



Roof Wizard

Advanced Software for Roof Modeling and Estimating

Tutorial for Modifying Reports

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Introduction

Using this manual

This tutorial is designed to explain, step by step, the process of modifying your report templates to suit your requirements.

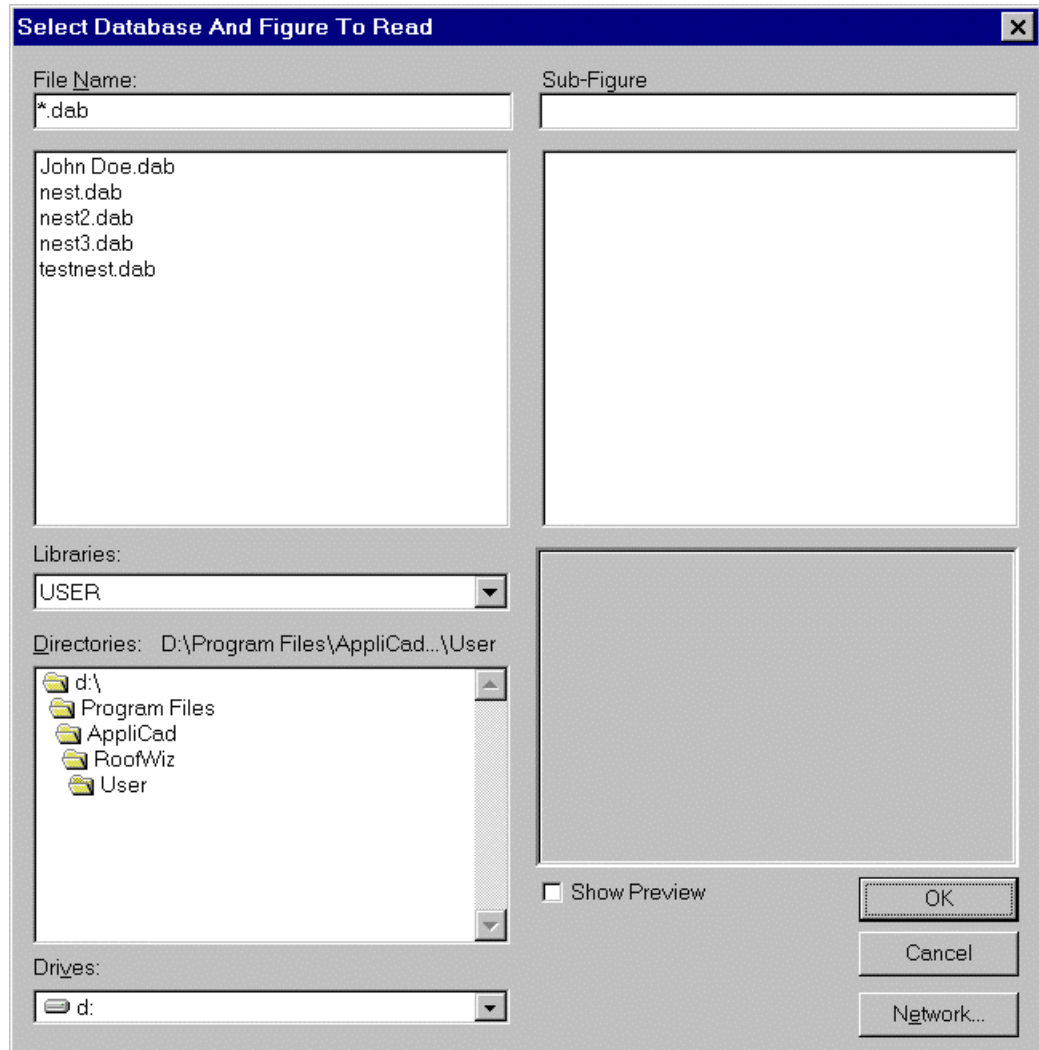
While not essential, it is recommended that the basic Learning Guide for Sorcerer or Roof Wizard has been completed prior to attempting to work through this tutorial. An understanding of the process is helpful, as is a basic understanding of the construction of a roof.

This manual will be helpful if you forget how to or don't know how to modify your reports.

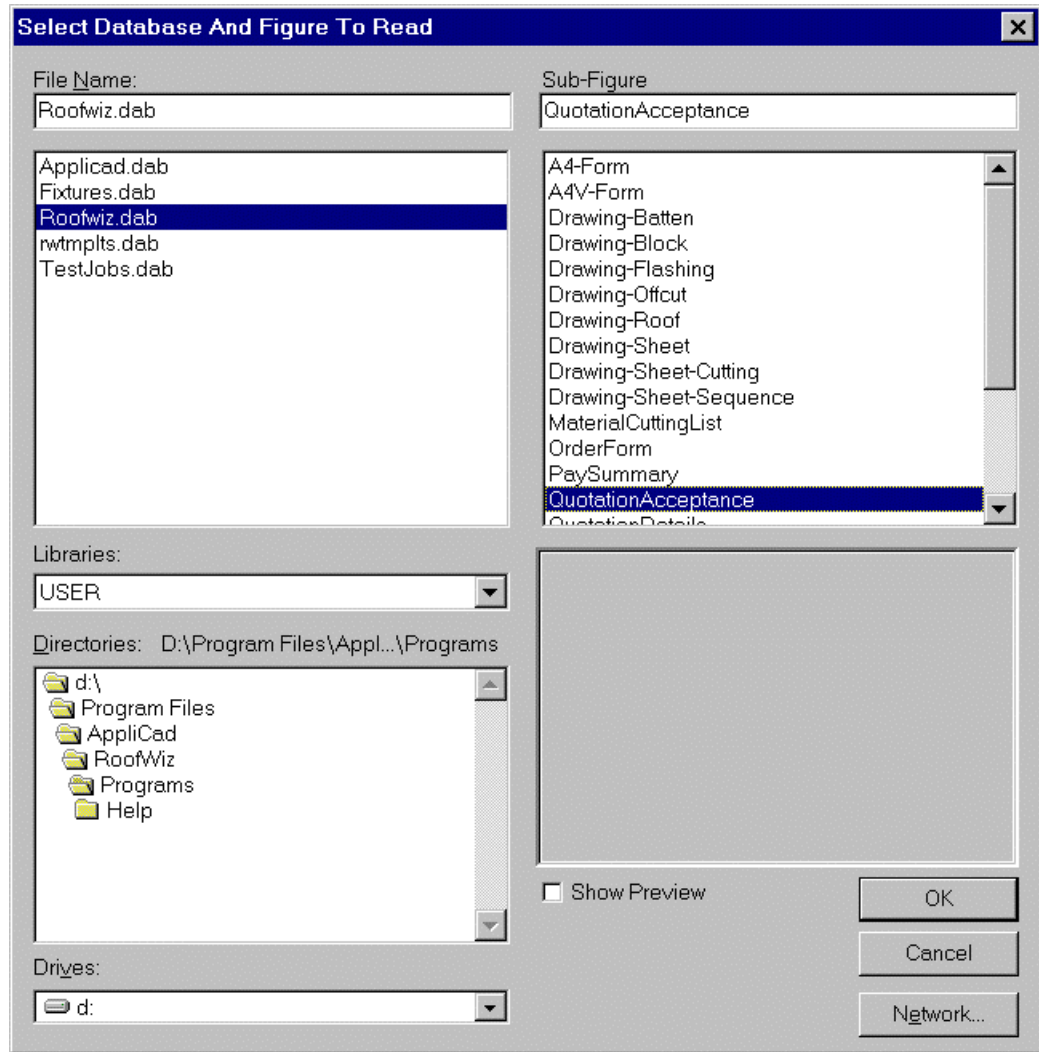
Modifying Your Reports

Finding the Templates

The first step when modifying your reports is to find them. First open Roof Wizard. From here open **File** from the drop down menus at the top of the screen. Drag down to the **Sub-Fig** command. This will open another drop down menu, from here drag to the **Open** command and the following dialog box will appear.



With this dialog box now open, double click on the **RoofWiz** folder, followed by **Programs**. The dialog box should look similar to the one on the following page.



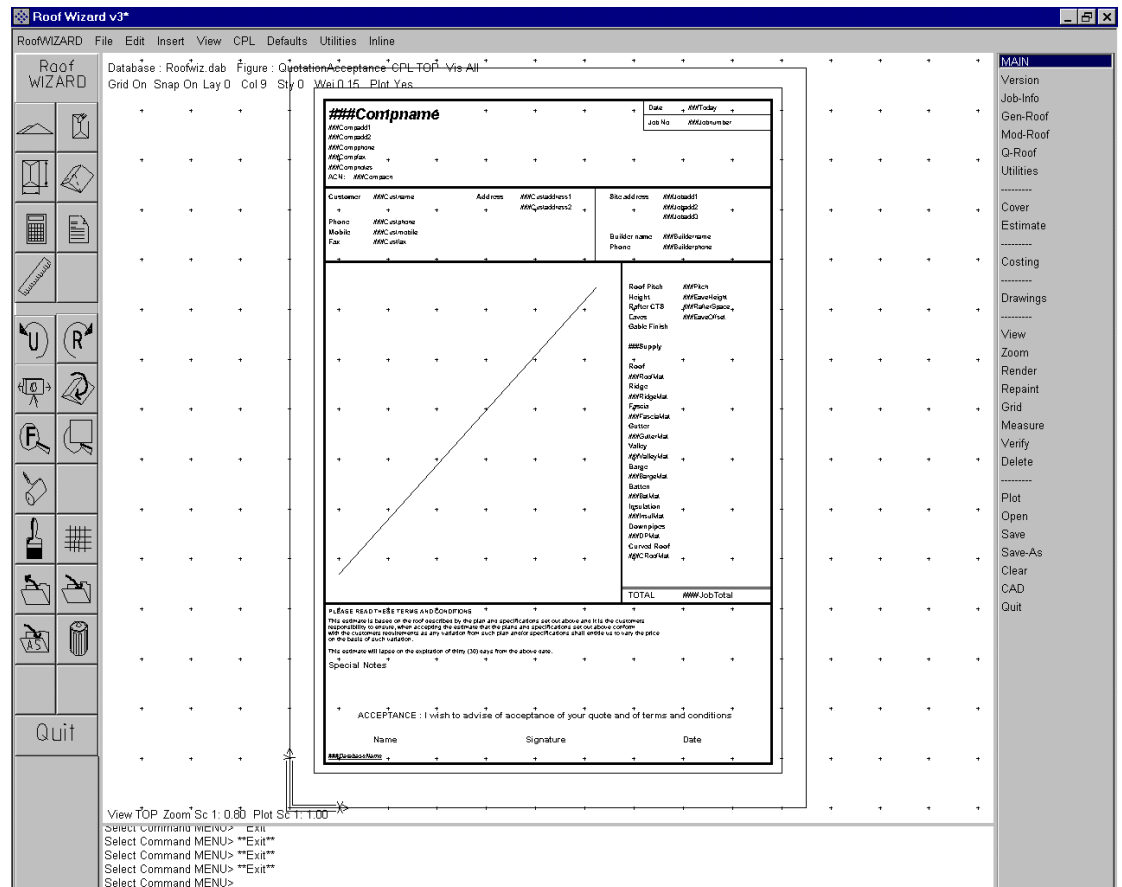
By selecting the file **Roofwiz.DAB**, the 20 templates that are used for your quotation letters are shown on the right hand side. From here select the template you would like to modify (we will use QuotationAcceptance for this tutorial) and click **Ok**.

The template will now be opened in the main screen, similar to the picture on the following page.

The templates are:

- 1: A4-Form
- 2: A4V-Form
- 3: Drawing Batten
- 4: Drawing Block
- 5: Drawing Flashing
- 6: Drawing Offcut
- 7: Drawing Roof
- 8: Drawing Sheet
- 8: Drawing Sheet Cutting
- 9: Drawing Sheet Sequence
- 10: MaterialCuttingList
- 11: Order Form
- 12: PaySummary
- 13: QuotationAcceptance
- 14: QuotaionDetails

- 15: QuotationForm
- 16: QuotationLetter
- 17: UserForms 1-4



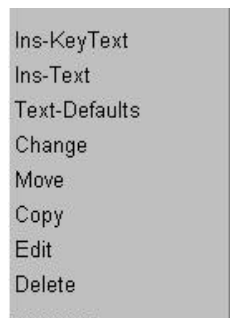
From here we can start to modify our template.

Modifying the Text

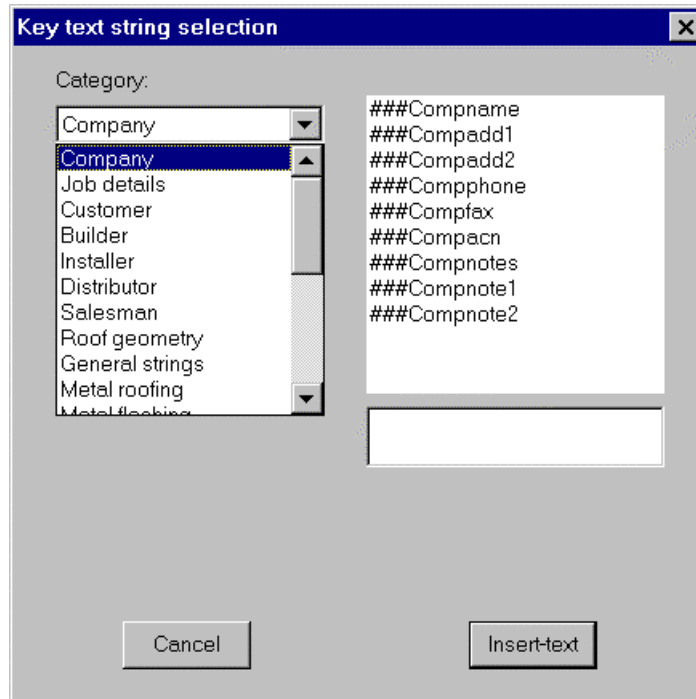
The first step we have to take in modifying the text is to select the **Utilities** menu which looks like this.



From this **Utilities** menu we will only be using 8 commands. These are:

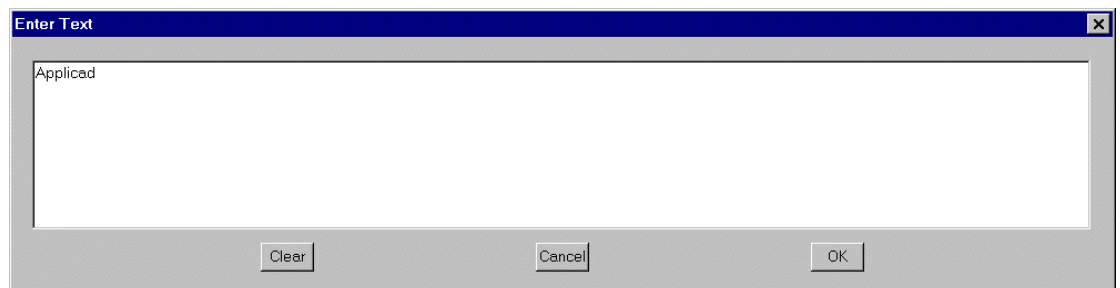


The first of these commands that we come across is **Ins-KeyText**. This will bring up the following dialog box.



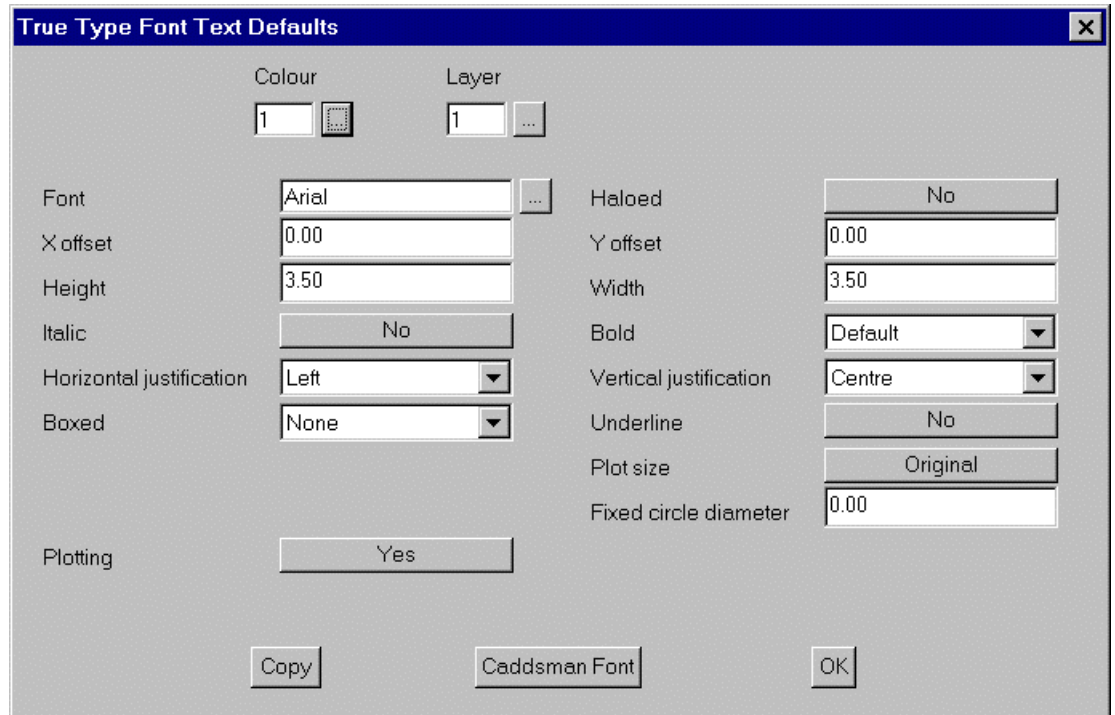
From this box you can insert a text field that is linked to the appropriate database. Therefore if you put in the **###Compname** field, when you print up your reports, the Key Text String(KTS) will be replaced by the company name for the quote. To show the fields on the left of this dialog box, click on the down arrow at the end of the field. From here you can select category, and the KTS from that category will appear on the right hand side of the dialog box. To insert the KTS, click on the KTS that you want to insert and then click on **Insert-text**. You will then be asked where you want the text to be placed. Move the pointer to where you want the text to go and left click the mouse. The KTS will now appear on your screen.

The next item on our **Utilities** menu is **Ins-Text**. Click this command and the following dialog box will appear.



From this dialog box you can insert your own text. Type in the text that you want to put on the template and then click **Ok**. You will then be asked where you want to put your text. Move the cursor to where you want your text to go and left click the mouse. Press the right mouse button to exit the placement stage, and you will be brought back the previous dialog box. If you would like to add in more text simply repeat the process previously explained. If you would like to exit simply click on **Cancel**.

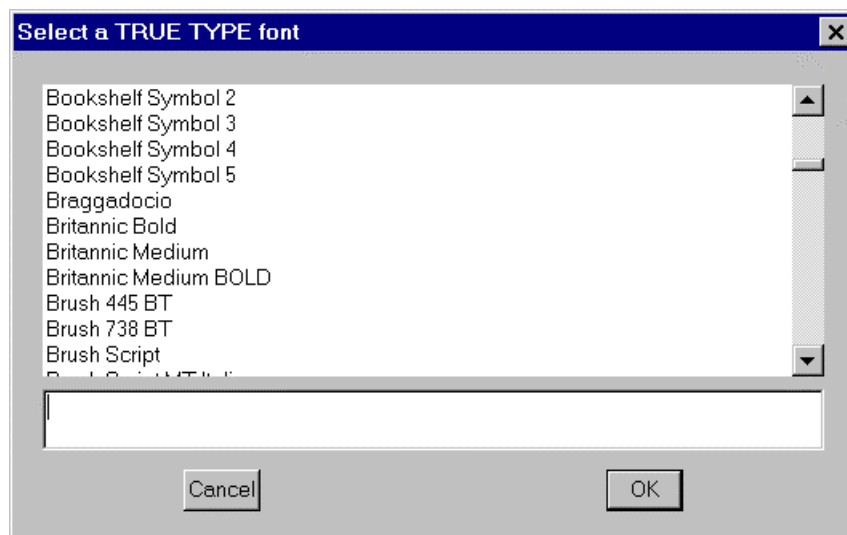
The next item on our **Utilities** menu is **Text-Defaults**. Clicking on this command will bring up the following dialog box.



In this dialog box we have a number of choices of what we can do to the text. Bear in mind that any changes that are made in this dialog box will stay as the default for any new text that you may put in. For this tutorial we are only going to go through the basic functions of this dialog box, these are **Colour**, **Font**, **Height**, **Italic**, **Boxed**, **Horizontal Justification**, **Bold** and **Underline**.

The first of these commands that we will use is the color function. Click on the selection box after the colour field, and a colour palette will appear, select the colour that you want and then click **Ok**.

The next field we will change is that Font field. To change this click on the selection box at the end of the font field. This will bring up the following dialog box.



From here select the font that you want and click **Ok**.

We will ignore the **x Offset** field, and move on to the height field. This field is where we set the height of the text, the larger the number the larger the size of the text. To change this field, click on it and type in the size that you want.

The next field we come across is **Italic**. Changing this to yes will put the text in Italic.

To change this click on the box to change it from **Yes** or **No**.

The next field we come across is the **Horizontal Justification** field. This command is used to describe where the text will be written from. E.g. the text will write normally. The text will write from left to right across the screen. Or, stay centered on a particular point. To edit this field click on the arrow at the end of the field. This will open up a drop down menu with 3 choices in it **Left**, **Center** and **Right**. Move the highlight down to the choice that you want and click on it. The menu will close and the choice you made will be left in the field.

The next field is **Boxed**. This field uses a drop down menu, in which you can put a border around the text if you want to. If you do not want to put a border around the text leave this on **None**.

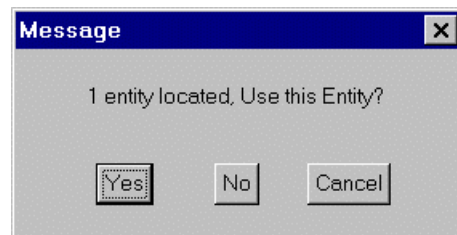
We will skip the next three fields which are **Haloed**, **Y Offset** and **Width**, and move onto **Bold**. This field also uses a drop down menu setup, in which you can alter the boldness of the text if you want to.

Underline, is the next field we come across. Selecting **Yes** in this field will put an underline on the text. If you don't want this, leave this on **No**.

The remaining fields we will ignore.

To save these fields as your default click on **Ok**, and the settings will be saved.

The next command that we come across is **Change**. Clicking on this will bring up a dialog box similar to that of the **Text-Defaults** dialog box. The main difference with this command is that it will only change the text for the text that you select. Make the changes in the appropriate fields and then click **Ok**. You will then be asked which text you would like to change. Select the text and right click the mouse. The following dialog box will then appear

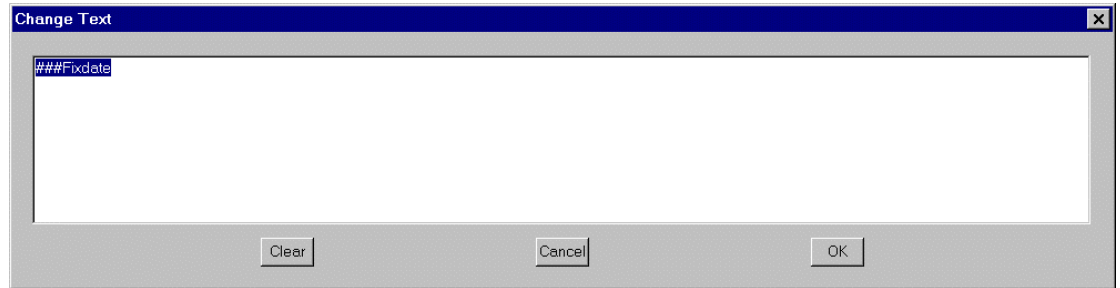


If you have chosen the correct text then click on **Yes**. If you have not then click on **No**, and reselect the correct text.

The next command that we come across is **Move**. Click on this command, and you will be asked to select which text you would like to move. Select your text, and move the cursor to where you want the text to be moved, you can snap to a point. When your text has been moved to the correct location right click the mouse. If you don't want to move any more text right click the mouse again.

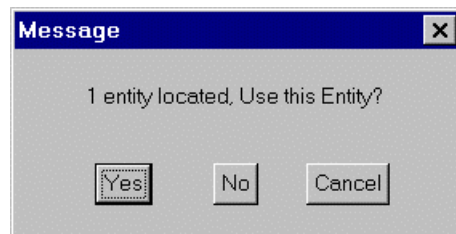
The next command that we come across is **Copy**. Click on this command, and you will be asked to select which text you would like to copy. Select your text, and move the cursor to where you want the text to be copied to. When you have finished copying your text, right click the mouse. If you don't want to copy any more text right click the mouse again.

The Next command that we come across is **Edit**. Click on this field and you will be asked to select which the text that you want to edit. When the text has been selected the following dialog will appear.



From here type in what you would like the text to be, and click **Ok**. This will change the text to what you have written. If you have chosen the wrong text, or want to exit click on **Cancel**.

The final command is **Delete**. Use this command to delete any unwanted text. Simply select **Delete** and you will be asked to select what text you would like to delete. Select the appropriate text(s), and then right click the mouse. The following dialog box will appear

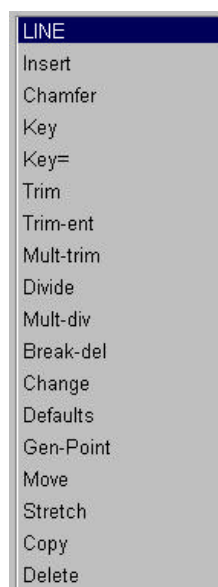


If you have selected the correct text then click **Yes**, and the text will be deleted. If you have chosen the wrong text click **No**.

That completes the section on how to edit the text on your templates.

Modifying the Layout

If you want to edit the layout of the template select **CAD** from the main menu followed by **Line**. This will bring up the following menu.



From this menu we will only need to use 6 commands. These commands are **Insert**,

Trim, Change, Defaults, Move and Delete. The first of these commands that we will use is **Insert**. This command will bring up the following menu.



From this menu we will yet again only use a few commands. These commands are **Free, Free-Len, Hor, Hor-Len, Ver, Ver-Len** and **Constrain**.

By selecting **Free** you can draw in a line using the cursor anywhere on the screen, with no set length or angle. When you have drawn your line right click the mouse to exit this command.

The next command is **Hor**. This command will allow you to draw a horizontal line anywhere on the screen, with no set length. To draw in you line move your cursor to where you want your line to start and left click the mouse. Then move your cursor to where you want your line to end, the angle of the line doesn't need to be perfect as the program will draw a perfect horizontal line. As before, right click the mouse to exit this command.

The next command is **Ver**. This command works exactly the same as the **Hor**

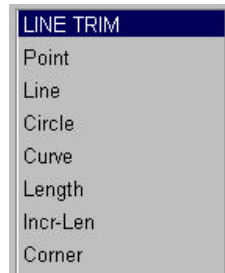
command but will insert a vertical line instead.

The next command is **Constrain**. This command will allow you to draw in lines of any length, but you can set a constraint on the angles,(i.e. 45°).

The final three commands, **Free-Len**, **Hor-Len** and **Ver-Len**, will follow the same ideals as their previous commands but you will be asked to specify a length as well.

This completes the insert menu options.

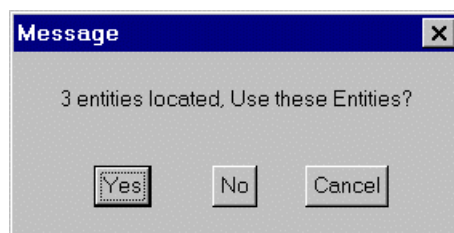
The next menu option that we come across in the **Cad | Line** menu is **Trim**. Selecting this option will bring up the following menu.



From this menu we will only be using the one command, which is **Line**. This command will now allow you to trim a selected line to a point intersecting another line. In other words you can trim two lines to make a perfect corner. To do this first select the line that you would like to trim, making sure that you select closer to the end that you would like to be trimmed otherwise the line will be trimmed from the wrong end causing generally an extremely short line. When you have selected the line, select the line that you would like the first line to be trimmed to, and your line will then be trimmed to the second line. To exit this command simply right click the mouse.

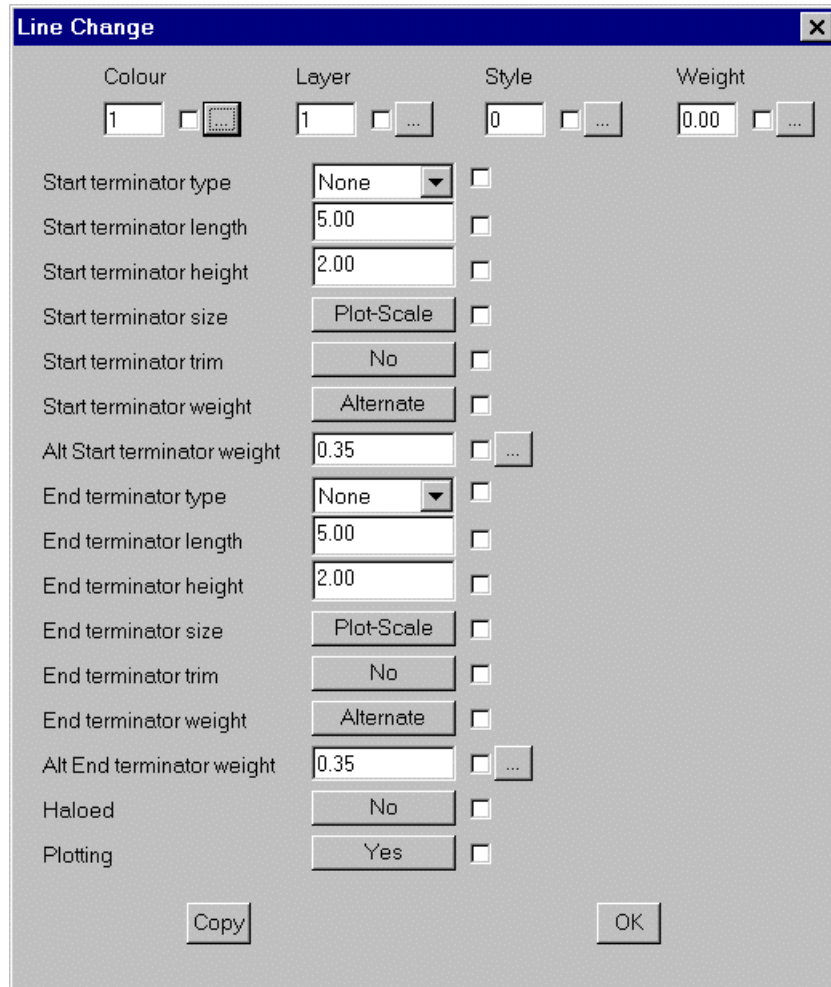
The next menu option that we come across in the **Cad | Line** menu is **Move**. Using this command you can move an entire line to anywhere on the screen. After selecting this command you will be asked to select the line that you would like to move. Select the line that you would like to move, taking note of where on the line you selected as it will take the end closest to where you selected as the reference point as to where you place the line. When the line has been selected, move the cursor to where you want the line to start and left click the mouse. You can continue moving this line if you wish by continually pressing the left mouse button. If you are happy as to where the line is you cancel the placing of the line by right clicking the mouse. If you don't want to move any more line you have to right click the mouse again, because the software will be asking you to select the next line that you would like to move.

The next menu option that we come across in the **Cad | Line** menu is **Delete**. This command is used for deleting line(s). Simply select this command and you will be asked which line(s) you would like to delete. Select the line(s) that you would like to delete, and right click the mouse. This will bring up a similar dialog box to the following.

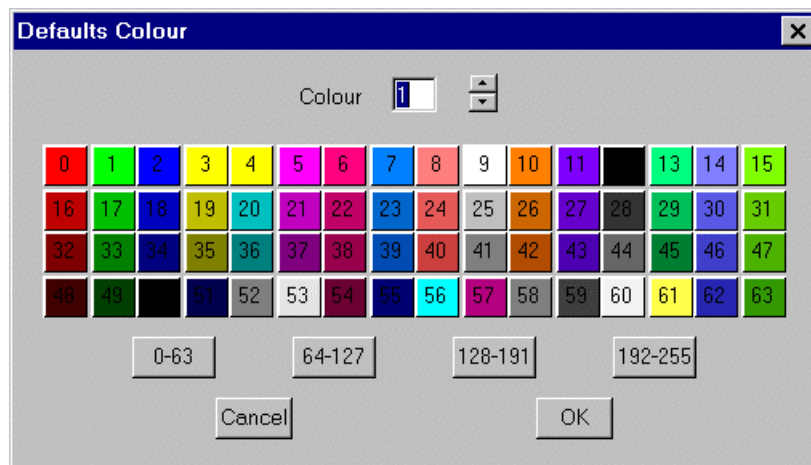


If the selected lines are correct, select **Yes**, and you line(s) will be deleted. If they are not select **No**. and reselect the correct lines.

The next menu option that we come across in the **Cad | Line** menu is **Change**. This will bring up the following dialog box.



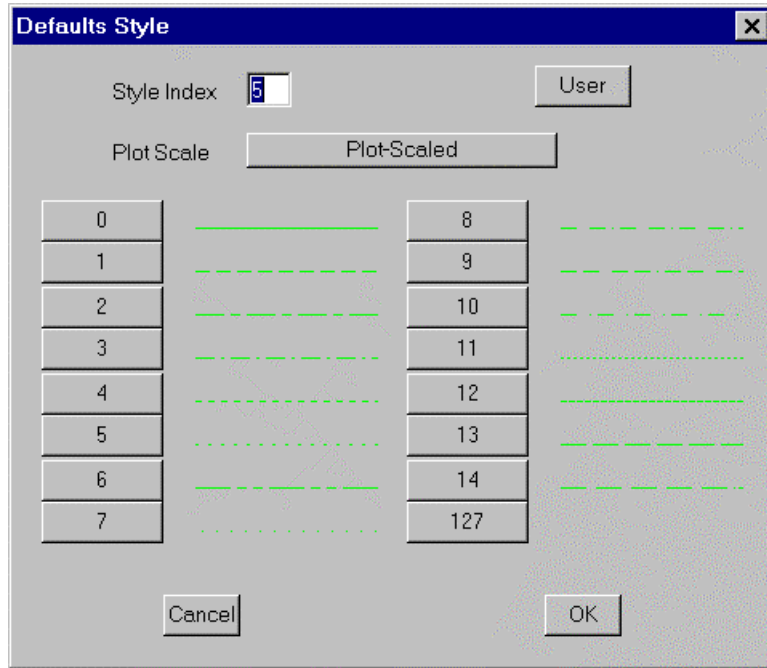
From this dialog box you can change the style, color and thickness of a line. To change the color of the line click on the selection box at the end of the colour field. This will bring up the following dialog box.



From this dialog box you can select the colour of the line that you want. To do this simply select the colour that you want from the palette, or type in the corresponding number. When you have chosen the correct colour click on **Ok**, and you will return to

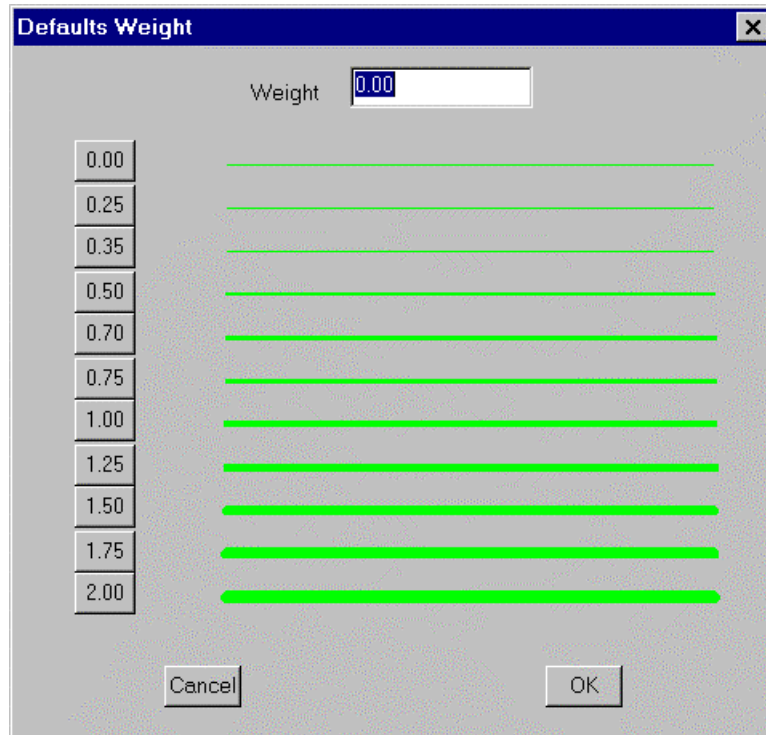
the main dialog box.

The next command we will use from the main dialog box is **Style**. This will change the style of the line. Click on the selection box at the end of the Style field and the following dialog box will appear.

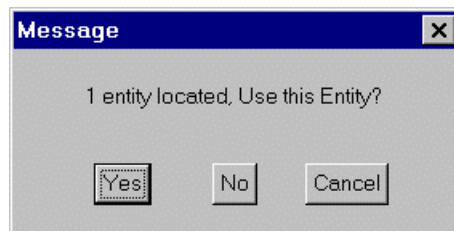


From here you can see all the types of line that you can use. To choose a line simply click on the number next to the appropriate line or type in the number. When the correct line has been chosen, click on **Ok**, to return back to the main dialog box.

The final command that we will use on the main dialog box is **Weight**. The command is used to change the width of the line. Clicking on the **Weight** selection box, will bring up the following dialog box.

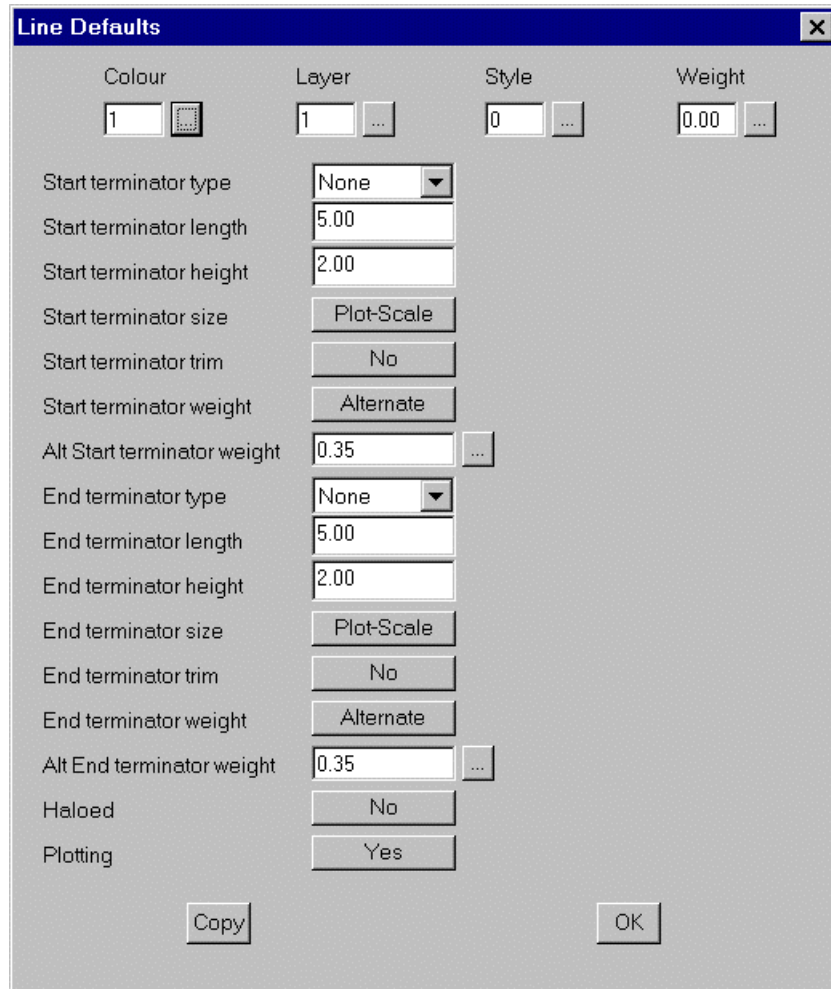


To change the thickness of a line, click on the number corresponding to the appropriate thickness, or type in the number. When the appropriate thickness has been chosen click on **Ok**, and you will be returned to the main dialog box. Now that all of your specifications have been entered, click on **Ok** and you will be asked to select the line(s) that you would like to change to the specifications that you have just set. One the appropriate line(s) have been selected, right click the mouse and the following dialog box will appear.



If the line(s) that you have selected are correct click on **Ok**, and the line will be changed. If the lines are not correct click on **No**, and reselect the line(s) that you would like to change.

The final command that we will look at in the **Cad | Line** menu is **Defaults**. Clicking on this will bring up the following dialog box.



This dialog box is identical to the one under **Change**, but the only difference is that any changes you make in this dialog box will be saved as your defaults. Meaning that every time that you open the **Change** dialog box whatever the figures that you entered into this box will be the figures that will be in the **Change** dialog box.

That now completes our tutorial on how to modify your templates.