Opera 3 Getting Started

Accreditation
Training Courseware

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Introduction

About Opera 3

Opera 3 is the most versatile and user-friendly accounting, supply chain management, payroll & HR, manufacturing and reporting solution from Pegasus Software. A modular solution, Opera 3 enables you to select the components that match your current business model, whilst making it possible to add further functionality as requirements change. This means that the capability or capacity of a system can be seamlessly expanded whilst safeguarding the investment.

For more information about Opera 3, select the Solutions link on the Pegasus web site.

About this Guide

This Accreditation Training Courseware offers an accompanying guide to the accreditation training course.

If you are new to Opera 3, read the Getting Started section of the Opera 3 Help that covers the application in more detail. You can access this from the Windows Start menu, or by using the F1 Key or Help menu when you have logged in to the product.

Opera 3 is available for both Visual FoxPro and SQL Server database platforms. This Accreditation Training Courseware applies to both database platforms, however, there are certain elements that are only included in one or the other database, and as such, the relevant sections or paragraphs are clearly identified with the following labels:

> **[SQL]** – only relevant if you are running the application on an SQL Server database.
>
> **[VFP]** – only relevant if you are running the application on a Visual FoxPro database.

Sections that are not identified with these labels are relevant to both database types.

For more information, see the section Functional Differences between Opera 3 Enterprise & Opera 3 Enterprise SQL section in the release guide.

Feedback

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Please note that product support is not offered through the above email address.

Training Literature Releases

Release	Added Information
R1.0	Originating document (Uplift to O3) Including more in-depth details
R1.1	Uplift for v1.3x and Chapter heading changes
R1.2	Uplift for v1.5x
R1.3	Uplift for v2.2x

Notes

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1 Launching Opera

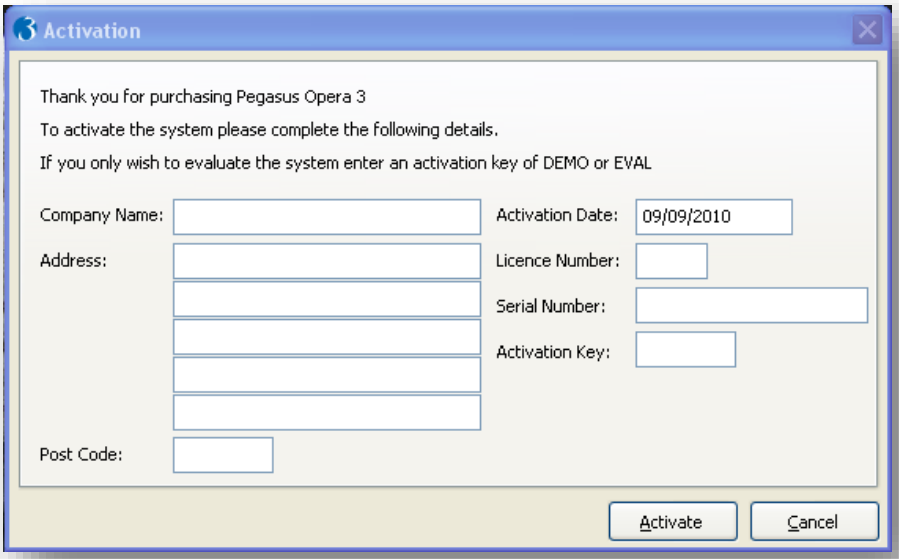
1.1 Starting Opera 3

Activating Opera 3

If you do not have a shortcut on your Windows Desktop, Click the Windows Start button. In the Programs group, point to Pegasus Opera 3 and then click Pegasus Opera 3.

Enter the details into the Screen displayed using the information from your registration card…

Note: If you do not have an Activation Key, you can use the EVAL or DEMO activations to Activate Opera 3 in evaluation or demonstration mode.



Once all the details have been entered, click the Activate button.

Note: You must enter your activation details from your registration card accurately (that includes letter casing) otherwise the activation will not work.

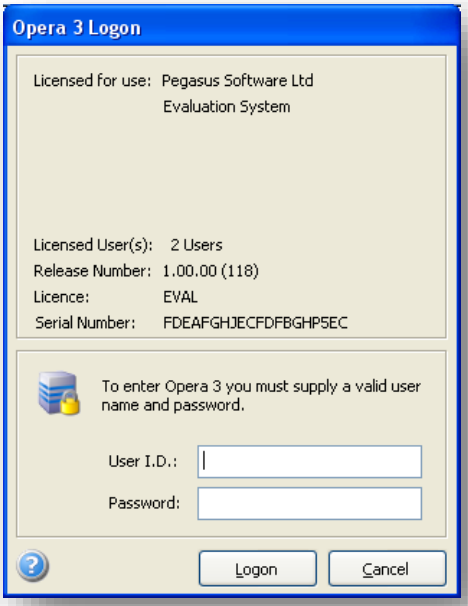
1.2 Logging on to Opera 3

Once Activated Opera 3 will prompt you to enter the User Identification and the password for that user. As standard, Opera 3 comes with three users being ADMIN, MANAGER and USER. None of these Login ID's have passwords set.

1.2.1 User Login

Notes

In the User I.D. box, type the User name required. ADMIN, MANAGER and USER are the logins provided to demonstrate the menu security provided with Opera 3. Manager has access to all menu Items and functions. The User login has a restricted access.



Leave the Password box blank and click the Logon button to proceed or press Enter.

1.3 Using the Online Help

The Help file includes comprehensive information about the application. It is designed to be displayed in Microsoft's HTML Help window and relies on Microsoft's Internet Explorer 6.0 or later being installed on the computer.

Help Window tabs

The following tabs are available to help you find the information you need:

Tab	Description
Contents	Displays books for each chapter or modules, menu items, and pages. Click a book to expand it to show groups of pages. Click a page to view its corresponding topic.
Index	Provides a list of keywords. Click a keyword to view its corresponding topic. If several topics reference the same keyword, select the topic to view from a pop-up menu.
Search	Enter words or phrases to scan topic content and find all topics that match the search criteria. **Tip:** Use double quote marks before and after the phrase to find all words in a search phrase. For example, to search for occurrences of Sales and Invoice together, enter "Sales Invoice". To search for all occurrences of either Sales and Invoice, enter Sales Invoice.
Favourites	You can use this tab to create a personalised list of favourite Help topics. You can then go quickly to topics you view often by selecting them from this tab.

Notes

Accessing the Help

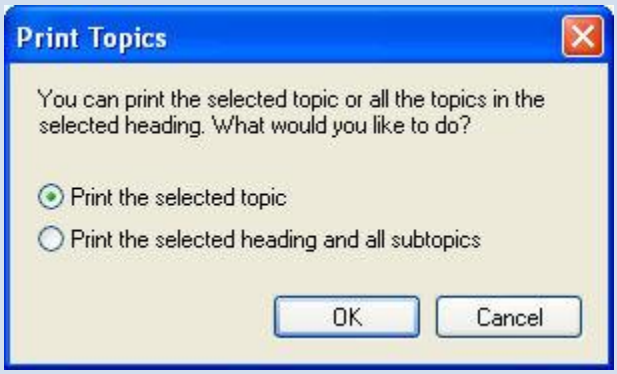
You can access the Help from anywhere in the application. If a form is already open the relevant Help topic for that form is displayed. Access the Help by doing the following:

- Click the button on the toolbar.
- Pressing **F1**.
- Selecting the **Contents & Index** command on the **Help** menu.

Each chapter in the Help file represents a module in Opera II. If you are a new user, the **Getting Started** chapter will guide you through the user interface, adding, deleting and editing records, searching, and printing and reporting.

Feedback: Pegasus is interested to hear your views on the information we provide. If you find an error or omission in the Help file, please send an email to feedback@pegasus.co.uk describing the issue and including the words "Opera Help" in the email's subject line. Please note that product support is not offered through the above email address.

Help Window toolbar

Button	Purpose
Hide/Show	Hides the navigation pane including the Contents, Index, Search and Favourites tabs. This frees up your screen for the Help topic and other applications. **Note:** The **Show** button is displayed after the **Hide** button is selected.
Locate	Locates to highlight the topic you are viewing in the **Contents** pane.
Back/Forward	Displays previously viewed topics.
Refresh	Refreshes the Help topic. If you search for words in the Search tab, Refresh removes the highlighted words in the Help topic.
Print	Prints the topic. If you have the Contents tab selected, this form provides options for printing the current page (topic) or everything contained in a current heading (based on the item selected in the contents). You can also right-click inside the topic frame and select Print from the shortcut menu to print the topic. 
Pegasus	Opens the Pegasus web site (www.pegasus.co.uk) in your web browser if the computer is linked to the internet.

1.4 Viewing Guides in Adobe Reader

Notes

User guides are an important part of the application because they are provided to answer your questions. Each release includes a Release Guide, System Requirements Guide, Installation Guide, Implementation Guide and Demonstration Data Guide. These guides are in PDF format which are read using Adobe Reader (Default location: C:\Program Files\Pegasus\O3 Client VFP\User documents) .

Release Guide

When new versions of the application are released, they are normally accompanied by a Release Guide that contains information about the new enhancements in the release as well as information about earlier releases.

Note: You can also view the guide from the Opera II CD Installation Menu.

Demonstration Data Guide

This guide is provided to assist in the use of the demonstration data. It is recommended that the Help is used at the same time.

Implementation Guide

The Implementation Guide provides a high-level view of Opera II and how to approach an implementation. It details how the modules are integrated, and recommends the order in which elements should be set up.

System Requirements Guide

The System Requirements Guide details the minimum and recommended computer hardware and software requirements that are required to install and use the Enterprise and Enterprise SQL editions. It also includes guidance on using the Enterprise and the Enterprise SQL editions in a Terminal Services environment in Windows Server 2003 and Windows Server 2008 (32-bit & 64-bit).

To View and Print a PDF guide in Opera II

1. The guides can be viewed from these areas of the application:
    a. From the **Help** menu when the Classic Navigator or Navigation Pane is used.
    b. From the **Opera 3 button** when the Ribbon Bar is used.
2. On the **Guides** menu, click to select the guide you want to view. The guide is displayed in Adobe Reader.
3. On Adobe Reader's **File** menu, click **Print** and select the printer you want to use. Then click **OK**.
4. If the **File** menu is not displayed, either click the **Print** icon on the toolbar or press the right-click button on the mouse and select **Print**. Then choose your printing preferences and click **OK**.

Installing Adobe Reader

The latest version of Adobe Reader is on the application's CD. During the installation of the client software, the application checks to see whether Adobe Reader is installed on your machine. If it cannot be found, a message is displayed prompting you to install it from the CD. You can install it from the **Prerequisites** menu that is displayed on the setup menu when you insert the CD into the CD drive.

1.5 Focused Online Help

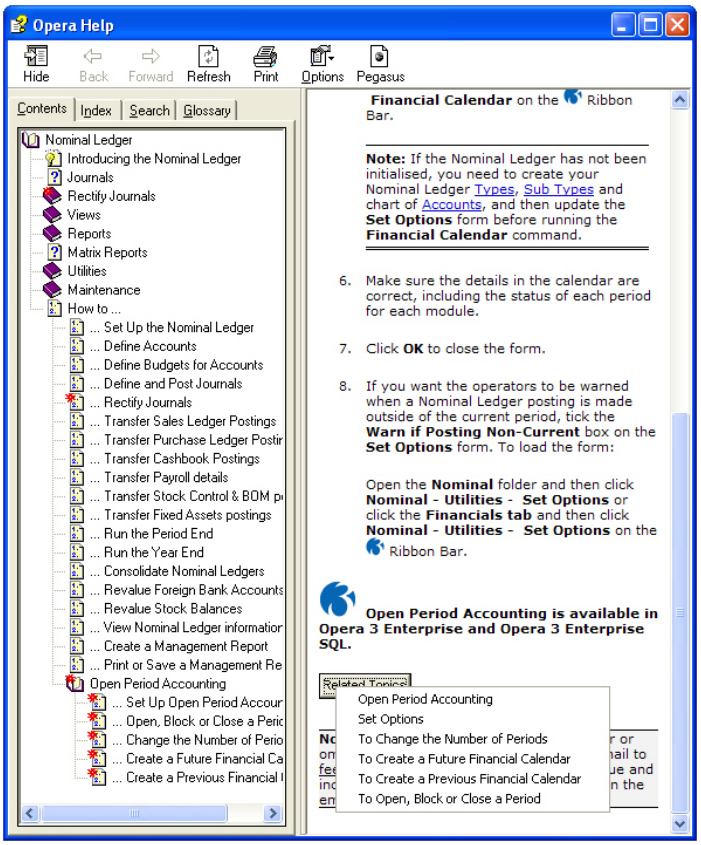
Notes

The Help supplied with Opera 3 has been restructured and improved. Each module in the application has it's own Help system that includes the information you need to understand the purpose of the module, what each form and box on each form is for, and how to complete tasks.

Information Type	Description
Concept	An 'Introduction to ... " topic that gives an overview of the module, describes the different areas of the module, and includes a chart of how the module links to other modules in the application.
Reference	These topics describe the different boxes on each form in Opera 3. These Help topics have been shortened so that information is easier to find.
Task	These topics describe the steps required to do tasks in Opera 3.
New Features	This 'What's New' Help file provides information on features in a new release plus other information that is relevant to the release that can be read on-screen. This information is also available to print in a PDF file.

Each form in Opera 3 has a Help button that opens the Help topic for that form. When you click the Help button only the Help for that module is displayed so you are not overwhelmed by Help for the entire application.

To help you find other information you may be interested in, most Help topics include a button that links to other related Help topics like instruction topics. Topics that relate to features that are available in Pegasus Opera 3 but not available in Pegasus Opera II are indicated in the contents pane by either this icon - or by this icon -.



The Opera 3 Help form with the Related Topics menu displayed.

It is easier to search for information in Opera 3. The search results include the module that the information is included in, helping you to decide which topic to open. You can search the Help topics' titles only, search for similar words and search only in the results of a previous search.

Notes

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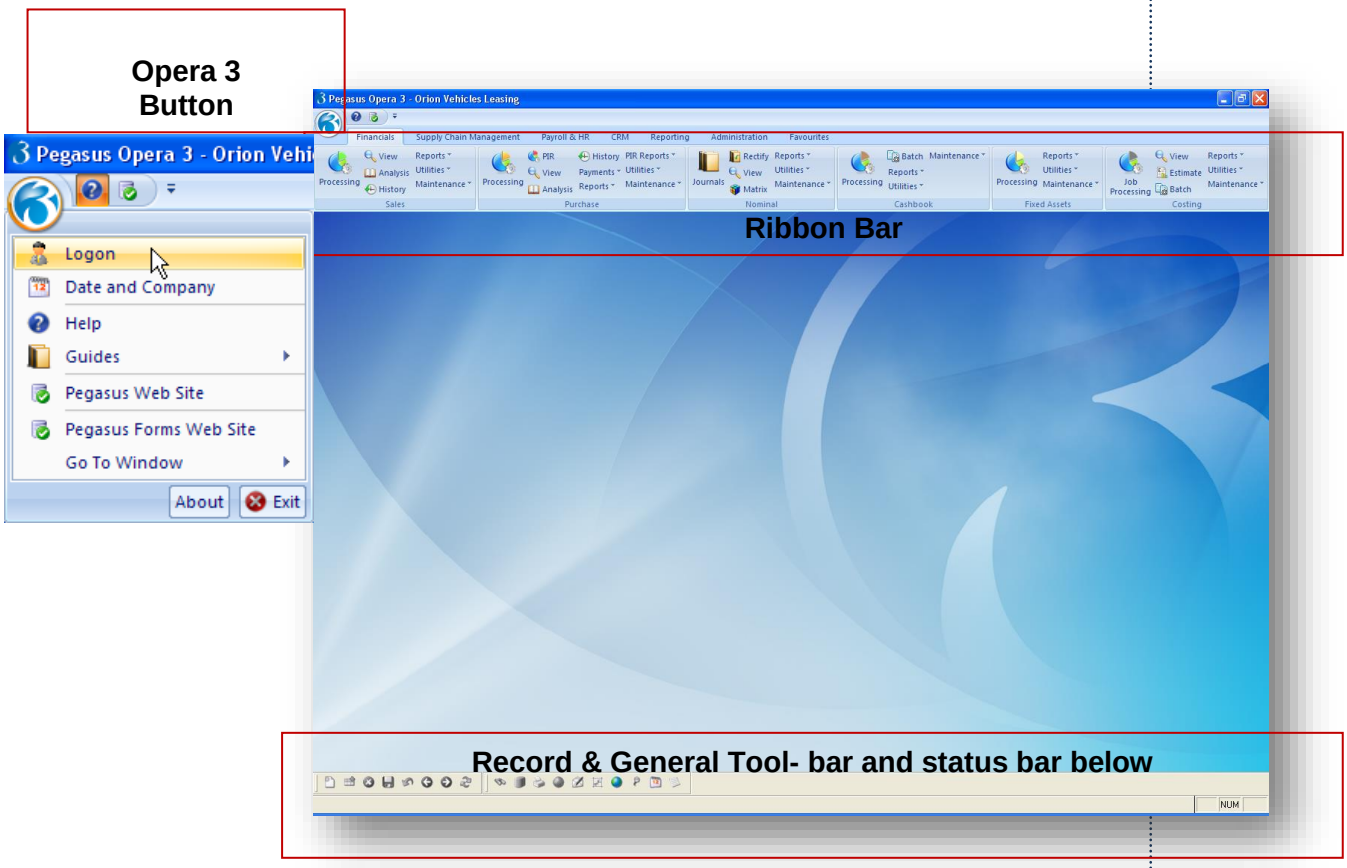
2 Opera Desktop

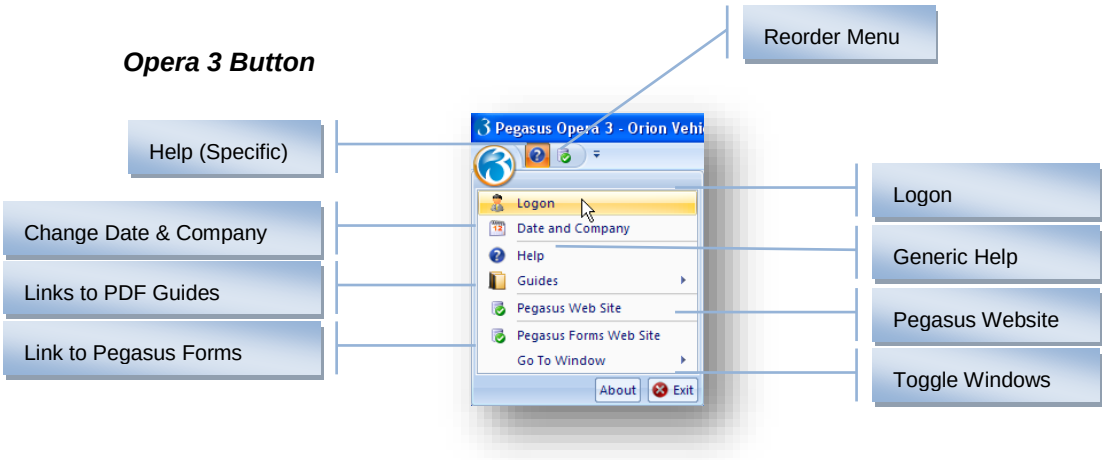
2.1 The Desktop

The default setting for Opera 3 is the Ribbon Style menu, with the Record and General Toolbar at the button. Opera 3 also sports an O3 button with various functions and links.



The Ribbon follow current technology (MS Office 2010 style) and offers the modules as per the appropriate modular groups. Instead of folders previously seen in the navigator, the sections such as utilities and maintenance now offer a drop down selection.

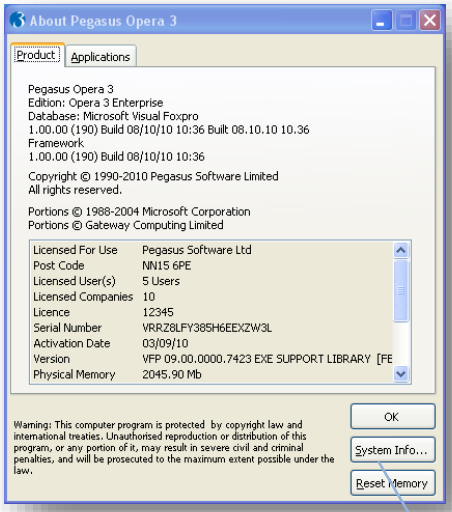
Opera 3 Button

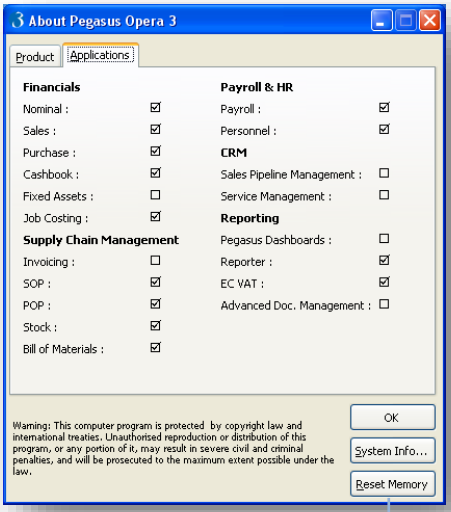


With the Ribbon Bar, the user is able to use both the mouse and the keyboard to select options. The Alt key allows single key navigation to an application, while the Tab key allows navigation between the options within an application.

The About…

Notes





Memory Management

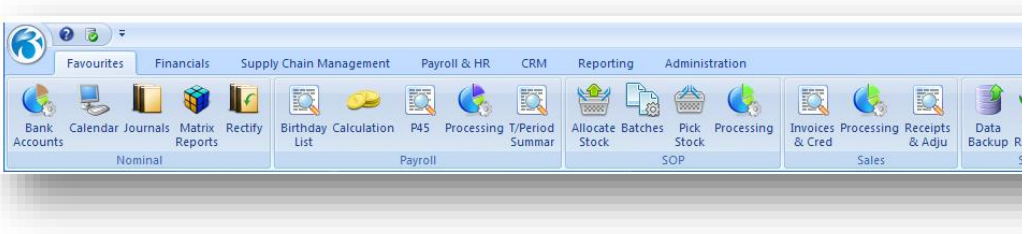
Within Opera 3 Pegasus does not write any code to control the memory management or allocation of the computers RAM. All memory functions are carried out by the Visual FoxPro application itself. Being a true 32-bit application, Visual FoxPro will use its own dedicated block of memory given to it by the Operating System. This sits independently within the PC's RAM of any other application.

It is possible however that the RAM allocated to Visual FoxPro runs out. This would then trigger "Paging" the dumping of RAM to Disk to free up memory. As long as there is plenty of disk space paging can give the application a huge amount of extra "Virtual memory". If disk space were short, or run out this would result in an "Out of Virtual Memory" message.

Force Opera 3 to reset its memory by clicking the Reset Memory button on the About Opera 3 form.

More Ribbon Bar Functionality & Favourites

The Ribbon bar is a navigation panel that groups the modules in Opera 3 under different tabbed pages. The panel is similar to the Ribbon bar used in Microsoft Office 2007 and is the default navigation method in Opera 3. You can change the order of the tabbed pages and add either your most-used commands in the application or a link to another software product to the Favourites tabbed page. Instructions to do this are included at the end of this Help topic.



The Ribbon bar form with the Favourites tabbed page displayed.

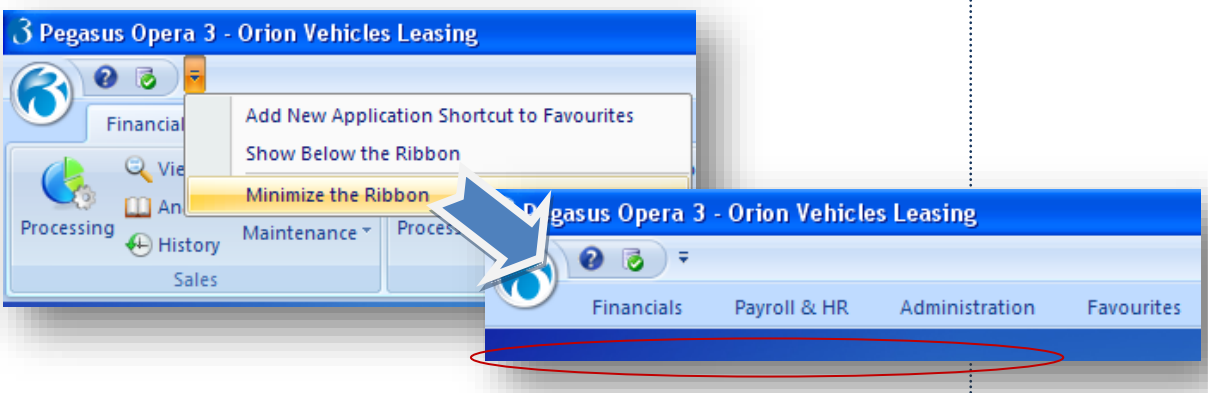
Notes

The Ribbon bar includes the Opera 3 button that displays a menu so you can easily:

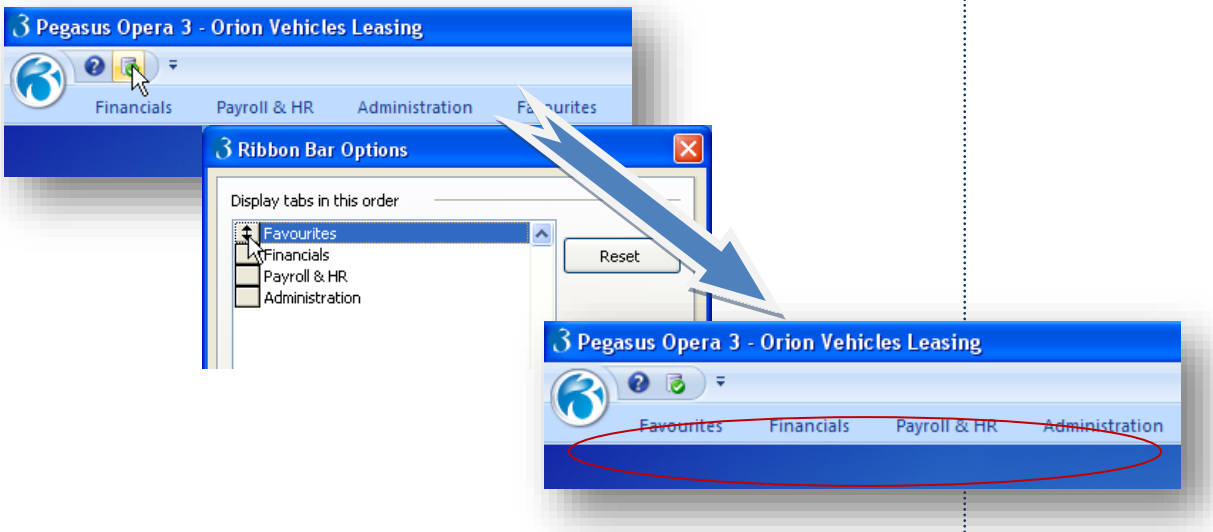
- Log in to the application again (if prompted to do so)
- Change the application's accounting date
- Access the Help file and user guides
- Load the Pegasus and Pegasus stationery web sites
- View a list of the forms that are open.

Single click on these functions to launch the respective processes. Keyboard options to navigate the Ribbon bar are also available.

There are several options for the Ribbon bar including minimising it to offer more working space in the screen.

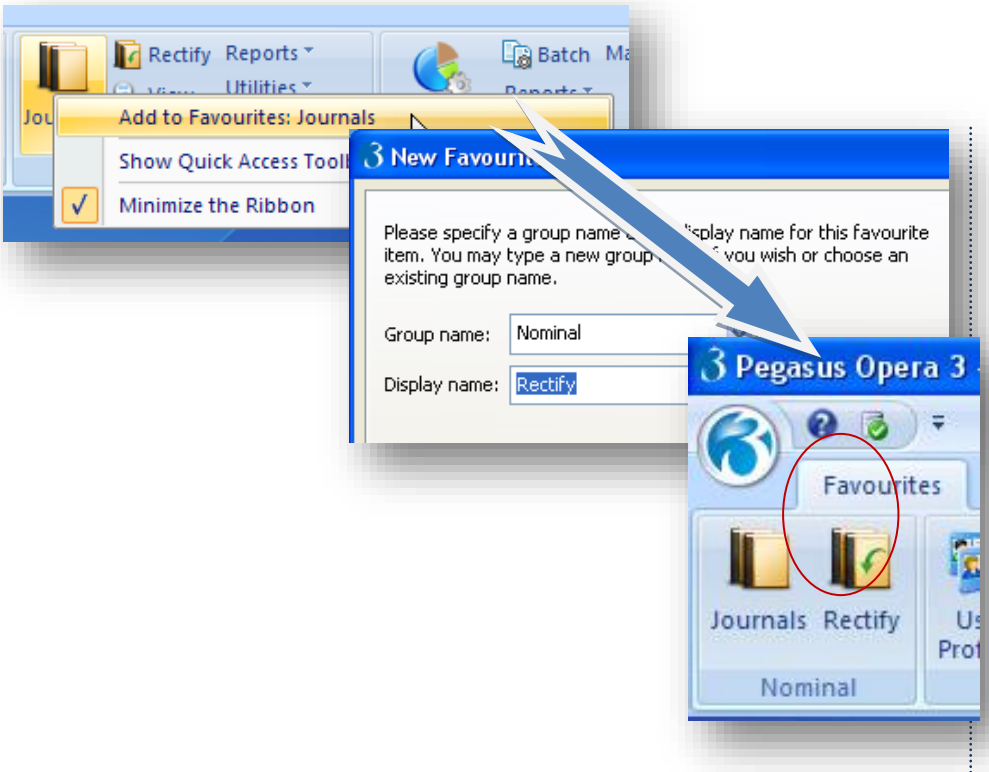


You have the ability to re-order the sections by clicking on the Re-order icon and click & drag the sections as required.



Right click on a “favourite” or “common” function and add it to your favourites section.

Notes



The modules in the Ribbon bar are arranged into the following tabbed pages:

Group	Modules
Favourites	Your favourites. Each user can add their own most-used commands to this group.
Financials	Sales Ledger, Purchase Ledger, Nominal Ledger, Cashbook, Costing, and Fixed Assets
Payroll & HR	Payroll and Personnel
Administration	System etc.

2.1.1 Navigation Options

The navigation is user defined – there are various options available

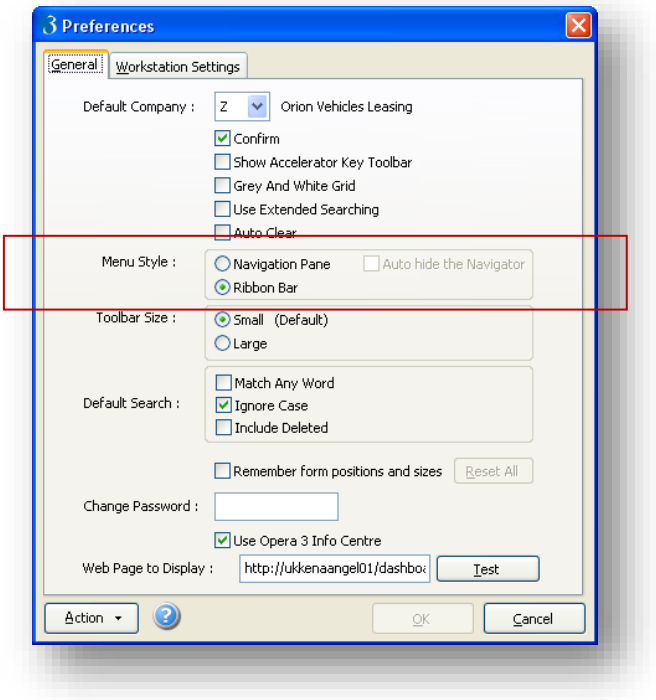
The Menu Bar & OII equivalent Navigation

When activated, the menu bar at the top of the screen contains one menu command for each activated module, such as System, Sales, Purchase, Nominal and so on and one menu including File, Edit, Record, Window and Help. This is a multi-layer menu as in all Windows products. You can also use the Opera II style Navigator.

Notes

The File, Edit, Record and Help menu bar commands have equivalent buttons on the Toolbar and control the non-accounting aspects of the Windows interface. They are concerned with the maintenance of account records and include functions such as New, Save, Delete and so on.

The menu bar also lists the module menu items along the top of the screen (as was the case in Pegasus Opera). This menu bar and the Navigator are optional and are activated in Preferences, by selecting the Navigation Pane or Classic Navigator option and Menu Bar.



The menu bar can be accessed either via the mouse or via the keyboard with the use of shortcut keys. Shortcut keys are underlined characters in each menu item and can be used in conjunction with the ALT keys to select a command. For example, the keys 'ALT + R' open the Record menu.

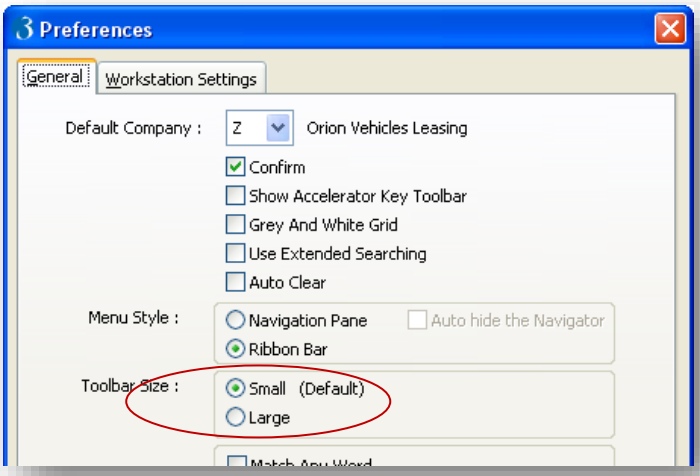
With a menu open, commands on that menu drop down list can also be selected with shortcut keys e.g. to select the New command on the Record menu, press CTRL + N.

Shortcut keys can also be used without opening the menu. However, it must be noted that commands with shortcut keys on are only available in the appropriate context. For example, CTRL + N to create a new record can only be used when a form that allows new records to be created is open.

2.1.2 The Record Toolbar

The Toolbar is a row of buttons at the bottom of the Pegasus Opera 3 window that provides shortcuts for the commands on the Record menu. These commands are for processing records, therefore they can only be used when a record form is displayed. The various commands can be accessed either with the mouse or via the shortcut keys as detailed later in this guide. Each toolbar command has a tooltip. When the user places the mouse pointer over a toolbar button a tooltip message will flash on the screen indicating what will happen when the button is pressed.

Notes



The size of the icons in the General, Record, Help, and Accelerator Key toolbars can be set in System Preferences. The user can select either small (default) or large.

NB: The size of the icons in the Accelerator Key toolbar is only affected if it is docked to an edge of the desktop area.

Toolbars contain buttons that make it easier for you to use the application. Each button also has an equivalent menu command on the application's Main menu or Action menu.

There are four toolbars in the application:

- Record toolbar
- Help toolbar
- General toolbar
- Accelerator Key toolbar

Note: The **Accelerator Keys** toolbar is only displayed if you select the **Show Accelerator Key Toolbar** option in the System - Preferences command. The toolbar is a quicker way to use the commands that appear on the Action menu. The toolbar normally appears on the desktop but it can be docked to an edge of the desktop area.

The toolbar shows the current form's shortcut keys. If no shortcut keys are available, it shows the text 'No Acc. Keys'.

The toolbars are normally 'docked' side by side below the Main menu, with the exception of the **Accelerator Key** toolbar which 'floats' in the desktop area. When docked, toolbars have a 'handle' on the left edge which indicate the start of each one. You can drag the toolbar to a different location, for example, in a different docked position or to create a floating toolbar in the desktop area. If you want to reposition a floating toolbar, you drag the title bar of the toolbar window to the new location. You can also dock a floating toolbar; either under the menu bar or along a different edge of the main window.

Notes

You can change the size of the Record, Help and General toolbars by selecting the Toolbar Size option in the System - Preferences command. You can also change the size of the Accelerator toolbar if it is docked to an edge of the desktop area.

The following is a list of the docked toolbar buttons.

Note: Some buttons are not available for some modules or activations. The buttons' availability also depends on the process you are using and the record type currently selected.

Icon	Description	Shortcut Key
	Create a new record	New (Ctrl+N)
	Insert a new record before the current record	Insert (Ctrl+I)
	Delete the current record	Delete (Ctrl+D)
	Save current changes	Save (Ctrl+S)
	Revert changes to a record	Revert (Ctrl+R)
	Move to the previous record	Move to next record (Ctrl+LeftArrow) (Ctrl+RightArrow)
	Move to the next record	
	Refresh the data	Refresh (Ctrl+H)
	Help	Help (F1)
	Search for a record	Search (Ctrl+F)
	Copy data	Copy (Ctrl+M)
	Print records on the **List** tab	Print (Ctrl+P)
	Open the web site associated with the currently selected record, or the default web site defined in the System Preferences command, if the currently selected record does not have a web site.	Website (Ctrl+W)
	Send an e-mail message to the address associated with the currently selected record, if available	Email (Ctrl+L)
	Reset default size	Reset (Ctrl+F12)
	Always keep child form on top of parent form	Always On Top (Ctrl+F11)
	Change the system date	Change System Date (Ctrl+Y)
	Create notes for a record	Notes (Ctrl+O)
	Launch the Opera 3 Info Centre	

To Change the Toolbars' Size

1. Use the **System - Preferences** command. The Preferences form appears.
2. In the Toolbar Size field, select either Small or Large.
3. Click **OK**.

Notes

2.1.2.1 Navigator Shortcuts

Return to the Navigator	CTRL & T
Move down the tree structure	Down Arrow
Move Up the tree structure	Up Arrow
Expand a tree view	Right Arrow on top level
Collapse a tree view	Left Arrow on top level

2.1.2.2 Menu Bar Shortcuts (OII Only)

To drop down the File menu	ALT & F
To drop down the Edit menu	ALT & E
To drop down the Record menu	ALT & R
To drop down the Window menu	ALT & W
To drop down the Help menu	ALT & H

2.1.2.3 Processing Forms

Move to the next field	Tab OR Enter/Return
Open the Action Button	ALT & A
Close button to close a Form	ALT & C
Move to General Tab view	ALT & G
Move to Memo Tab view	ALT & M
Move to List Tab view	ALT & L

2.1.2.4 Reports

Ok button	ALT & O
Cancel Button	ALT & C
Select output to Screen	ALT & S
Select Output to Printer	ALT & P
Run the Report (Report button)	ALT & R

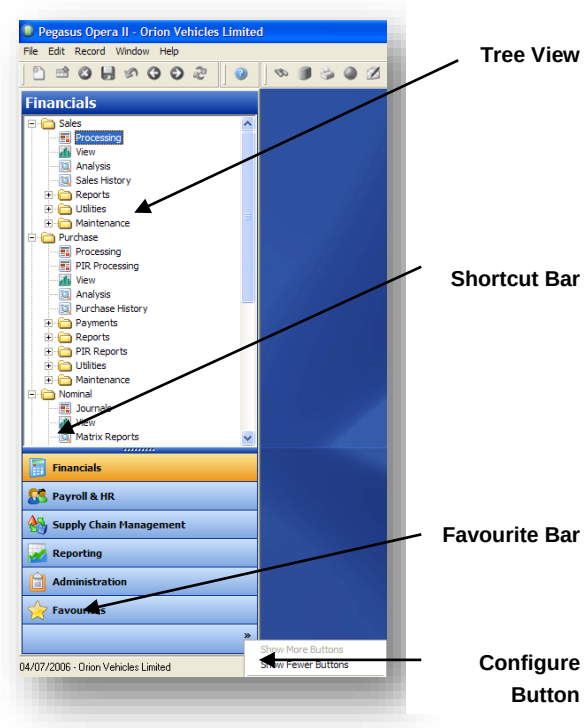
2.1.2.5 Special functional keys

Drop down the contents of a list box	ALT & Down Arrow
Toggle tick boxes on/off	Space Bar / Enter
Move between radio buttons	Up/Down Arrow Key
Select radio button in the group	Space Bar / Enter

2.1.3 Navigation Pane

Notes

The Navigation Pane enables the user to select commands or functions for particular modules.



You access the module commands using the **Navigation Pane**. It provides an alternative means of selecting commands to the Classic Navigator or Menu Bar**.** The commands in the **Navigation Pane** relate to the module commands; there are no equivalent commands for the **File**, **Edit**, **Record**, **Window** or **Help** menus.

The Navigation Pane organises the application's modules into logical panes or groups so making for easy navigation to the parts of the application that interest you. You can change the order that the panes are displayed in and use a favourite pane for the commands you use most.

The Navigation Pane consists of three parts:

- pre-defined panes (displays logical groups of commands)
- tree view menu
- favourite pane (displays your favourite commands).

2.1.3.1 Using the Pre-defined Panes

The modules are organised into the following panes:

Pane	Modules
Financials	Sales Ledger, Purchase Ledger, Nominal Ledger, Cashbook, Costing, and Fixed Assets
Supply Chain Management	Sales Order Processing, Purchase Order Processing, Stock and Bill of Materials
Payroll & HR	Payroll and Personnel

Notes

Customer Relationship Management	ales Pipeline Management, Service Management, and Helpdesk
Reporting	Reporter and EC Vat
Administration	System, Import and Upgrade
Favourites	Views and any user-specific favourites

2.1.3.2 To Select Commands in the Navigation Pane

1. Click to open the pane you want.
2. In the tree view menu click the command or double-click the submenu folder you want. If the command relates to a form, the form opens. If the command opens a submenu, more commands are displayed.

Tip: You can also open and close folders in the tree view menu using the '+' plus and '-' minus signs alongside each folder.

To open a folder, click the '+' plus sign. To close a folder, click the '-' minus sign.

To open a folder and all its subfolders, click the folder, then press '*' asterisk on your keyboard. To close the folders, click the '-' minus sign.

2.1.3.3 Using the Favourites Pane

You can use the **Favourites Pane** to maintain shortcuts to commands in the system, or to other applications.

2.1.3.4 To Add Commands to the Favourites Pane

1. Click to open the pane that contains the command you want to add to the **Favourites Pane**.
2. In the tree view menu right-click the command.
3. Click to select the **Add...to favourites bar** command, which will have the name of the command in the title. The **New Favourite** form is displayed.
4. In **Group name**, do one of the following: accept the default (which is the module name), click to select an alternative from a list (which can be one already defined on the **Favourites Pane**) or enter a new name.
5. In **Display name**, either accept the default (which is the command name) or type a new name.
6. To add the item to the **Favourites Pane**, click **OK**.

Note: Groups are sorted by name alphabetically (case insensitive), but this does not happen until the next time you log on.

Notes

2.1.3.5 To Add an Application Shortcut to the Favourites Pane

1. Click the **Favourites Pane**.
2. In the Favourites tree view menu right-click to select the **New application shortcut**. The **New Application Shortcut** form is displayed.
3. Enter the path and name of the application or use the browse button to locate the application to be used.
4. In **Group name**, do one of the following; accept the default (which is *Applications*), click to select an alternative from a list (which can be one already defined on the **Favourites Pane**) or type a new name.
5. In **Display name**, either accept the default (which is the application name) or type a new name.
6. If you want to use a specific icon for the item on the **Favourites Pane**, type the path and name or use the browse button to select.
7. To add the item to the **Favourites Pane**, click **OK**.

2.1.3.6 To Resize the Navigation Pane

You can quickly change the size of the buttons in the **Navigation Pane** by:

- Clicking the **Configure** button at the bottom of the **Navigation Pane,** and then clicking **Show More Buttons** or **Show Fewer Buttons**.
- Pointing to the horizontal splitter bar between the tree view menu and the panes, then dragging the bar up or down when the mouse pointer turns into a double-headed arrow.

If you drag the horizontal splitter bar to the bottom of the **Navigation Pane**, or use the **Show Fewer Buttons** or **Show More Buttons,** all the large panes convert to small buttons and are displayed in a single row of icons at the bottom of the **Navigation Pane**.

Tip: Pause your mouse pointer over the buttons to see their descriptions.

2.1.3.7 To Change the Order of the Panes

You can change the order that the panes are displayed by:

- Clicking the **Configure** button at the bottom of the **Navigation Pane,** and then selecting **Navigation Pane Options**.
- Pointing to the button beside the pane's description, then dragging the button up or down when the mouse pointer turns into a double-headed arrow.

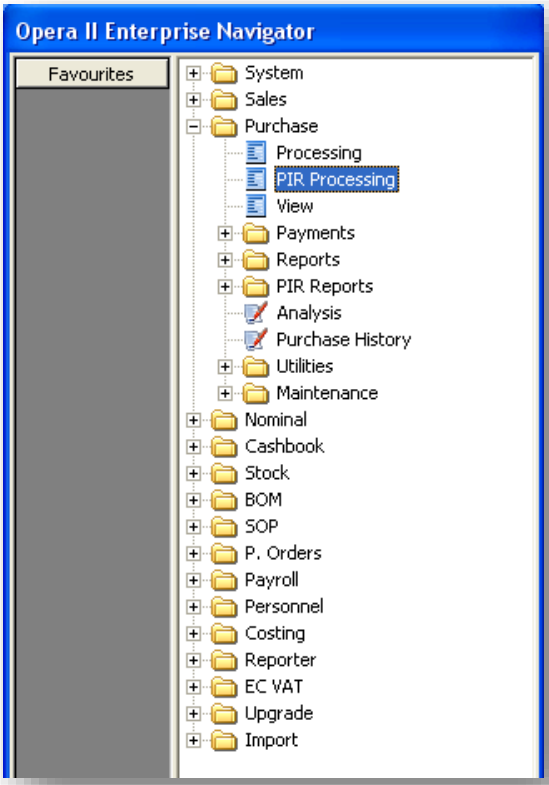
When you have finished, click **OK**.

Tip: Click the **Reset** button on the **Navigation Pane Options** form to reset the order of the panes back to the original order .

2.1.4 Classic Navigator (OII Only)

Notes

The tree view displays the commands in a hierarchy for each module depending on which section of the shortcut bar has been selected. For example, select 'Financials' to access Sales, Purchase, Nominal, Cashbook and Costing (depending on the activation key).



You can access the module commands using the **Classic Navigator**. It is only displayed if the Classic Navigator option is selected in the **System - Preferences** command. It provides an alternative means of selecting commands to the Navigation Pane and **Menu Bar**.

The commands only relate to the module commands; there are no equivalent commands for the **File**, Edit, **View**, **Record**, **Window** or **Help** menus. Modules and their submenus are represented by folders. To see the items in a module, double-click the folder or click the '+' plus sign next to the folder icon. A list of commands appears for you to select.

The Classic Navigator consists of two parts:

- **tree view**
- **favourites bar.**

2.1.4.1 Using the Tree View to select commands

1. Double-click to open the folder for the module you want. A list of commands and submenu folders appears.
2. Click the command or double-click the submenu folder you want. If the command relates to a form, the form opens. If the command opens a submenu, more commands are displayed.

Notes

Tip: You can also open and close folders in the tree view using the '+' plus and '-' minus signs alongside each folder.

To open a folder, click the '+' plus sign. To close a folder, click the '-' minus sign.

To open a folder and all its subfolders, click the folder, then press '*' asterisk on your keyboard. To close the folders, click the '-' minus sign.

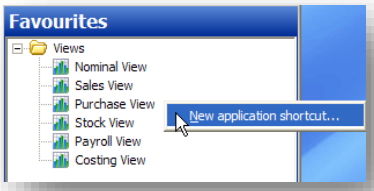
Using the Favourites Bar

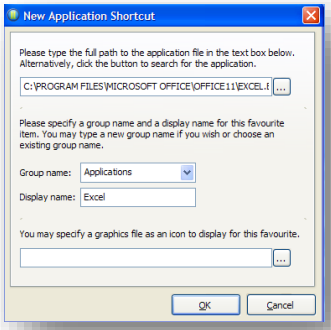
Use the **Favourites Bar** to maintain shortcuts to commands in the system, or to other applications. You can also hide either the **Tree View** or the **Favourites Bar** if you want to free up space on the screen. One of the two must be open; you can choose. Right-click on either control to use **Hide** or **Show** or use the commands on the **View** menu.

2.1.5 Favourites Bar

The favourites bar, contains the favourite commands selected by each user for their own menu view. Favourite commands are selected from the tree view menu by right clicking a command and selecting Add 'Command' to favourites.

External applications such as MS Excel can be added to the Favourites bar.





When the Add to favourites bar is selected, the following window will appear:

Browse to Excel in C:\PROGRAMFILES\MICROSOFTOFFICE\OFFICE11\EXCEL.EXE

For more flexibility and ease of use the user can configure the new shortcut bar of navigator by selecting the Configure button at the bottom of shortcut bar. Selecting the Configure button will activate a popup menu which will have an item to allow the user to configure the Shortcut Bar.

2.1.5.1 To Add Commands to the Favourites Bar

1. Right-click on the command in the **tree view** that you want to add to the **favourites bar**.
2. Click to select the **Add...to favourites** bar command, which has the name of the command in the title. The **New Favourite** form is displayed.
3. In **Group name**, either accept the default (which is the module name), click to select an alternative from a list (which can be one already defined on the **Favourites** slider bar) or enter a new name.
4. In **Display name**, either accept the default (which is the command name in the **tree view**) or type a new name.
5. To add the item to the **favourites bar**, click **OK**.

Note: Groups are sorted by name alphabetically (case insensitive), but this does not happen until the next time you log on.

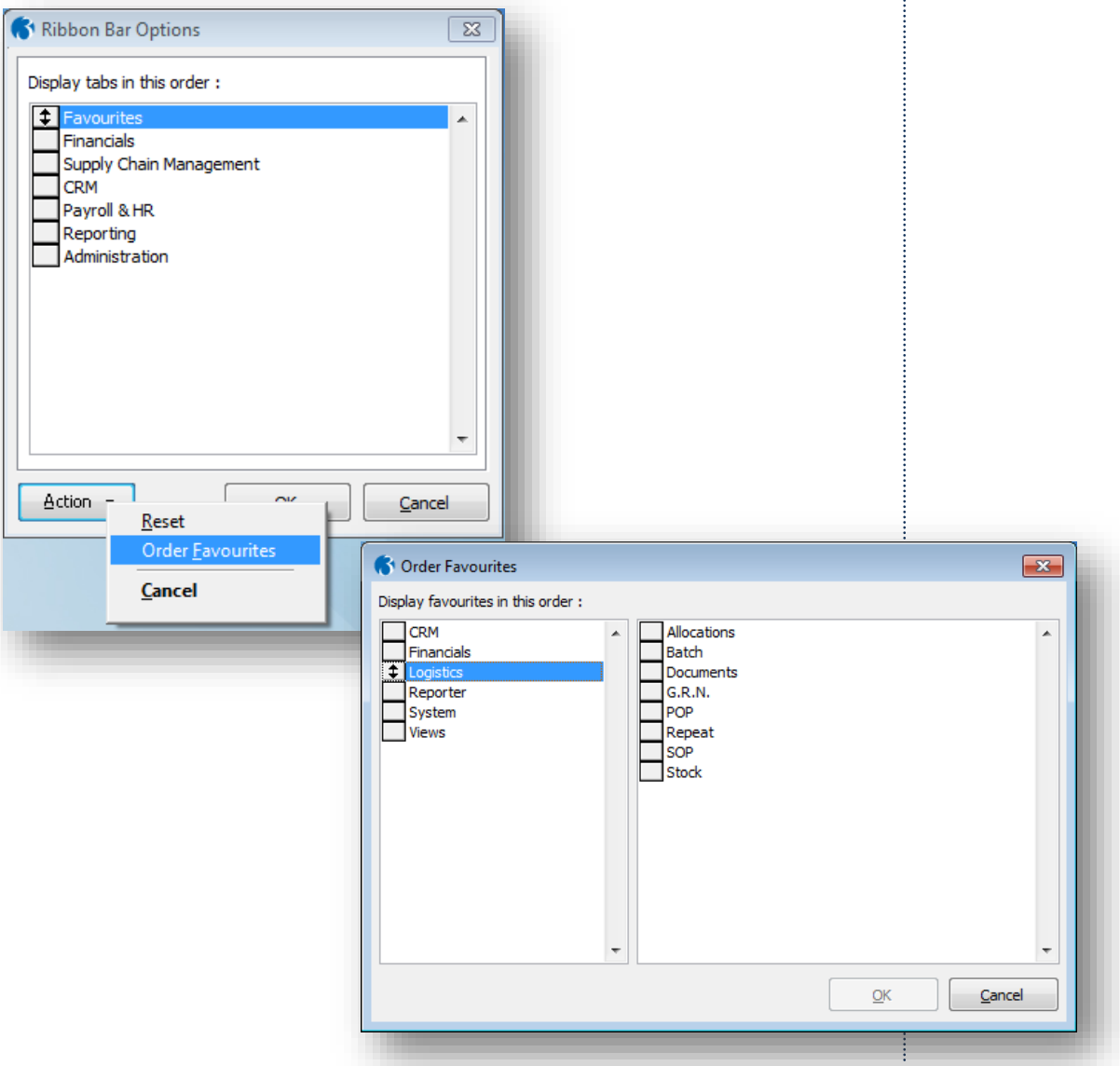
Notes

2.1.5.2 To Add an Application Shortcut

1. Right-click on the **favourites bar** or **tree view**.
2. Click to select the **New application shortcut**. The **New Application Shortcut** form is displayed.
3. Enter the path and name of the application or use the browse button to locate the application to be used.
4. In **Group name**, either accept the default shown (which is Applications), click to select an alternative from a list (which can be one already defined on the **Favourites Bar**) or enter a new name.
5. In **Display name**, either accept the default shown (which is the application name) or type a new name.
6. If you want to use a specific icon for the item on the **favourites bar**, type the path and name or use the browse button to select.
7. To add the item to the **favourites bar**, click **OK**.

2.1.5.3 To Customise and Change groups and items within the favourites bar

Individual users have the ability to customise groups and items on the favourites bar.



2.2 Menus and Commands

Notes

If the menu has been activated:

The Main Menu contains menus including **File**, **Edit**, **View**, **Record**, **Window** and **Help**. You can also include an additional menu command by selecting the **Menu Bar** option on the System - Preferences form. This menu is not available if you use the Ribbon Bar in Pegasus Opera 3.

A menu displays a list of commands. The menu commands have access keys. These are characters that are underlined and can be used in conjunction with the ALT key to select the command. For example, the R**ecord** menu has an access key of **R** because that is the letter underlined. To open the **Record** menu with the keyboard, you press ALT+R. With the menu open, commands on that menu can also be selected with access keys. For example, to select the N**ew** command on the **Record** menu, you press **N**.

Shortcut keys are associated with some commands. For example, on the **Record** menu, CTRL+N is the shortcut for the **New** command and CTRL+D is the shortcut for the **Delete** command. You can use shortcut keys without opening the menu. Commands with shortcut keys are only available in the appropriate context. For example, you cannot use CTRL+N to create a new record unless you have a form open that allows new records to be created.

Notes

You may be prevented from gaining access to a module, command or form by the menu access rights set for your user profile. Menu access rights are defined by a user with 'manager' rights using the **User Profiles** command in the System module.

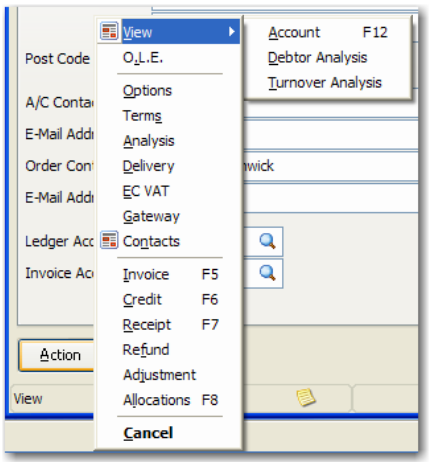
To select commands on menus

Do one of the following:

- Point to the menu you want and click to open it and then point to the command you want and click to select it.
- Press ALT and the access key simultaneously to open the required menu and then press the access key for the command you want.

Action Menu

Some processing forms provide an **Action** command button. Clicking this button displays a menu of commands that control what further processing is possible with the currently selected record. The commands are grouped within command separators (lines in the menu) according to the type of action. The **Action** menu can also be displayed by right-clicking a record displayed on a **List** tab.



Using the View Menu (if using the Classic Navigator)

You can use the **Show favourites bar** and **Show tree view** commands on the **View** menu to change the way the Classic Navigator is displayed in the desktop area.

2.3 Forms and Dialog Box Elements

Forms, grids and dialog boxes are displayed in the desktop area according to the selections you make on menus, the **Navigator**, or as a result of a process under the control of the application. They contain various controls including information, input boxes, command buttons, options and so on.

2.3.1 Form Elements

Some of the elements are described below:

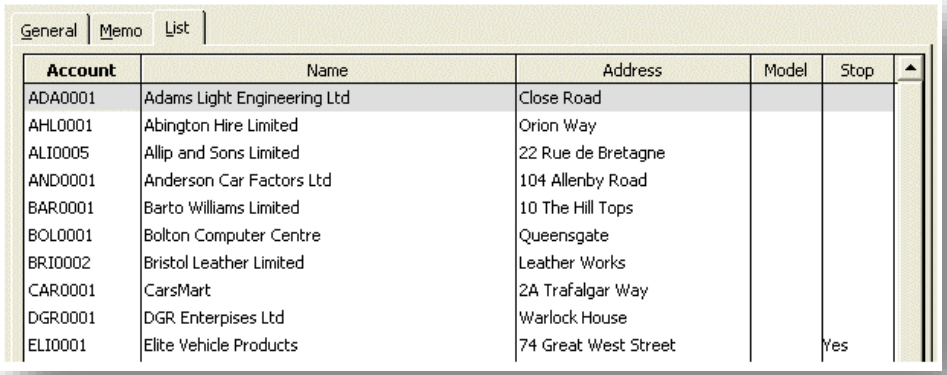
Example	Element name	Definition
☑	Check box	A square box that is selected or cleared to turn an option on or off. More than one check box can be selected. Referred to in the documentation as an 'option'.

Notes

OK	Command button	A rectangular button that initiates an action. The **Action** command button label ends with an arrow to indicate that a menu will appear: another selection must be made before the action can be completed. Many dialog boxes have **OK** and **Cancel** commands. Command buttons, like menu commands are show in bold text in the documentation.
...	Date Selector button	A square button with ellipses that opens the **Date Selector** dialog box. The **Date Selector** is a pop-up calendar from which you can select an entry for a date box.
TRA	Drop-down list box	A box with an arrow next to it. Clicking the arrow opens the list from which you can select an entry. In some cases, you can also type text into the box to search for a matching entry in the list of those available.
	Option button	A round button used to select one of a group of mutually exclusive options.
3	Spin box	A text box with up and down arrows that you click to move through a set of fixed values. You can also type a valid value in the box.
General	Tab	A labelled group of options used for many similar kinds of settings.
	Text box	A rectangular box in which you can type text. If the box already contains text, you can select that default text or delete it and type new text.

2.3.2 List Tabs

Most main processing forms have a **List** tab. These display a list of all the records associated with the command. Apart from being used to view all the records in a particular set, you can use the list to select records for processing.



To Display a List of Records

1. Open the form that relates to the type of record you want to list.
2. Click the **List** tab.

Notes: You can browse through the records in the list using the scroll bars.

See also the information about grids. You can manipulate and sort data on **List** tabs in the same way as other grids.

2.3.3 Form Types & Control

Notes

'Parent' and 'Child' Forms

For many of the processing functions within the system, you open more than one form for a particular record in order to carry out a particular action. A top-level form, such as one displayed when you use a processing command, is called the 'parent' form. If you then use one of the commands on the **Action** menu associated with that form, another form opens. This is called a 'child' form. There are some cases in which the 'parent' and 'child' forms are synchronised, so that if you change the record displayed in the 'parent' form, the 'child' form is updated automatically to display the details of the new record.

Keeping Child Forms On Top

For those forms where a child form is synchronised, you can force the application to keep the child form on top of the parent form by clicking the **Always Keep Form On Top** toolbar button or pressing CTRL+F11.

Opening Multiple Forms

You can open more than one processing form in the desktop. In addition to being able to open different forms simultaneously, you can also open more than one instance of a given form. For example, you can open two copies of a form from the same module in order to view or process two records at the same time. When used in a multi-user environment, only one record can be updated at the same time. Note that when you close a parent form, any related child forms that are open will also close. However, if you have more than one instance of both forms open, only the child form associated with the record being closed is affected.

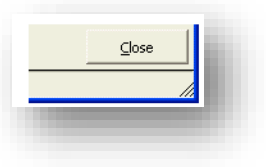
Changing the Size and Position of Forms

You can change the size and position of a form, but within certain limitations. If your monitor resolution permits, you can enlarge a form horizontally and vertically within the desktop provided it has a window corner at the bottom right of the form. However, you cannot shrink a form below certain dimensions. A form can be maximized to occupy all the available desktop area within the window using the **Maximize** button. If the form is smaller than the desktop area, you can drag the form using the title bar to reposition it. This is useful if you want to arrange two or more open forms in the desktop area.

To change the form size

Do one of the following:

- To change the overall size of the form, click and drag the form border or corner.



- To fill the desktop area with the form, click the **Maximize** button.

To Reposition a Form in the Desktop Area

- To change the position of the form within the desktop area, click and drag the title bar.

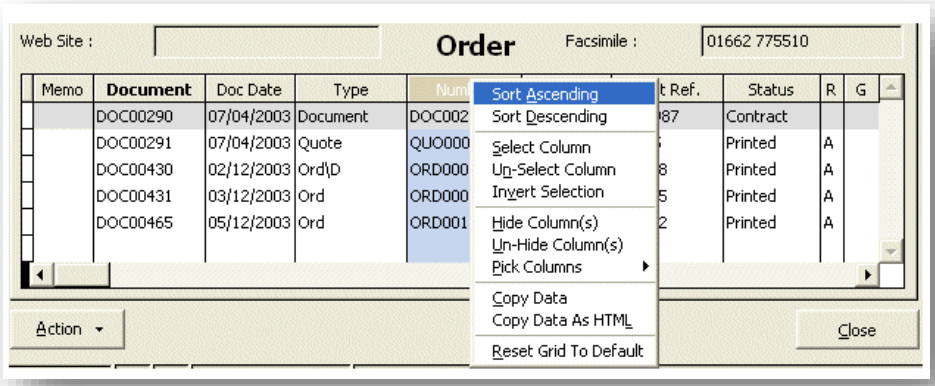
Note: Changes you make to the form position and size are retained if you have selected the **Remember form positions and sizes** option on the **System Preferences** form in the System module. You can reset form sizes using the **Reset All** command on that form or the **Reset form to default size and position** toolbar button.

Notes

Grids

Some forms include a grid where separate columns of data are displayed. If there are many columns in the grid, you may have to scroll the grid area to display the additional columns. You can manipulate the order of records in grids, change the column order and width and the sort order of the rows of data within the grid. You can click to select an individual column. If you want to select more than one column for an operation, you can:

- hold the SHIFT key down while you click the mouse to select a range of columns between the first column selected and a second one.
- hold the CTRL key down while you click the mouse to select separate columns in any order you want.



If you right-click on a column, a menu of options appears:

Command	Description
Sort Ascending	Sorts the rows of data in the grid by ascending order of the data in the column on which you right-clicked the mouse.
Sort Descending	Sorts the rows of data in the grid by descending order of the data in the column on which you right-clicked the mouse.
Select Column	Selects the column on which you right-clicked the mouse.
Un-Select Column	Deselects the column on which you right-clicked the mouse.
Invert Selection	All currently selected columns are deselected and *vice versa*.
Hide Columns	Hides the column(s) currently selected. The vertical line between any column you choose to hide and its adjacent column will appear thicker.
Un-Hide Columns	Reveals hidden columns. You need to select the columns either side of the hidden column (indicated by the thicker vertical line) before you use this command.
Pick Columns	Displays a menu from which you can choose which columns are displayed in the grid. All column names showing a tick on the menu will appear in the grid.
Copy Data	Copies the data from the currently selected column(s) to the Windows Clipboard. If you paste the data into Microsoft Excel, each column selected from the grid will be pasted as a separate data column in the spreadsheet. If you paste the data into Microsoft Word, the selected columns are pasted as a table.
Copy as HTML	Copies the data from the currently selected column(s) to the Windows Clipboard in HTML code format.
Reset Grid to Default	Returns the columns and appearance of the grid to the application's default setting.

Notes

If you want to move a column, right click the one you want to move and drag with the mouse to the position left or right as required. The column appears to the right of the column on which you release the mouse if moving to the right; or the left of the column on which you release the mouse if moving to the left.

If you want to change the width of a column in the grid, click the vertical line that separates the columns and drag left or right to make narrower or wider respectively.

Note: Changes you make to the width and column order in the grid are retained if you have selected the **Remember form positions and sizes** option on the **System Preferences** form in the System module.

Using Zoom Facilities to 'Drill Down'

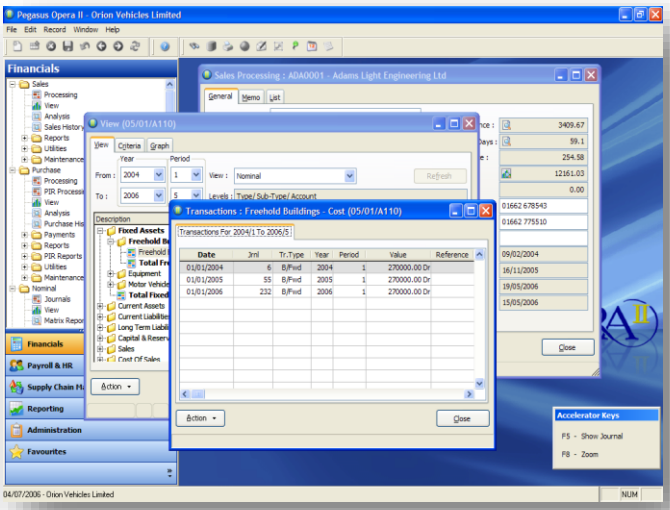
When browsing records in a grid, you might be able to display more information about a particular record by selecting a **Zoom** command on the **Action** menu. Alternatively, you can double-click the transaction or press F8. Some views have multiple levels of zoom. If no further information is available, a message to that effect appears. For records that have an 'image' record (such as a document) you will need to have Adobe Reader installed before you can 'zoom' to display the image.

Multiple Forms

As Pegasus Opera 3 is a true 32 Bit Windows solution the user can open multiple forms from either the same or different modules. This makes the day-to-day operation of Pegasus Opera 3 more flexible and efficient compared to Pegasus Opera 16.

Forms are displayed in the desktop area of the Pegasus Opera 3 screen according to the selection made on the menu bar, the navigator or slider bar or as a result of a process under the control of the program.

Multiple forms from either the same or different modules can be open simultaneously. Each open form is active and does not have to be closed in order to work within the other form. The user can move between windows when working and can make a window active by clicking on it. When used in a multi-user environment, only one record can be updated at the same time.



When the user is working in a form the accelerator keys Ctrl & T will move the cursor back to the navigator.

Notes

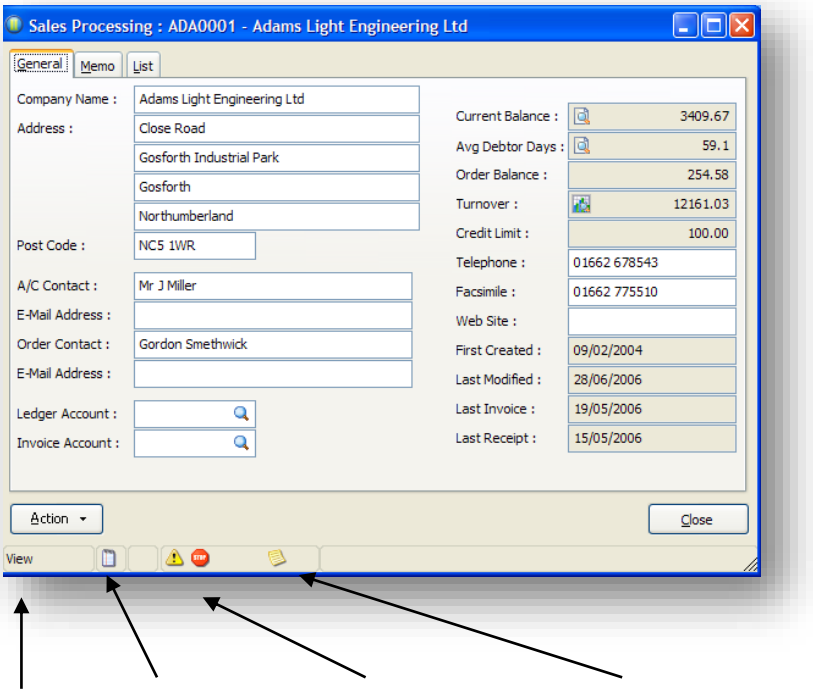
There are two main types of form within Pegasus Opera 3, Modeless and Modal Forms. Forms like the Sales Processing form is a modeless form as an unlimited number of these can be open at any one time.

A form entering transaction type data or system type information such as Customer Options is known as modal. The user will not be able to do anything outside this type of form until it is shut down.

2.3.4 Form Content

The Status Bar

The status bar is found at the bottom of each form and displays the mode of the form that is currently open. The form can either be in View mode or Modified mode (Edit). The bar also shows whether the account is a model account, is deleted, over credit limit, on stop or has a memo via small graphical images or icons.



Form Status Memo Over Credit/On Stop Indicator Notes

Most Record forms have three tab frames, General, Memo and List.

You can open forms directly by double-clicking icons that are displayed in the status bar on different forms in Opera 3. You can also open the forms by either using the toolbar or the Action button.

Notes

There are three icons that can be used in this way:

- The icon for records that have notes attached to them. Double-clicking the icon that is displayed on Processing forms throughout the application will open the Notes form.
- The icon for Nominal Ledger accounts that have recorded future transactions. Double-clicking the icon will open a view form that displays the transactions for the account. This applies to the Nominal Ledger - Accounts form.
- The icon for documents that have been archived in Pegasus Document Management. Double-clicking the icon that is displayed on Processing forms throughout the application will open a form so you can view the documents.

2.3.4.1 The General Tab Frame

The General tab contains all account header information, as was the case in Pegasus Opera. In the Sales and Purchase Ledger modules, Email and Web Address fields are now found on the header form. The Options, Terms, Analysis and VAT boxes are now accessed via the 'Action' button (see the next section on the Action Button for further details). In general, it is from this tab that all further account processing is done.

2.3.4.2 The Action Button

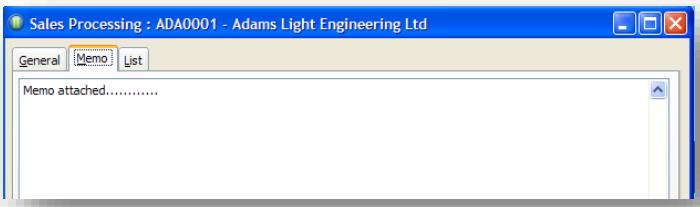
This is a new standard that is found on all forms that have functions that can be executed from within the form. Clicking on the Action button will display a menu of commands that control the type of further processing that is possible with the currently selected record.

The commands are grouped within command separators (lines in the menu) according to the type of action. For example, in Sales Processing, Options, Terms, Analysis and Delivery all relate to additional entry forms associated with customer records, while Invoice, Credit, Receipt and so on are commands used to enter transactions for the customer.

The command selected from the Action button always relates to the record currently selected in the processing form from which it was started. The Action button can also be displayed by right clicking a record displayed on the List tab.

2.3.4.3 The Memo Tab Frame

Memos are now attached to an account via the Memo tab. Once a memo has been created the status bar at the bottom of the form will be flagged accordingly.



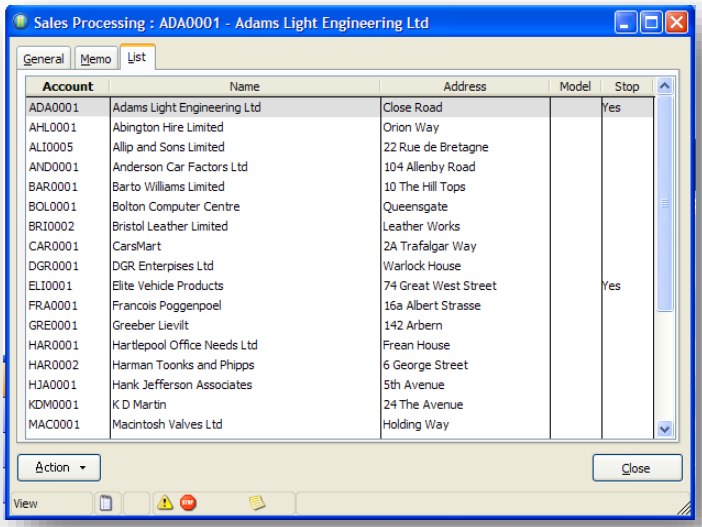
All Cut, Copy and Paste functions are available when in the Memo tab via the Edit menu. Within Pegasus Opera you were able to insert a date by using the keyboard shortcut of CTRL-D. This now is the shortcut for deleting a record so the Insert Date is now available as a right click function of the mouse.

2.3.4.4 The List Tab Frame

Notes

The List tab displays a list of all the records associated with the command. The List tab on the Sales Processing form for example displays all the customer account records for the selected company.

In the Sales and Purchase Ledgers, model accounts and accounts that are on stop are flagged as such.



The user can use the list to select records for processing. Clicking a record in the list will change the record currently displayed in the General tab from which processing transactions can be undertaken.

The Action button is also available on this tab. Alternatively the user can also select a command from the Action button by right clicking on a record.

In order to change the order in which records are displayed in a list the user can click on the column title bar and the list switches between ascending and descending order. The column title by which the list order has been selected now appears in bold type.

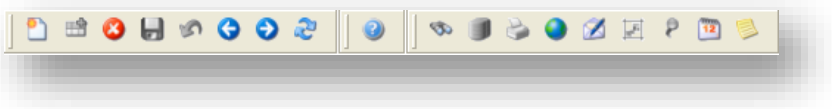
Notes

Accreditation Training Courseware

3 Record Navigation & Processing

3.1 Record Bar Navigation

The Record Bar in Opera 3 controls the navigation of records within the Opera 3 system. It allows single click functions for creating new records, deleting records, saving altered information etc. The toolbar and O3 icon also contain links to the help system and general system functions.



3.2 Creating New Records

Records are added through forms. For some records, you can create new records using existing ones as a model. The entry of 'transaction' records require that you select the 'master' record first. Most new records are created using forms. Once you have opened the relevant form, you can add a new record in one of the following ways:

- Selecting the **New** command on the **Record** menu.
- Clicking the button on the toolbar.
- Pressing CTRL+N.

When you create a new record using a form, the application clears most of the data from the form. Some boxes will contain default values. This might depend, for example on other records, or what other default options have been defined for the module.

3.2.1 Creating Ledger Accounts

Once the user has entered data in all the fields on the header form, the focus is placed on the Action button to prompt the user to fill in appropriate details in Options, Terms and Analysis screens. Once all account information has been entered, the record must be saved in one of the following ways:

- Select the Save icon on the Toolbar
- Use CTRL + S.

Pegasus Opera 3 uses form level validation rather than field level validation. That is, before a record can be saved, the program checks for the presence of certain data. If any mandatory boxes have been left empty or incorrect information has been entered, a message appears to prompt the user to add the necessary information.

For example, should a user NOT enter Options, Terms and Analysis information, the product will automatically present them with these forms before saving the new account record.

3.2.2 Editing Existing Records

Notes

Unlike Pegasus Opera, there is no need to select 'Edit' before altering account information. Forms in Pegasus Opera 3 always open in 'Edit' mode. In order to make changes to existing records, the user must first retrieve the relevant record in the form and then the data can be edited immediately simply by typing in the relevant fields.

To edit a record, first retrieve the record in the form. When the record is displayed, the data can be edited immediately. If you make changes to a record, but then decide not to keep them, you can revert to the previously saved version in one of the following ways:

- Selecting the Revert command on the Record menu.
- Clicking the button on the toolbar.
- Pressing CTRL+R.

After you have made changes to a record, you must save the changes if you want to keep them. Some boxes cannot be modified directly. For example, the application might update a particular value or balance automatically as a result of other processing in another part of the system. While editing a record, the following keys can be used to move around the processing form:

Note: This must be done before any amendments are saved.

Use this Key	To
TAB or DOWN ARROW	Move the cursor to the next item on the form. This may be a box, form control, tab or command button.
SHIFT+TAB or UP ARROW	Move the cursor back to the previous item on the form.
ENTER	Move the cursor to the next item on the form. This is similar to the TAB or DOWN ARROW keys except that if the item currently in focus is a command button or form control, pressing ENTER will activate that command or control or toggle a setting, such as check box or option button.
SPACEBAR	Activate a command button or form control or toggle a setting such as check box or option button. The action taken depends on the item currently in focus on the form. For example, if the Action command button is in focus, pressing SPACEBAR will open the Action menu.
HOME	Move the cursor to the start of a box.
END	Move the cursor to the end of a box.
INSERT	Toggle between insert and overwrite mode of text entry. In insert mode, characters typed at the keyboard are inserted at the current cursor position and all characters to the right are moved along. In overwrite mode, characters typed at the keyboard overwrite those starting at the current cursor position.

Notes

RIGHT ARROW	Move the cursor one character to the right within a box.
LEFT ARROW	Move the cursor one character to the left within a box.
DELETE	Delete the character to the right of the current cursor position within a box.
CTRL+Z	Undo the last typed action.
SHIFT+RIGHT ARROW	Select text in a box to the right of the current cursor position. The number of characters selected is controlled by the use of the RIGHT ARROW key.
SHIFT+LEFT ARROW	Select text in a box to the left of the current cursor position. The number of characters selected is controlled by the use of the LEFT ARROW key.
SHIFT+END	Select all text in a box from the current cursor position to the end of the box.
SHIFT+HOME	Select all text in a box from the current cursor position to the start of the box.
CTRL+C	Copy the text selected in a box.
CTRL+X	Cut the text selected in a box. (Cut text is placed on the Windows clipboard unlike deleted text which is cleared).
CTRL+V	Paste the content of the Windows clipboard into the current box.

Commands on the Edit menu can be used when you are completing entries in boxes on forms and dialog boxes. The commands and their functions are described below.

Use this Command	To
Copy	Copy the text selected in a box.
Cut	Cut the text selected in a box. (Cut text is placed on the Windows clipboard unlike deleted text which is cleared).
Paste	Paste the content of the Windows clipboard into the current box.

3.3 Browsing Existing Records

The user can browse through the records on a form by clicking the arrows on the toolbar.

NB: The user can also scroll through the list of records displayed on the List tab of the form or use the shortcut keys CTRL + LEFT ARROW or CTRL + RIGHT ARROW. The user can use a third method of the Mouse wheel to flick between records

When browsing through records using the toolbar arrow buttons, they are displayed in order of their key reference. For example, as in Pegasus Opera, customers are displayed in account code order in the Customer form displayed using the Processing command in the Sales module.

Notes

Mouse Wheel Navigation

You can use your mouse wheel to step through records sequentially on forms where you maintain multiple records (a 'maintenance' form), for example the Sales - Processing form where you create and edit your customers' details, or the Payroll - Processing form where you create or edit your employees' details.

Moving the mouse wheel up moves to the next record. Moving the mouse wheel down moves to the previous record.

This is in addition to these other methods.

- Using the List tabbed page of a maintenance form.
- Using the keyboard keys - CTRL+LEFT ARROW - to move to the previous record or - CTRL+RIGHT ARROW - to move to the next record.
- The arrow toolbar buttons used to step through records sequentially.

Synchronized Forms

Some forms are synchronized. For example, if you open one form for a main records and then open a related form, such as enquiry, the second form will reflect any change of record in the first form when using the browse buttons or other method of record selection.

3.4 Deleting a Record

To delete a record, first retrieve the record in the form. Before a record can be deleted, the application will check to see if you are allowed to delete that particular record. For example, if other records or enquiries are dependent on the record you want to delete, the application will prevent you from doing so.

Once you have opened the relevant form and retrieved the record concerned, you can delete it in one of the following ways:

- Selecting the **Delete** command on the **Record** menu.
- Clicking the button on the toolbar.
- Pressing CTRL+D.

Once deleted, the status bar of the record is flagged accordingly. As in Pegasus Opera, the record will remain on the system until a Period End has been run.

3.5 Saving Records

When you add a new record or modify an existing one, you must save the record to store your entries. Before you can save a new record, the application checks for the presence of certain data. If any mandatory boxes have been left empty or incorrect information has been entered, a message appears to prompt you to create the necessary information. When you have created a new record or made changes to an existing one, you can save it in one of the following ways:

- Selecting the **Save** command on the **Record** menu.
- Clicking the button on the toolbar.
- Pressing CTRL+S.

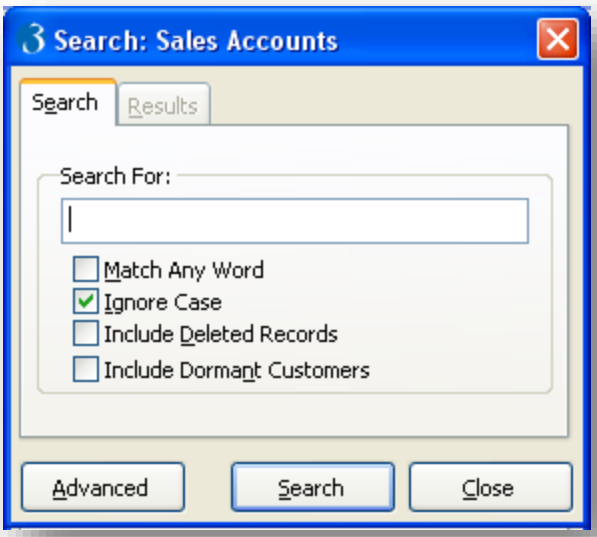
3.6 Searching

There are various ways in which you can search for records and information within the system.

3.6.1 Using the Search Toolbar Button

Notes

You can use the **Search** command to locate records on grids and forms. The search for a record is based on a criterion you enter. You enter some text that you want to use to locate the record and define whether the search is for any or all words you have typed and whether the search is case sensitive. You then select which fields in a record are to be searched for a match. Before you can use the facility, you must first open the form that corresponds to the records you want to search. This also determines which fields are searched for a match. If more than one form is already open, the search will only operate on records in the active form.



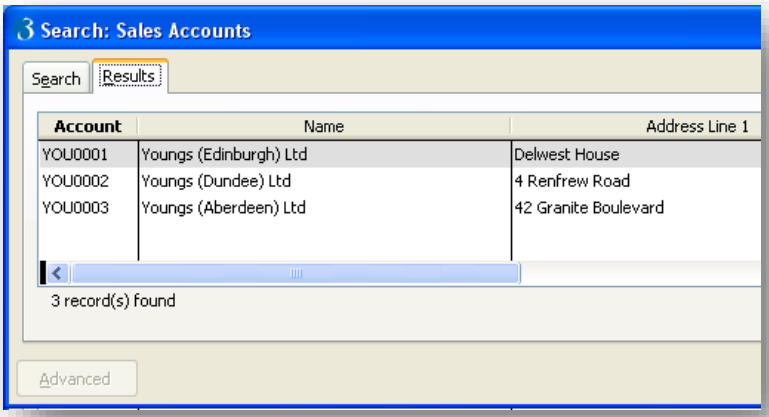
If the **Use Extended Searching** option is selected on the **Preferences** form in the System module, text entered in the **Search For** box will be treated as multiple 'strings' (phrases). For example, if you wanted to search for a customer called SMITH who is located in BRADFORD, you could enter SMITH BRADFORD in the **Search For** box, then, taking all other search options into consideration and assuming your search included name and address fields, the application would find a match based on the two separate strings 'SMITH' and 'BRADFORD', each of which might be located in different fields (such as Company Name and Address Line 3).

If the **Use Extended Searching** option is not selected, text entered in the **Search For** box will be treated as a single 'string' or phrase. For example, if you entered SMITH BRADFORD in the **Search For** box, the application would look for a match for the text string 'SMITH BRADFORD'; that is, both words would have to occur together as a single phrase in one or more of the fields selected for the search. In this scenario, even if you had a customer called SMITH located in BRADFORD and you searched the name and address fields, the application would produce no matching results if these words did not appear together in any one field.

The default settings for the **Match Any Word**, **Ignore Case** and **Include Deleted Records** options are determined by the options you select on the **Preferences** form displayed when you use the **Preferences** command on the System menu.

Notes

If only one match to the criterion you enter is found, the corresponding record appears in the processing form from which you started the search. If more than one match is found, the **Results** tab of the **Search** form displays a list of all matching records from which you can select the one you want to appear in the processing form from which you started the search.



3.6.2 To find a record

1. On the toolbar, click the **Search for records matching criteria** button. The **Search** form is displayed.
2. In the **Search For** box, type the criterion on which the search will be based. This can be text or numbers.
3. If you want to specify the fields included in the search, click **Advanced** and then under **Search These Fields**, click to select which field or fields are to be search to find a match to the criterion.
4. If you select the **Match Any Word** option, the application will search for the occurrence of the string entered in the **Search For** box anywhere within the selected field(s). If the option is cleared, the search will be for the string appearing at the beginning of the selected field(s).
5. To match the case of the characters you have typed in the **Search For** box when searching the records, clear the **Ignore Case** option. If the **Ignore Case** option is selected, the search will ignore the case of the characters you have typed in the **Search For** box.
6. To exclude records marked for deletion from the search results, clear the **Include Deleted Records** option.
7. Click **Search**. If only one match is found, the corresponding record is displayed in the processing form. If more than one match is found, records are listed on the **Results** tab of the **Search** form and you can choose the one you want by clicking once to highlight and then clicking **Select** or double-clicking the record.

Note: If no records match the criterion you have entered, the message 'There were no matching records found' appears. Click **OK** to try another search.

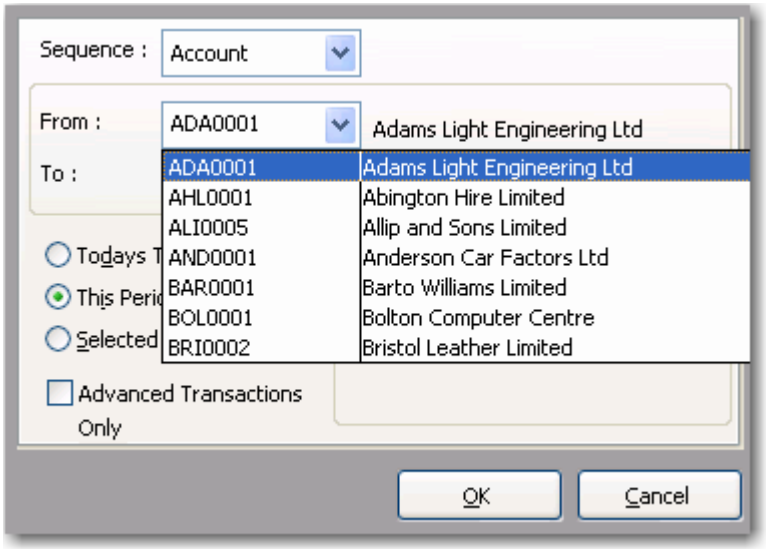
3.6.3 Searching Using List Tabs

Many processing forms have a **List** tab. This displays a list of all the records associated with the command. Apart from being used to view all the records in a particular set, you can use the list to select records for processing. When you display records using the **List** tab, you can change the order in which records are listed by right-clicking the column and selecting the **Sort Ascending** or **Sort Descending** command as appropriate.

3.6.4 Searching in Key Field Text Boxes

Notes

Some text boxes relate to 'key fields'. These are usually unique references that identify a particular record. Some such boxes are shown as list boxes. These are boxes with an arrow alongside. Clicking the arrow opens the list from which you can select an entry. In some cases, you can also type text into the box to search for a matching entry in the list of those available.



Some types of data, for which you may have a considerable number of records, loading all the available records in a drop-down list box would occupy a considerable amount of computer memory and could take some time. Therefore, in such cases, the text box uses a different method for searching and this is indicated by the magnifying glass icon. If you see this type of box, you simply enter part of the description you want. The more complete your entry, the more precise is the list of records displayed. You can then select the record you want from the list displayed.

Searching in key field text boxes operates according to the setting of the **Match Any Word** option in **System Preferences**. That is, if this option is switched on and a search in a key field text box is carried out, records are returned if the search text is contained in any of the search fields; if this option is switched off and a search in a key field text box is carried out, records are returned if the search text is present at the beginning of the search fields.

An option on the **System Preferences** form in the System module called **Maximum Number of Search Results** is used to determine the maximum number of records that are retrieved when you use a searchable text box. A message appears to inform you if more records exist that the maximum specified. The minimum number allowed is 100.

3.6.5 Using Wildcards

You can use an asterisk or question mark as a wildcard in the searchable text box. For example, both LON and LON* will find records starting with LON, such as LONDON, while *LON* will find records that contain LON. A question mark represents any character in that position, so C?LE finds records starting with C and ending with LE but with any second character, so COLE and CALE are valid results.

Notes

3.6.6 Searching in Memo Tabs

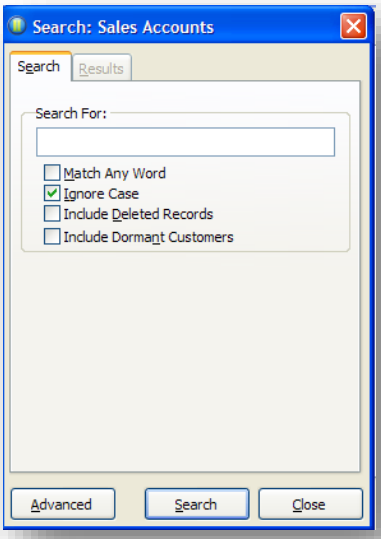
Some forms have **Memo** tabs in which you can type notes. You can search for text within **Memo** tabs using CTRL+F.

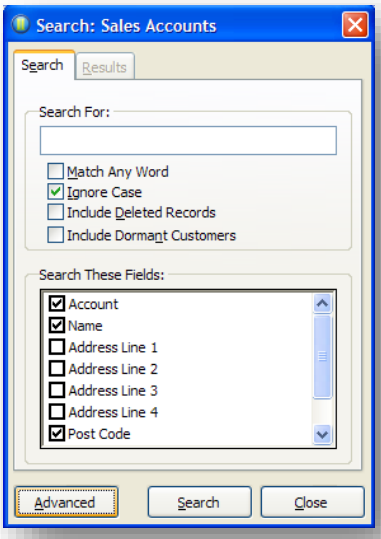
3.6.7 To find a text string in a memo

1. Press CTRL+F. The **Find** dialog box is displayed.
2. In the **Look For** box, type the text string.
3. You can choose to match the case of the characters you entered by selecting the **Match Case** option.
4. Click **Find Next**.
5. To clear the **Find** dialog box, click **OK**.

3.6.8 Searching for Records…extended

The user can use the Search command to locate records on grids and forms. The search for a record is based on criteria entered.





The user can enter text to locate the record and define whether the search is for any or all words that are typed and whether the search is case sensitive. By clicking on the 'Advanced' button the user can then select which fields in a record are to be searched for a match.

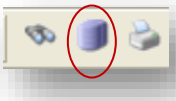
This facility is available once the user has opened the form that corresponds to the records that are to be searched. If more than one form is open, the search will only operate on records in the active form.

If one match to the criterion entered is found, the corresponding record appears in the processing form. If more than one match is found, the Results tab of the Search form displays a list of all matching records from which the user can select the relevant account.

3.7 Copying

Notes

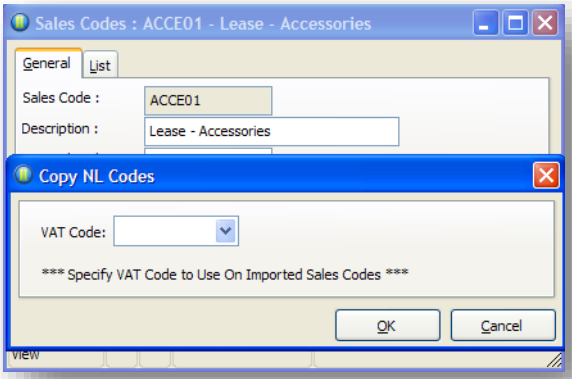
3.7.1 Copying Data from other Companies



Within Pegasus Opera, there were a number of functions that enabled you to copy data from one company to another.

For example, within the Nominal Ledger utilities it was possible to select the Copy Accounts function to transfer the chart of accounts from one company to the company you currently are processing in.

This functionality remains, however all “COPY” menu items have been removed, and replaced with the Copy Data button located on the record toolbar.



For example, if you select the Sales Ledger Processing Form, the Copy Data button will remain “greyed out” or inactive, but if you open the Sales Ledger Sales Codes maintenance form, the button becomes active, clicking it produces the following result.

3.7.2 Copying data from Opera 3

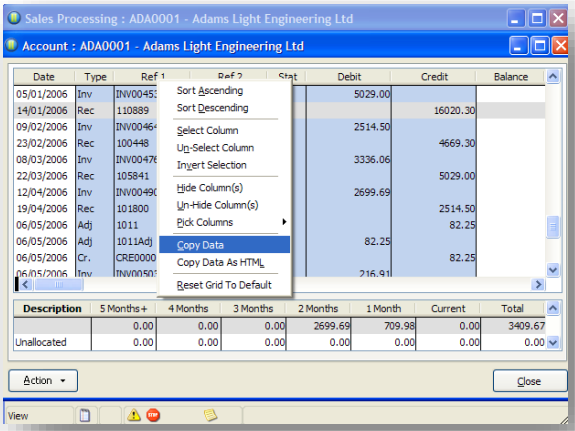
Data from the product’s grids may be copied for use in MS Excel and MS Word. The data is initially copied to a clipboard and is then available to be pasted into the required application.

To select the columns to be copied the User may chose a combination of the following options:

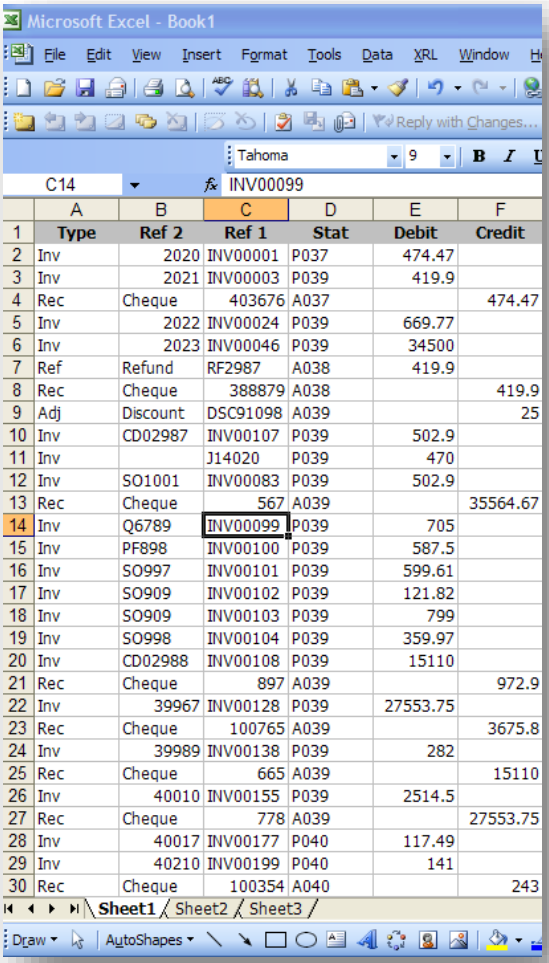
- Left Mouse Click – This would highlight the column being left-clicked and un-highlight any other columns highlighted. If you hold the button down and drag the mouse across columns then all the columns the mouse is dragged across will be highlighted.
- Shift + Left Mouse Click – This would highlight the column being left-clicked and any other columns that are between it and the last column previously highlighted that is still highlighted.
- Ctrl + Left Mouse Click – This would highlight the column being left-clicked. Any other columns highlighted would remain highlighted.

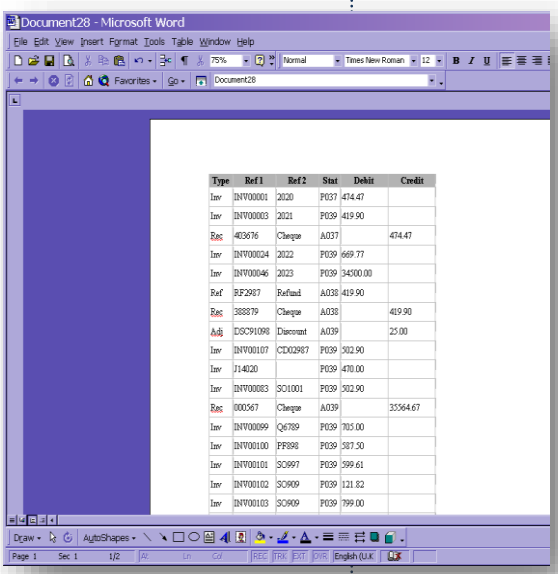
Notes

Once the required columns are highlighted, the User should select Edit and Copy from the local menu or Ctrl+C to copy the data into the clipboard. Alternatively, by right-mouse clicking on the column heading, this will provide a local menu with an option to Copy Data or Copy Data As HTML.



Once the data is copied into the clipboard it may be pasted into the application. When a grid is copied into Excel, each grid column will become a column in Excel, the column header in the grid becoming the column header in Excel.





Note: When a grid is copied into Word, each grid column will become a table column heading in Word.

3.8 Pushpin (Always Keep Form on Top (Ctrl+F11))

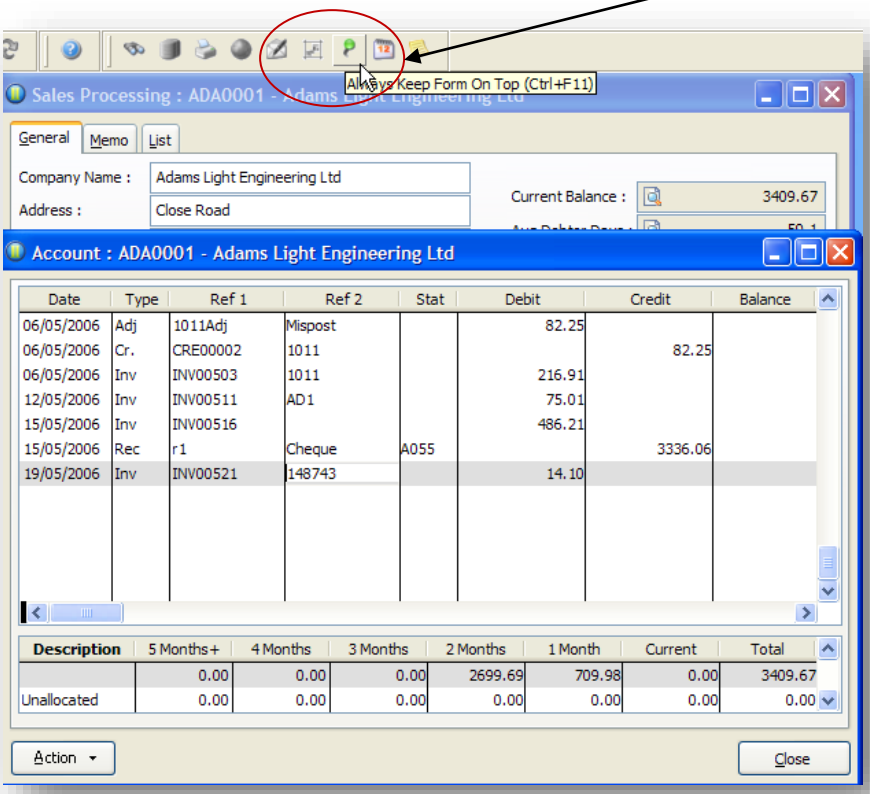
Notes

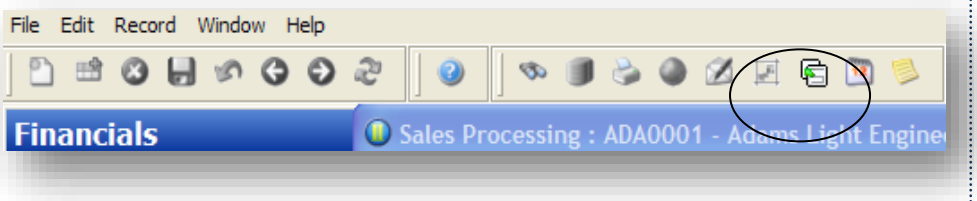
The Pushpin functionality has been included for all forms that are synchronised, and if selected, will always keep the child form on top, even when clicking back to the parent form to select a different record.

This enhances the synchronisation functionality and is available, for example, on Sales and Purchase Views, Nominal Account View, Snapshot, Budgets, Costing Views, Personnel forms, etc.

Open the required child form and then use the Pushpin icon to initialise.

Once the form is closed down, the pushpin will be reset to off.





The icon changes whenever Pushpin is activated. Multiple pushpins may be activated on each individual active form if required.

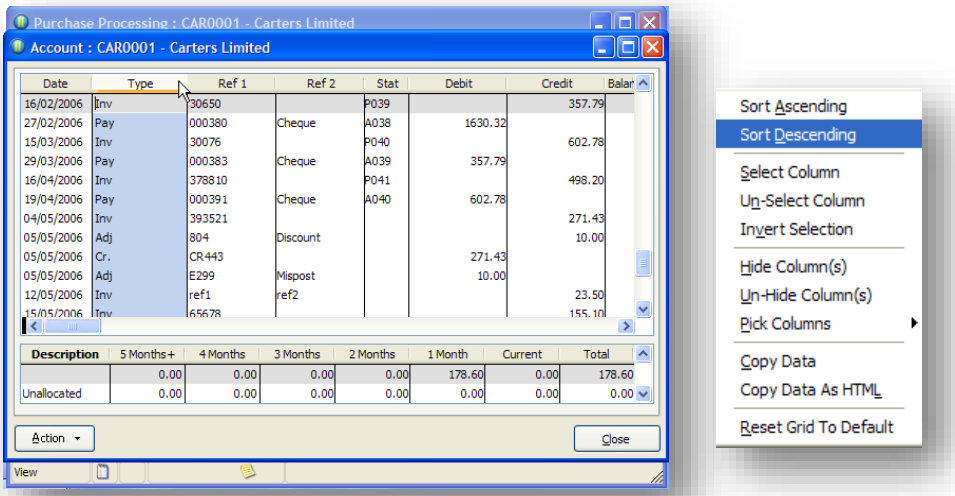
3.9 Change Column Order and Width

Notes

It is possible for each individual User to change the column order and column widths of all forms, if required.

The existing 'Remember Forms Sizes and Positions' preference, found in System Manager, will now also control whether the column order and width is remembered if modifications are made by the User.

When a form is active the User may select a column by positioning the mouse pointer over the desired column heading and then by holding down the left mouse button, drag the column to the preferred position.

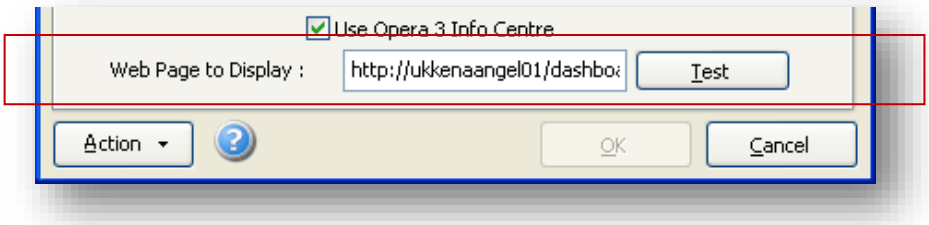


To change the column width, again hover the mouse pointer over the desired column, ensuring that the pointer is directly on the vertical line. This will cause the mouse pointer to change to a double-headed arrow. Hold down the left mouse button will allow the User to drag the column to the preferred width.

Alternative actions to moving columns and adjusting the column widths can be found by right-mouse clicking on the column headings. This will introduce a local menu that will allow columns to be hidden, selected, picked, copied and sorted.

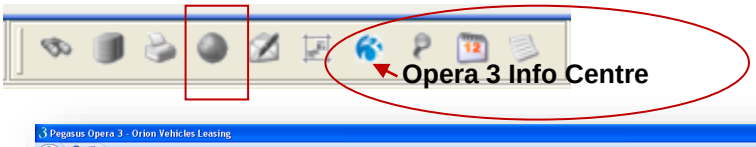
3.10 Opera 3 Info Centre

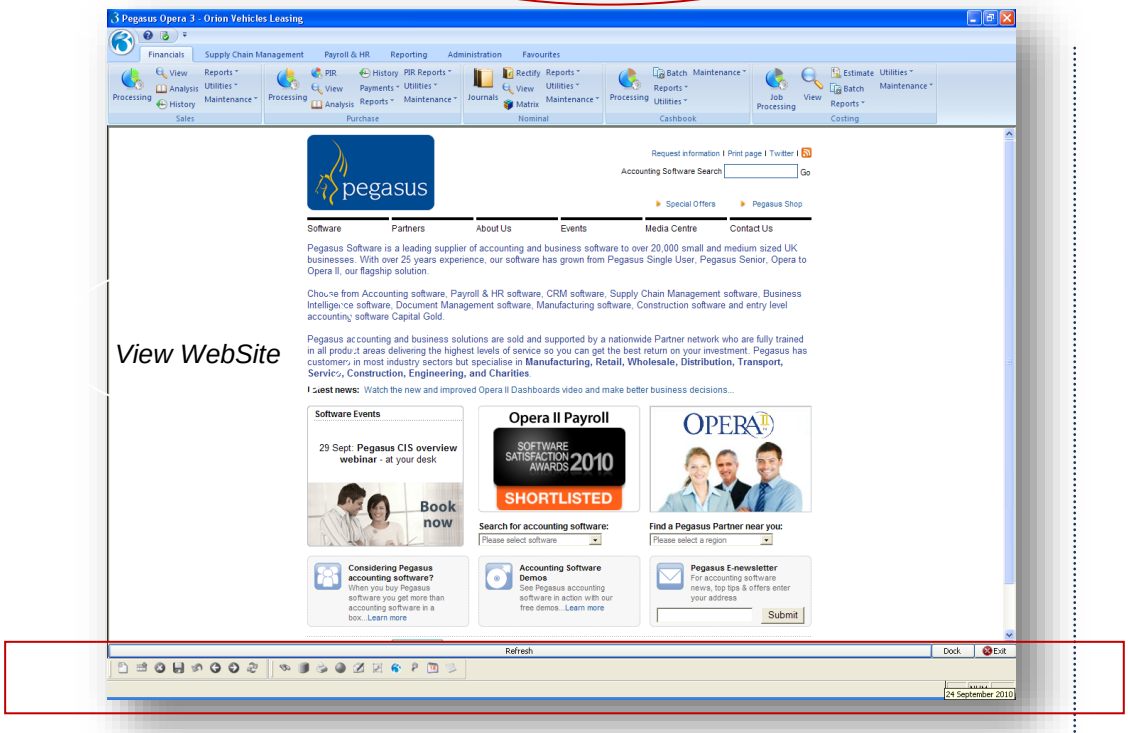
There is an additional field in User Preferences for a WebPage link which can be launched when the Opera 3 Info Centre button is selected and saves you from launching an external browser. This is set up in the Preferences box.



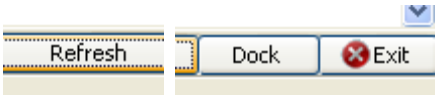
Notes

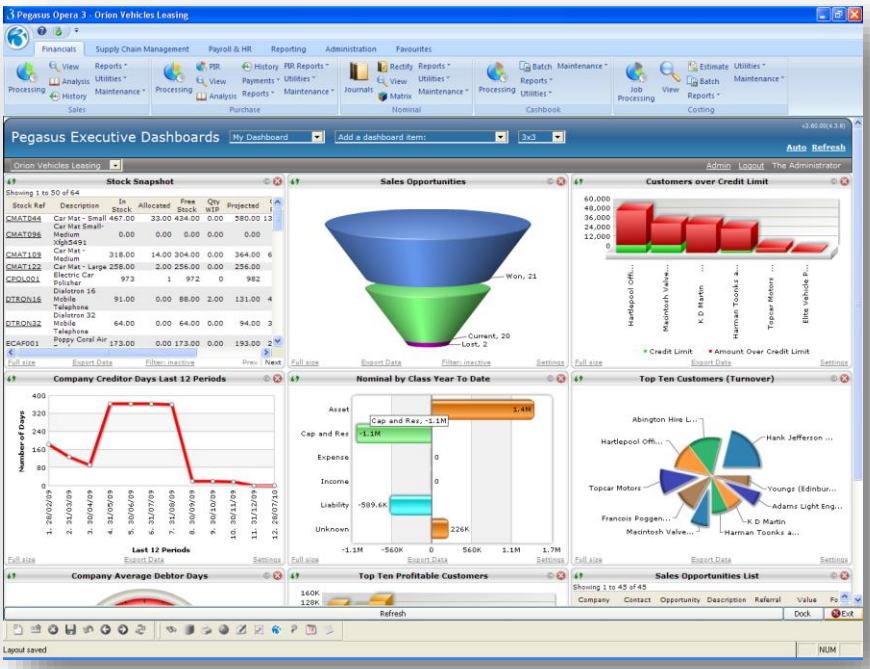
It will display the website specified at Log on or when the Opera 3 Info Centre button is selected.





There are buttons at the bottom of the form allowing you to Refresh, Dock or Exit the Opera 3 Info Centre.





For a new user created, the default website is
http://www.pegasus.co.uk/opera3infocentre

Notes

NB: The default website to the Opera 3 Website is reset during an Upgrade

Notes

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4 Printing & Reporting

Standard reports and documents are available to report on the data stored in the database. All reports have range options and criteria so you can control the content. Standard reports are usually available on the **Reports** submenu in each module folder, though some processes also generate an audit report and some modules have additional report folders for special reports.

4.1 Options for PDF Reports and Screen Previews

There are a number of options that affect how **PDF** **(Portable Document Format)** reports are published and also whether advanced features are available for screen previews.

Option	Form	Description	User-specific
Keep The PDF Printer	System - Utilities - System Preferences	An option that determines whether the PDF printer is removed when the **Publisher** form is used to create a document in the system. If this option is cleared, the **Publisher** creates the PDF printer whenever it is required and then removes it when the printing is finished. If the option is selected, the PDF printer is retained.	No, this option affects all users.
PDF Font Full Embedding	System - Utilities - System Preferences	An option that determines whether some fonts are fully embedded in PDFs created in the application. PDFs that include embedded fonts are typically larger than those where fonts are not embedded. However, the on-screen and print quality is improved. The PDF is portable between computers without losing print quality.	No, this option affects all users.
Use Opera PDF Printer	System - Preferences	An option that determines that PDF publishing in Opera is achieved using the Opera PDF printer, which is created as a 'printer driver' in the Windows printer dialog when Opera 3 is installed. If this option is cleared, the 'XFRX' application, which is installed with Opera 3, is used for creating PDFs. In Windows Terminal Server environments, the XFRX application may be a better choice than the Opera PDF printer for printing because users will not be affected by other people printing reports. The Opera PDF printer driver is shared by all users so one user's printing could be delayed because another user is printing a report.	Yes
Advanced Previews	System - Preferences	An option that determines that printed Opera 3 reports use better font rendering and also that enhanced screen previews are available.	Yes

Notes

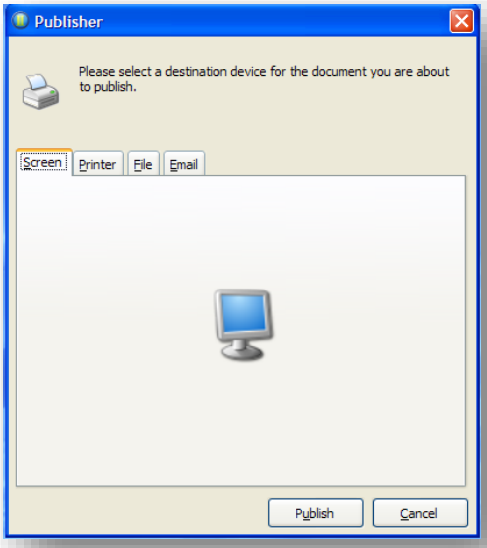
4.2 Selection Criteria and Report Options

For most reports, the selection criteria is presented first. This varies according to the report command you have chosen, but typically includes the names of tables and fields for which a range of values can be specified. In the **From** and **To** lists, you can select the start and end value of the corresponding data item. In addition to range options, other options and controls may be provided that determine the content of a report. These may be presented in the form of check boxes or option buttons. Details about these are provided in the help topics relating to the individual report commands.

4.3 Publisher Form

What is the Publisher?

Simply the Opera 3 Publisher is the new control within Opera 3 that looks after the output of your report. Depending upon what report you are printing the publisher gives you the correct default output destination.



Most standard reports from within Opera 3 are able to display to the Screen, however documents and some reports such as Invoices, audit trails at Period end etc, require output to either a printer, or a spool file.

NB: All screen previews will use the Default printer driver in use.

Notes

When printing a report to screen the preview will automatically be maximised. No user intervention is required.

When you have completed the selection and report options, you click **OK** to display the **Publisher** form. This is the form you use to determine what type of output you want, and you can choose from the following options by clicking the appropriate tab. In each case, you use the **Publish** command button to generate the report output in the format chosen.

Use this tab	To
Screen	Direct the report output to the computer screen. If you direct a report to the screen, a preview window displays the first page of the report. If you view a report on the screen, a toolbar is displayed so you can open different pages, decrease or increase the size of the font used, search for text on the screen by either selecting the binoculars or pressing CTRL+F, or print the report to a chosen printer. Most reports that are used from the Reports menu in each application can be displayed on the screen whilst you do other tasks in the application. For example, you can view the Invoices and Credit Notes report in the Sales Ledger at the same time as posting a receipt in the Cashbook. However, there are some report screen previews that must be closed before you can do other tasks because, as well as reporting, they also update relevant records after the report is closed. • Cashbook Reports • Paying slip • Cheque List • Credit Card List • Remittances • EC VAT Reports • ESL Report • ESL Summary • ESL Audit Trail • Fixed Assets Report • Statutory Movements Report
Printer	Direct the report output to a printer. A list of installed printers is displayed. You choose the printer you want to use by clicking in the list box. If you want to check the alignment of your printer, click **Align Printer**. A dialog box with the prompt 'Print an Alignment Check?' appears, with **Yes** and **No** command buttons. If you click **Yes**, a dummy report is printed on one, page so you can check alignment of the stationery in your printer. You can repeat this process as often as you wish as the alignment prompt reappears. When you click **No**, the report is printed. If you want more than one copy of the report to be printed, change the value in the **No. of Copies** box. **Tip:** If you want to update the list of available printers (this may be relevant in a network environment), click **Refresh List**.
File	Direct the report output to a disk file. You have three options for file output: • **PDF Document**. This creates a **PDF** file which can be viewed and printed using Adobe Reader . In Opera 3, each user can choose from two different methods of creating PDFs. See the Help explanation for the Reporting option on the User Preferences form for details. • **Print Spooler**. This creates a text-based output that you can print using the **Spooler Control** command in the System module • **Excel Document.** This creates a spreadsheet that can be viewed and amended in Microsoft Excel 2003, 2007 or 2010. This option is available for many but not all reports. See below for a list of reports that can be viewed in Microsoft Excel.

Notes

	This feature is available in Opera 3 and Opera 3 SQL.
File…	**Note**: The Publisher form that is displayed for Matrix Reports in the Nominal Ledger has different options on the File tab. On that form you can choose a number of different types of file to create, including Microsoft Visual Foxpro and Microsoft Excel. If you create an Excel file, it will open in 'compatibility mode' in Microsoft Excel 2007 and Microsoft Excel 2010. When you save the file you can convert it to the latest Excel format.
Email	Create a PDF document attachment containing the report and generate an e-mail message using your e-mail messaging software. The **Email** tab includes boxes so you can define the location and file name for the report attachment and type a subject line and message text. When you click **Publish**, the application will load your e-mail messaging software, so you can complete the addressee details and any other settings before sending. You must have a MAPI-compliant email messaging system installed to use this facility. **Tip**: If there is a problem in the email messaging system the message 'Unable to send email at present' is displayed. There are numerous reasons why the email messaging system may fail. If you use the ADMIN ID to log in to this application, the message includes more detailed information that describes the problem - starting with 'Sending Email Failed Because ...'.

4.3.1 More About File Outputs

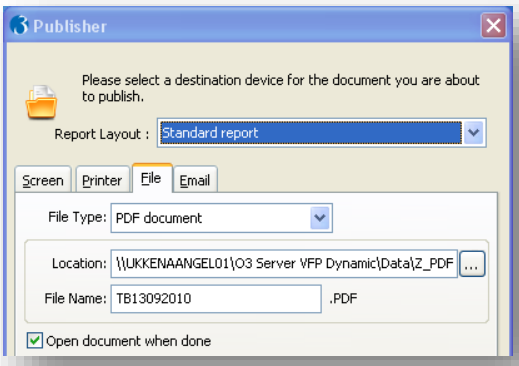
You can create a report using the **PDF Document**, **Print Spooler** or **Excel Document** options. Opera for DOS, and Opera for Windows had the functionality to output to a Spool file. This was simply an ASCII format file, which was generated from the DOS design template.

Opera 3 does not have DOS design templates to achieve this, so we are not able to output to ASCII format text files, however, now we have access to the state of the art Windows technology, do we really want to!

You can create a report using the PDF Document, Print Spooler or Excel Document options.

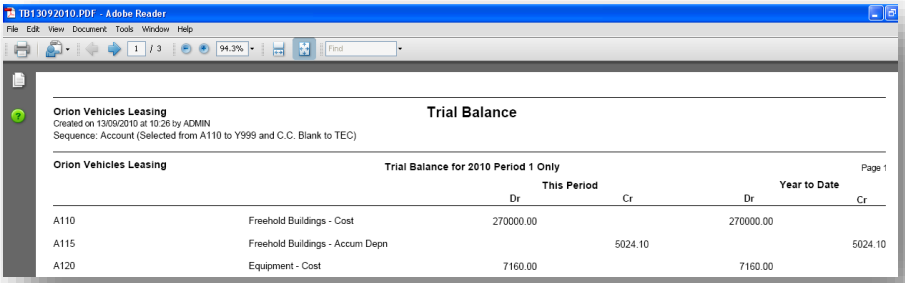
4.3.1.1 Using the PDF Option

To use the **PDF Document** option for reports, you need Adobe Reader. If you do not already have it, you can install it from the application's CD. The advantage of using PDF files is that you can use Adobe Reader to view the report and print it on any printer you have installed without needing to reformat the content. The application supports long file names (up to 20 characters) therefore a meaningful file name can be given to the file. You can choose the location and file name for the report and if you want to view it as soon as it is finished, you click the **View PDF when done** option.



Notes

If you type a name you have already used, the displays a prompt and asks if you want to overwrite or append the existing file. PDF files are stored in a subfolder of the **PDF** folder according to the transaction date. The folder uses a prefix based on the module, followed by the year and month.



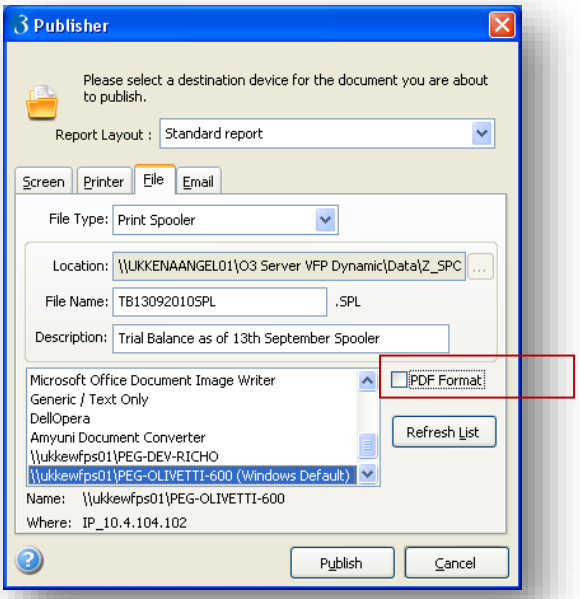
Note: The answer to the problem was still to have an output to file, but to use a file that could handle a windows output, and retain the entire font, and formatting information held in a Windows document. The answer was simple, a technology most people are already familiar with, Adobes' 'Public Document Files', or PDF.

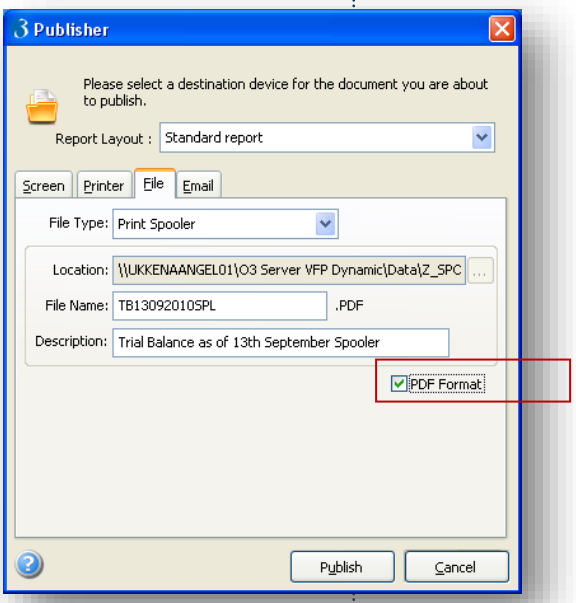
All that you need to do is specify the location and the file name of the output then click Publish and the PDF file will be created. This can be viewed from any PC with Adobe Acrobat Reader installed, or even any PC with Internet Explorer installed (with the PDF plug in installed).

From the Spooler Control function, you can view these files, and if required print the file at that time.

4.3.1.2 Using the Print Spooler Option

Using the **Print Spooler** option, you can store reports on disk to print later using the **Spooler Control** command in the System module. Spooler files are always located in the **Data** subfolder of the application's main folder. You can type a file name of up to 20 characters. Use the **Description** box to type a name for the report that will appear in the **Spooler Control** form to help you identify the report's content. If you type a name you have already used, the application overwrites that file unless you select the **Append** option.





You can spool reports in either PDF or spooler format. If you select the **PDF Format** option, a PDF file is created and you will need Adobe Reader to be able to process the file later. If you clear the **PDF Format** option, you must select the default printer to be used when the spool file is processed using the **Spooler Control** command.

Notes

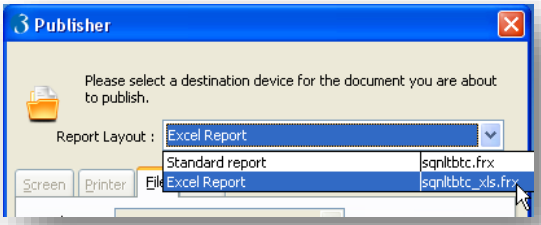
Although you can select a different printer before printing, it is necessary to ensure that the printer selected at the time of printing is compatible with the one you selected for the creation of the spool file. For example, you cannot direct a spool file created for a non-PostScript printer to a PostScript printer and *vice versa*.

Note: The second output to file option is simply for users who wish to print a report, but not just yet! Selecting the Print Spooler option will create a file for the printer currently highlighted, this file can then be printed to the Printer at a later date via the Spooler Control function within Opera 3. If the user un-checks the PDF Format option the file created would be of an .spl extension. These files cannot be viewed to screen.

4.3.1.3 Using the Excel Document Option

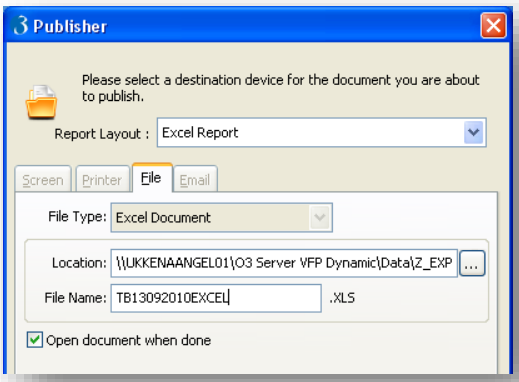
You can save some reports as spreadsheets to view in Microsoft Excel. This option is available for some but not all reports. This facility puts the information in a report directly into the cells on the Excel spreadsheet and sets the height of the rows and width of the columns to achieve the desired layout. All numeric information can be used in calculations and you can modify the report as required.

Microsoft Excel 2003, Microsoft Excel 2007 or Microsoft Excel 2010 must be installed on the computer to view the report as a spreadsheet.



There are advantages of saving a report as a spreadsheet rather than a PDF report or a spool file:

- It provides a report saved at a certain point in time but you can amend the information if required. You can change the information to do different calculations. The range of formulae that you can apply ranging from adding two numbers together to applying 'what if' scenarios.
- You can change the appearance of the information by using different fonts, colours, borders etc.
- You can change the order of the information by changing its sequence.
- You can protect the information in a spreadsheet by using a password
- You can use the charting facilities to display the information in a graph. Charts make numerical information understandable by presenting them as a graphic.



Notes

4.3.1.4 Installing Microsoft Excel

To save and view the report in Microsoft Excel, it must be installed:

- on the Opera 3 client workstation
- on the Opera 3 server only if:
  - Opera is run from the server
  - Opera is run in thin-client environments like Terminal Services.

Tip: Check the System Requirements guide on the Opera CD and on the Opera 3 Info Centre for details of the versions of Microsoft Excel that are supported.

4.3.1.5 These reports can be saved as an Excel spreadsheet:

Application	Description
System	Summary VAT Audit Trail
	Detailed VAT Audit Trail
	Summary VAT Values Report
	Detailed VAT Values Report
Cashbook	Cashbook Report
Costing	Transaction Report
Sales Pipeline Management, Service Management & Helpdesk Management	Sales Pipeline Report
	Contract Cost Report
	SLA Monitor Grid
	Company List
	Company Address Book
	Contacts List
	Activity Analysis
	Contract List
	Equipment List
EC VAT	SD Audit Trail
	ESL Audit Trail
	VAT Reconciliation Report
Nominal Ledger	Audit Trail
	Trial Balance
	Ledger Summary
	Income Accounts
	Expense Accounts
	Assets Accounts
	Liabilities Accounts
	Capital/Reserves Accounts
	Budgets List

	Nominal Analysis
	Nominal View History
	Nominal View Transactions
	Nominal Account Transactions
	Nominal Account Snapshot
Payroll	This Period Summary
	To Date Summary
	Auto Enrolment Updates
Personnel	Training Report
Purchase Ledger	Supplier Status
	Creditors Report
	Retrospective Creditors Report
	Invoice & Credit Note Listing
	PIR Invoices & Credit Note Listing
	Payments & Adjustment Listing
	Realised Gains/Losses
	Currency Revaluation
	Turnover Report
	Held Invoices
	Payment Forecast
	Suggested Payments
	Purchase Analysis Reports - VAT Analysis, Transaction List and User Defined Reports
	Suggested Payments
Purchase Order Processing	Orders Report
Sales Ledger	Credit Control
	Account Status
	Credit Management Diary Actions
	Credit Management Promised Payments
	Currency Revaluation
	Disputed Invoices
	Debtors Report
	Invoice & Credit Note Listing
	Receipts & Adjustments Listing
	Realised Gains and Losses
	Retrospective Debtors Report
	Revenue Forecast
	Turnover Report
	Sales Analysis Reports - VAT Analysis, Transaction List and User Defined Reports
Sales Order Processing	Orders Listing
	Suggested Delivery Listing
	Suggested Invoice Listing

Notes

Sales Order Processing	Order Listing
Stock Control	Stock Movements report
	Stock Valuation report
	Historical Stock Valuation report

Notes

Tip: If you intend to modify a report design before it is displayed in Microsoft Excel using the ADMIN user, you may need to install the Microsoft XPS Document Writer on your computer. This is important only if the width of the report is unusually wide, for example a report with many columns created in the Reporter application. If you do not have Microsoft XPS Document Writer installed you may not be able to see the full width of the report design on your screen before the information is displayed in Microsoft Excel.

On Windows 7, Windows Vista and Windows Server 2008, Microsoft XPS Document Writer is already installed. If you use Windows XP (Service Pack 2) or Windows Server 2003, you can download the Microsoft XML Paper Specification Essentials Pack from the Microsoft Download Center.

4.3.2 Alternative Report Layouts

Alternative layouts for standard reports can be used within the system. You use an application such as Crystal Reports Designer to create the designs and the **Report Layout** command in the System module to identify the layout.

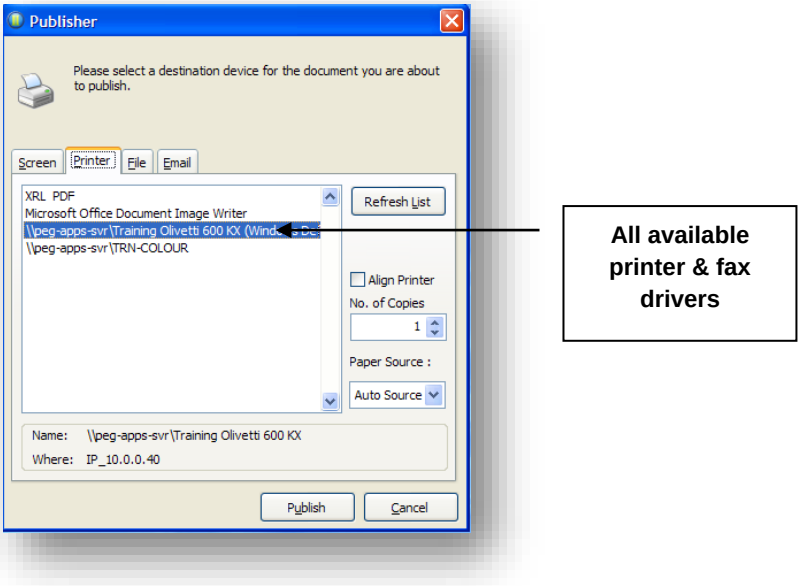
Notes

4.3.3 Documents for Preprinted Stationery

Unlike standard reports, documents are usually printed on preprinted or special stationery forms. These include documents such as statements, remittance advices, cheques, and so on. Default layouts for the documents are installed with your software. These can be tailored to suit a particular design. Your Pegasus Partner may be able to assist you if you want specific document layouts.

4.4 Printing in Opera 3

Most reports within Opera 3 have been redesigned to fit A4 Laser paper, in either a portrait or landscape layout. Where this will make a lot of customers happy, but there are still a number of customers using wide-carriage dot matrix printers for reports such as debtors list, stock valuation etc. These reports will now have to be printed via the correct printer driver, or an alternative printer driver to a laser or dot matrix printer.



For example it is possible to print a wide-carriage design, such as the Invoice Design to a laser printer, using the Generic Text Only driver.

One advantage to moving to Windows printing means Opera 3 is NOT restricted to the captured port names such as LPT1: or LPT3: that Opera for DOS & Windows was. Now when printing a report, all available Windows printer drivers will be listed for you to chose the destination of the output, whether it be a printer or fax software!

4.4.1 Printer Alignment

Within most Windows applications you simply have to print a document to see how the document will come out on the stationery you wish to use. Opera 3 now has an Align Printer option, will allows you to print a page, so you can align the printer up with the pre-printed stationery, before you send the actual report to the printer.

Notes

4.4.2 Number of Copies

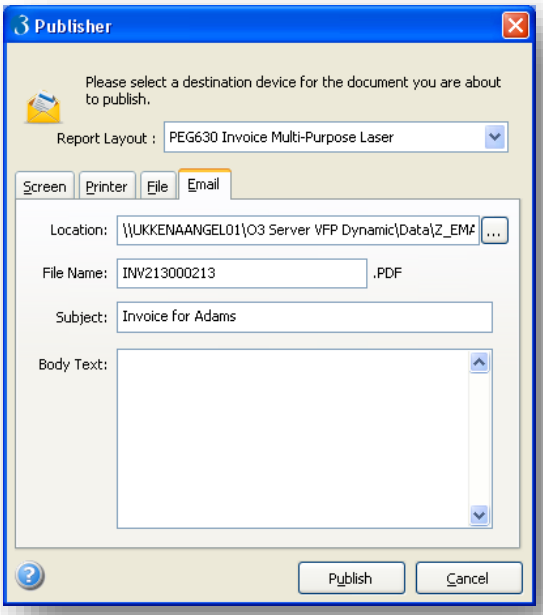
In Opera 3 it is now possible to also state how many copies of each document you print or report you print at the time of printing. This is very useful when, for example printing Invoices, you can now print 3 copies.

4.4.3 Text Output

The concept of direct to port text printing no longer exists within Opera 3. Should there be a requirement to output to a text type printer, then the Generic/Text Printer driver must be used.

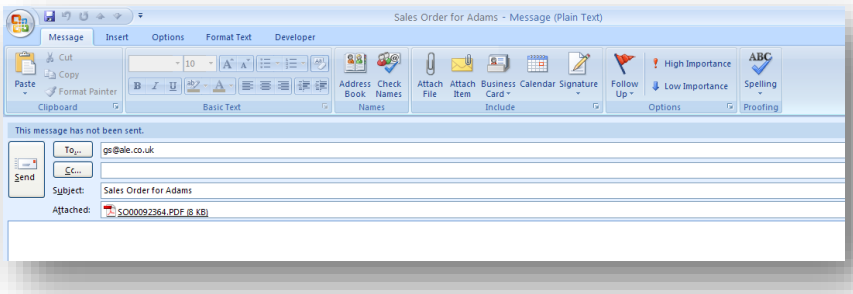
4.5 Distributing a Report on e-mail

Reports or documents can be emailed to colleagues, customers and suppliers directly using the Output to Email.



The Publisher will produce a PDF file and attach it to the email. You are able to enter the Subject and Text of the email at this point.

Your default email client will then be selected, and this information entered within Opera 3 passed to it.



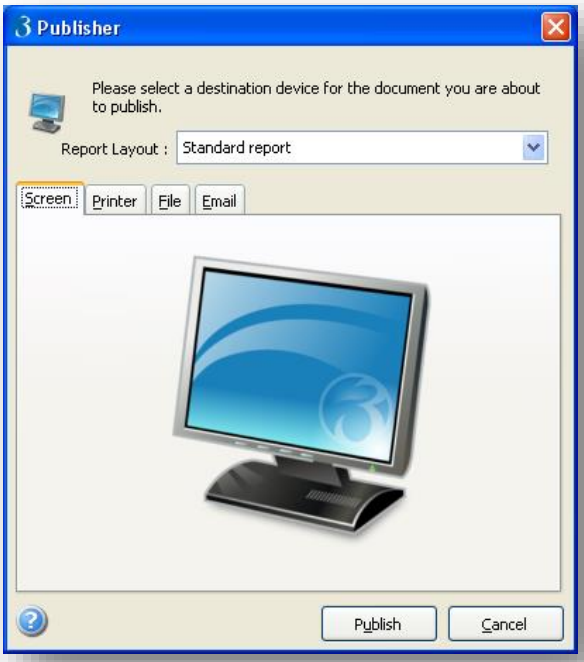
Notes

Alternatively, located within System Manager a system defined Email Profiles that may be used to send Statements, Remittance Advice slips & Sales Order Acknowledgements. If these options are correctly set up on the customer/supplier record the Publisher will load directly onto the Email tab & the Email Profile fields will be effective, The File Name, Subject and Body Text will load automatically.

4.6 Previewing Reports

Most standard reports from within Opera II are able to display to the Screen, however documents and some reports such as Invoices, audit trails at Period end etc, require output to either a printer, or a spool file. All screen previews will use the Default printer driver in use.

When printing a report to screen the preview will automatically be maximised. No user intervention is required.



Notes

When you choose to view a report on your screen rather than print it, the report is displayed in the Report Preview form. The form displays the report on your screen so that, if required, you can check it before printing. You can also search for text in the report, use the zoom feature to make the details easier to read and quickly move from page to page.

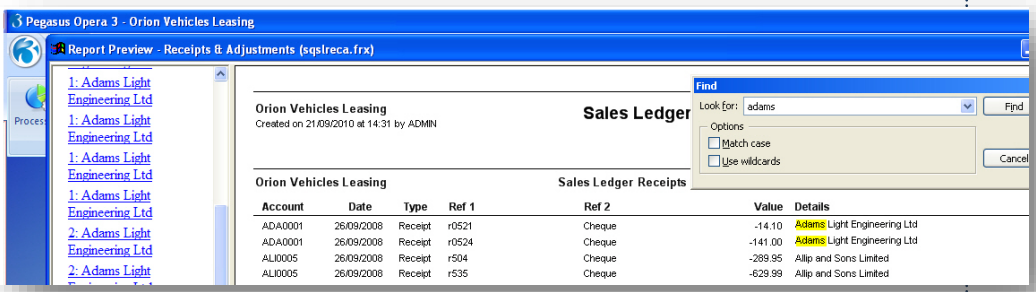
For most reports that are opened from the various Reports menus in the application, you can leave the Report Preview form open whilst you work in other areas of the application. You can also view more than one report at a time. Each report is displayed in a separate Report Preview form. For example, you can view the Depreciation report in Fixed Assets at the same time as viewing the Receipts and Adjustments report in the Sales Ledger.

When some reports are being previewed it is not possible to work in other areas of the application:

- Reports that are opened from areas other that the Reports menus in the application
- Reports that update your data after they are viewed or printed.

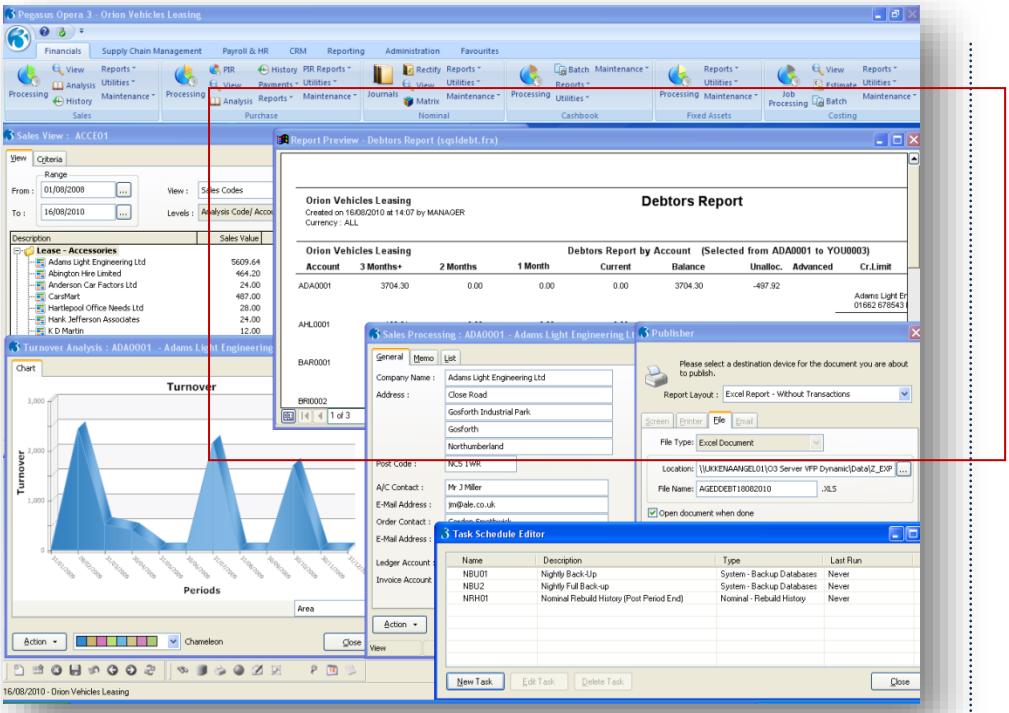
These options are available on the Report Preview form:

Box	Description
Highlighted search results	You can search for details in the report. The search results are highlighted in the report and a pane is displayed on the left of the screen that displays the search results by page number.
Page navigation	You can easily navigate from one page to the next.
Zoom	You can zoom the report up to 10 times of normal size. You can also fit the width of the report to the screen and fit all the contents of the report to the screen.
Print	You can print the report after viewing it on the screen. You have a number of choices before printing the report: Include all pages Include only certain pages Include only odd numbered pages Include only even numbered pages Print one or more copies of the report Fit more than one page of the report preview on the printed report. For example, if you have a four page report preview, you can fit the four pages on one printed page.



Notes

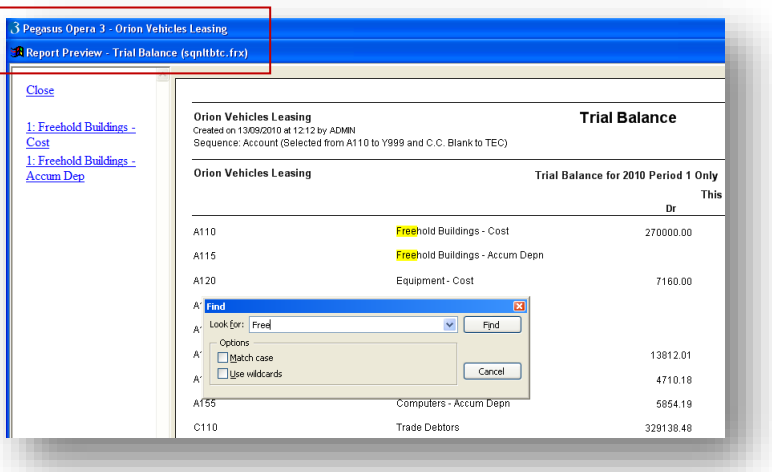
A modeless report screen preview facility with searching comes as standard in O3 for all standard reports. This functionality offers significantly enhanced sociability within Opera 3 and allows users to launch other functions whilst having the report screen preview still open on screen. This facility in Opera II /Opera 16 is modal (exclusive process).



Please note: that only reports that can be loaded from the reports folder in an Opera 3 module will be modeless. If a specific report writes back data then the report will remain modal.

Searching highlights is one of the new features, as well as Bookmark facility.

Report Name



Notes

Accreditation Training Courseware

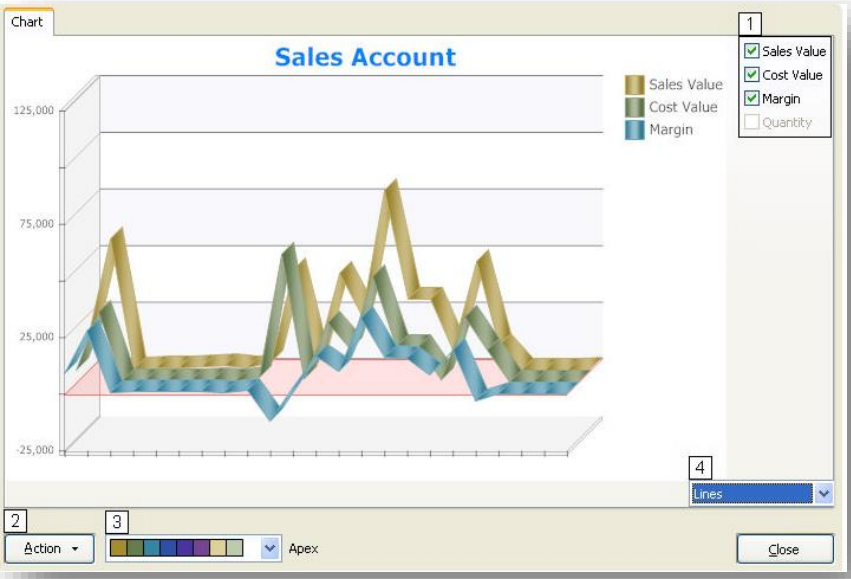
5 Chart Views

Pegasus Opera 3 includes powerful and versatile chart views throughout the application so you can view your company data in a graphical format. Charts can be copied to the Windows Clipboard, saved as a graphical file on your computer, or printed. You can choose the colours used in a chart from colour themes when you view a chart.

You can view as many charts as you need at the same time. So, if you want to compare different codes of information, like supplier accounts, you can open as many chart forms as you need. For example, if you wanted to compare the turnover of customer account ADA0001 and customer account YOU0001, you can do this by positioning a chart for the first account next to a chart for the other account. You can also view the same information in different types of charts at the same time. For example you can view a customer's turnover in both a vertical bar chart and a horizontal bar chart.

Some charts will not display negative values. Other charts, like the Pie Chart and Doughnut Chart, only display one category of information. If the view you are using includes either negative values or more than one category of information, a message is displayed when you select a type of chart that cannot display the information.

This is a line graph which is accessed from the View form in the Sales Ledger.



	Feature	Description
1.	Tick boxes	Some charts allow you to select the categories of information you want to include on the chart. In the multi-category chart above for example, you can choose to include the value of sales, the cost of those sales and the sales margin. Other charts are single-category charts so include one set of values only.

Chart Views

Notes

2.	Action button	These commands are available: • **Clipboard** to copy the chart to the Windows clipboard • **Print** with various printing settings • **Export** to save the chart as a bitmap graph • **Criteria** to view the current criteria for the form.
3.	Colour Scheme	You can choose the colours you want to see in the chart by selecting a colour scheme. The application uses the first colour in the chosen scheme to display the first series or category of information, the second colour for the second category of information, and so on. The colours are used until you close the chart form.
4.	Chart Types	Each view can be drawn using different chart styles. The styles that are available depends on the selected chart. Click here for a description of each type of chart available.

Chart views are available in the System Manager, Sales Ledger, Sales Pipeline Management, Purchase Ledger, Nominal Ledger, Costing, Stock and Payroll modules. Each chart's scale either displays values (as in a Line chart) or percentages (as in a Full-Stacked Bar chart). This table describes all the charts that are used in the different views in the application. Only some of the chart types are available to each chart.

5.1 Where are Opera 3 Charts available?

The charts in Opera 3 are available throughout the application. This table describes the areas where charts are available, the information that is included in each chart and also the types of chart that can be used. Pie charts and Doughnut charts can be selected in the areas mentioned in the table below only if one category of data is selected.

Module	Command	Sub Command	Description	Available Charts
System Manager	Utilities	Monitor Companies	Displays the sales turnover and purchase turnover for the company from the beginning of the calendar year.	Points Lines Area Vertical Bars Horizontal Bars
Sales Ledger	View		Display customer enquiries based on the analysis facilities used in the Sales Ledger. You can include a range of customers in this view.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut

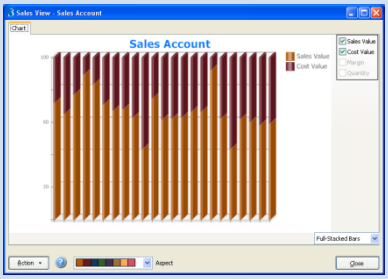
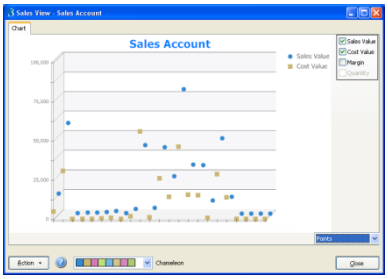
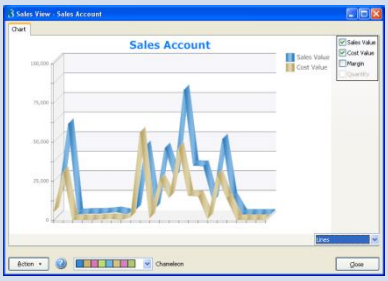
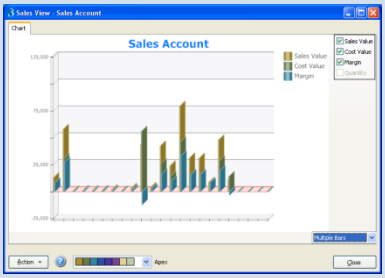
Sales Ledger..	Processing	Turnover	Displays a twelve month analysis of turnover for the selected customer.	Points Lines Area Vertical Bars Horizontal Bars
Purchase Ledger	View		Display enquiries based on the analysis facilities used in the Purchase Ledger. You can include a range of suppliers in this view.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
	Processing	Turnover	Displays a twelve month analysis of turnover for the selected supplier.	Points Lines Area Vertical Bars Horizontal Bars
Nominal Ledger	View		Display enquiries based on the account, cost centre, type, sub type dimensions used in the Nominal Ledger. If the Advanced Nominal Ledger is used, views can also include additional dimensions as well, like projects and departments.	Vertical Bars Horizontal Bars
Costing	View		Displays enquiries on costs and revenue transactions posted in the Costing module and other modules that update Costing with job costs and revenue.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
Stock	View		Displays enquiries of receipts, issues, returns, allocations, deallocations, adjustments, transfers, purchase orders and sales order transactions that affect stock.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
Payroll	View		Displays enquiries on payroll transactions.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut
Sales Pipeline Management	Opportunities	View	Displays enquiries of your sales opportunities.	Full-Stacked Bars Points Lines Area Stacked Bars Stacked Area Horizontal Multiple Bars Horizontal Stacked Bars Horizontal Full-Stacked Bars Pie Doughnut

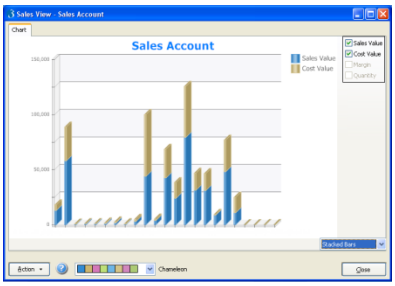
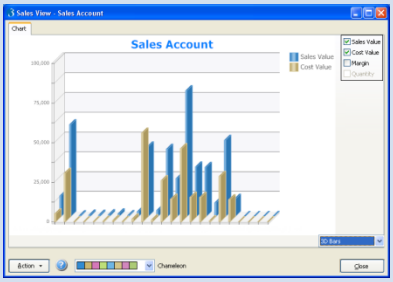
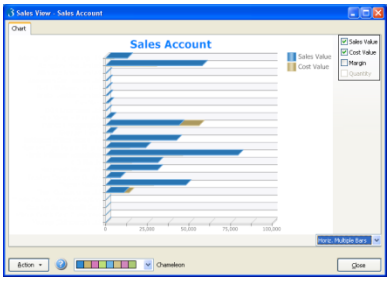
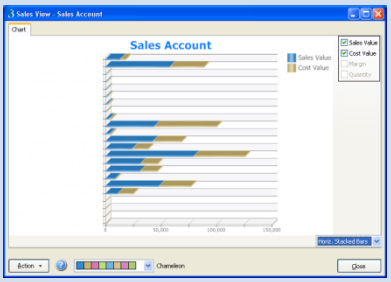
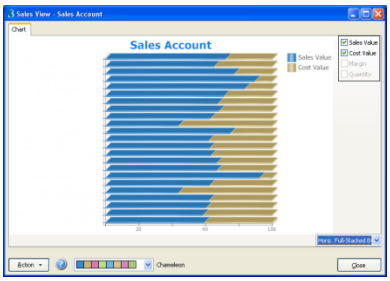
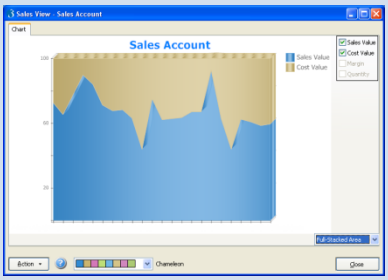
Notes

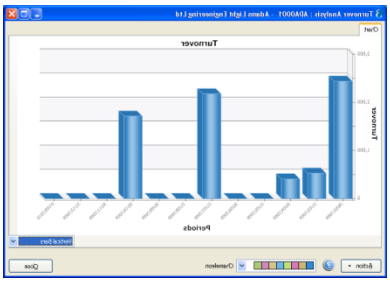
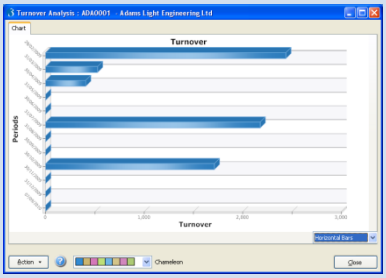
5.2 Opera 3 Chart Types

Notes

Each view in the application can be drawn using different chart styles. The styles that are available depends on the selected chart. This table lists the different charts available, describes each chart and suggests when they could be used.

Chart Type	Description	Displayed as	Suggested Use	Allows negative values	Screenshot
Full-Stacked Bars	Displays one or more categories of stacked information displaying the percentage of each category up to 100%.	%	To show different categories of information stacked in the same bar. Each data category is displayed up to the largest value in the selected data.	No	
Points	Displays one or more categories of information as scattered dots. The horizontal scale is represented in values.	£	To see discernible trends in the information, for example your customers' turnover trends.	Yes	
Lines	Displays one or more categories of information in 3D lines.	£	When you need to show trends for several categories on the same diagram, and to compare the values of several categories for the same points arguments.	Yes	
Area	Displays categories of information as filled areas on a chart, with each data point displayed as a peak or hollow in the area.	£	To show trends for several categories on the same diagram, and also show the relationship of the parts to the whole.	No	
Multiple Bars	Displays one or more categories of information vertically. Each bar represents a different categories.	£	To view graphs with more than one numeric values displayed vertically.	Yes	

Stacked Bars	Displays one or more categories of information vertically. Each bar includes all of the selected series. The height of each bar is determined by the total of all the category values for the category.	£	To show different categories of information stacked in the same bar.	No	
3D Bars	Displays one or more categories of information vertically. Each bar represents a different category. The bars are placed one behind the other.	£	To show different categories of information placed adjacent to each other.	Yes	
Horizontal Multiple Bars	Displays one or more categories of information horizontally. Each bar represents a different categories. The bars are displayed next to one another.	%	When it is necessary to compare the percentage values of different point arguments in the same categories , and to illustrate these values as easy to understand pie slices, but with a hole in its center.	Yes	
Horizontal Stacked Bars	Displays one or more categories of information horizontally. Each bar includes all of the selected categories. The width of each bar is determined by the total of all the values for the categories.	£	To show the cumulative effect of a category of information using values.	No	
Horizontal Full Stacked Bars	Displays one or more categories of stacked information horizontally displaying the percentage of each category up to 100%. Each bar includes all of the selected categories. The width of each bar is determined by the total of all the values for the categories.	%	To show the cumulative effect of a category of information using percentages.	No	
Full Stacked Area	Displays categories as areas on a diagram, so that the percentage value of each category is stacked with all the other corresponding categories. The height of the area is always the full height of the chart. An area chart can be thought of as a stacked line chart, with the data points showing the sum of the values in the categories rather than the individual values.	%	To emphasise a change in values by filling in the portion of the graph beneath the line connecting various data points.	No	

Pie	Displays one category of information in segments. Each segment represents a percentage of the total value of the information on display.	%	To represent percentage values as proportionally-sized slices of a pie, each slice displayed in a different colour.	No	
Doughnut	Displays one category of information in segments. Each segment represents a percentage of the total value of the information on display.	%	To represent percentage values as proportionally-sized slices of a pie, each slice displayed in a different colour with a hole at the centre.	No	
Vertical Bars	Displays one category of information vertically.	£	Use to view graphs with numeric values displayed vertically.	Yes	
Horizontal Bars	Displays one category of information horizontally.	£	Use to view graphs with numeric values displayed horizontally.	Yes	

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Appendix

Appendix A – Notes

Most maintenance forms have a Memo tab you can use to record notes about the record currently displayed on screen. You can also use object linking and embedding to attach documents or images. In addition to these facilities, further notes can be attached to certain master records which are more structured, and that can be used to record and monitor actions or tasks to be carried out by someone else. Notes can also be generated automatically as a result of a particular process; for example, putting an account on stop.

Notes are created, edited and viewed by selecting the Notes button on the toolbar, or by pressing CTRL+O, once you have retrieved the master record concerned. The facility is not available for all records, or under all circumstances. You can only create or view notes for a record when this button is available on the toolbar.

For each note record you create, you can enter a subject heading and the details of the note. The default date of the note will be the processing date and the originator's user name is also recorded. You can assign a priority to the note, depending on it's level of importance (low, normal or high). If the note relates to a task or action to be undertaken by someone else, you can select one of the persons identified on the People Profiles form and record a date by which the action should be completed. If that person record has an e-mail address associated with it, or if you type an e-mail address on the note record, the application will automatically generate an e-mail message, using your default MAPI-compliant e-mail software, when the note is saved.

The note can be retrieved for viewing or editing at any time when the master record is displayed using the same Notes toolbar button used to create it. You can create many notes for the same master record; each one is summarized in the grid in the bottom half of the Notes form. A report is available to list the notes created for the master records.

If the note relates to an action, you can record when the action has been done using the (Un)Complete command on the Action menu associated with the Notes form.

You can identify when a record has a note attached by an icon that appears in the form's status bar:

If a note has been assigned a high-priority status, this is indicated by an exclamation mark in the status bar of the Notes form, provided that note is the one currently selected in the grid:

You can mark a note for deletion by retrieving the note record concerned and using one of the normal record delete functions. Records marked for deletion are removed using the Reorganise System Files command in the System module. You select the Tidy Notes option on the Reorganise System Files form for this purpose.

Automatic Notes Creation

Some processes result in the automatic creation of a notes record, including:

- On production of a sales statement.
- When a sales or purchase account is put on stop or subsequently released.
- When a sales or purchase invoice is marked as being in dispute or subsequently released.
- When an e-mail is produced for a customer or supplier via the Processing menu.
- Optionally when producing e-mails from the Customer Contacts or Supplier Contacts reports, provided the Note of E-Mails option is selected.

Automatically generated notes do not have corresponding actions; no entries are made in the Action For, E-Mail, or Done By fields. However, the Completed field is updated with the same date as the note's creation date.

Note Reports

For those modules where notes can be maintained, you can print the notes created for master records using the appropriate command on the Reports menu. You can use selection criteria to determine which note records are listed. For example, you can restrict the list to a range of master records, persons identified in the Action For box, user records (those responsible for creating the notes) and action dates. You can also select by priority level and optionally include notes not intended for action, or that have already been marked as complete.

Prerequisites

Before you create a note record, you need to have created the master record to which the note will be attached. If you want to record an action for a specific individual in the Action For box, you must create the person record using the People Profiles command in the System module. In order to make it possible to generate a default e-mail message when the E-Mail box is used, you must have a MAPI-compliant e-mail software application installed on your PC.

To create a note record

1. Retrieve the record for which you want to create a note record.
2. On the toolbar, click Notes.
3. On the Record menu, click New.
4. In the boxes provided, enter the details of the note record.
5. If you have entered an e-mail address, on the Record menu, click Save. (You do not need to use the Save command if the record has been created without an e-mail address.)
6. To close the Notes form, click Close.

Note: If an entry is made in the E-Mail box, saving the note will result in the application starting your default e-mail software and generating a default e-mail message.

Note Entries

Box	Description
User	The user name of the person creating the note. This is automatically based on the name used to log on and recorded in the User Profiles form of the System module. You cannot override this on the note record.
Date	The date on which the note was created. The default is the current processing date. If you want to change this, type a new date or use the calendar button alongside the box to select an alternative. Once the note record is stored, you will not be able to amend this creation date.
Priority	An option that determines the level of importance for the note. You can select 'Low', 'Normal' or 'High' from a list. The default selection is 'Normal'. Once the note record is stored, this priority level is reflected in the grid in the bottom half of the Notes form in the column headed P. 'L' means 'low', 'H' means 'high' and no entry in this column means 'normal'.
Action For	A reference that identifies someone on the People Profiles form in the System module to whom the note relates. You can select from a list. If the note is not relevant to a particular individual, or the person does have a corresponding record in the System module, leave this box blank. If you do select a person record and they have a corresponding e-mail address, that address will appear in the following box.
E-Mail	The e-mail address of the person for whom the note is intended. This may be shown automatically if one exists on the person record. If not, you can type an e-mail address. When the note record is saved, the application will automatically generate an e-mail message using your default e-mail software. If you do not want an e-mail created, leave this box blank.
Done By	A date by which the action or task should be completed. You can leave this blank if the note has no deadline or time restriction. You can use the calendar button alongside the box to select a date. Once the note record is saved, this date will appear in the Be Done By column of the grid in the bottom half of the Notes form.
Subject	The subject of the note. This is also used as the default subject line if an e-mail is generated. A default subject heading will appear in the note has been generated automatically.
Note	The detail of the note. This will appear as the message text if an e-mail is generated, preceded by the ID and name of the record to which the note relates. A default message will appear in the note has been generated automatically.

To mark a note as completed

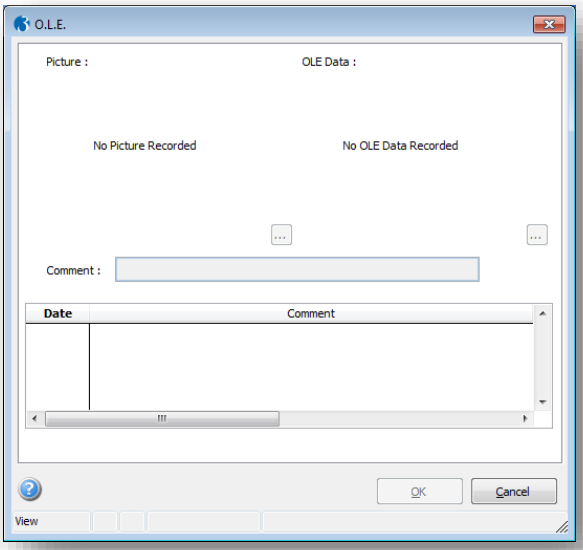
1. Retrieve the record for which you want to update the note record.
2. On the toolbar, click Notes.
3. On the Action menu, click (Un)Complete. The current processing date appears in the Completed column of the grid in the bottom half of the Notes form.
4. To close the Notes form, click Close.

Note: You can reinstate a note to its incomplete state by reselecting the (Un)Complete command on the Action menu associated with the Notes form. This causes the date in the Completed column of the grid on the Notes form to be removed.

Appendix B - Object Linking and Embedding

You can link objects to be associated with records such as customers, suppliers, stock items, employees and so on. A representation or placeholder for an object is inserted on the O.L.E. form associated with the record. The object exists in the source file and, when it is changed, the linked object is updated to reflect these changes. You can attach a picture as well as an object placeholder. This can be associated with the OLE data object or be independent. You can link several objects to each record. Double-clicking on the icon associated with the OLE Data heading will start the application used to create the object, assuming the application and document is available to you. Right-clicking on an icon associated with an OLE Data heading displays a shortcut menu. The menu options on the shortcut menu are dependent on the type of object, and provide the ability to edit the object and/or edit the package using Object Packager.

Important: These are dynamic links. If you move or rename a linked object without changing the file extension on the same hard disk drive, the link in Opera is automatically updated. However, if you move a linked object to a different hard disk drive (either on the same computer or a different computer), the link in Opera will not be updated. The link in Opera with then not work. If you delete the linked object, the link in Opera will not work. Once the OLE object is not linked anymore, you will need to manually reattach the object in Opera to link to the object again.



To link objects

1. Open the relevant module folder, and then click Processing.
2. Retrieve the record for which you want to store object details, click Action and then click O.L.E. The O.L.E. form appears.
3. On the Record menu, click New.
4. Under Picture, click the browse button to locate the file that contains the image you want to link.
5. Under OLE Data, click the browse button to locate the file that contains the document you want to link.
6. In Comment, type a comment that identifies the objects you have linked.
7. To store the object details, click OK.

Notes: An icon appears on the status bar of the record processing form to show that an object record exists. You can use the New command button on the toolbar to add additional objects. To start the application used to maintain a data object, double-click the icon under OLE Data. To delete an OLE entry, click to highlight in the list and then click the Delete command button on the toolbar. Both picture and OLE data objects are removed as one item. Deleted OLE files are removed when you use the Reorganise System Files command in the System module with the Tidy System Files option selected.

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Other Guides and Help

The following user documents are also provided with the respective software. Guides are available from various sources including Answerlink, the Opera 3 CD and from the Opera 3 Client installation's main folder, normally *C:\Program Files\Pegasus\O3 Client XXX\User documents (where XXX is either VFP or SQL)*. Some guides are also available from the Opera 3 Help menu or respective software Help menu.

Readme File

The Readme file is an HTML document. It contains late breaking news and any other release specific important information.

Note: This file can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Release Guide

When new versions are released such as Opera 3, they are normally accompanied by a Release Guide that contains information such as What's New in this Release, Release History, and Functional Differences between versions.

Note: This guide can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Installation Guide

The Installation Guide is provided to help you install the application in your chosen Windows environment. It contains technical information and advice to ensure the installation process is successful.

Demonstration Data Guide

This guide is provided to assist the use of the demonstration data and contains pertinent information that is not contained elsewhere in the product documentation. It is recommended that the Help be used at the same time.

Implementation Guide

The Implementation Guide provides a high-level view of an application such as Opera 3 and how to approach an implementation. It details how the modules are integrated, and recommends the order in which elements should be set up.

System Requirements Guide

The System Requirements Guide details the minimum and recommended computer hardware and software requirements that are required to install and use software such as Opera 3 Enterprise and Opera 3 Enterprise SQL.

It also includes guidance on using Opera 3 Enterprise and Opera 3 Enterprise SQL in a Terminal Services environment run in Windows Server 2003 and Windows Server 2008 (32-bit & 64-bit).

Help

F1 Help provides details of all the functions available in the application.

Document Management & Executive Dashboards Guides

Installation Guides are available for both Document Management and Executive Dashboards. A user guide is also available for Executive Dashboards. Help for Document Management is in the Opera 3 Help.

Note: The guides are in the respective folders on the Opera 3 CD and can be accessed from the Opera 3 CD Installation Menu.