders that include those 'Not Done' then the user can use this button to action the reminder as 'Done'. The current date and time are used together with the selected employee -
please read the note below.
N.B. The 'Done By' employee will be the currently selected employee as shown in the ermployee combobox positioned within the Filter by Employee Group. If this has been changed since opening the form then a warning is sissued and a single opportunity to re-set this is given.

Reminder Viewer - Utilities, Delete All Done Reminders, Command Button

Delete All Done Reminders - Command Button. Use this button to remove all remiders actioned as 'Done' from VPM's database.
Tip: Restrict use of this facility to fee aerners/partners if old reminders might be required for reference/archive purposes.

Reminder Viewer - Print, Print Controls

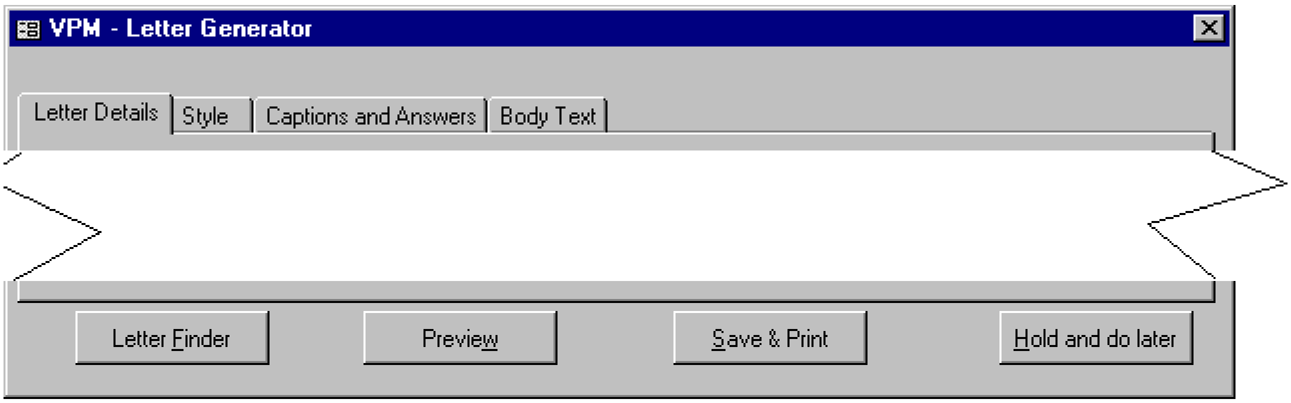
Print As Currently Filtered - Command Button. This will send all reminders in the currently filtered records set to the device selected in the Print Option Group below.

Print Option Group:
Preview - If this option is selected then the print output will be directed to the print preview window.
Printer - If this option is selected the print output will be directed to the default printer.

Letter Generator Form

Purpose - This form allows the rapid generation of letters utilising the information stored in VPM's database. This process effectively brings together the many strands of VPM's data input forms to produce useful output.

Please click on the page tab that you require help for in the picture below:-



The Letter Generator Form is a Tabbed Dialog Form. Clicking on any of its 4 tabs displays a different dialog sheet containing standard windows controls; the sheets take the user through the logical steps required to generate a letter.
Using the View 'n New Group buttons on the first page it is possible to view or create information that is missing (yet required) and subsequently return to the generator ready to resume production of a letter.

Letter Generator - All Tabs, Command Buttons

Four command buttons are positioned along the bottom of the letter generator's form which are accessible at all times. These are described below:-

Letter Finder - Command Button. This pops-up a dialog which offers quick and easy finding of any letter within the VPM database. See Letter Selector Dialog.

Preview - Command Button. This opens the Print Preview window, displaying the letter as currently configured. N.B. Note that the letter reference will not be fully formed until it is committed to printing.

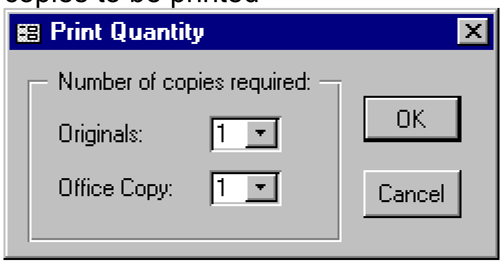
Save and Print - Command Button. Please see separate Help topic for Save and Print.

Hold and Do Later - Command Button. This facility allows the letter generator to be hidden temporarily whilst other actions are carried out e.g. recording incoming messages. Any attempt to produce another letter will activate the Letter Generator Form with the details as they stood at the time the process was suspended.
N.B. Any attempt to close VPM will produce a warning if letter generation has been held for later completion.

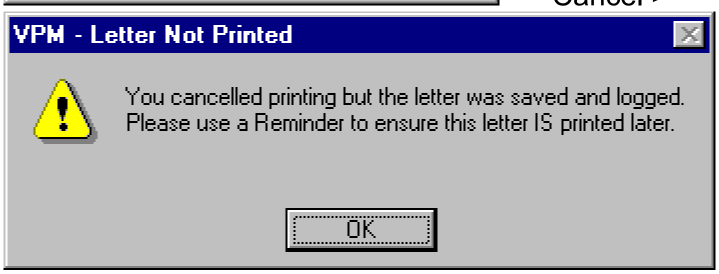
Letter Generator - All Tabs, Save & Print Command Button

Save and Print - Command Button. This starts the print process detailed below:-

1) Pops-up a dialog with a brief list of details requring confirmation.
2) Pops-up a Print Quantitiy dialog allowing the user to set the number of originals and office copies to be printed >

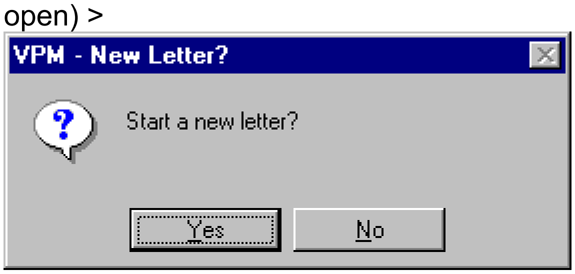


Cancel >

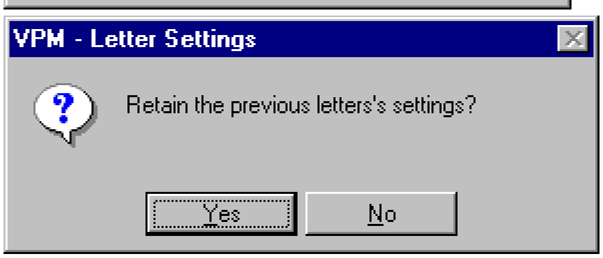


2a) If 'Cancel' is chosen **the letter is logged but not printed** and a warning issued.
2b) If 'OK' is chosen the letter is printed on the default printer and logged as normal.

3) The Reminder Generator is opened pre-configured with the letter details. Save or Cancel.
4) The user is queried as to whether a new letter is to be started (keeping the Letter Generator open) >



Yes >



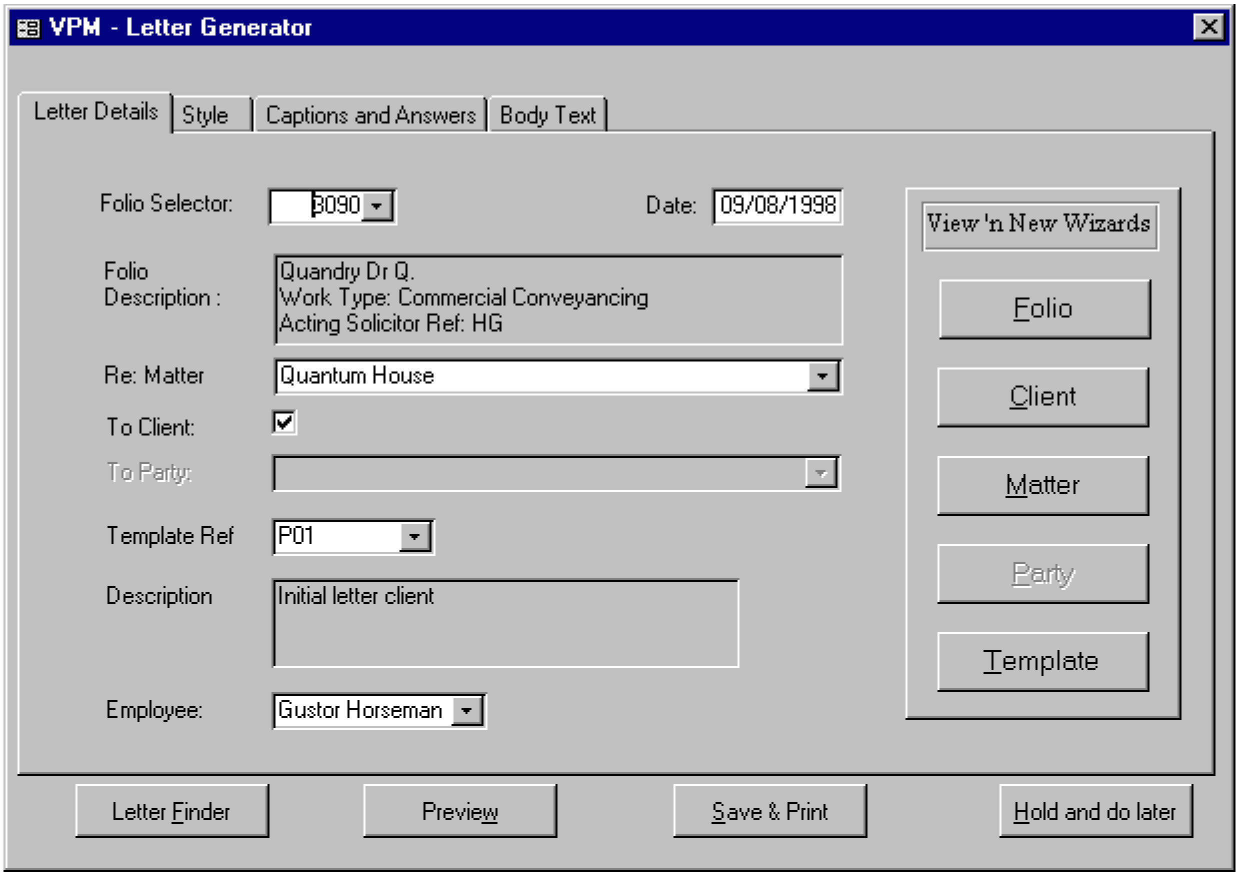
4a) If 'Yes' is chosen the user is asked if the existing settings are to be retained (or a new letter is to be started). 4b) If 'No' is chosen the Letter generator is closed.

N.B. A letter is not considered complete until it has been printed, hence any attempt to close the dialog without printing will pop-up a standard message dialog asking if the user wants to abandon the letter i.e. it is only possible to log (and hence save) a letter by cancelling the Print

Quantity dialog as described above.

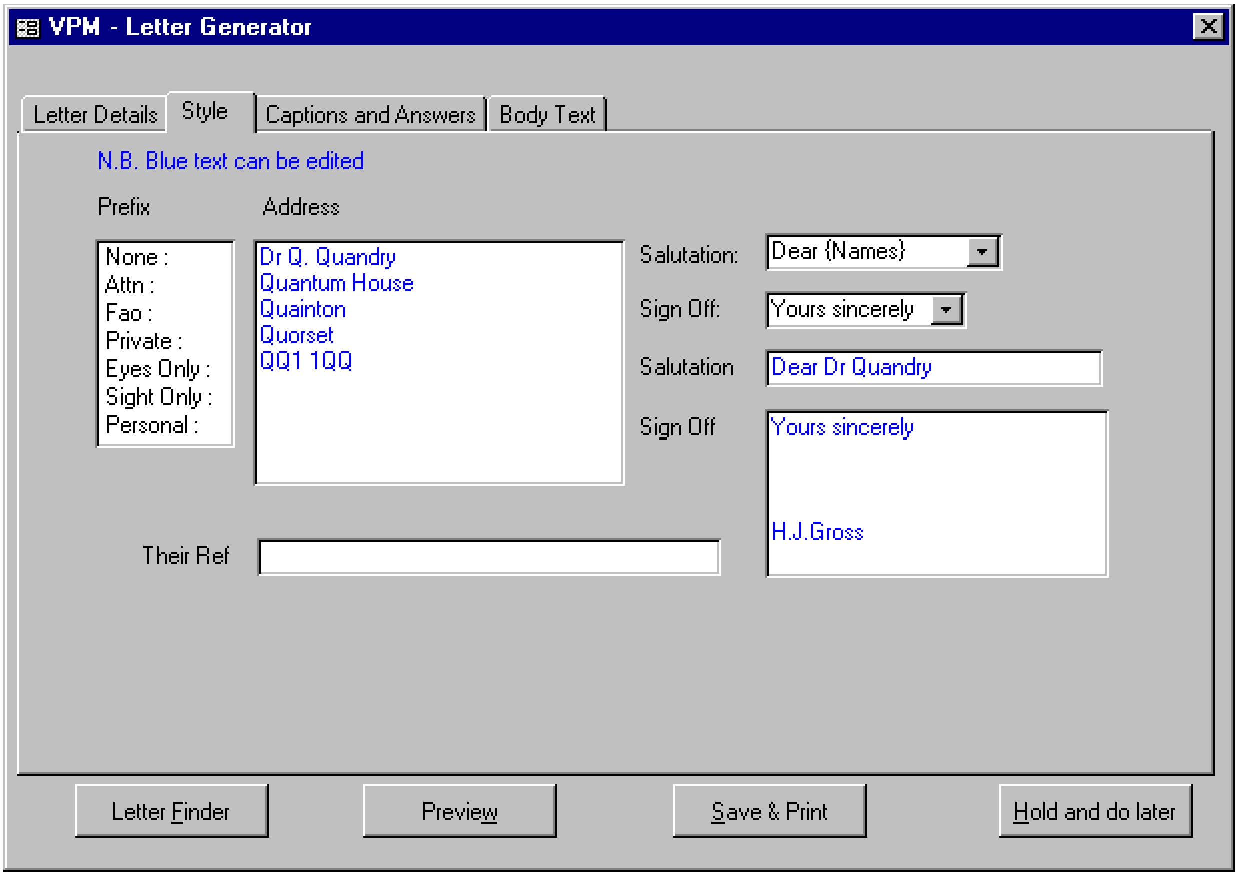
Letter Generator - Letter Details, Tab

Please click on the item you require help for in the picture below:-



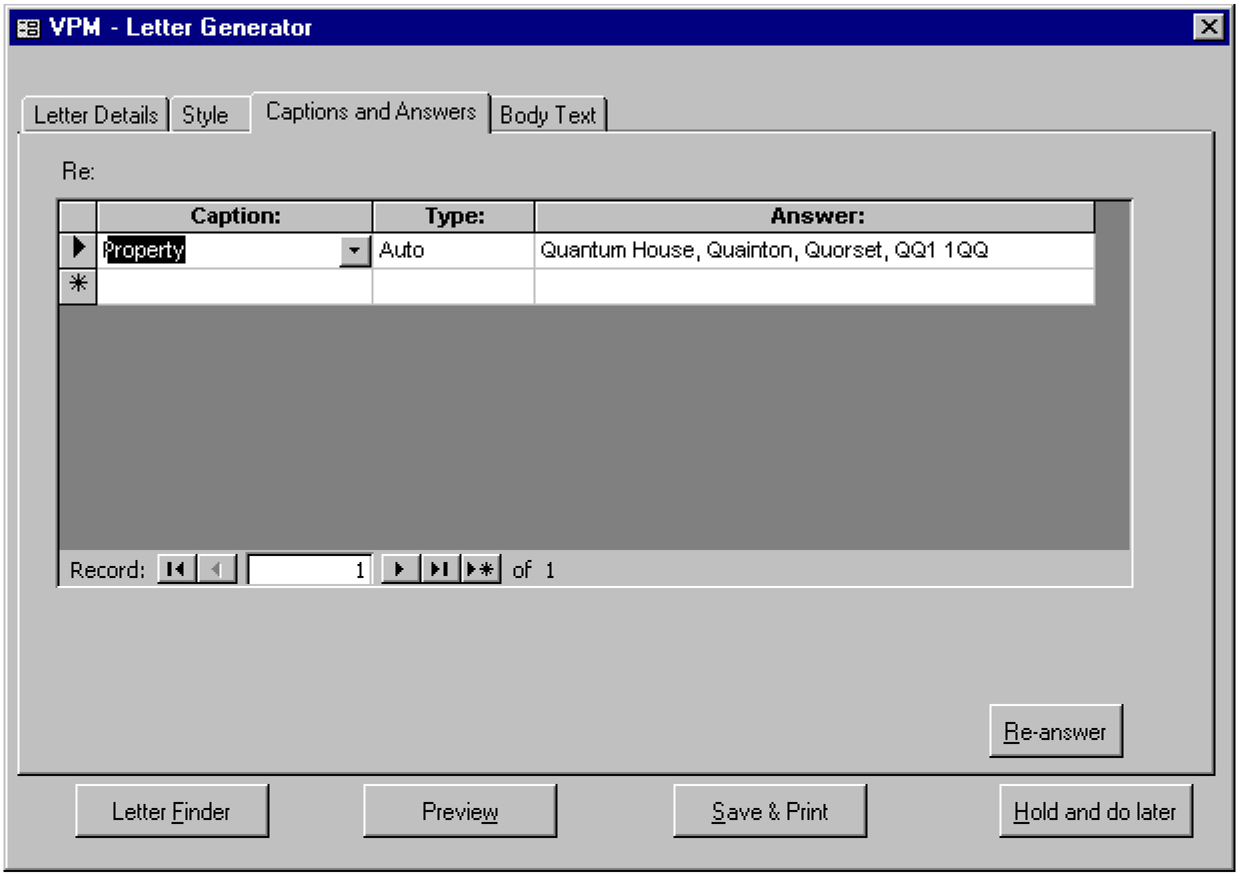
Letter Generator - Style, Tab

Please click on the item you require help for in the picture below:-



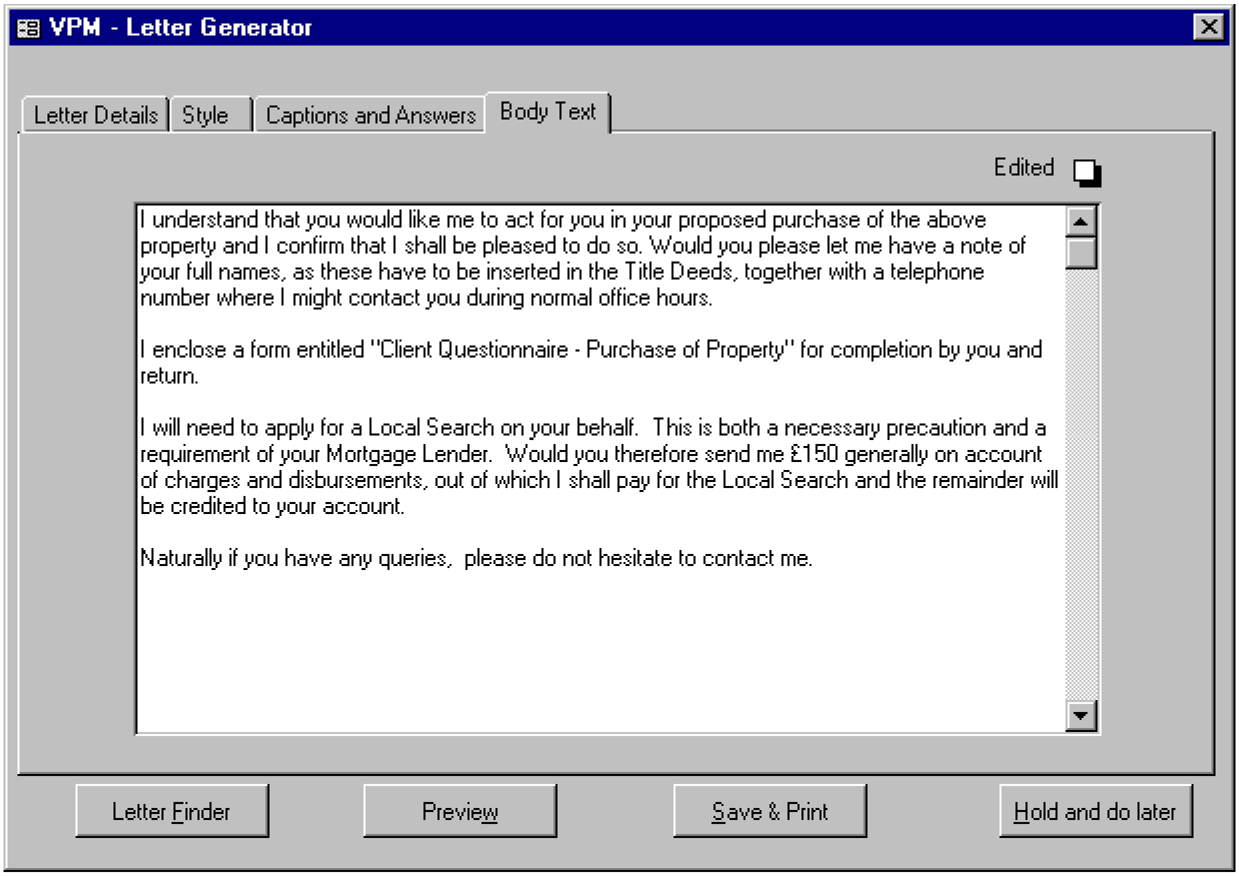
Letter Generator - Captions and Answers, Tab

Please click on the item you require help for in the picture below:-



Letter Generator - Body Text, Tab

Please click on the item you require help for in the picture below:-



Letter Generator - Letter Details, Mixed Controls

The Letter Generator is designed such that the controls are used in a logical sequence, starting from the top.
The combobox controls are initially disabled and are automatically enabled in sequence as required.
Tip: If at any stage the required item details require confirming OR the item doesn't exist it is usually possible to view or create new using the corresponding button from the View 'n New Wizards button group.

Folio Selector - Combobox. (1) First select the required folio from those in the drop-down list. Confirmation details for the chosen folio will then be displayed in the Folio Description control (see below).

Folio Description - Display-only mutli-line textbox.

Re. Matter - Combobox. (2) Select the required matter, from those listed for the chosen folio.

To Client - Checkbox. (3) Initially checked, this will automatically use the folio's client as the addressee. If the letter is to be addressed to another party then un-check this box to enable the 'To Party' combobox control (below).

To Party - Combobox. (4) If the above checkbox is not checked then select an 'Other Party Destination' from those listed for the chosen matter.

Template Ref. - Combobox. (5) Chose the letter template for the style of letter required from those in the drop-down list. Confirmation details will then be displayed in the Template Description control (see below).

(Template) Description - Display-only mutli-line textbox.

Employee - Combobox. (6) Select the employee responsible for generating the letter.

Date - Date masked textbox. This is automatically set to today's date. Change this date if required.

Letter Generator - View 'n New Wizards, Command Buttons

Purpose - This group of five command buttons allows the user to inspect item details relevant to the letter generation process. Additionally, where the context allows, editing and creation of new details can be performed via these wizards. Navigation to other forms through these wizards will always return the user to the Letter Generator with any relevant changes being updated in the letter details controls i.e. a circular route is taken via whatever forms are necessary to change or add relevant data items..

Usage:-
The View 'n New Wizards correspond to the key data items required for letter generation on the Letter Details Tab. In each case, the program first checks if a corresponding data item has been selected and if not the user is asked whether they require to create a new entry of that type. If confirmed then then the relevant form is opened pre-configured for 'Add New'. If a data item has been selected then the wizard button simply opens the corresponding form with the item selected, where it can be viewed or edited by the user, provided this process is within context and would not invalidate data integrity.
In this way it would be possible to create a complete folio with all relevant information for generating a letter directly from the Letter Generator itself - though this would be an unusual way of working with VPM!

The View 'n New Wizard buttons are listed below:-

Folio; Client; Matter; Party; Template.

Letter Generator - Style Tab, Mixed Controls

The controls on this page allow inspection and alteration of the addressing and salutation details for the letter if these automatically generated details are not as required for the final printed output.
Information displayed in blue can be edited and any changes are incorporated into the letter as printed.

Prefix - Listbox. Reselect a new prefix if required from this listbox.

Address - Multi-line textbox. Displays the address as formatted for printing, reflecting the chosen prefix and the addressing details as chosen in the Client or Other Party' form. Edit if required.

Salutation - Combobox. Reselect a new salutation style if required.

Sign Off - Combobox. Reselect a new sign off style if required.

Salutation - Textbox. Displays the salutation as formatted for printing, reflecting the chosen style and the addressee's name as chosen in the Client or Other Party' form. Edit if required.

Sign Off - Mutli-line textbox. Displays the sign off as formatted for printing, reflecting the chosen style and the senders name as specified in the employee name control on the Letter Details Page. Edit if required.

Their Ref. - Textbox. If required, the addressee's supplied reference can be entered here for inclusion in the letter.

Letter Generator - Captions and Answers, Grid Control

Purpose - The default Data Request Captions and their corresponding Types and Answers from the letter's template are displayed on this page in a Data Grid Control. The grid control displays and allows non-automatic Data Requests to be completed. It is also possible to delete template provided Data Requests, change the Type or Add a New request.

Deleting a data Request item. Select the grid row and use the delete key.
Adding a new data request to the list. Select the new row or click the New record (*) button on the grid's data control record selector.
Use the embedded combobox to select a Caption and likewise a suitable data Type.
To edit an existing Caption or Type simply select the respective embedded combobox and reselect.
Please see the Help Topic: Template Form - Data Requests, Grid Control for further help on this control.

The grid control has 3 columns listed below:-
Caption; Type; Answer

Re-Answer - Command Button. It is important that this button is used to update the grid's Answers column for 'Auto' Type requests if any changes have beeen made.

Tip: Should data for 'Auto' Type requests be found to be missing or be incorrect (after using the 'Re-Answer' button!) it is possible to use the View 'n New Wizard buttons on the Letter Details page to open up the required form; inspect, confirm and change the data item and then return to the Captions and Requests page, not forgetting to 'Re-Answer' to view the change(s) made.

Letter Generator - Body Text Controls

The 'Body Text page conatins just two controls. A Text Editor and a checkbox.

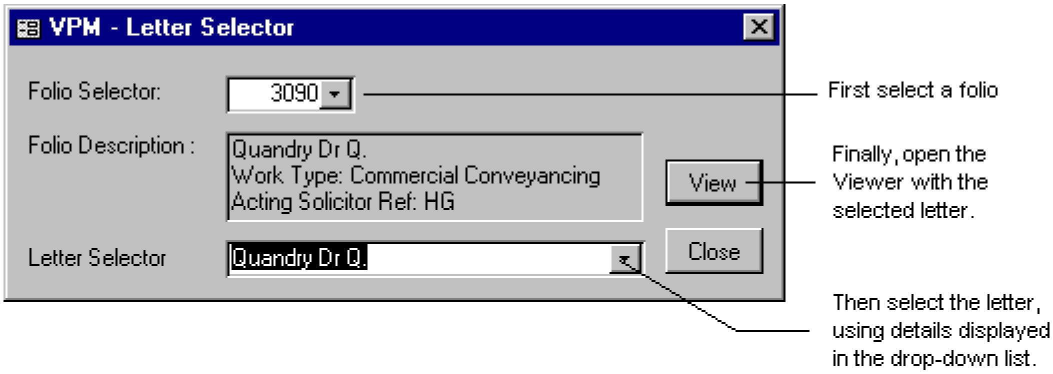
Body Text - Text Editor - This displays and allows editing of the letter text, Initially this will appear exactly as entered into the template that the current letter has been based upon (selected on the Letter Details page). Edit the letter body text if required.

Edited - Display-only checkbox. This will be checked if the letter's body text has been changed from that contained in the specified template.

Tip: If multiple or detailed changes are required for always required for a given template then it is worth considering a building a new template specifically for that purpose.

Letter Selector Dialog

Use this dialog to rapidly find and view a letter within CPM's database.



Letter Viewer - Letter Selector, Combobox

Letter Selector - Combobox. This is the preferred control to quickly select a Letter should the major details be known. The drop-down listbox displays four columns, Folio Client, Our Ref., Dated and Destination. Either select from the drop-down list or use the built-in quick-search features (See General Help on Listboxes and Comboboxes)

The Letter Viewer Form also contains a standard data control style record selector at the bottom left which can be used to navigate records sequentially. Additionally, displayed records can be filtered by letter date using the Filter by Date/Use Date Filter controls provided, thus making record selection using the data control much quicker and easier.

Letter Viewer - Filter By Date/Use Filter, Mixed Controls

Purpose - These controls allow the displayed records to be filtered (restricted) to those letters with a specific letter date. This will usually reduce the number displayed to that easily managed and navigated using the standard data control style record selectors.

Filter by Date - Combobox. This is enabled and disabled by checking the 'Use Filter' checkbox described below. When first enabled, the drop-down listbox is displayed from which has two columns, LetterDate and (Letter) Count.
Select the required date to restrict the displayed records to those for that date.

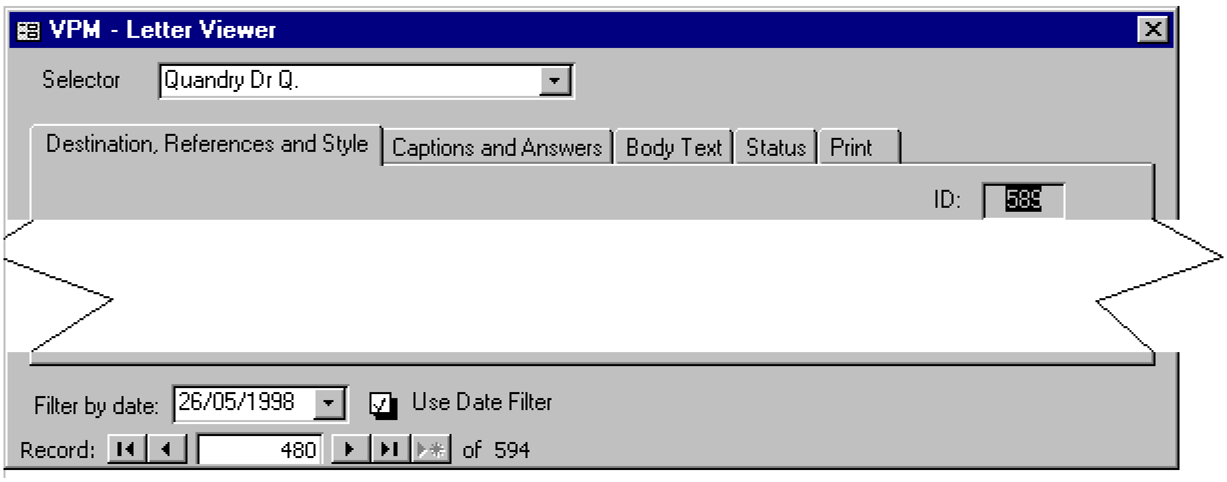
LetterDate	Count
26/05/1998	13
22/05/1998	5
21/05/1998	13
20/05/1998	8
19/05/1998	16
18/05/1998	3
15/05/1998	3

Use Filter - Checkbox. When checked this will enable the 'Filter by Date' combobox described above. When it is un-checked the combobox is disabled and **all records are then re-displayed.**

Letter Viewer Form

Purpose - This form is provided for easy inspection of letters that have been generated and are stored in VPM's database. Four tabbed pages of information are provided which correspond loosely to those found in the Letter Generator. The fifth tab provides print preview and printing functions.

Please click on the page tab that you require help for in the picture below:-

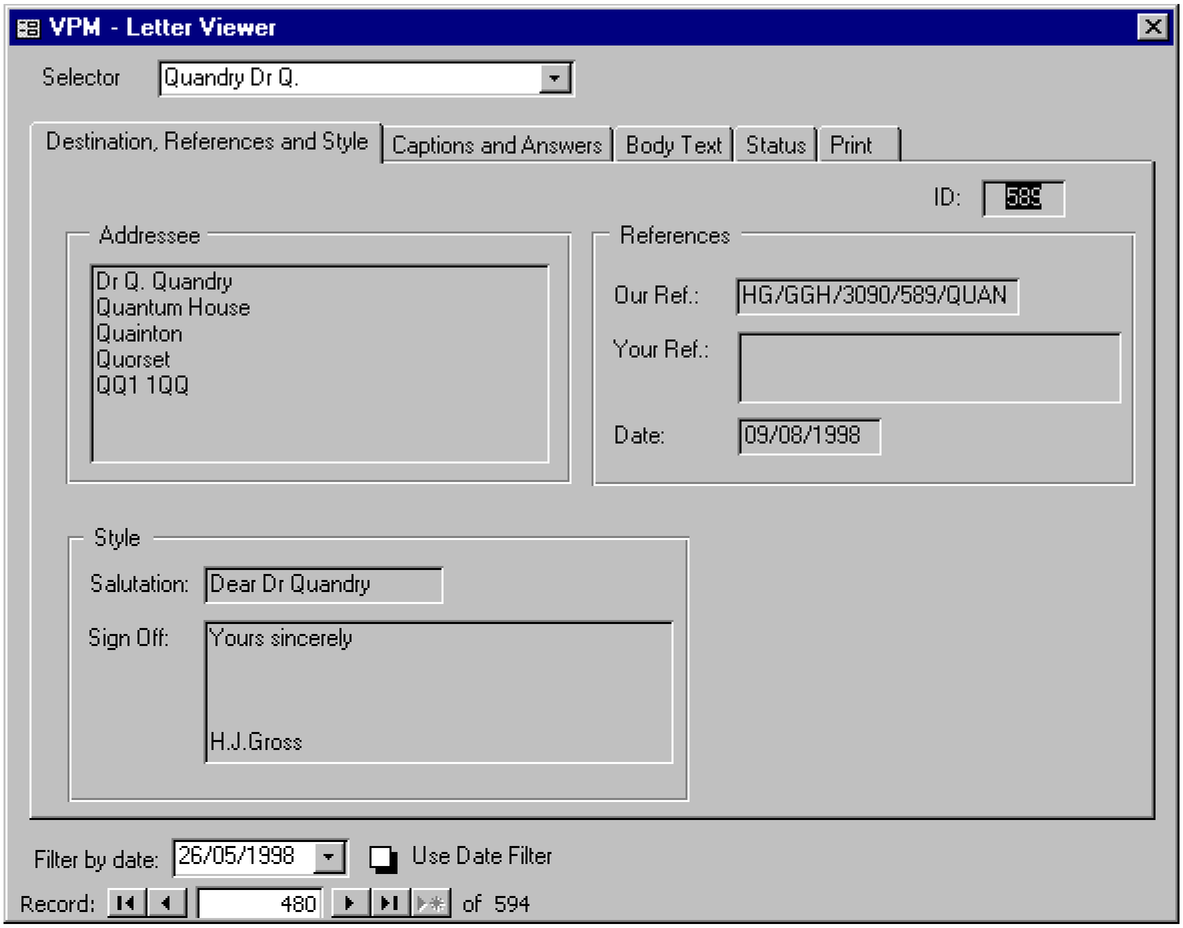


The Letter Viewer Form is a Tabbed Dialog Form. Clicking on any of its 5 tabs displays a different dialog sheet containing standard windows controls. Find the required letter either from the record selector at the top left or use the date filter facility; once suitably filtered then navigate records using the data control selectors at the bottom of the form.

N.B. The controls on this form for displaying letter details are all read-only/display-only - the form is intended for browsing letter details only; generated letter details cannot be changed.

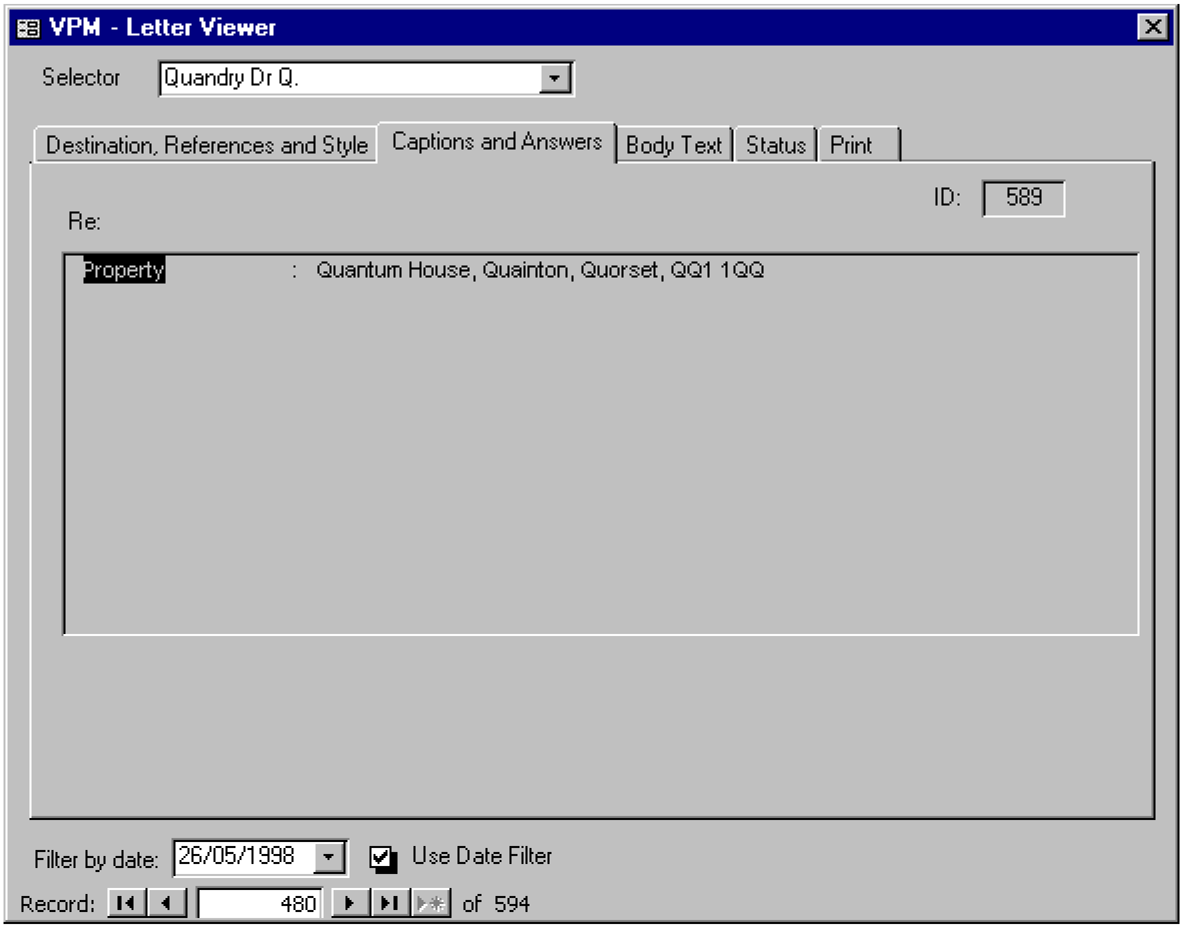
Letter Viewer - Destination, References and Style, Tab

Please click on the item you require help for in the picture below:-



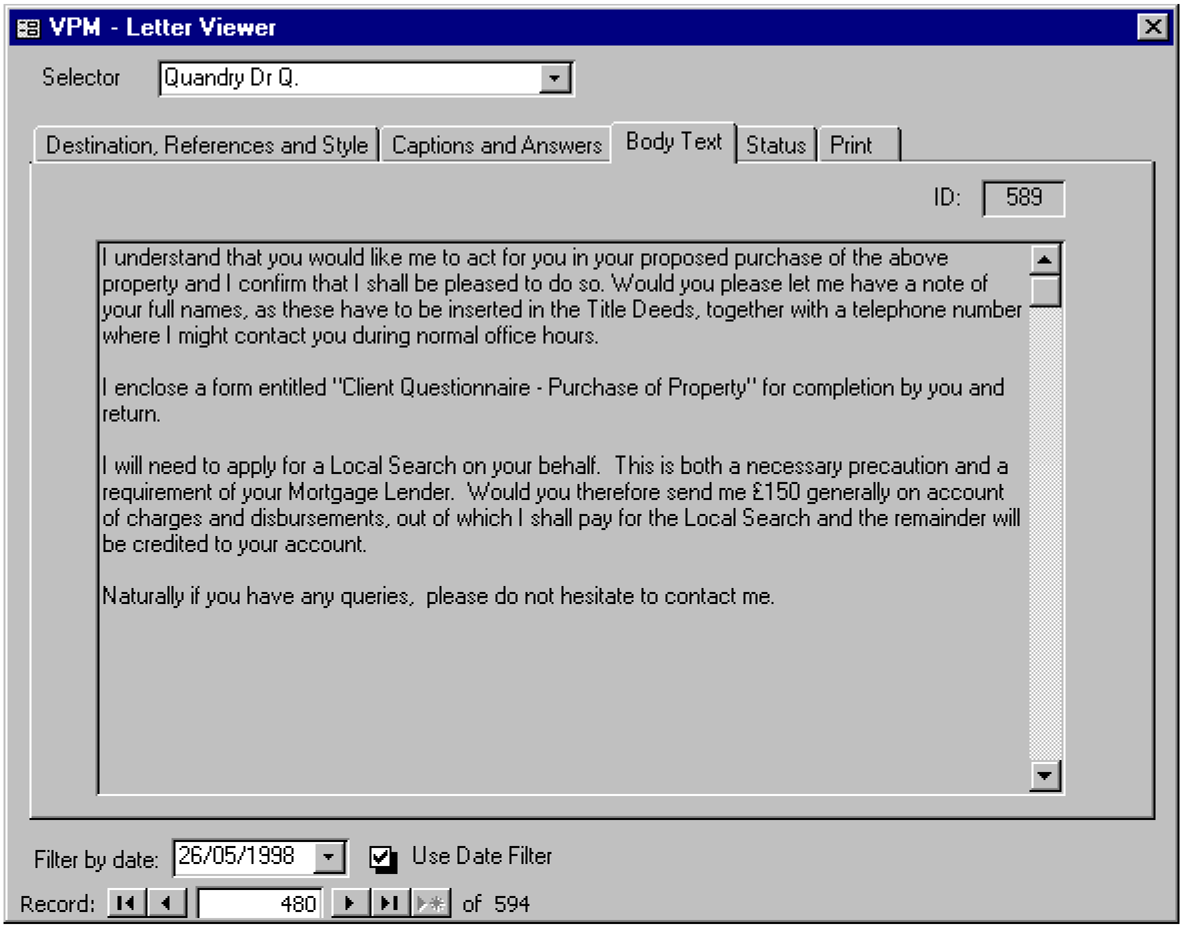
Letter Viewer - Captions and Answers, Tab

Please click on the item you require help for in the picture below:-



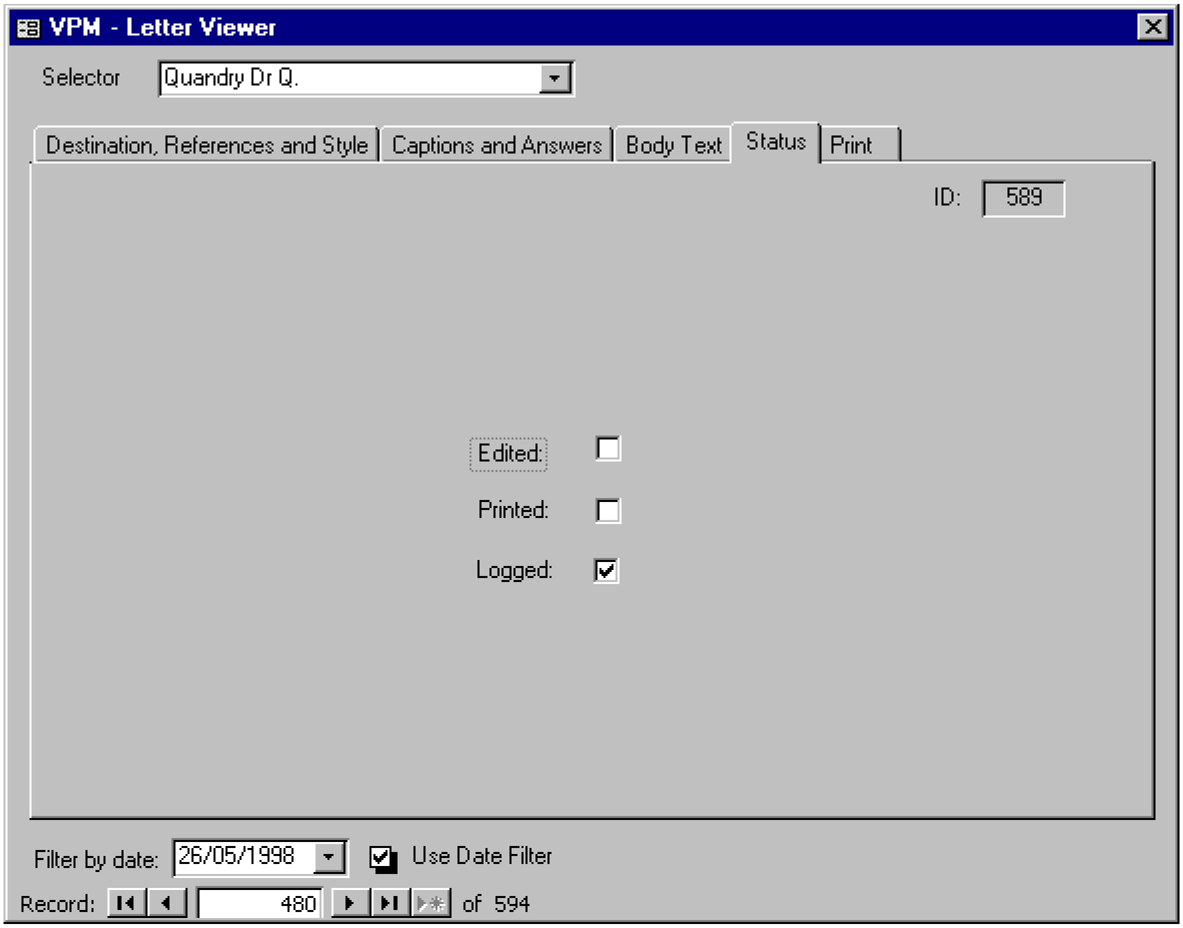
Letter Viewer - Body Text, Tab

Please click on the item you require help for in the picture below:-



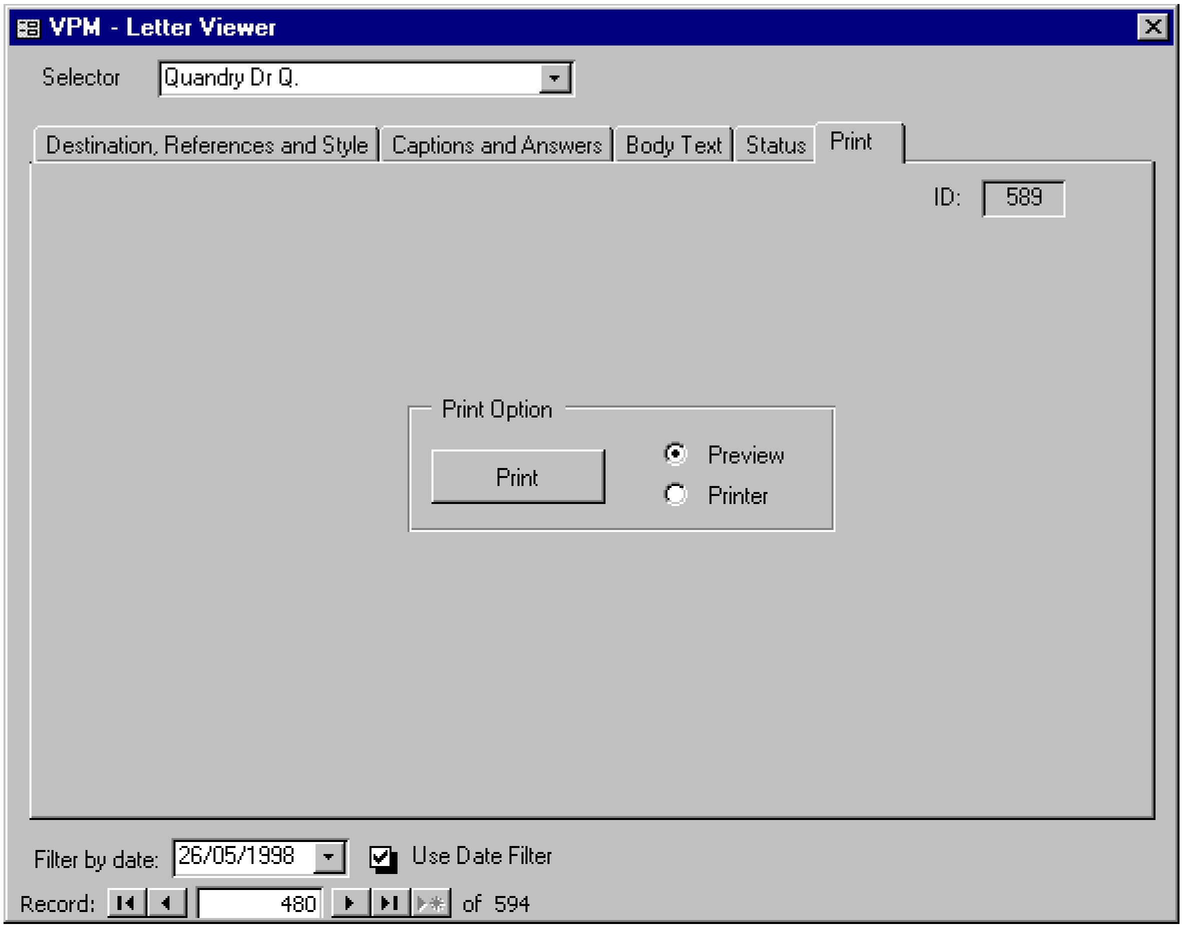
Letter Viewer - Status, Tab

Please click on the item you require help for in the picture below:-



Letter Viewer - Print, Tab

Please click on the item you require help for in the picture below:-



Letter Viewer - Destination, Refs. and Style, Mixed Grouped Controls

Addressee Group:

- Multi-line textbox. This displays the Destination addressee name and address.

References Group:

Our Ref. - Textbox. The letter's full reference.
Your Ref. - Multi-line textbox. The addressee's previous reference (if any).
Date - Textbox. The letter's date.

Style Group:

Salutation - Textbox. The letter's salutation text.
Sign Off - Multi-line textbox. The letter's sign off text.

Letter Viewer - Captions and Answers, Data Grid Control

Re: - Data grid control. This lists each Data Request Caption and Answer included in the letter, exactly as displayed and printed.

Letter Viewer - Body Text, Text Editor

This display-only text editor shows the letter's main body text as finally edited and printed.

Letter Viewer - Status, 3 Checkboxes

Edited - Checkbox. If checked confirms whether the body text has been edited from that in the template used for the letter.

Printed - Checkbox. If checked confirms whether the letter has been printed.

Logged - Checkbox. If checked confirms whether the letter has been logged.

Letter Viewer - Print Option, Grouped Controls

Print - Command Button. This button initiates printing a copy of the letter; the print output is sent either to the print preview window or the default printer dependent upon the setting of the print/preview option buttons below.

Print/Preview - Option Buttons. Before printing, select the desired output device using these option buttons.

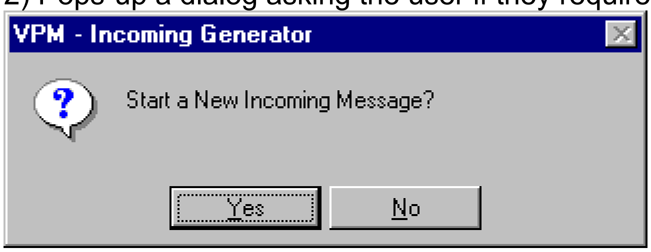
Incoming Generator - All Tabs, Command Buttons

Three command buttons are positioned along the bottom of the Incoming Generator's form which are accessible at all times. These are described below:-

Hold and Do Later - Command Button. **This facility allows the Incoming Generator to be hidden temporarily whilst other actions are carried out** e.g. When normal work flow be interrupted. Any attempt to produce another memo will activate the Incoming Generator form with the details as they stood at the time the process was suspended.
N.B. Any attempt to close VPM will produce a warning if incoming (memo) generation has been held for later completion.

Letter Finder - Command Button. This pops-up a dialog which offers quick and easy finding of any letter within the VPM database. See Letter Selector Dialog.

Save - Command Button. This first saves the memo. Then:-
1) Opens the Reminder Generator (Set reminder Form) pre-configured with the incoming memo details.
2) Pops-up a dialog asking the user if they require to remain in the Incoming Generator:-

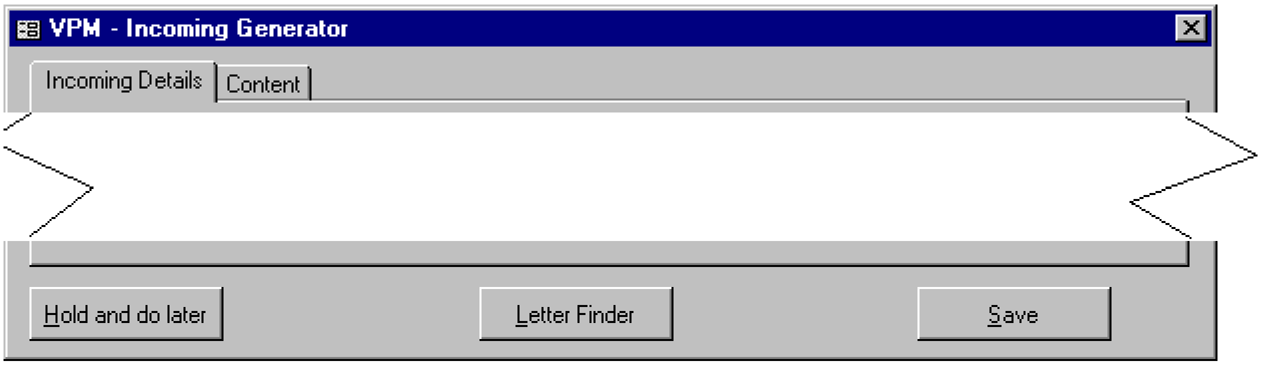


If dismissed the Incoming Generator is closed, else it is cleared ready for a new memo.

Incoming Generator Form

Purpose - This form allows the rapid generation of memos pertaining to incoming events e.g. phone calls, letters and visits.

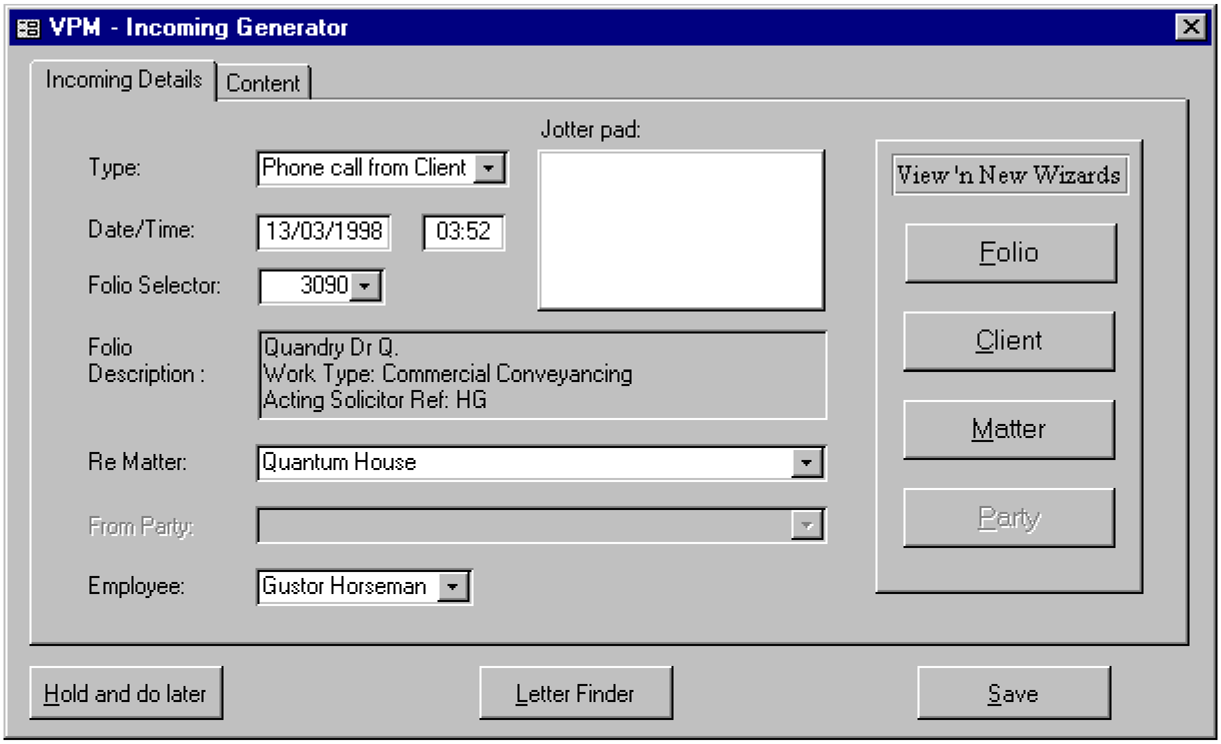
Please click on the page tab that you require help for in the picture below:-



The Incoming Generator Form is a Tabbed Dialog Form. Clicking on either of its tabs displays a different dialog sheet containing standard windows controls; the sheets take the user through the logical steps required to generate an incoming memo.
Using the View 'n New Group buttons it is possible to view or create information that is missing (yet required) and subsequently return to the generator ready to resume creation of a memo.

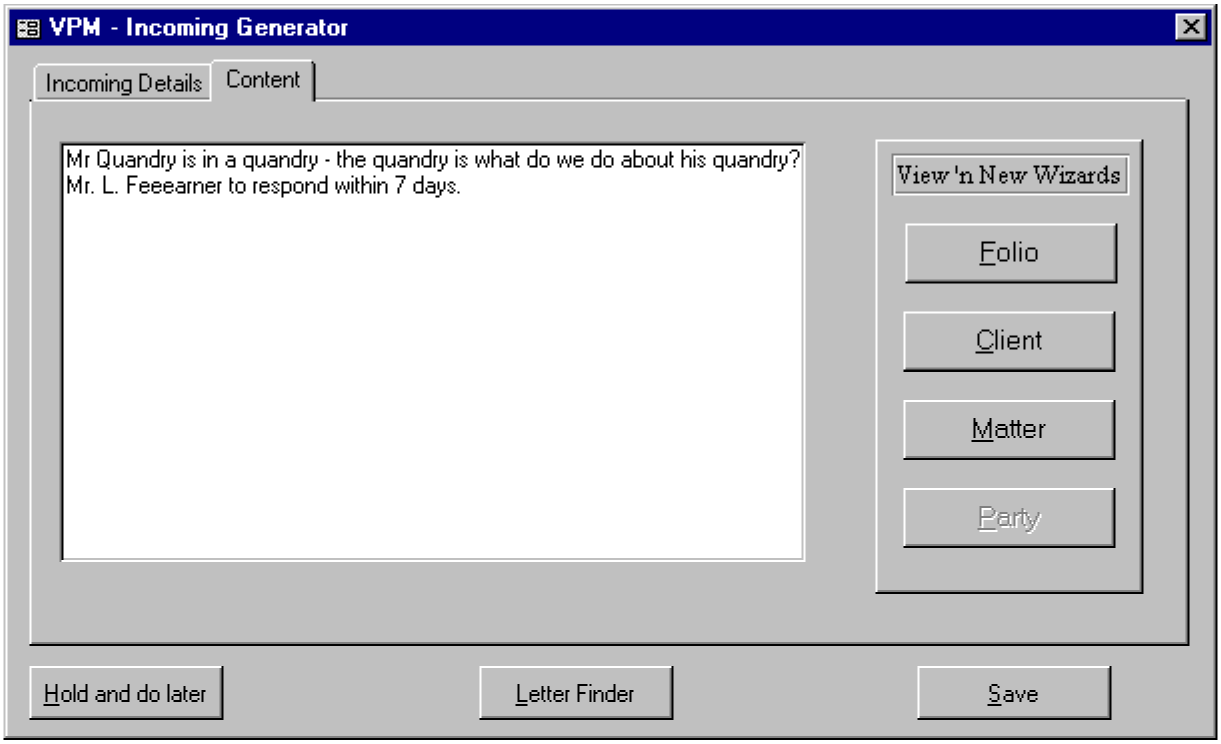
Incoming Generator - Incoming Details, Tab

Please click on the item you require help for in the picture below:-



Incoming Generator - Content, Tab

Please click on the item you require help for in the picture below:-



Incoming Generator - Incoming Details Tab, Mixed Controls

Type - Combobox. This is the main specifier for the memo. Select from the types shown in the drop-down list which are can be grouped into those from existing clients and those from other parties (non clients).
Phone call from client, Letter from client, Visit from client. Phone call from ?, Letter from ?, Visit from ?.
N.B. If the 'Incoming' event is not from a folio's client then the 'From Party' combobox will be enabled when a relevant 'Matter' is selected.

Date/Time - Date and time masked textboxes. These will both be initially set with the current system date and time. However, they can be changed if so required.

Folio Selector - Combobox. All incoming memos must be associated with a given VPM folio. Select the folio from the drop-down listbox *The Folio wizard can be used to view, edit or create new folios directly from the generator, although the latter would only be done in exceptional circumstances*.

Folio Description - Display-only multi-line textbox. This confirms the selected folio details.

Re. Matter - Combobox. This will be enabled upon selection of a folio. Select the matter pertaining to the incoming event. *The Matter wizard can be used to view, edit or create new matters directly from the generator, although the latter would only be done in exceptional circumstances.*

From Party - Combobox. This will only be enabled upon selection of a matter when the incoming memo Type is **not** specified as coming from a Client. Otherwise, the control will offer all current destinations for the matter selected above. *The Party wizard can be used to view, edit or create new 'Other Party" destinations directly from the generator, although the latter would only be done in exceptional circumstances.*

Employee - Combobox. Initially this will be set to the current employee. Re-set should this be required.

Jotter Pad - Text editor. This is provided as a utility to allow the user to jot down rough notes and information quickly whilst simultaneously taking phone calls e.g. use for jotting contact information and general details.

Tip: If whilst creating a memo for an incoming event it is found that a required data item is incorrect or not available within VPM's database then the View 'n New Wizards provide a means to create new or modify existing data items without leaving the Incoming Generator.

Incoming Generator - View 'n New Wizards, Command Buttons

Purpose - This group of four command buttons allows the user to inspect item details relevant to the incoming memo generation process. Additionally, where the context allows, editing and creation of new details can be performed via these wizards. Navigation to other forms through these wizards will always return the user to the Incoming Generator with any relevant changes being updated in the form's controls i.e. a circular route is taken via whatever forms are necessary to change or add relevant data items.

Usage:-
The View 'n New Wizards correspond to the key data items required for incoming generation details. In each case, the program first checks if a corresponding data item has been selected and if not the user is asked whether they require to create a new entry of that type. If confirmed then then the relevant form is opened pre-configured for 'Add New'. If a data item has been selected then the wizard button simply opens the corresponding form with the item selected, where it can be viewed or edited by the user, provided this process is within context and would not invalidate data integrity.
In this way it would be possible to create a complete folio with all relevant information for generating an incoming memo directly from the Incoming Generator itself - though this would be an unusual way of working with VPM!

The View 'n New Wizard buttons are listed below:-

Folio; Client; Matter; Party.

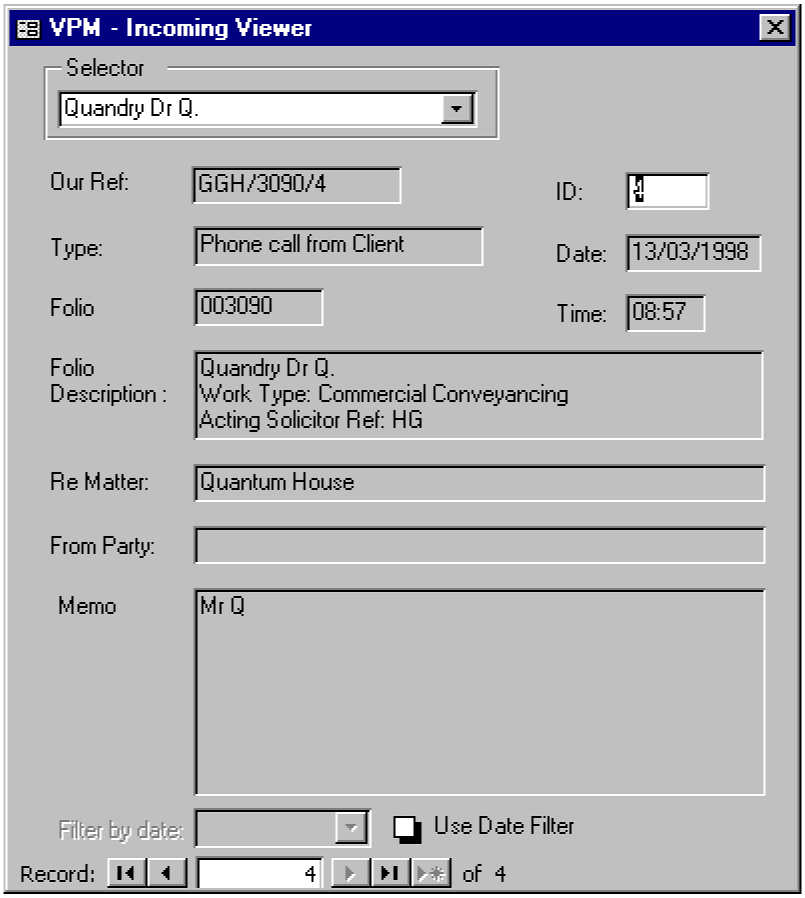
Incoming Generator - Content, Text Editor

This text editor is the control that the user will use to record the important memo content for the incoming event.
See Help on General Controls - Text Editors..

Incoming Viewer Form

Purpose - Accessed from the Main Switchboard, this form offers sorting and filtering of incoming memos for selective viewing.

Please click on the control that you require help for in the picture below:-



Usage:-

Find the required memo either from the record selector at the top left or use the date filter facility; once suitably filtered then navigate the records using the data control selectors at the bottom of the form.

N.B. The controls on this form for displaying incoming memo details are all read-only/display-only - the form is intended for browsing memo details only; generated memo details cannot be changed, nor can they be deleted.

Incoming Viewer - Filter By Date/Use Filter, Mixed Controls

Purpose - These controls allow the displayed records to be filtered (restricted) to those memos with a specific memo date. This will usually reduce the number displayed to that easily managed and navigated using the standard Data Control style record selectors.

Filter by Date - Combobox. This is enabled and disabled by checking the 'Use Filter' checkbox described below. When first enabled, the drop-down listbox is displayed from which has two columns, (Memo) Date and (Memo) Count.
Select the required date to restrict the displayed records to those for that date.

Date	Count
26/05/1998	1
24/06/1998	1
13/03/1998	2

Use Filter - Checkbox. When checked this will enable the 'Filter by Date' combobox described above. When it is un-checked the combobox is disabled and **all records are then re-displayed.**

Incoming Viewer - Memo Selector, Combobox

(Memo) Selector - Combobox. This is the preferred control to quickly select a Memo should the major details be known. The drop-down listbox displays four columns, Folio Client, Our Ref., Dated and From. Either select from the drop-down list or use the built-in quick-search features (See General Help on Listboxes and Comboboxes)

The Memo Viewer Form also contains a standard Data Control style record selector at the bottom left which can be used to navigate records sequentially. Additionally, displayed records can be filtered by memo date using the Filter By Date/Use Date Filter controls provided, thus making record selection using the data control much quicker and easier.

Incoming Viewer - Main Controls

This page displays the main details of the memo for viewing/reference purposes.
N.B. All controls on this page are display-only textboxes.

Our Ref. - The Memo Ref. Employees initials/Folio ID/Auto Memo Number
Type - The Memo Type e.g. Phone call from client.
Folio - The Folio ID.
Folio Description - A description of the main folio details.
Re. Matter - If included in the memo the matter is displayed here.
From Party - If an 'Other Party' was included in the memo it is displayed here.
Memo - The memo content is displayed here.

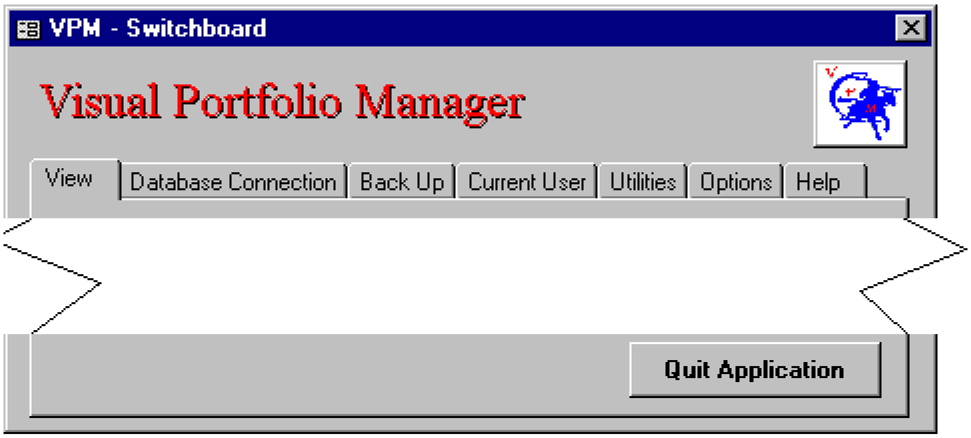
Date - The memo date.
Time - The memo time.

VPM Switchboard Form

Purpose - This is the main control form that gives access to all of VPM's main forms, and offers controls and utilities for managing the VPM environment.

The switchboard is a tabbed dialog, offering seven tabbed pages, the leftmost 'View' tab being the most commonly used, offering command buttons to open all the main working forms,Viewers, VPM Custom Generators and Custom Browsers. The switchboard from is the starting and ending point of all VPM sesssions and as such will always be displayed upon closing VPM's main working forms.

Please click on the page tab that you require help for in the picture below:-



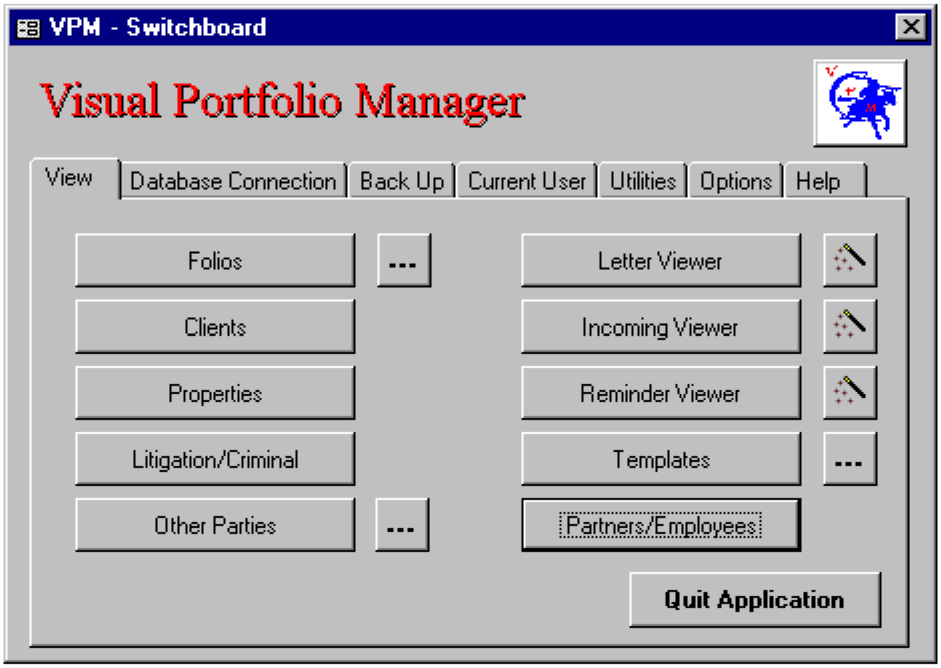
Switchboard - Quit, Command Button

Quit - Command Button. This button is the preferred means of closing down a VPM program session properly. Should any processes not be completed (e.g. letter generation has been temporarily suspended using a 'Hold and Do Later' button) then a warning will be given, the user being offered the opportunity of cancelling the close operation and finishing the generation process.

Switchboard - View, Tab

This page is the centrepoint of most VPM program activity as it offers access to all the main forms.

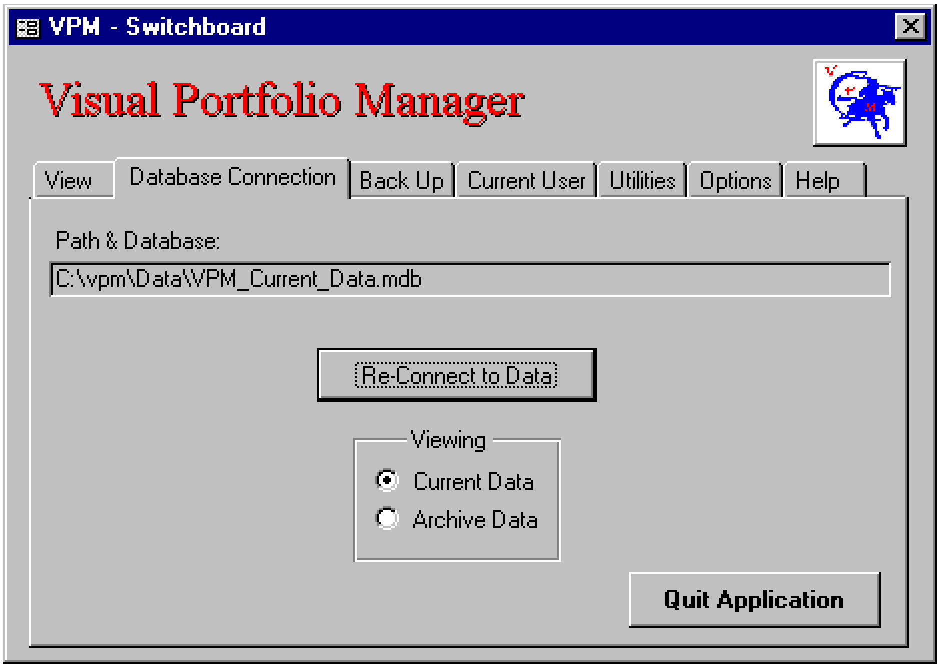
Please click on the control that you require help for in the picture below:-



Switchboard - Database, Tab

This page allows the user to reconnect to VPM's databases and to switch between 'Current' and 'Archive' data.

Please click on the control that you require help for in the picture below:-



Switchboard - Backup, Tab

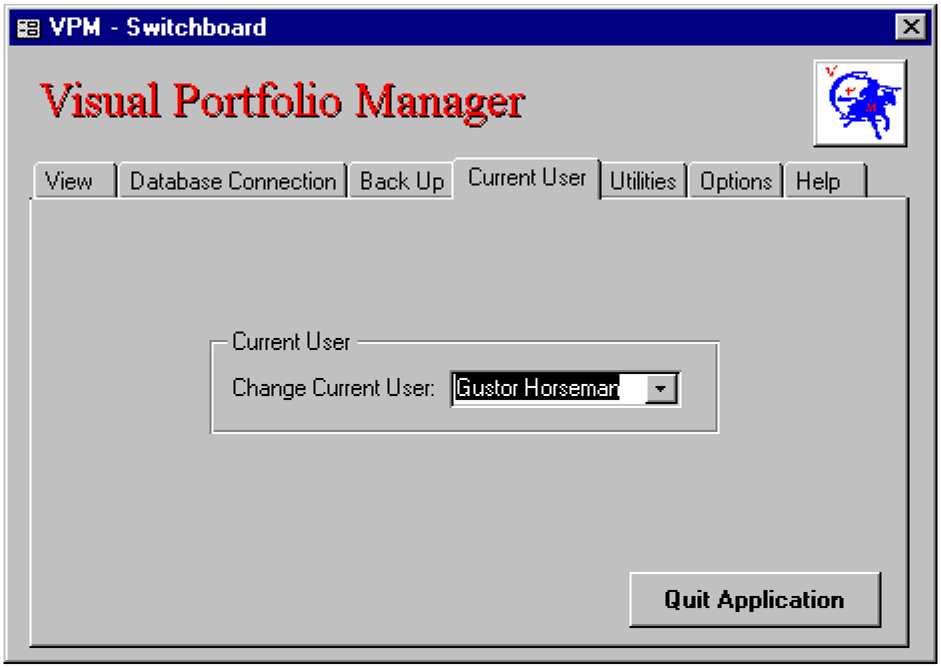
This page offers the user an automatic back up process for both current and archive databases.

Please click on the control that you require help for in the picture below:-

Switchboard - Current User, Tab

This page allows the user to inspect and change the current logged user.

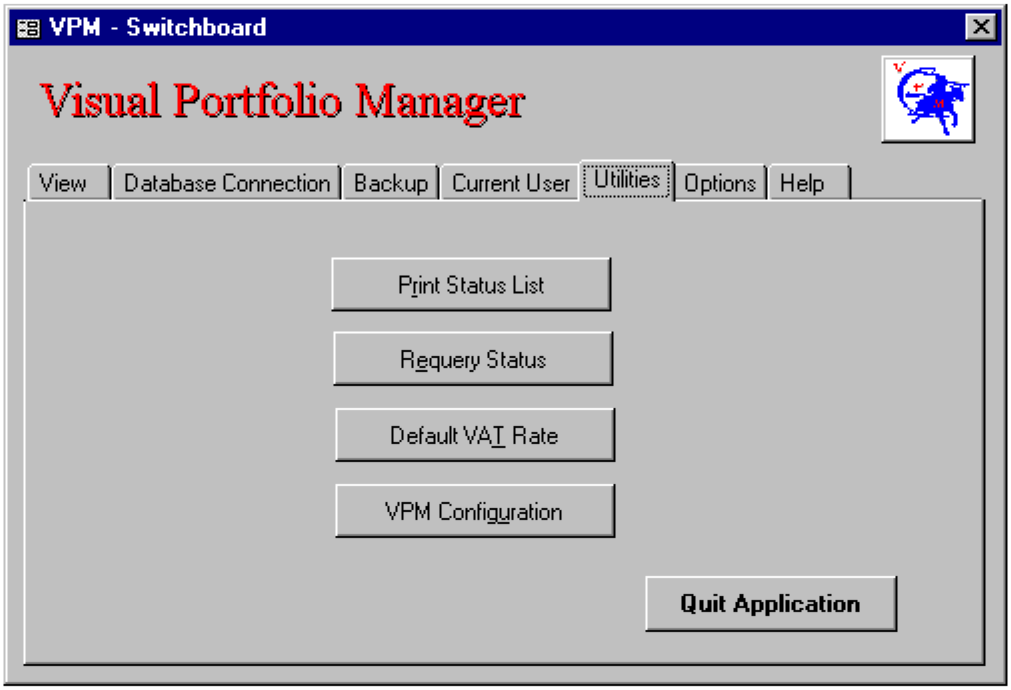
Please click on the control that you require help for in the picture below:-



Switchboard - Utilities, Tab

This page allows the user to run the several utilities.

Please click on the control that you require help for in the picture below:-

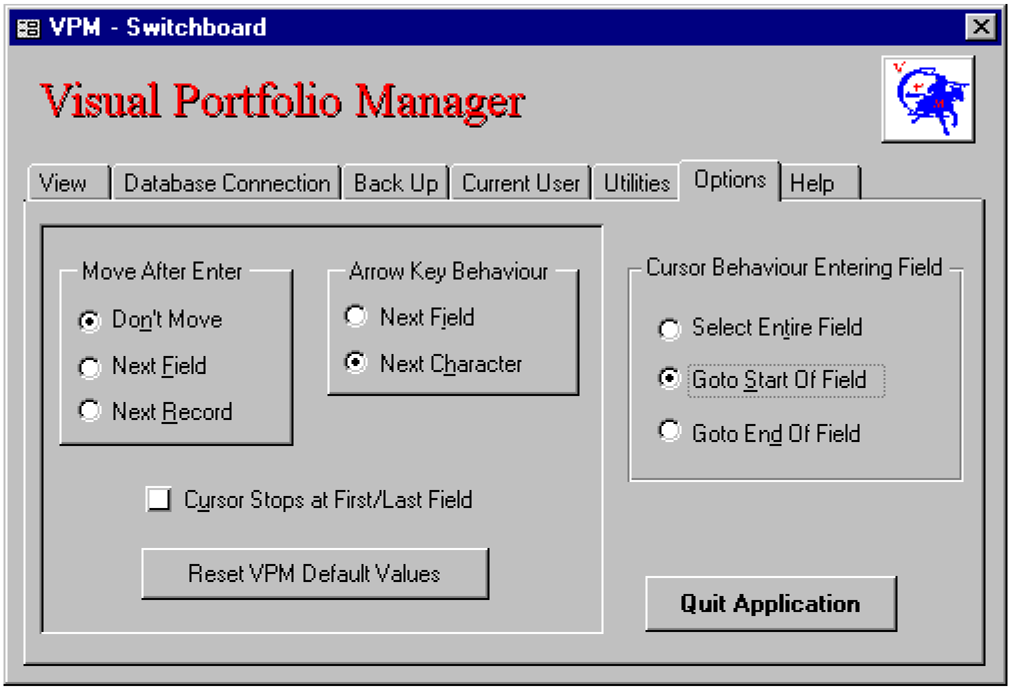


N.B. VPM Configuration is only available to VPM Personnel.

Switchboard - Options, Tab

This page allows the user to set the VPM general options.

Please click on the control that you require help for in the picture below:-



Switchboard - Help, Tab

This page allows the user to directly open the main Help functions.

Please click on the control that you require help for in the picture below:-

General - Removing Duplicate/Unwanted Records

Purpose - Occasionally, two or more versions of a Client or Other Party Destination record will have been created in error. This VPM Help topic outlines a technique for 'removing' duplicate or unwanted records.

Other Parties - It is not possible to delete an 'Other Party' record, but they can be re-used, **provided they have been checked for links to any Matters and any found have been removed.**

1) Open the 'Other Party' Form from the Switchboard and then use either the Selector or Browser to inspect the records. Find those that have been duplicated in error, in some way or other, that are not wanted e.g. they do not represent two differerent offices or functions within a single like named company.
Tip:- These may not appear next to each other if input at different times or have different (erroneous) names for instance. See below for tips on finding differently named duplicates *. In-house systems for preventing this can be established by investigating the causes of each occurrence.

2) Decide which record is the best to base the sole 'Other Party' record for that person, company or site signal the other(s) by adding an easily noticed identifier to the Address and/or Company Name e.g. Marlin Fischer Co.XXXXX (suffixing rather than prefixing allows it to still sort in any browsers by it original name).

3) Move any verified detail from the unwanted record(s) to the one chosen, which remains unsignaled.

4) Select the unwanted 'Other Party' record(s) in turn and change to the 'Print' Tab. Use the 'Connected Matter Report' button to see and **take note** of those Folios containing connections.

5) Close the 'Other Party' and open the Folio Form, then select the 'Matters in connection'Tab. Inspect the grid control's list for the Matter that connects to the 'Other Party', perhaps because you signalled say the Party's address in 2) above and that is the Matter. Select the Matter likely to be linked to the Party to be removed and use the 'View Selected Matter' button and then within this (property or lit/crim) matter form, choose the 'Other Parties in Connection' Tab to find the Party with the signalled name or address. Select and delete or change to the chosen Party.

6) Repeat step 5) for each Folio that has a Connected Matter noted in 4) as linked to the Other Party record being removed.

7) Repeat procedures 3) to 5) for any further duplicates of 'Other Party' records signaled in 2).

8) Go to 'Other Parties' Form and clear out the Name and Address details from the record(s) that have been un-linked. Type something that sorts to the top in the Name and Address details for these records. e.g. {SPACEBAR}Use for next new record or _XXXXX, the underscore (or use a tilda or space) sorting above alpahabetic characters.

9) Resolve to use up these records by changing their details to those for new entries without actually adding any new ones until they have all been re-allocated to other 'Other Parties'.

Client Details - It is not possible to delete a Client record, but they can be re-used, **provided they have been checked for links to any Matters and any found have been removed.**

1) These can be handled in much the same way as 'Other Parties' above, finding ways to track down those duplicates created in error, de-linking (deleting or changing any connections) and subsequently re-using them.

2) Use the 'Folios in Connection Tab' of the Clients Details Form to find those with links to the unwanted Client record. Taking each of these in turn Double Click a folio entry displayed in the listbox. The folio form will be opened and using the 'Change Client' button of the Client and Work Details Tab, change the Client, selecting the one that has been established in the step 1).

3) Repeat for other folios in the Folios in Connection listbox on the Clients Form and then rename and re-use the erroneous Client records as described for 'Other Parties' above, step 8) and 9).

*Tip:- Further help on finding duplicates
If it is suspected that two records relating to the same Client or Party have been entered erroneously but cannot be found easily, preventing their comparison then:-

Use the Find/Find Next facility on VPM's Custom Toolbar, configuring the Search criteria to cover the obvious cases where there will be the same data e.g. part of a name field. Using Find Next should point to likely candidates to investigate further!

See also - General Help on Searching For Records

Switchboard - Database, Mixed Controls

Purpose - The controls on this page allow management of VPM's database connections.

N.B. In normal usage workstation users do not have to reconnect to data upon opening VPM, nor would they be responsible for archiving* inactive folios i.e. they would rarely, if ever, use these controls**.

Path and Database - Display-only textbox. This allows the user to confirm the currently connected database's drive, path and file name.

Re-Connect to Data - Command Button. This will open a standard Windows 95 style dialog allowing the user to set the drive, path and file name for the database reconnection. It will be preset with the 'Archive' database name if viewing 'Current' data and vice versa for convenience but this does not restrict the choice of connection.
Upon confirming the 'Open' dialog, VPM verifies the database and then attempts to connect to all the required database tables during which time a dialog is displayed which informs the user of progress. Upon successful connection the user is informed or in the event of failure, warning messages are displayed.

Viewing - Display-only option buttons. These confirm the existing data view i.e. 'Current' or 'Archive'.

*Archiving - VPM allows the archiving of individual folios that are currently unused or considered inactive. This process removes all the data specific to the folio to the 'Archive' database so that VPM's 'Current' working data can be kept to a minimum. This should be seen as a housekeeping task carried out by the VPM Administrator. It is not intended to be a data back up process (which is a separate responsibility for the administrator - see Help on the Switchboard's Back Up Tab).

**Note: There are three particular situations when the workstation user might have to use the reconnection facility; after initial installation, if the database files are moved or if network directory paths become unavailable.

Switchboard - Back Up, Mixed Controls

Purpose - An automatic data back up facility is provided to offer VPM System Administrators a quick and easy method of saving a copy of both 'Current' and 'Archive' databases in order to offer a degree of insurance against data corruption*. Note that the data backup procedure should **only** be carried out on the data server containing VPM's two working databases - see General Help on Installation Requirements.

Warning! You should ensure that all other VPM Client Programs (workstation installations) are closed before carrying out this operation.

Progress Bar - This gives the user an indication of the progress of the operation since backing up may take from 5 to 20 seconds dependent upon the overall system perfromance.

Back Up Current and Archive Data - Command Button. Operating this button will initiate the back up operation.
If any warning messages are displayed note them down - if the warning states that one or other of the databases cannot be backed up because it is in use then ensure all client workstation users have closed the VPM program, restart VPM on the data server and immediately perform the back up.

*N.B. This has the following limitations:-
1) The backed up data is only as current as it was at the time of the last back up.! Any work done since that time cannot be recalled or reinstated.
2) Since the back up disk drive is set to be the same as that of the working copy a mechanical failure or gross corruption of that drive will generally be data fatal.
3) Loss through theft or fire of the computer storing the data (generally the server) are obviously not protected against by this simple back up facility.

To overcome these limitations a more thorough back up policy should be strictly followed. As a starting point for a company wishing to implement a comprehensive policy for data back up the following is suggested:-

a) Use the automatic Back Up facility at regular intervals e.g. daily or weekly.
b) Copy the complete VPM <Data> folder (directory) to another disk drive (if a single local installation) or to another computer (if a multiple workstation installation) at predetermined regular intervals using manual file management methods e.g. Explorer/File Manager/DOS copy.
c) Copy the complete VPM <Data> folder (directory) to a removable medium (e.g. Floppy disks, Tape back up or other Removable Disk Storage device) at predetermined regular intervals (e.g. weekly/ monthly) and remove from the physical location of the VPM installation site or store in a fireproof safe.

General - Installation Requirements

Working data files - Installation Requirements. VPM requires two database files which are always called VPM_Current_Data.mdb and VPM_Archive_Data.mdb and installed together in the same directory/folder on the VPM Master Data Server (VMDS)* computer. The default original installation directory/folder for these data files is always set to Drivename\VPM**Data** where <Drivename> is a disk drive on the chosen VMDS computer for networked installations and Drivename\VPM is the directory/folder containing the VPM program (by default clean copies of both required databases are installed in C:\VPM\Data). However, this is not mandatory and provided the names of the data files are not changed, they can be positioned virtually anywhere on the network provided access is reliable/always available and gives adequate data access performance; simply reconnect all VPM installation workstations to the location of the working data.
The automatic back up facility will always create a directory/folder psoitioned 'below' the working data directory/folder called 'Back' and create the backed up data files within this.

* VMDS - The VPM Master Data Server is the computer where the working data files (databases) for all client installations are stored. This computer will have to be started before any client installations of VPM are started and used, although VPM does not have to be started and running on the VMDS.

Switchboard - Current User, Combobox

This control displays the employee logged as the current user for the client workstation in question. Should it be required to change the current user select a name from the drop-down list.
N.B. Once a user has given a verified password to open and log on to VPM it is assumed that the system is officially secure - for flexibility of working practices passwords are not required in order to change the current user.

Adding new users. It is important for data integrity for the VPM system to have access to the names and details of all those employees who officially use the VPM program - this is the VPM System Administrator's responsibility and is performed through the Partners/Employees form.

Switchboard - Utilities, Mixed Controls

Requery (Refresh) Status - Command button. Every time a VPM program restarts it checks the current system date and if the date has changed (e.g. overnight) all the folio and reminder prompting systems built into VPM are recalculated. This is known as the Requery Status process. Use this button to manually run this process which will ensure that the folio and reminder status prompts are all up to date (refreshed).
N.B. Note that after entry of a new matter for a folio the status will NOT automatically be updated and displayed meaningfully until the next day. If this is important then go to the Switchboard and use this button.

Default VAT Rate - Command button. Should the VAT rate for invoicing purposes be permanently changed by the Excise authorities then this can be changed using the dialog accessed from this button. *When inputting invoice details the default VAT rate is entered into the Invoice Details grid by Double-Clicking the VAT column.*

VPM Configuration - Command button. This is provided for the supplier's sales support staff to customise the VPM installation for your company e.g. Company name and details, purchase details for security etc.
N.B. This cannot be accessed by the purchasing company.

Switchboard - Options, Mixed Controls

The Options on this page are for customising VPM's form and field navigation, principally being for cursor/keyboard behaviour.

Advanced Field Navigation Options - All controls in the sunken group box. For advanced Access users only, these are set to VPM defaults upon starting the program. Changes here will not affect other MS Access programs. If these settings have been inadvertently disturbed giving unwanted behaviour then simply use the 'Reset VPM Default Values' button. For this reason n*o specific help is offered on the action of the advanced option controls.*

Cursor Behaviour Entering Field - Option Button Group. The options presented are:-
Select Entire Field
Goto Start of Field
Goto End of Field
Select one of the three options. Note that the advanced option group 'Arrow Key Behaviour' interacts with this setting.

N.B. These option settings effectively emulate those available in the full vesrion of MS Access 97. However, the set of controls in the leftmost group of options (styled to appear sunken) are set to suitable default values at startup, regardless of the original settings of Access, which are reset as VPM closes. These may be changed to suit the user's preferences but this is advised only for advanced users who understand their behaviour and interaction with the control group to the right, 'Cursor Behaviour Entering Field'. It is more likely that the user will wish to change this group's setting to suit their own preferences.

Switchboard - Help, Command Buttons

These buttons offer direct access to the Help file.

Help Contents - Opens the Contents Tab of VPM's Helpfile.

Search Help - Opens the Find Tab of VPM's Helpfile.

Help Glossary - Opens VPM's Helpfile Glossary.

About VPM - Pops-up VPM's About dialog.

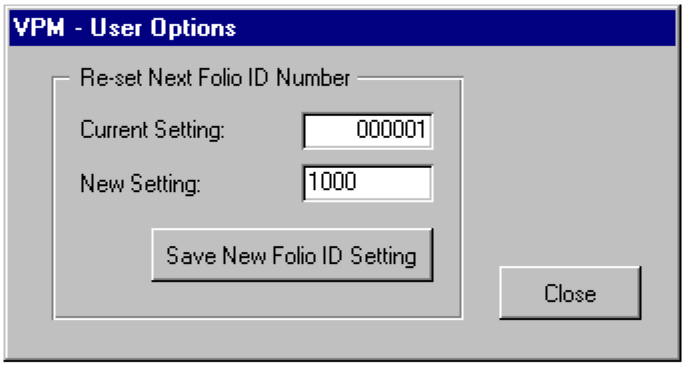
Folio - Letter Finder/Set Reminder, Command Buttons

Letter Finder - Command Button. This pops-up the Letter Selector dialog with the current record's Folio ID preset so that any letters produced in connection can be viewed quickly. See Letter Selector Dialog.

Set Reminder - Command Button. This will open the Reminder generator pre-configured for creating a new Folio Reminder for the current folio record.

Folios Form - Reset Next Folio ID, Command Button

Re-set Next Folio ID - Command button.
This requires the VPM Main Administrator Password before access is allowed. Once this has been satisfied, the pop-up dialog shown below is displayed.
Use this to manually re-set the ID number used to automatically number the next new Folio produced by VPM.



Typical use:- *This could be used immediately after installation to make VPM's Folio numbering consistent with that currently in use within the company.*
Input the required new folio number in the textbox provided and use the 'Save New Folio ID Setting' button and close the dialog. If unsure, close the dialog without changing the Next Folio number.

General - Archiving and Un-Archiving Folios

Archiving and Un-Archiving of folios is accomplished from the Utilites Tab of the Folio Form. The appropriate button's caption and function changes when VPM's database connection is switched between 'Current' and 'Archive' view.

Archiving - VPM allows the archiving of individual folios in the 'Current' database that are unused or considered inactive. This process removes all the data specific to the folio to the 'Archive' database so that VPM's 'Current' working data can be kept to a minimum. This should be seen as a housekeeping task carried out by the VPM Administrator. It is not intended to be a data back up process (which is a separate responsibility for the administrator - see Help on the Switchboard's Back Up Tab).
Un-Archiving - This is simply a reversal of the archiving process. By connecting to the 'Archive' database, VPM allows records to be viewed but not changed. Whilst in 'Archive View' the archived folios can be un-archived (reinstated to the 'Current' database).

See also General Help on Installation Configuration for details of Current/Archive databases.

N.B. Employees cannot be deleted form the database even when all associated records (folios) are archived. However, their details can be changed on the understanding that all previous records related/connected in any way to the employee in question will be re-assigned to the new details. Generally, this will not be a chosen course of action.

General Controls - Set Start-up AutoFormat Option for this Form, Checkbox

Purpose - Generally, the user will require to have the AutoFormat options active when filling in name and address details on those page tabs with this type of data entry requirement. By default these forms start up with AutoFormat turned on. However, each form containing a standard AutoFormat checkbox offers the option to have the form open with the option turned off.

Set Start-up AutoFormat Option for this Form - Checkbox. Check this control to always have the form start up with any AutoFormat options active or vice versa.

See also - General Controls, AutoFormat Checkbox.

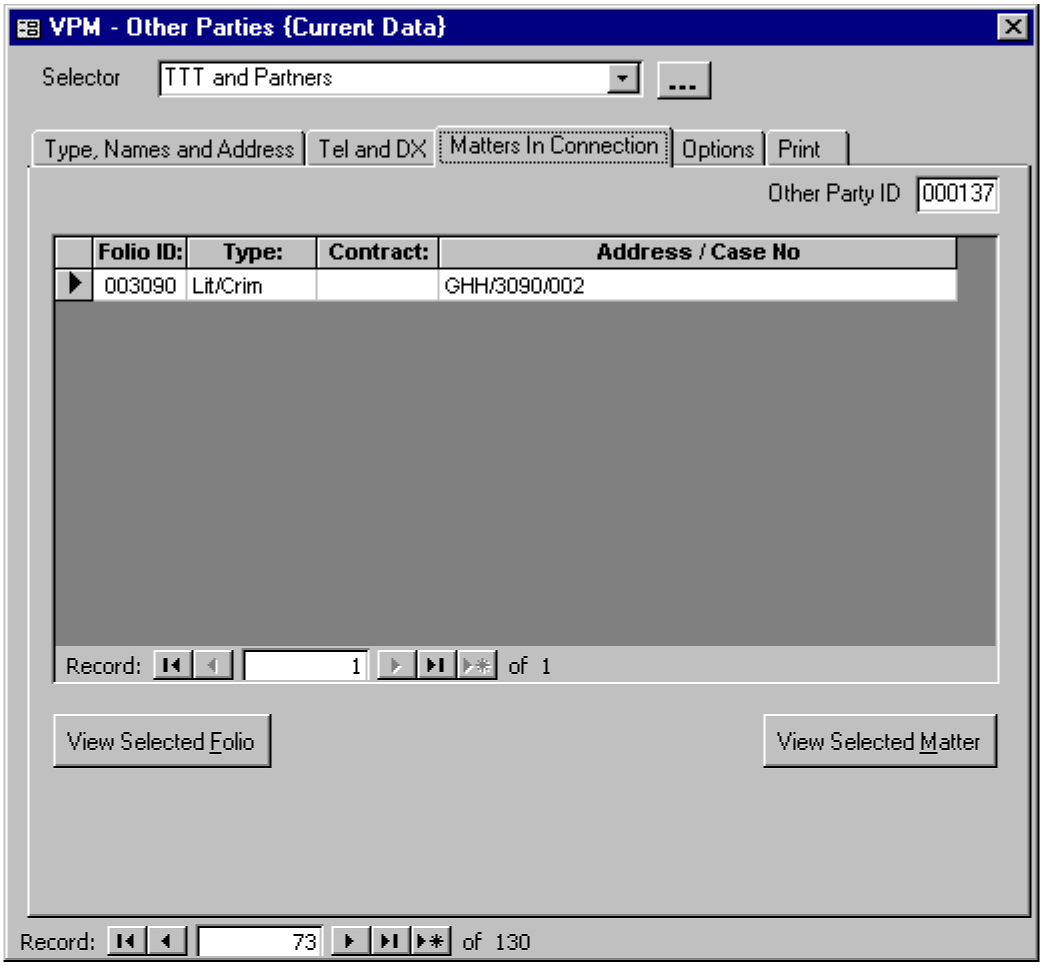
Litigation/Criminal - FolioID, Mixed Controls

Folio ID - Display-only textbox/Combobox. When viewing existing records this control will display their associated Folio ID. When adding new records this control is changed to a Folio ID selector combobox. Select the required Folio for the new matter from the drop-down list.

Change Folio - Command button. This control will change the Folio ID control to a Folio ID selector combobox should it be necessary to change the original Folio assignment for this matter.

Other Parties - Matters in Connection, Tab

Please click on the item that you require help for in the picture below:-



Other Parties - Matters in Connection, Mixed Controls

These controls are useful for identifying all matters connected to a given destination.

Matters in Connection - Read-only Grid Control. This displays four columns described below:-
Folio ID - The folio ID of the connected matter.
Type - The type of matter (Property or Lit/Crim).
Contract - The type of contract if the matter type is Property.
Address/Case No. - The descriptor for the matter; either property address or lit/crim case no.

View Selected Folio -Command button. This opens the Folio form configured to show the details corresponding to the selected matter in the grid control above.

View Selected Matter - Command button. This opens the relevant matter form configured to show the details corresponding to the selected matter in the grid control above.

See also Help on The Grid Control.

General - Keyboard Keys or Mouse Pointing Devices?

Many new users of Windows fail to appreciate the keyboard as a means of controlling and navigating an application. The following is intended to give new Windows users an overview of mouse and keyboard use.

The controls on forms and dialogs in a Windows' program can be navigated using a mouse pointing device **or** through use of the keyboard. It is convention that a standard set of keyboard key combinations are implemented which allows the user to control an application without using a mouse. Beyond a basic set of keyboard commands, Windows' programs frequently support custom key combinations giving access to powerful or specialist functionality. Some key combination functions are not always available with the mouse and vice-versa, though there is a large overlap where either could be used. e.g. *Double-Clicking* is often synonymous with selection or activation of a control and use of the <Enter> key.

Whilst the mouse has become the preferred device for controlling a Windows' application without learning a specialist set of key combinations it has to be remembered that:-

- A PC will run without a functional mouse but will not run without a keyboard attached.
- A standard set of key/function combinations exists that are common to all Windows' programs.
- In skilled hands the keyboard is the fastest device for navigation and data input - indeed, raw data cannot be input with a mouse alone therefore requiring continual reversion to the keyboard.
- Intensive data input applications require strong keyboard skills extending to a natural use of the numeric key pad.
- Operating in text editor or word processing mode can only be really efficient when the common keyboard controls are known and used fluently.

Many new users develop strong mouse skills; strengthening their appreciation of the basic key commands for working within the Windows' environment could be highly beneficial to productivity and help spread the load of repetitive manual actions.

Tip: When carrying out some tasks such as repetitive editing where both cursor/ caret control and keyboard entry are required a very effective technique is to dedicate one hand to each device, alternating mouse control and keyboard entry.

Whilst VPM is not a data input intensive application the above comments should point the novice Windows user towards attaining a degree of keyboard control over the appplication.

General - Navigating through the VPM program

The VPM interface is primarily a series of tabbed dialog forms. Navigating through the application is very easy and yet is flexible. The start and end point of a VPM session is the Switchboard form which offers a direct path to nearly all the forms in the application and which will always re-display upon closing any subsidiary forms opened to complete a task.
Thus the user can navigate to any main, generator or viewer form directly from the Switchboard and return before opening another form. Browsers available from the Switchboard (the 3-dot buttons) take the user on to the data's native form directly after a choice is made, unless cancelled.

There are other navigation paths within VPM, that allow opening further forms to view, edit or add new records before returning. There are also circular paths within VPM that allow moving through forms linked by common data in one direction, subsequently returning to the starting point with any data changes made in the meantime being incorporated and displayed. There are also the View 'n New Wizards on the Generator forms which allow key data to be viewed or created by moving to it's originating form, pre-configured for the purpose*, then returning with the Generator being updated.

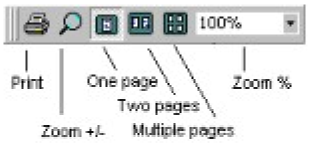
Opening and closing forms:-
Navigating through VPM's forms is achieved using the command buttons on the Switchboard and on those provided on other forms for that purpose (grid controls on some forms also support *Double-Clicking* of displayed items to take the user to the data's native form). Having completed a task by moving to a form or through a series of forms it is then that they have to be closed which is achieved using the standard Windows 95 style close button captioned 'x', positioned in the top right corner of the form (the form's system menu, top left will often also offer a Close command, the shortcut key being [CTRL] + [C])

Normally, VPM constrains the user to using of one form at a time, requiring that form to be closed or moved on from to progress a task - the application is effectively 'locked' into a form until it is closed. This is known as modal behaviour of forms and dialogs and contrasts with an environment where it is possible to switch between 2 or more forms at will.
*A feature of VPM when using custom 'Add New' command buttons is it's automatic filling in of blanks where pertinent data is available.

VPM Preview/Report Window Toolbar

Purpose - This built-in VPM toolbar provides a range of functions which are accessible from its buttons when a Print Preview or Report window is displayed.

The VPM Preview window toolbar is normally 'docked' against the upper edge of VPM's main container frame window. It can be re-docked against any other edge or set to 'float' within the container window if required. Its 6 component and their functions are illustrated below:-



Print - Printer icon. This will send a copy of the document to the default printer.

Zoom+/- - Magnifying glass icon. This allows toggling between two fixed zoom sizes by clciking on the preview/report windows document.

One page - Single page icon. This will change the display to show just one page.

Two pages - Two page icon. This will change the display to show two page.

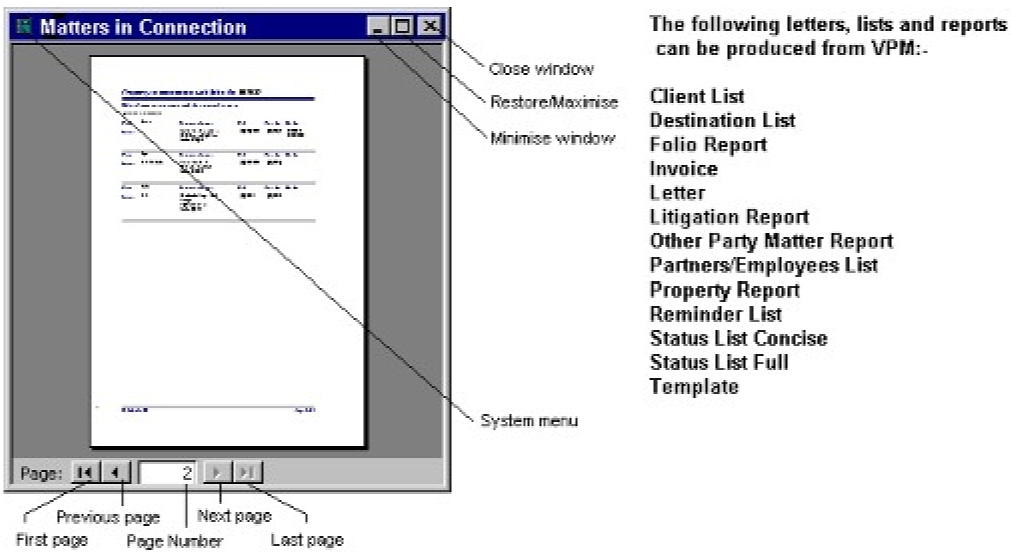
Multiple pages - Multi-page icon. Drag out this roll-up icon towards the bottom right until it shows the required number of windows.

Zoom % - Zoom combobox. Choose a zoom size from the drop-down list or type the required size into the textbox part.

General - Preview/Report Window

Purpose - The preview/report window is used for displaying print-previews, listings and reports so the user can inspect and verify the contents and layout before commiting to the printer, which can be done from the preview window's custom toolbar.

Within VPM letter printing can be directed to either the printer or print-preview window. Reports and listings produced throughout VPM can also be sent to the preview window. Apart from one exception (previewing from the Letter Generator), whenever a Preview/Report window is opened, the VPM Preview/Report Window Toolbar becomes available which offers printing and other functions. The preview/report window contains a set of page selectors to bottom left which are to be used for moving through a report, listing or letter.An example of a preview/report window is illustrated below (one of the Folio Report windows):-

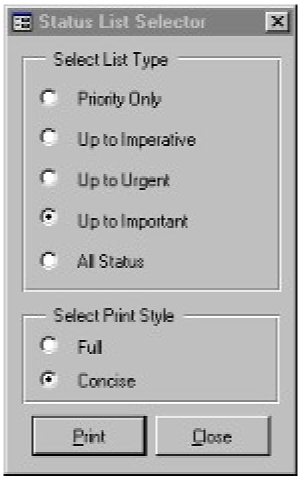


N.B. The preview/report window first displays at a normalised size within VPM's viewing area but can be maximised if required to fill the entire space available. In this event the user must be proficient at window handling in a multi-document environment e.g. know how to restore, minimise and maximise windows from their window frame buttons or their system menus and should appreciate the usefulness of the 'Window' menu item on VPM's menubar. It should also be noted that more than one preview/report window can be open simultaneously e.g. The Folio Report.

Switchboard - Print Status List, Command Button.

Print Status List - Command Button. This button will pop-up the Print List Selector Dialog shown below.

Select the required options from the two option groups and operate the print button to send the status list to the default printer. Repeat the procedure if required or dismiss the dialog.



General - Filtering Records

General - Filtering records is a process of restricting the records displayed (say, in a form) using a specific criterion (condition) or several criteria. This is best explained using an example:-
When choosing an 'Other Party' (Destination) from those available, it would be helpful, knowing that we require an Estate Agent to remove all those records that are not Estate Agents. We thus use a combobox to select the type of Other Party as Estate Agent and the form's records would be artificially reduced to that set, displaying only say 25 records instead of 250.
Additionally, we might want to look through those Estate Agents with a Northants address. This criterion could be compounded with the first such that only 4 records, representing known Northants Estate Agents were displayed, making their perusal a much easier and productice task.
Compounded criteria like this, with other more specific conditions such as 'Before' and 'After' date criteria, are used as a method to 'Find' records, sometimes reducing those found to a single instance that 'matches' all the necessary conditions.

Where necessary, VPM offers the user the ability to filter records e.g. Custom Browsers, Reminder Viewer etc. VPM also will automatically filter a form's records when it has been opened from a callee form for a particular purpose, being pre-configured for the particular task. Under these situations the user might want to revert to a view of all the records managed by the form - this is achieved by using the VPM Toolbar's 'Remove Filter' button. The form's data control will usually indicate a filtered recordset by displaying the word '(Filtered)' with the total number of records.
Using the Find/Find Next dialog does not limit or restrict the form's records for the user but will go to the first or last record in the form that matches the criterion that is specified in the dialog. The Find Next facility will select the next record in the current sort order that matches the conditions.

See General Help on Sorting Records.

Other Parties - Other Party Type Selector, Dialog

Called from the New Party button found on the 'Other Parties in Connection' tab of **both** the Property and Litigation/Criminal forms.
This button will pop-up a dialog offering the user two ways of selecting a connected party.

Either an immediate selection from Other Parties currently on file. First choose from the Select Type combobox which will filter the Select Other Party combobox to parties of that type. Then make a selection from the drop-down list.
Or input a New Party. If the Party to be connected to the property isn't currently on file then choose the New button, which will open the Other Parties Form pre-configured for adding a new record.

General - Getting Started

If you understand the concepts behind VPM's functionality then please view the more specific help on the program's forms and their controls. A good starting point is the Switchboard Form. For a more general introduction on how VPM works please view the General Help topic on VPM - FAQ's

VPM Program startup events

Use the VPM Program 'shortcut' installed in the VPM Start Program group to start a VPM session.
If the program has **not** previously been connected to the correct VPM Main Data Server database location then the user will first be asked to reconnect - point the Open File dialog to the correct location of the 'VPM_Current_Data.mdb' database file. Otherwise, the program will connect automatically, the user being asked for their password before being allowed to continue; input the password given by your VPM System Administrator; this identifies your employee name on the VPM system. Once succesfully logged on should it be required to change the current logged employee for certain work aspects this can be accomplished from the Switchboard's Current User tab. During the startup procedure an information message box stating that 'Requery Status has been succesfully completed' may be displayed - this will be because you are the first to start VPM for the day, the program re-calculates status for all folios and reminder prompts upon an overnight date change.

What is a folio?

A folio is a collection of information that is used to manage work done on behalf of a client. It is fundamentally a collection of matters that are being processed which can be either property or litigation/criminal types. These are provided with means to associate all the subsidiary information required to manage them. Invoicing details can be attached to each matter within the folio. There is no limit to the number of matters that can be included in a folio, though it may be worth considering the separation of different tranches of work for a given client into different folios.

Before creating the first folio

Since Folio ID numbering is automatic and sequential, you may want to set the beginning folio number to fit in with your existing company documentation/referencing/numbering schemes. See Help on the Folios Utilities Tab which contains a button for re-setting the next Folio ID.
N.B. Folio ID numbers cannot be changed retrospectively! However, by using the above feature new folios can be started at higher numbers than currently being used e.g. if year number prefixes are used in your company.

Creating an empty folio (for a client)

Provided VPM has been fully installed and correctly configured (see Installation Requirements) an empty (clean) 'Current' database will be available to begin entering data.

The only data requirement for the creation of a new folio is the *assigned client* for that folio and an employee and partner/fee earner. Either go the Client Details form and input a new client *before* opening the Folio form to create a new record assigned to that client **or** go directly to the Folio form whereupon it will be seen that a new client can be created which is automatically assigned upon return. A new client requires at least a name and address (mandatory data). Having created a new folio and assigned it a client it can be saved.

Building up a folio in order to be able to generate letters

To become useful the folio requires to have work matters assigned to it. This requires creating a new Property or Litigation/Criminal Matter. This can be achieved either directly from the relevant form (e.g. Properties) and then assigned to a folio from the Folio form **or** this can be be added to the folio from the Matters in Connection Tab (Add New Matter button) of the Folio form. Once a folio has a matter (or several matters) attached to it outgoing correspondence will be required relating to that matter, often taking the form of a standard letter. This will require the creation and assignment of Other Parties (Destinations for correspondence). Again, this may be done in one of two ways. Directly from the Other Parties form, where a new record can be created and the other party's details entered (for use in connection with *any* folio's matters in the future!), saving the record upon exit and assigning this to the respective matter using the Add Party button on the Parties in Connection tab (either in the Properties or Lit/Crim form). Alternatively, use the Add Party buttom from the relevant matter's form whereupon the resulting Party Type Selector Dialog may be used to specify that a 'new' party record is required to be created - upon return the party will be added to the matter automatically - this method is preferable since VPM pre-configures certain options for the user and returning to the Switchboard is not necessary. It will now be possible to generate a letter using the Letter Generator.

Generating a Letter

The VPM concept for letter generation is based upon *templates* which control the design and default content of each type of letter. VPM is delivered with over 130 pre-configured templates and the user can add new ones customised to their own requirements. The key features allow customised pre-set letter body text and an array of data requests which simply add captions and accompanying data (manually input at letter generation time or automatically extracted from VPM's database) to the letter. The company letterhead can be included in the letter template if required.
See Help on the Templates Form.

The Letter Generator, which is accessed via the Switchboard's View Tab, will take the user through a series of choices until sufficient information is assembled to first preview and subsequently print the finished letter (based on a template). Afterwards, the user is offered the opportunity of setting a reminder for the expected follow-up or response from the letter.

Other tasks

Please explore the Help on the Reminder Generator form and the Incoming Generator form for associated tasks.

See also General Help on VPM - FAQ's (Frequently Asked Questions).

General - VPM FAQ's (Frequently Asked Questions)

VPM - What does it do?
VPM is a software tool for managing solicitor's work folios. It stores the data required for quickly and easily producing pro forma and bespoke letters to all parties involved in property transactions and litigation/criminal work using a built-in letter generator. VPM also provides the means to store many types of incoming messages, produce memos, prompting reminders and generate invoices.

VPM - How does it do it?
The program consists of a series of tabbed dialog forms, each one being designed to manage a particular data input topic or output task e.g. the Client Details Form covers the input and display of client's details and the Reminder Generator controls the task of generating reminders. Navigation through the program and completion of tasks is not tightly controlled since users will, in practice, have to adopt an open ended approach when creating the data required to fully manage a folio.
See General Help on Tabbed Dialog Forms, Navigating Through the VPM Program and Filling in Forms.

VPM - How much information do I need to fill in each form?
One concept behind VPM's use is that the user has only initially to enter the barest minimum of data. Subsequently, as more detail becomes available this can be fed into the program. VPM attempts to prevent the user putting large quantities of data into the program that cannot subsequently be validated or saved. Throughout the program, if the existing data is not sufficient for the current task, the user will be warned. Sometimes it will be possible to create the missing data items without closing the current form and choosing another from the Switchboard - in these situations always look for buttons prefixed with the words 'Add **....**', 'Change **...**' or 'New **...**' as well as the 'View 'n New Wizards' on the Letter and Incoming Generators. VPM will sometimes 'jump' the user to the relevant page tab or control when additional data is required.
See Help on 'View 'n New Wizards' for Letter Generator or Incoming Generator.

See also General Help on VPM - Getting Started.

Glossary

A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z

A

Active Control
Active Window
archiving

B

Browse
Browser

C

callee
cell
Control Panel
cursor/caret

D

Destinations
disabled
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E

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Form

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mandatory
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N

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Navigation
notation

O

object

P

Part-search
pivot-date
pop-up

R

read-only
record
Right Click

S

selected

Active Control
This refers to the control device (e.g. textbox, command button) on the active window that currently has the focus of the user's input, which means that mouse or keyboard actions will go to that control.

Active Window - This refers to the window (dialog, form, report etc.) that contains the active control. The active window will have its title bar (ribbon containing the window's caption) highlighted e.g. a darker shade of pale.

Active Window
This refers to the window (dialog, form, report etc.) that contains the active control. The active window will have its title bar (ribbon containing the window's caption) highlighted e.g. a darker shade of pale.

Active Control - This refers to the control device (e.g. textbox, command button) on the active window that currently has the focus of the user's input, which means that mouse or keyboard actions will go to that control.

archiving
The process of hiving off of data; the removal of data to another place.
It does not automatically imply a backing up of data for safe keeping!

Browse
The act of scrolling through or perusing records with the object of choosing and selecting the required one. This is frequently achieved using list boxes that display relevant field data in one or more columns for many records (rows) at a time. These records may be sorted on suitable indexes and filtered upon various criteria to customise the display for ease of browsing. VPM uses custom browser controls e.g. the Folio browser.

Browser
A control that is specifically designed to allow the browsing (perusal) of database data. This is frequently achieved using list boxes that display relevant field data in one or more columns for many records (rows) at a time. These records may be sorted on suitable indexes and filtered upon various criteria to customise the display for ease of browsing. VPM uses custom browser controls e.g. the Folio browser.

callee

Used within Help descriptions. The form or control that has called the control under discussion. This will generally (but not always) be a command button on the previous form in the navigation sequence.

cell

Grid Control Cell - This refers to a Row/Column intersection within a Grid Control, containing a corresponding data item. This term is used extensively within spreadsheet applications too e.g. Microsoft Excel.

Control Panel

Windows' Control Panel - This is used to configure many of the operating system default settings e.g. mouse behaviour, default formatting of date/time and internationalisation features. It is accessed through the Start Button on the Task Bar (Settings)

cursor/caret
This is a display marker in the form of a vertical line or I-beam which blinks on/off, indicating the active character within a text edit control. This is in distinction to the screen's mouse pointer display (usually one of a series of arrow-head shapes) which is used to visually indicate mouse movement and position.
The caret can be positioned with keyboard command or mouse movements, the latter being made possible by the mouse pointer changing to a caret display when moved over a control supporting text editing. The caret is 'set' by clicking in a textbox at a certain place in its text-string.
A caret might be defined as Window's implementation of a text control's cursor device.
N.B. The cursor/caret blink rate can be set from Window's Control Panel (keyboard settings).

Destinations

Sometimes 'Other Parties' are referred to as the 'Destinations'. Generally the first description is used for conformity. These represent all the possible known destinations for communications purposes.

disabled
Generally refers to a control (e.g. a command button) being 'greyed out' visually and not responding to being to use input. This is often dependent upon the current context (form state) which deteremines it's state - enabled or disabled. N.B. Clicking a disabled command button will often produce a warning beep sound from the computer.

display-only

This describes a Windows' control that is not editable. Synonymous with read-only these are generally displayed with a light grey background for easy identification.

Double Click

This is a common mouse technique that usually achieves a custom action (dependent upon the control and context) e.g. an accepted convention when a listbox item is Double Clicked is to select the item and also then trigger an OK button. In a text editor, this might automatically select (highlight) a single word or a whole line dependent upon where the mouse action is targeted.

A Double Click event requires that the default mouse button (usually set to the left button for right handed users) is pressed down and released again within a certain time, usually around a quarter of a second. There are also limits on mouse movement during this action.

NB. The allowed time lapse can be configured within Windows to suit the user's preferences. See Windows' Control Panel.

enabled
Generally refers to a control (e.g. a command button) being 'greyed out' visually and not responding to being to use input. This is often dependent upon the current context (form state) which deteremines it's state - enabled or disabled. N.B. Clicking a disabled command button will often produce a warning beep sound from the computer.

Form

A form is simply another term used to describe particular program windows, usually those that require completing in the same way as a paper form. The term is frequently used in database applications where a window might contain a large number of input fields that require completing in a logical order. Other windows that use this term within VPM are report forms.
The term has become synonymous with almost any program window in some Microsoft programming tools, such as Access.

In these Help files, a form is used to describe what can be thought of as one of the main or fundamental windows of the program. Most of VPM's main forms are tabbed dialogs.
Simple pop-up dialogs are used for warning/informing the user, obtaining simple responses or requesting simple user input e.g. the 'Get User Password' dialog. These dialogs are not generally referred to as forms.
See also Help on - Standard Forms, Tabbed Dialogs.

ID

Identifier Index (ID) - These are used throughout VPM to uniquely identify a record within a database table. The main ID's are Integer numbers and are 6 digits i.e. the Folio ID.

N.B. They are formatted to include leading zeros e.g. 002514; 000001 etc., which requires consideration when using quick-search tools.

See also - Part-Search in this glossary or General Help on Searching for Records.

mandatory

A compulsory, required database field. If a mandatory entry is left blank the record will not be able to be saved. Records are usually saved by closing the form or moving-off of the current record.

mask
A predefined restriction within a control to force the user to only input certain sets of characters e.g. Date Mask.

See also - General Date Entry Controls and Date Formats

navigable

Describes the process of moving through either:-

a) An application i.e. navigating its interface, moving from form to form and control to control (to accomplish a task).

b) Records i.e. moving throught a set of records e.g. moving sequentially forwards or backwards using any of the record selector controls provided.

Navigation

Describes the process of moving through either:-

a) An application i.e. navigating its interface, moving from form to form and control to control (to accomplish a task).

b) Records i.e. moving throught a set of records e.g. moving sequentially forwards or backwards using any of the record selector controls provided.

notation

A form of codification. For instance, a code can be used to prefix descriptions, adding a quick reference system for familiar users. When used with user definable Unique Refs and Descriptions can self-sort records and aid rapid search/find, selection and browsing.

object
In VPM this term is generally used to specify a letter, a memo, a property or litigation/criminal matter. e.g. a property matter object.
An object is a 'thing' of a given type!

Part-search

Some VPM controls support a part-search facility. This means that to initiate a search only the 'beginning part' has to be entered. However, to fully distinguish and find values that have this beginning part in common and that lie after the first occurrence requires that a more fully complete 'part' be used.

See also - General Help on Searching for Records.

pivot-date

The year Microsoft (R) chooses to set the rollover of dates into the next century when entering and displaying 2 digit year formats. Currently, this 1931/2030. That is, typing in 30 results in 2030 being stored, typing in 31 would result in the date being interpreted as 1931. To explicitly 'force' the century in th last case to be other then the 20th century a full 4-digit year must be entered. Conversely, when displaying 2 digit years, 11 would inply 2011 whereas 45 would imply 1945.

See also - Help on Date Formats

pop-up

Pop-up dialog - This term is used when a dialog requires dismissing before the user can continue work elsewhere in VPM. Whilst a pop-up dialog is displayed, attempting to use another window results in a system 'Beep' and the pop-up dialog remains the active window. Technically referred to as being 'Modal'.

Examples of this behaviour are found in all VPM's Message Boxes and the Custom Browser Dialogs. To continue work elsewhere simply action either the Default (OK/Open) or Cancel button.

read-only
This describes a windows' control that is not editable. Synonymous with display-only, these are generally shown with a light grey background for easy identification.

record

A record can be thought of as a single row or line of data within a database table. Each record usually consists of a set of fields each of which might hold different types of data. One special data field is often used to identify ('index') the record. A table can have many records which can be moved through using whatever means of navigation is provided e.g. a data control, a record selector combo box or custom browser.

Right Click

Windows supports this mouse action, generally by displaying a context-sensitive pop-up menu sometimes referred to as a shortcut menu. This will offer only those actions that are consistent within the current context.

A Right Click event is achieved by depressing and releasing the non-default mouse button (right button for right handed users) with a time delay longer than the Double Click time setting. Move the mouse off the target before releasing the button if after pressing down you want to cancel the Click event.

NB. The default button and its counterpart can be configured within Windows to suit right or left handed users. Thus Right Clicking would be accomplished using the left button for left handed users.

selected

Selected (text) - This term in Windows' terminology means that an item, set of characters or a control's contents are highlighted (black or dark blue). This confers a 'special' status that is used to determine the next action within the given context e.g.a row item in a listbox, being selected, would indicate that it is the user's choice should it be confirmed by the next action (pressing the OK button in a dialog for instance).

Selected (control) - Generally refers to a textbox or list/combobox that has the focus (is active) and contains the caret, whether or not any text is actually selected as described above.

Selected (record) - The form's record that is currently showing, hence record selectors.

Selector
Generally refers to form's main record selector combobox, positioned top-left. This is combined with an adjacent Custom VPM Browser button on some forms for enhanced record browsing capabilities.
N.B. Most forms also have a Data Control style record selector, positioned bottom left (see General Help on Data Controls).

sort

Sort, sorted, sorting (sort order) - Sorting records is the process of ordering them in a logical sequence e.g. alphabetically, by date.

If records are left unsorted they usually display in the order in which they were created which is known as 'Record Number' or 'ID' sort order.

NB. VPM's toolbar has two buttons for sorting records.. See also - Help on 'VPM Toolbar Buttons' and General help on Sorting Records.

String

Text strings, Number strings, Mixed Character strings. This is a commonly used term in computing to describe a series (contiguous collection) of text characters be they letters, numbers or special characters. Strings are displayed in textboxes, listboxes and comboboxes, labels and captions. Only some controls (e.g. textboxes) support editing of text strings.

Strings

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tab

Tab (Dialog sheet tab) - A tab refers to the tab (thumb index) markers on a tabbed dialog form that control display of separate 'sheets' . They each will carry a label indicating the relevant sheet's main purpose. To select a sheet (bringing it to the top of the pile and into view) simply click the relevant tab.

Tab (Text editor) - Tabs are usually set at 0.5" by default and determine the positioning of the next character when a 'tab' is inserted into the text with the keyboard tab key.

Tabbing (Tabbing through a form's controls) - This is the process of moving the current focus on a form from control to control using the keyboard [TAB] or [ENTER] keys. The controls on a form are set in a pre-defined order (the tab order) such that the controls are navigated in a logical order upon each press of the keyboard tabbing keys. Please see the Help Topic entitled 'Tabbing around a form's controls' for more details.

Table

A database consists of one or more tables. Each table generally holds data which relates to a common subject. A table holds data by virtue of pre-defined fields each of which is configured to store a particular type of data (e.g. numbers, dates, currency). Two or more tables can be linked together in various ways, such that cross-referencing and look-ups can be implemented or to make them appear as a single table to the user.

tabs

Tab (Dialog sheet tab) - A tab refers to the tab (thumb index) markers on a tabbed dialog form that control display of separate 'sheets' . They each will carry a label indicating the relevant sheet's main purpose. To select a sheet (bringing it to the top of the pile and into view) simply click the relevant tab.

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tick

Tick/check a checkbox - This terminology relates to the setting of the value of a checkbox control. U.S. terminology refers to 'checking' whilst in the U.K. sometimes 'ticking' a box is used. An 'X' will display when the checkbox option is active.

NB. Checkboxes are independent of others whereas Option Buttons (radio buttons) are always mutually dependent within a group i.e. pressing one will always clear (turn-off) all others, hence the alternate name, 'radio buttons'.

Window's control

A graphical windows device allowing the user to interact with the programs interface using the keyboard and mouse. Interactions with the control result in visual changes and occasionally for error conditions, audible feedback.
The control connects to the program when suitable changes are registered e.g. a click on a button. Where appropriate, the changes caused by user interaction are communicated by the program to the database tables for permanent storage.
Examples of controls are Text Boxes, List Boxes, Combination Boxes, Check Boxes, Command Buttons, Option Buttons, and Picture/Image display Boxes.
Controls can be disabled (usually greyed-out) where appropriate and some never allow keyboard or mouse interaction being for display purposes only.