

Compass Software

MANUAL FOR THE CREATION OF FORMS



INSTRUCTION MANUAL

Manual Forms

Content

1.0 The Forms Tree.....	3
1.1 Forms.....	4
1.1.1 Creation	6
1.1.1.1 3D-View	7
1.1.1.2 Floorplan Drawing	8
1.1.1.3 Building Parts Drawings.....	9
1.1.1.4 Profile.....	10
1.1.1.5 Pictures	11
1.1.1.6 Tables.....	12
1.1.1.7 Labels	13
1.1.1.8 Graphics	14
1.1.1.9 Value Fields.....	15
1.1.1.10 Permanent Text.....	16
1.1.1.11 Lines.....	17
1.1.1.12 Rectangle.....	18
1.1.2 Editing Already Created Elements	19
1.1.3 Formatting Objects on the Form Template	20
1.1.3.1 Explanation with an Example	21
1.1.4 Assigning your Forms.....	22
1.1.5 Initiating the Measurement Tool.....	24

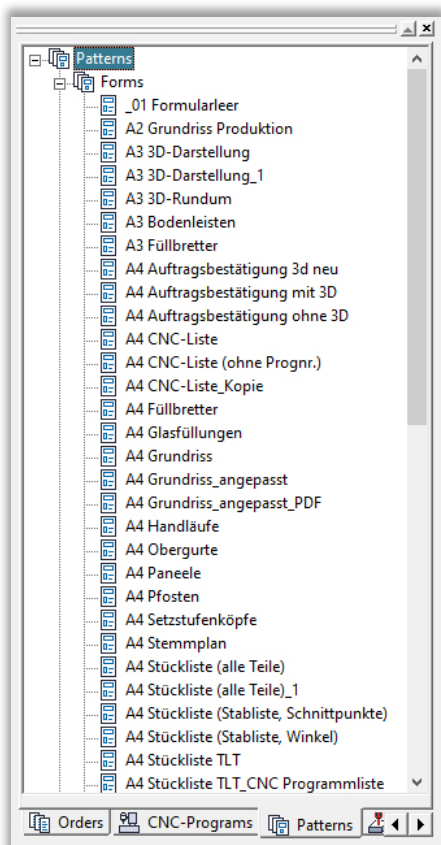
Manual Forms

1.0 The Forms Tree

The template tree contains all your form and table templates. Here you can administer your templates and create your own, e.g., for offers or order confirmations.

You can freely arrange certain outputs, texts, and bitmaps (e.g., your company logo) on **form templates**. A form template can also contain different construction parts, e.g., all treads and/or stringers of a staircase. The following kinds of forms are available:

- **Single page form:** this form consists of one page only.
- **Multi-page form:** this form can consist of one page only. In the case that not all parts fit onto the first page, the form will extend to fit everything on additional pages.
- **Multi-page form with cover:** this form is similar to the multi-page form, but it also contains a cover, which can display something different than the remaining pages.



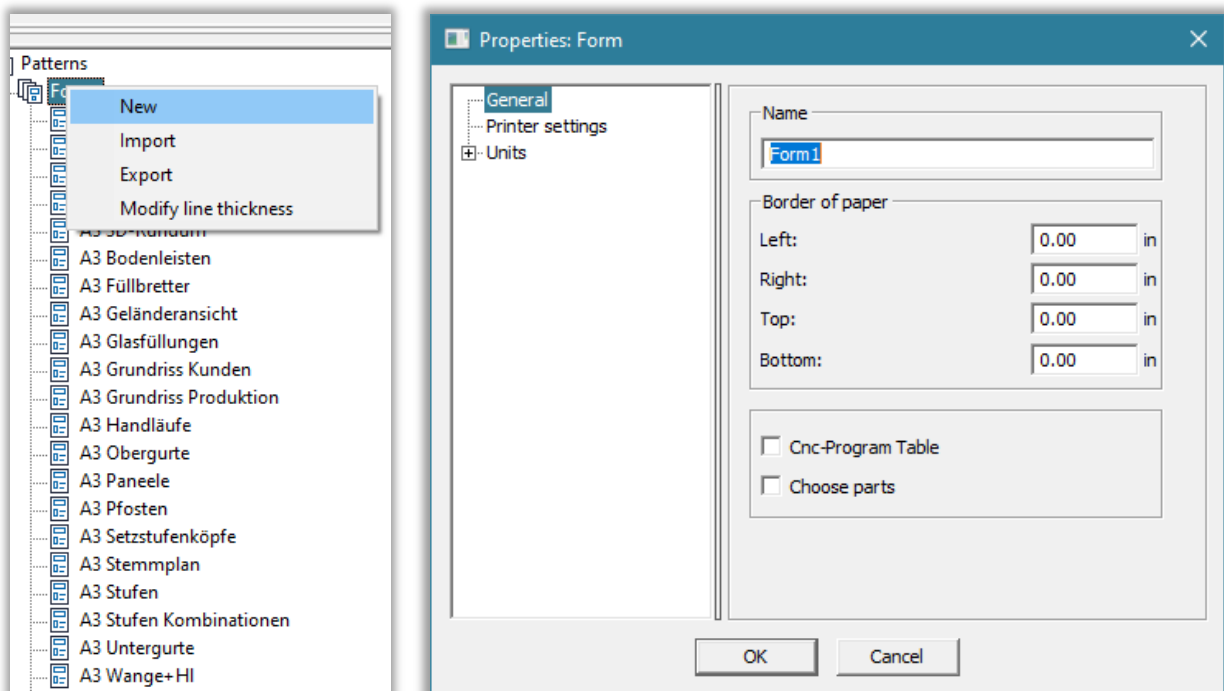
You are able to assign finished **form templates** to any of your stairs, that is normally you would only create the form template once, e.g., for floorplan constructions, which you would use again and again.

Manual Forms

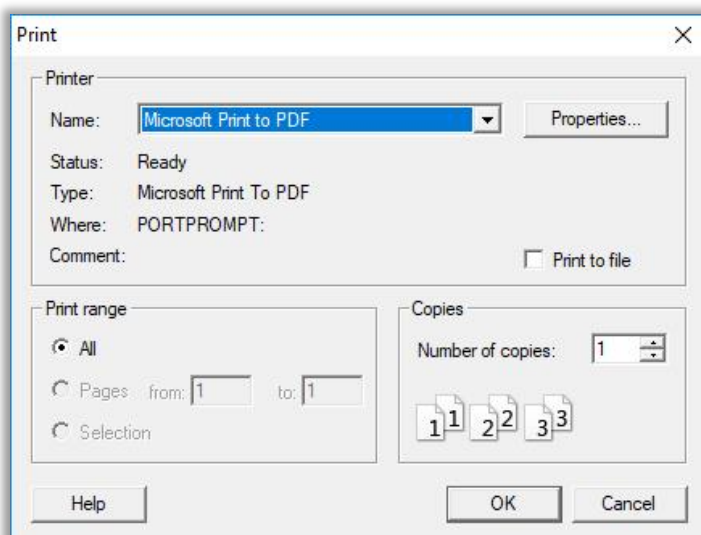
1.1 Forms

Creating a Form Template:

- Expand the **Templates** node in your template tree located in the work area.
- Open the template tree and right-click on **forms** to select **new**.
- The window **Properties: Form** will open.
- Enter a name for your template, e.g., form1.

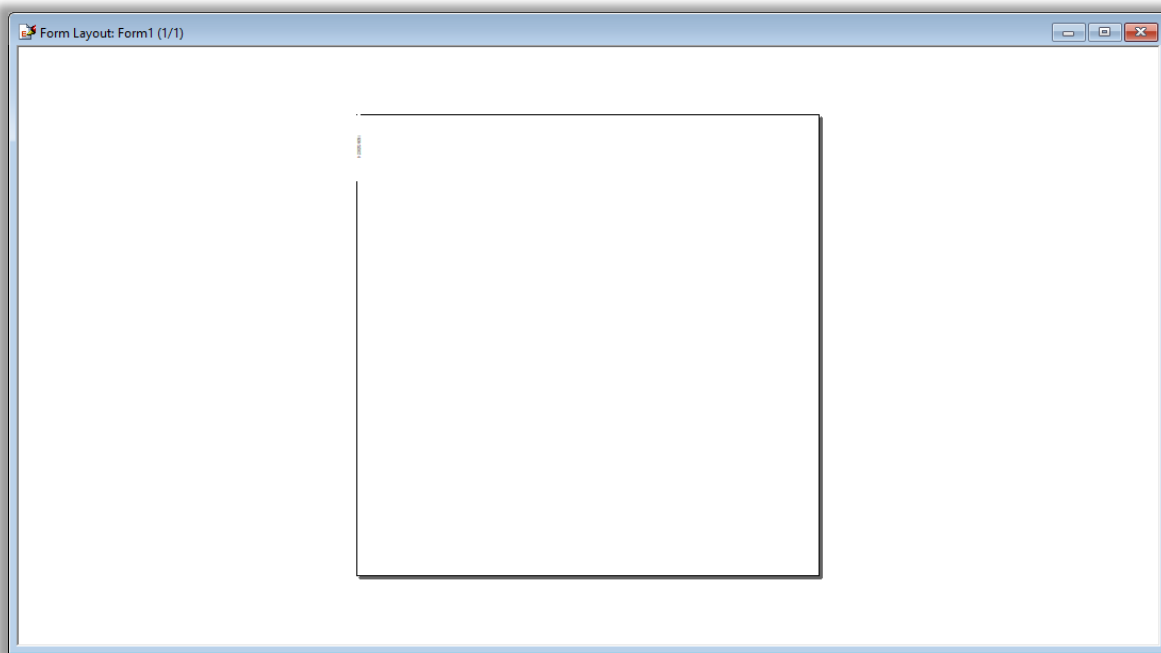


- If you go to the tab **printer settings** you will find the button **selection**, which will lead you to the printer set-up. Please refer to your printer manual on what settings to choose.



Manual Forms

- When creating a new *form* you can choose between **single page**, **multi-page**, or **multi-page with cover** in the printer settings
- Select **single page** for forms that only consists of one page, e.g., your floorplan.
- Select **multi-page** for forms that consist of more than one page, e.g., component drawings or parts lists. This lets you print all treads of a stair on several pages for example.
- Select **multi-page with cover** for forms that consist of several pages and also contain a cover page.
- The tab **general** contains the category **edges**, which lets you enter the size of your margins, which will be left empty. Confirm your settings by clicking **ok**.
- The window **form layout (1/1)** will open subsequently. You can now create your form template by using the available icons. Before creating a new form template, make sure to get an overview of the keyboard layout in the form editor:



- **Enlarge / shrink** the display image with the **+/-** keys.
- **Shift** the display image with the **arrow keys** or the **page up/down** keys.
- The **Pos1** key moves the display image to the top left corner of the screen.
- The **End** key moves the display image to the bottom right corner of the screen.

Manual Forms

1.1.1 Creation

This is a short explanation of the individual points. They will be explained in more length later in this chapter:



With this icon:

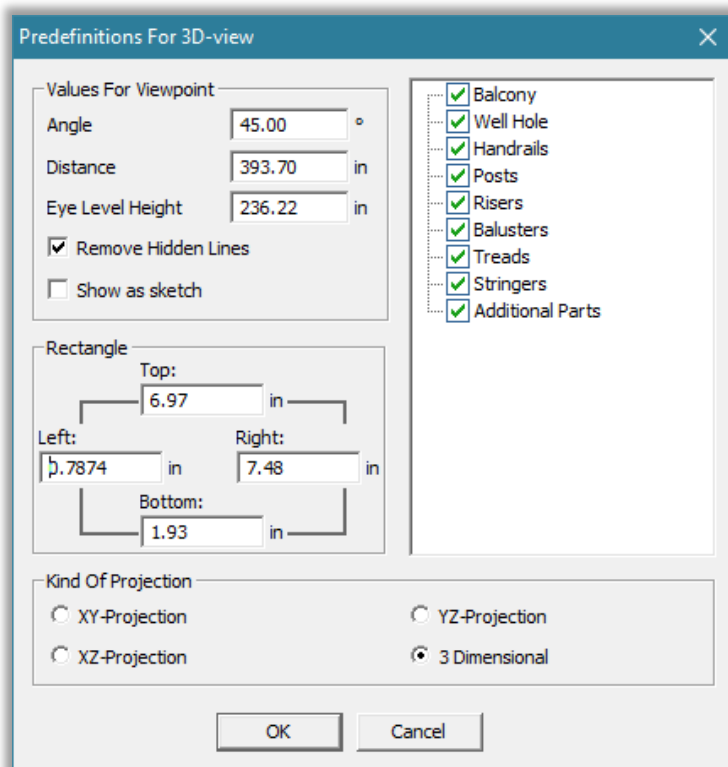
-  you delete all elements that have been inserted on the form template.
-  you can turn on/off the dialogs. Dialogs let you further adjust the elements.
-  you can insert a floorplan drawing into the form template.
-  you can insert the drawing of a specific building component into the form template.
-  you can insert a field into the form template where the handrail profile will be displayed.
-  you can insert a table, e.g., a parts list, into the form template.
-  you can insert labels into the form template.
-  you can insert a 3D drawing into the form template.
-  you can insert a picture (or snapshot).
-  you can insert a Bitmap or Metafile graphic into the form template.
-  you can insert a value field. The value information are custom to each order and will change accordingly. E.g., the name of each order is different, the value field name will change with each order to show the correct name.
-  you can insert a permanent text box in the form template. This text box will always be the same and will not change with each order.
-  you can insert 3 different kinds of lines in your form template. Either random, horizontal, or vertical lines.
-  you can insert a rectangular into your form template.
-  with a left-click on the ->> icon you will turn the page forward (**next page**). With the <<- icon you will turn the page backwards.

Activate the **paste dialog** with the left-click on the icon. By doing this the system will show a dialog for each element you insert on your form template. The dialog will let you edit each element further.

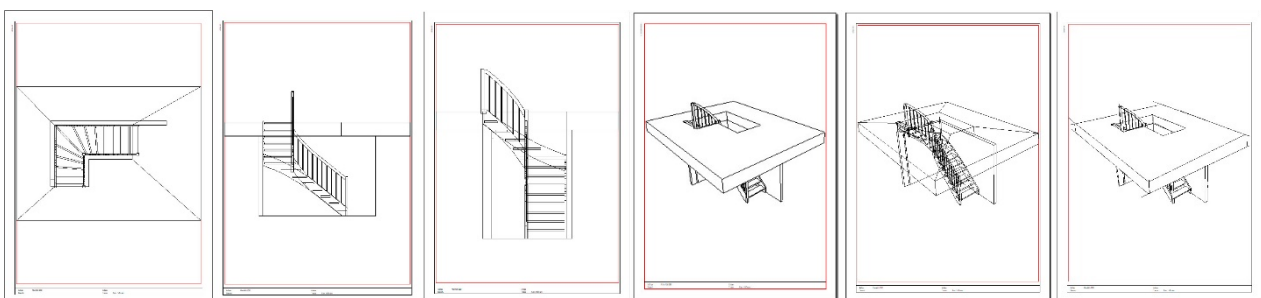
Manual Forms

1.1.1.1 3D-View

With a left click select the **3D view** icon . Move your cursor onto the form template. Click left and keep the left mouse key down while dragging the cursor to draw the frame for your **3D drawing** window. Let go of the left mouse key when you're satisfied and the **3D drawing** will be inserted. The window **Predefinitions For 3D-view** will open:



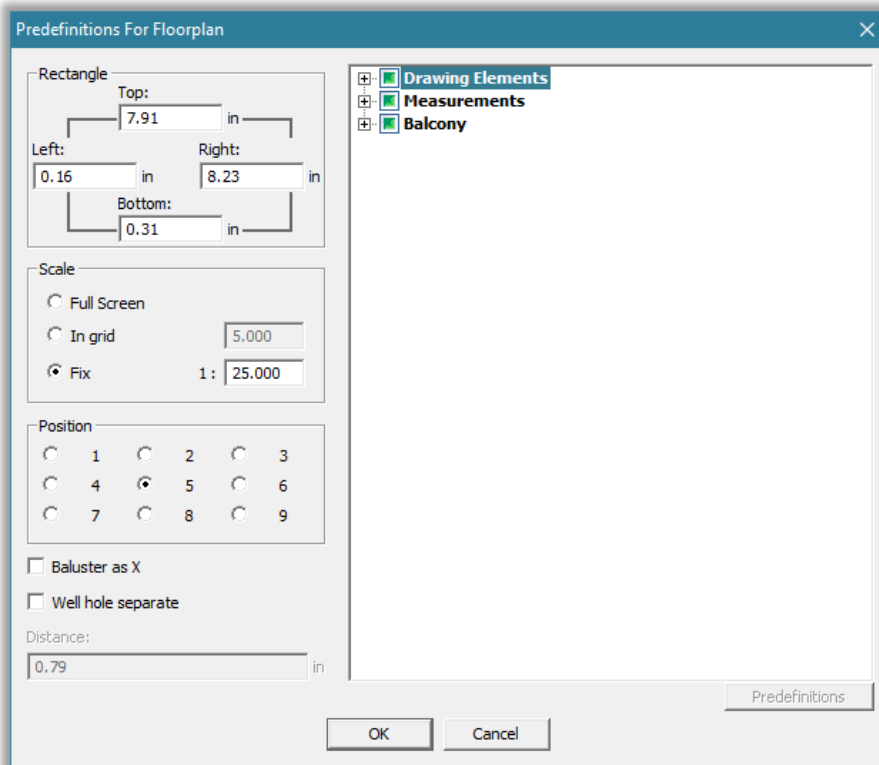
- **Values for Viewpoint:** You will define the angle from which to show the 3D drawing here.
- **Hidden Lines:** This function will let you display stairs and the surroundings transparent.
- **Show as Sketch:** This function will let you display the stair as a sketch.
- **Rectangle:** This function lets you edit the size and position of the area in which the 3D drawing will be displayed.
- **Kind of Projection:** This function lets you decide whether to show the drawing from a bird view, side view, front view or spatial view.



Manual Forms

1.1.1.2 Floorplan Drawing

Left click on the **floorplan drawing** icon . Move the cursor to the form template. Click the left mouse key and keep it down while dragging the cursor to create an area for your floorplan drawing. Release the left mouse key and the floorplan drawing will be inserted. The window **Predefinitions For Floorplan** will open:



The dialog box "Predefinitions For Floorplan" contains the following sections:

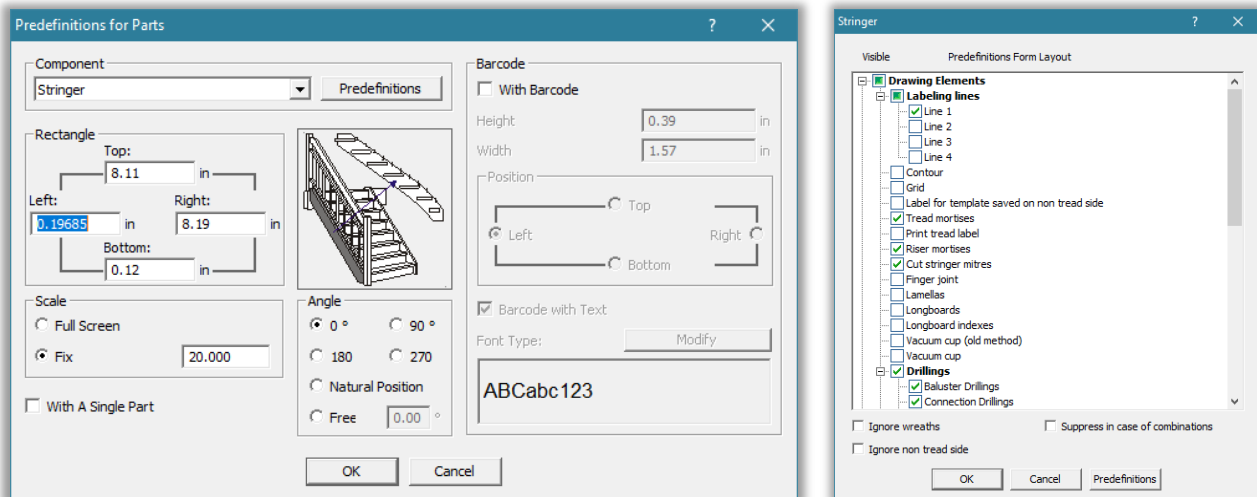
- Rectangle:** Fields for Top (7.91 in), Left (0.16 in), Right (8.23 in), and Bottom (0.31 in).
- Scale:** Radio buttons for Full Screen, In grid (with a value of 5.000), and Fix (with a value of 1 : 25.000).
- Position:** A 3x3 grid of radio buttons numbered 1 to 9. Position 5 is selected.
- Options:** Checkboxes for "Baluster as X" and "Well hole separate".
- Distance:** A field with the value 0.79 in.
- Buttons:** OK, Cancel, and a "Predefinitions" button.
- Right Panel:** A list of components with checkboxes: Drawing Elements (checked), Measurements (checked), and Balcony (checked).

- **Rectangle:** Here you can edit the size and position of the rectangle in which the floorplan is shown.
- **Scale:** Here you can adjust the scale. **On grid** let's you set the increments for the scale (e.g., 1:5, 1:10, 1:15). The system will then calculate the biggest possible scale within the defined rectangle for those grid increments. **Full screen** selects the biggest possible scale for the page size.
- **Position:** The position function gives you 9 possibilities to position the drawing within the rectangle.
- You can use the list on the right side to decide which components will be displayed in the floorplan drawing.
- **Baluster as X:** This option makes it possible to display balusters as X's in the floorplan drawing.
- **Well hole separate:** This option makes it possible to display the staircase and well hole separately.

Manual Forms

1.1.1.3 Building Parts Drawings

Click left on the **building parts** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your **building component**. Release the left mouse button and the **building component drawing** will be inserted. The **Predefinitions for Parts** dialog will open:

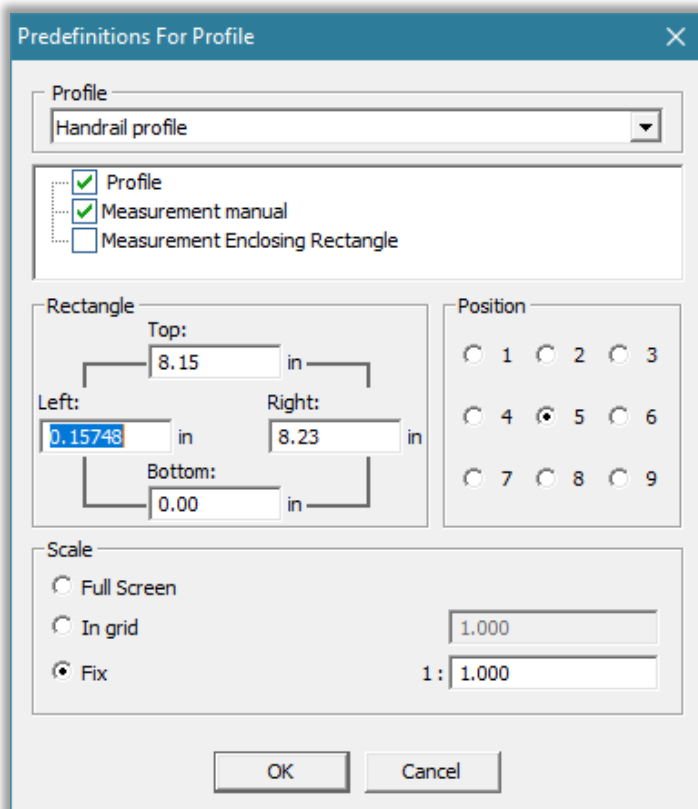


- **Component:** Here you can choose which component to display.
- **Rectangle:** Here you can edit the size and position of the rectangle in which the building component drawing is shown.
- **Scale:** This setting will let you adjust the scale.
- **Predefinitions:** A window opens which lets you define which elements to show in the drawing (e.g., drillings, contours, component labels). If you selecting an element and click on settings, you will be able to change the properties, such as colour, line type, line thickness.
- **Angle:** Lets you adjust the angle in which the building component is shown.
- **Barcode:** If you select barcode, you can configure the width, height, and position of the barcode shown in the rectangle here.

Manual Forms

1.1.1.4 Profile

Left click on the **insert profile** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your profile. Release the left mouse key and the profile will be inserted. The window **Predefinitions for Profile** will open:



The **Predefinitions For Profile** dialog box contains the following settings:

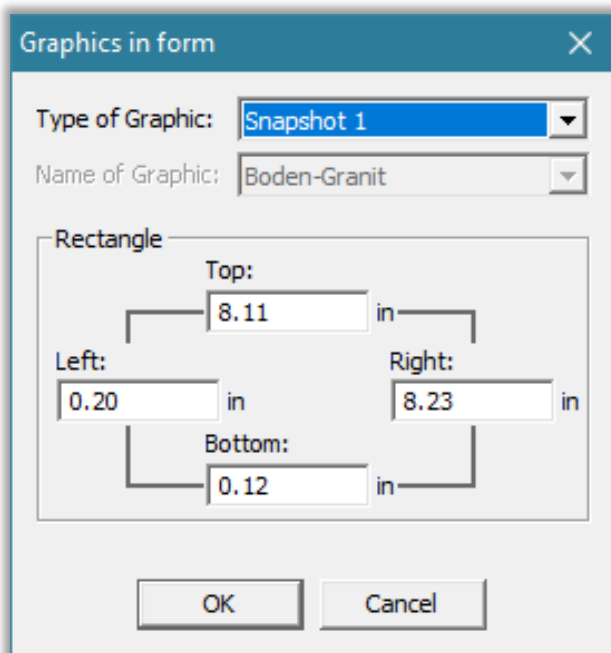
- Profile:** A dropdown menu showing "Handrail profile".
- Checkboxes:**
 - ☒ Profile
 - ☒ Measurement manual
 - ☐ Measurement Enclosing Rectangle
- Rectangle:** A diagram showing a rectangle with dimensions:
 - Top: 8.15 in
 - Left: 0.15748 in
 - Right: 8.23 in
 - Bottom: 0.00 in
- Position:** A 3x3 grid of radio buttons numbered 1 to 9. Position 5 is selected.
- Scale:**
 - ☐ Full Screen
 - ☐ In grid (with a value of 1.000)
 - ☒ Fix (with a value of 1 : 1.000)
- Buttons:** OK and Cancel.

- **Position:** This option gives you 9 possible positions where to display your drawing within the rectangle.
- **Scale:** Here you can adjust the scale. **On grid** let's you set the increments for the scale (e.g., 1:5, 1:10, 1:15). The system will then calculate the biggest possible scale within the defined rectangle for those grid increments. **Full screen** selects the biggest possible scale for the page size.
- **Rectangle:** Here you can edit the size and position of the rectangle in which the building component drawing is shown.

Manual Forms

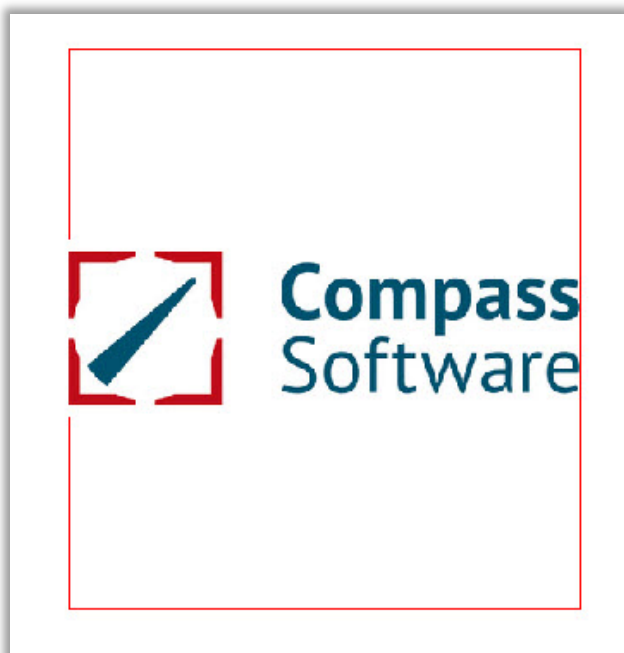
1.1.1.5 Pictures

Left click on the **insert graphics** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your picture. When you release the mouse key a menu will appear which is used to insert a picture.



The 'Graphics in form' dialog box is shown. It has a title bar with a close button. Inside, there are two dropdown menus: 'Type of Graphic:' set to 'Snapshot 1' and 'Name of Graphic:' set to 'Boden-Granit'. Below these is a 'Rectangle' section with four input fields for dimensions: 'Top:' (8.11 in), 'Left:' (0.20 in), 'Right:' (8.23 in), and 'Bottom:' (0.12 in). At the bottom are 'OK' and 'Cancel' buttons.

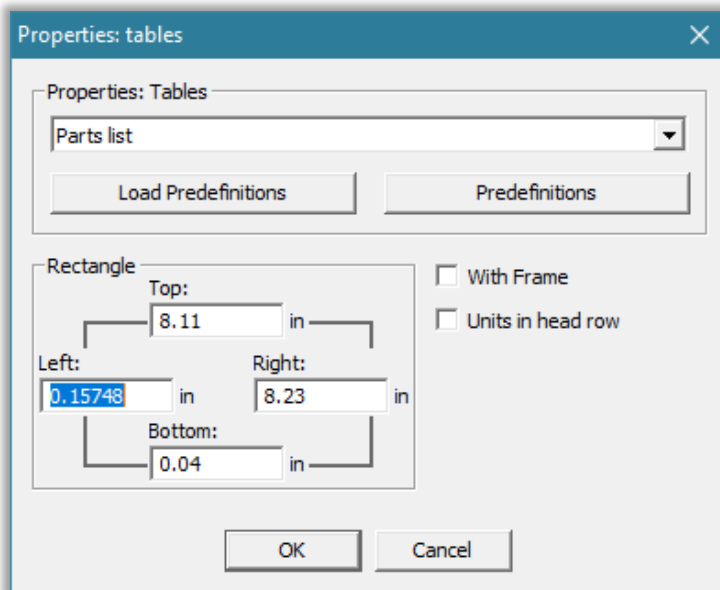
You can also insert snap shots from your 3D Plus mode here.



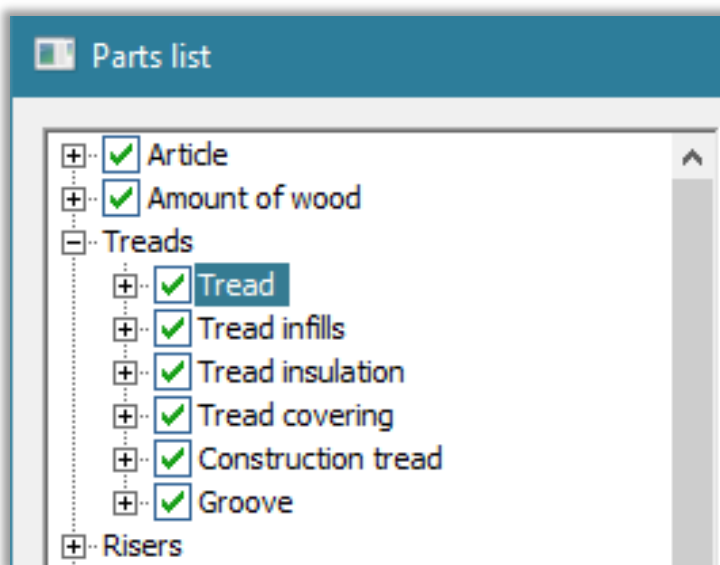
Manual Forms

1.1.1.6 Tables

Left click on the **table** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your table. Release the left mouse key and the table will be inserted. The window **Properties: Tables** will open. Here you can insert already existing tables from a list.

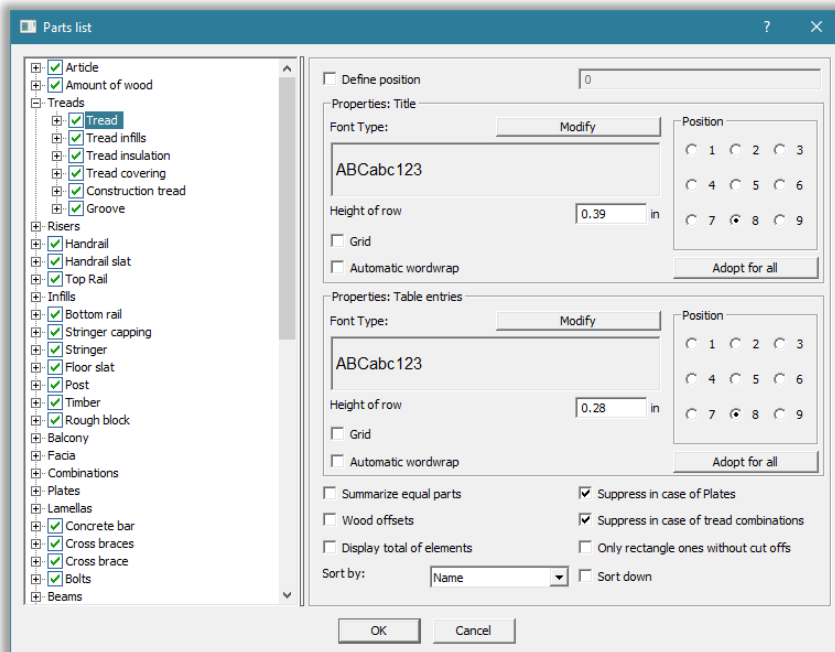


- Click on **Predefinitions** to define your own new list. The window **Predefinitions Lists** will open. Here you can choose the components which will be included on the list.
- Click on the + sign in front of the stair component. The tree will open and you can choose the individual components.



Manual Forms

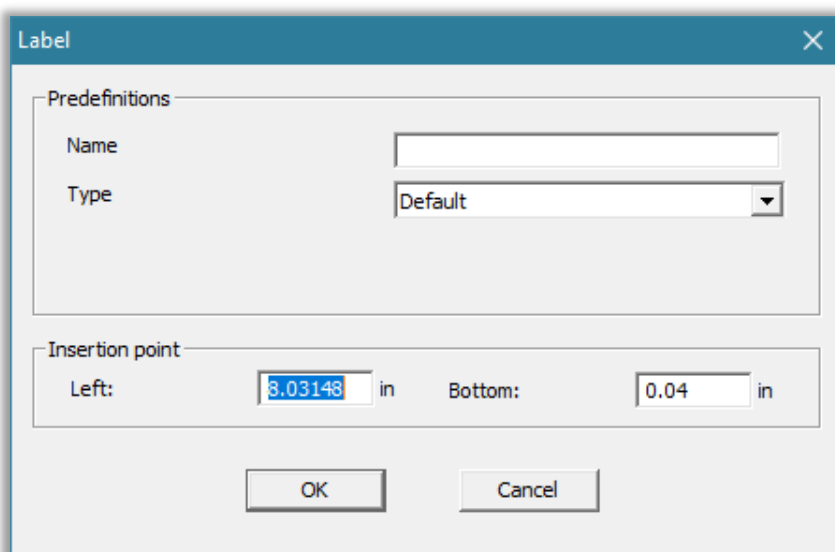
- Via the **Properties** tab you can position the values and format your text.



- **Position:** here you can define the size and position of the area in which the list will be displayed.

1.1.1.7 Labels

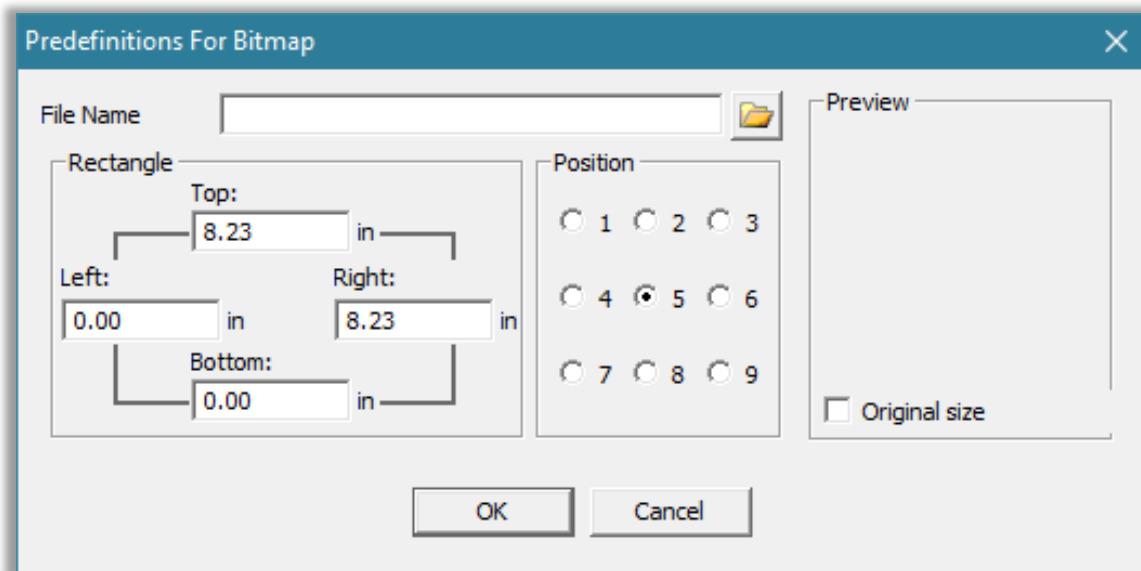
Left click on the **label** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your labels. Upon release of the mouse key a menu will open, where you can select your labels.



Manual Forms

1.1.1.8 Graphics

It is possible to place graphics, e.g., your company logo. To do this click left on the **picture** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your bitmap. Release the left mouse key and the area for your picture will be inserted. The window **Predefinitions for Bitmap** will open:



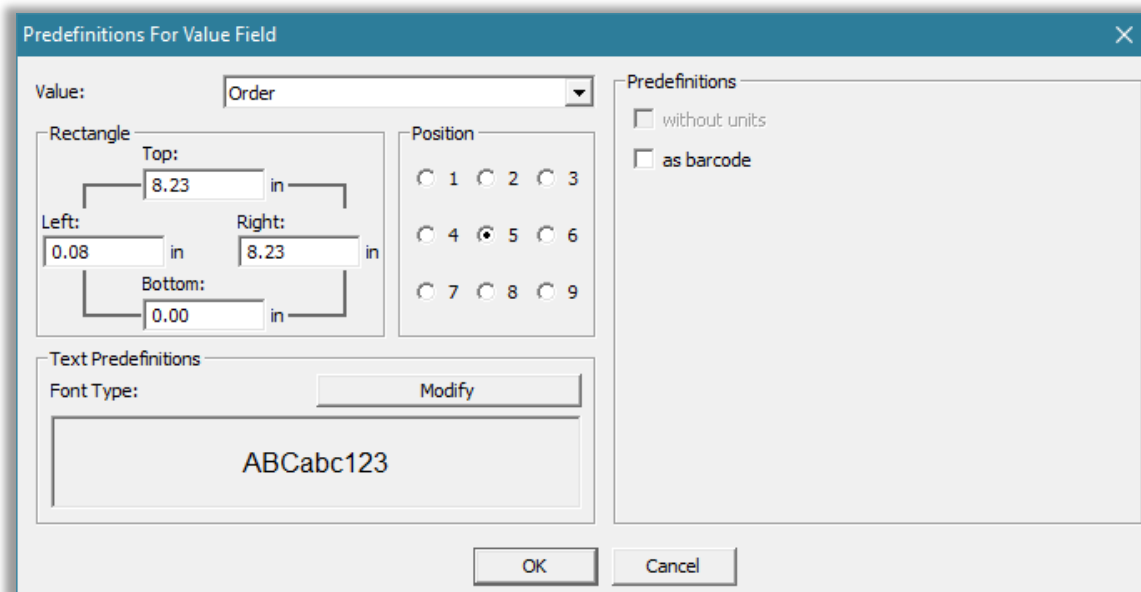
You can **choose your bitmap file** via the **Search**  function. The default file format are **bitmaps (*.bmp)**. It is also possible to import other file formats. Select your picture and click on **open**.

- The window **preview** will display the entire bitmap. If you activate **original size**, you will see a part of the picture in the original resolution.
- **Position:** Here you will be given 9 possibilities to position your picture within the selected area.
- **Rectangle:** Here you can edit the size and position of the rectangle in which the picture is shown.

Manual Forms

1.1.1.9 Value Fields

The user can insert values on the form template within **value fields**. Left click on the **value field** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your **value fields**. Release the left mouse key and the value fields will be inserted. The window **Predefinitions for Value Field** will open.



The dialog box "Predefinitions For Value Field" contains the following sections:

- Value:** A dropdown menu currently set to "Order".
- Rectangle:** A section with four input fields for dimensions:
 - Top: 8.23 in
 - Left: 0.08 in
 - Right: 8.23 in
 - Bottom: 0.00 in
- Position:** A 3x3 grid of radio buttons numbered 1 through 9. Position 5 is selected.
- Text Predefinitions:**
 - Font Type: A dropdown menu.
 - Modify: A button.
 - A preview box showing the text "ABCaBc123".
- Predefinitions:** Two checkboxes:
 - ☐ without units
 - ☐ as barcode
- Buttons:** "OK" and "Cancel" at the bottom right.

The menu **Predefinitions for Value Field** lets you see different values that you can insert into your form template.

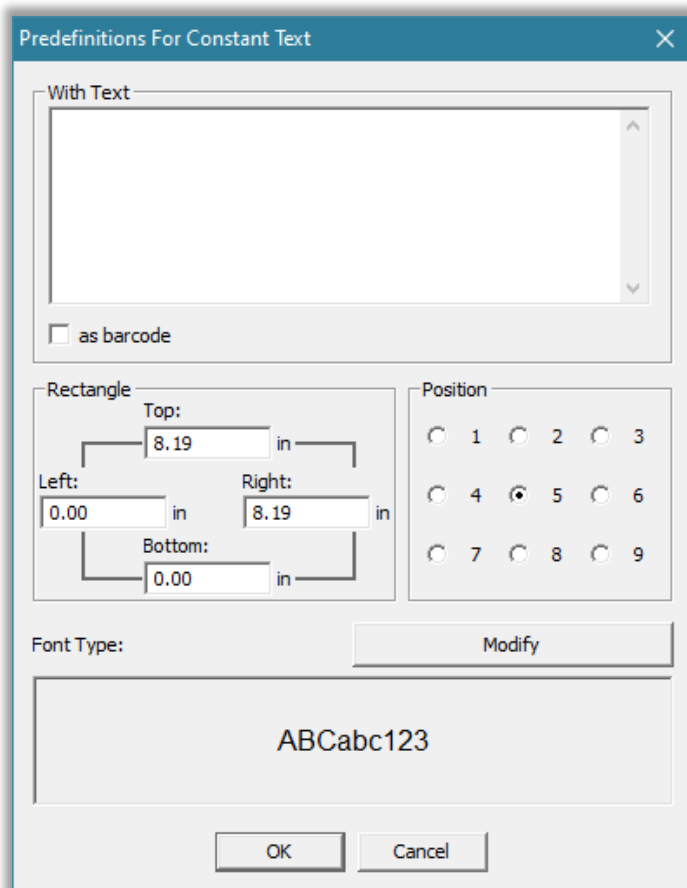
The value field will be empty for now, but once you use the form template the appropriate value will be inserted into the field.

- **Position:** Here you will be given 9 possibilities to position your text within the selected area.
- **Rectangle:** Here you can edit the size and position of the rectangle in which the value fields / permanent text is shown.

Manual Forms

1.1.1.10 Permanent Text

Text on form templates can be designated as **permanent text**. Left click on the **permanent text** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create an area where you want to display your **permanent text**. The window **Predefinitions for Constant Text** will open.



The dialog box titled "Predefinitions for Constant Text" contains the following elements:

- With Text:** A large text area for entering the permanent text.
- ☐ **as barcode**
- Rectangle:** A section with four input fields for dimensions:
 - Top: 8.19 in
 - Left: 0.00 in
 - Right: 8.19 in
 - Bottom: 0.00 in
- Position:** A 3x3 grid of radio buttons for positioning the text. The center position (5) is selected.
- Font Type:** A dropdown menu and a **Modify** button.
- Preview:** A text box displaying "ABCabc123" in the selected font.
- Buttons:** **OK** and **Cancel** buttons at the bottom.

Here you can enter your permanent text, e.g., a tile or a paragraph which should be displayed on each form of this kind. This text will never change.

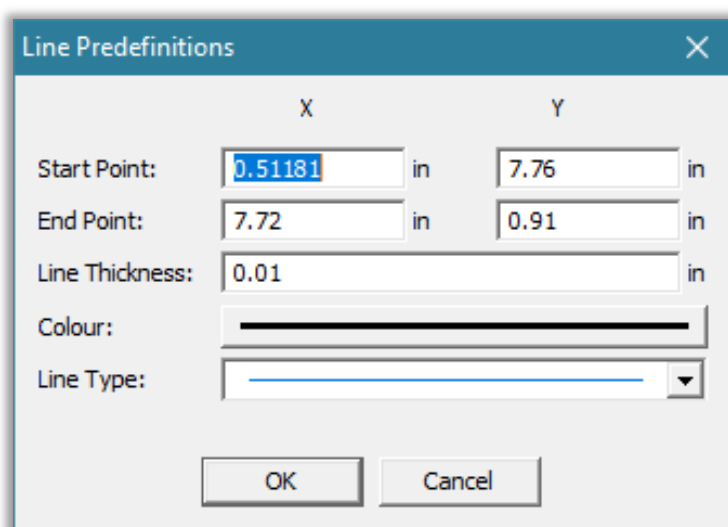
- **Position:** Here you will be given 9 possibilities to position your text within the selected area.
- **Rectangle:** Here you can edit the size and position of the rectangle in which the value fields / permanent text is shown.

Manual Forms

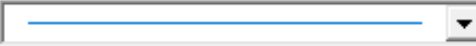
1.1.1.11 Lines

There are three different line types available to draw lines on the form templates:

-  **horizontal lines** With a left click select the icon for the line you wish to draw. Move the cursor to the form template. Click left and keep clicking while dragging the cursor to draw the **line**. Release the left mouse key and the **line** will appear. The window **predefinitions for lines** will open.
-  **vertical lines**
-  **random lines**



The **Line Predefinitions** dialog box allows you to configure the following properties for lines:

	X	Y
Start Point:	0.51181 in	7.76 in
End Point:	7.72 in	0.91 in
Line Thickness:	0.01 in	
Colour:		
Line Type:		

Buttons: OK, Cancel

Here you can change the position and length of your lines, as well as the line thickness, colour, and the line type.

All changes made to the lines will be adapted for all lines and rectangles inserted after making the change. Lines and rectangles that had already been inserted into the form template will remain the same.

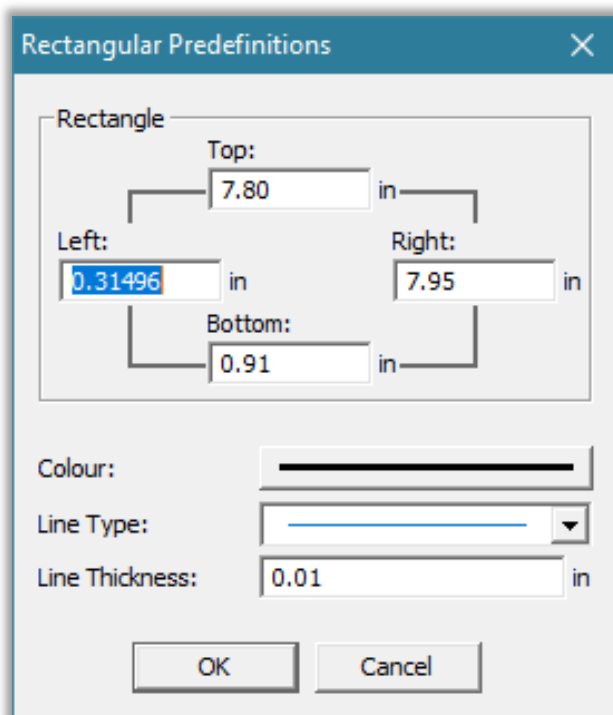
A double click with your left mouse key on the line will take you back to the **predefinitions for lines** window.

Manual Forms

1.1.1.12 Rectangle

You are also able to draw rectangles on your form template. This feature can be used to draw boxes for example.

Left click on the **rectangle** icon . Move the cursor to the form template. Click left and keep clicking while dragging the cursor to create your rectangle. Release the left mouse key and the box will be inserted. The window **Predefinitions for Rectangles** will open.



The dialog box titled "Rectangular Predefinitions" contains the following settings:

- Rectangle** (tab selected)
 - Top: 7.80 in
 - Left: 0.31496 in
 - Right: 7.95 in
 - Bottom: 0.91 in
- Colour: (black line)
- Line Type: (solid line)
- Line Thickness: 0.01 in
- Buttons: OK, Cancel

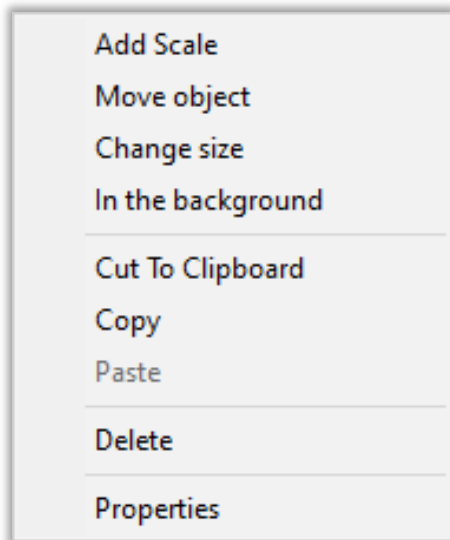
Here you can adjust the **line type**, **line thickness**, and **colour**. All changes made to the lines will be adapted for all lines and rectangles inserted after making the change. Lines and rectangles that had already been inserted into the form template will remain the same.

Manual Forms

1.1.2 Editing Already Created Elements

Once you have inserted an element into your form template, you can edit it as much as you like. Elements that are currently being edited, will appear with a red frame.

Click right on the element. A pop-up menu will appear with the options add scale, move object, change size, move to background, cut, delete, and properties.



- **Add scale** lets you add a value field which will display the scale of the element.
- **Move object** will let you change the position of the element on the form template.
- **Change size** will let you change the size of the element edges.
- **In the background** will move the selected element to the background if it is overlapping with another element.
- **Delete** will delete the element from the form template. You can also use the delete key for this.
- The **properties** option will take you to the respective predefinition windows.

Manual Forms

1.1.3 Formatting Objects on the Form Template

Here is a short explanation of the toolbar icon's functions.



With this icon:



you will align all selected objects to the left of the object that you had last selected.



you will align all selected objects to the right of the object that you had last selected.



you will align all selected objects on top of the object that you had last selected.



you will align all selected objects below the object that you had last selected.



you will adjust all selected object to the same width as the object you had last selected.



you will adjust all selected object to the same height as the object you had last selected.



you will adjust all selected object to the same height and width as the object you had last selected.



you will adjust the horizontal space between several objects to the same distance.

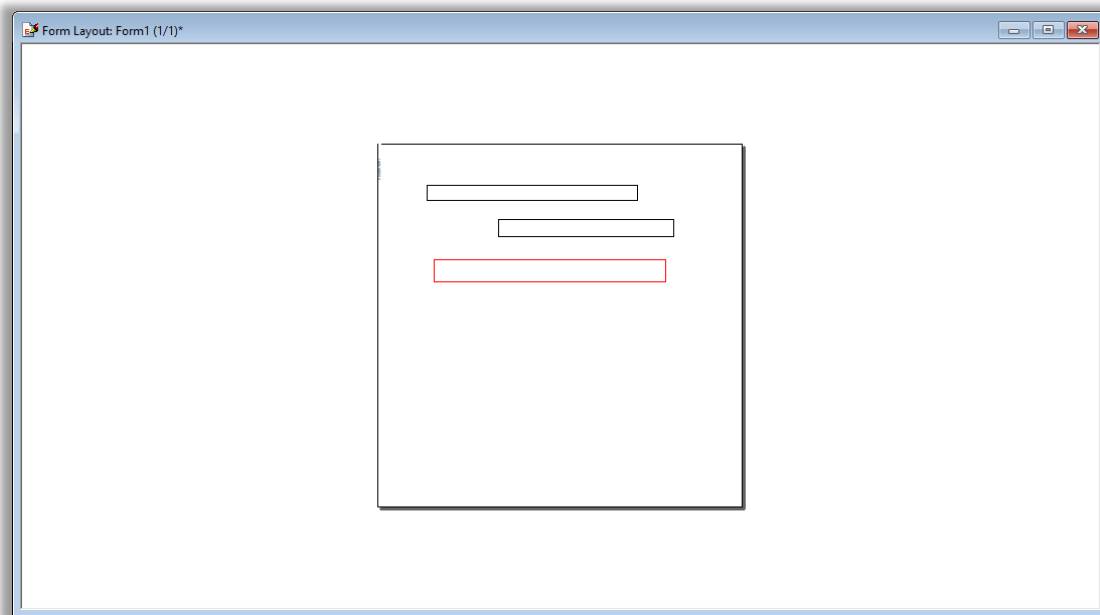


you will adjust the vertical space between several objects to the same distance.

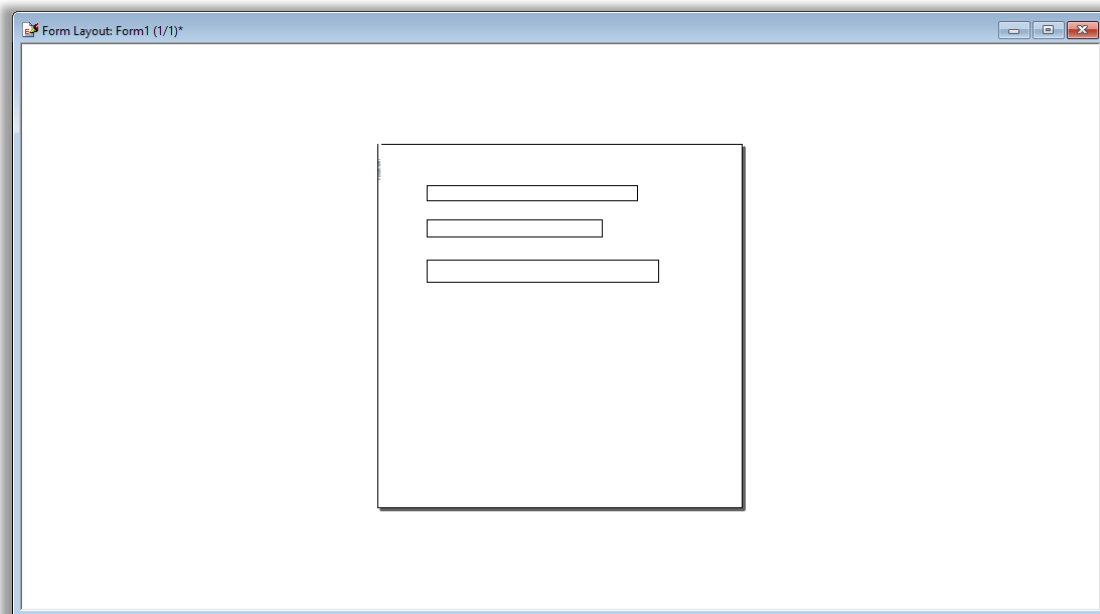
Manual Forms

1.1.3.1 Explanation with an Example

This example shows 3 rectangles that have been placed on the form template.



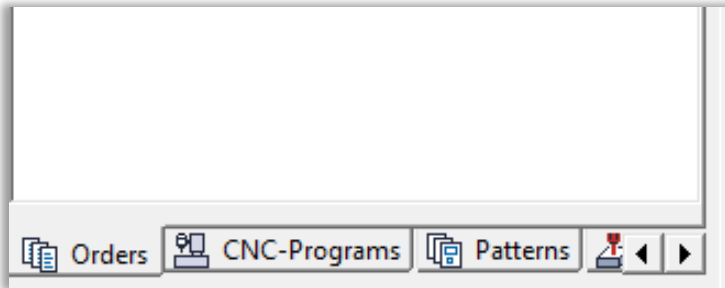
If you would like to align the two bottom rectangles with the left edge of the top rectangle, you have to first select the two bottom rectangles with Ctrl + left click. Now, you will also select the top rectangle in the same way, make sure you select this one last, as it will be the one that the other will now be aligned with. The toolbar for formatting the template will now activate in the top left corner. In this case you would select align to the left of the object that you had last selected.



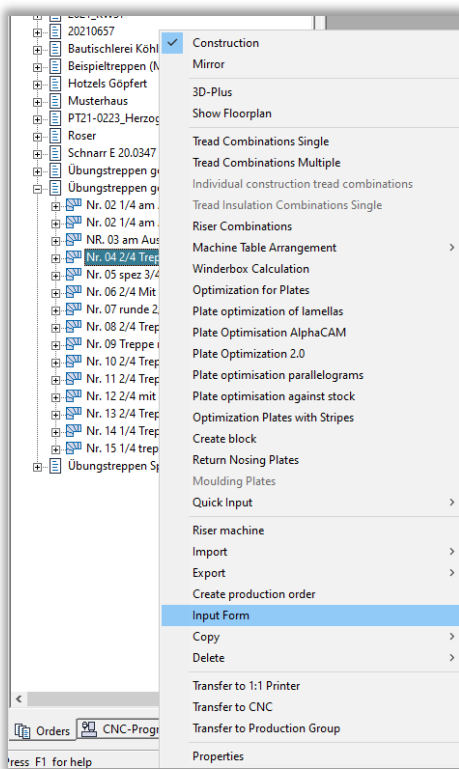
Manual Forms

1.1.4 Assigning your Forms

- Unhide your order tree.

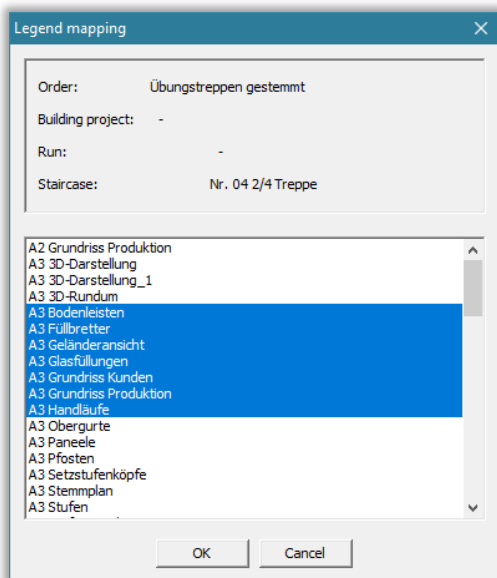


- Open the nodes of the order tree until you have reached the stair to which you would like to assign your form.
- Right click on the stair. A selection menu will open. Here you select **input form**.

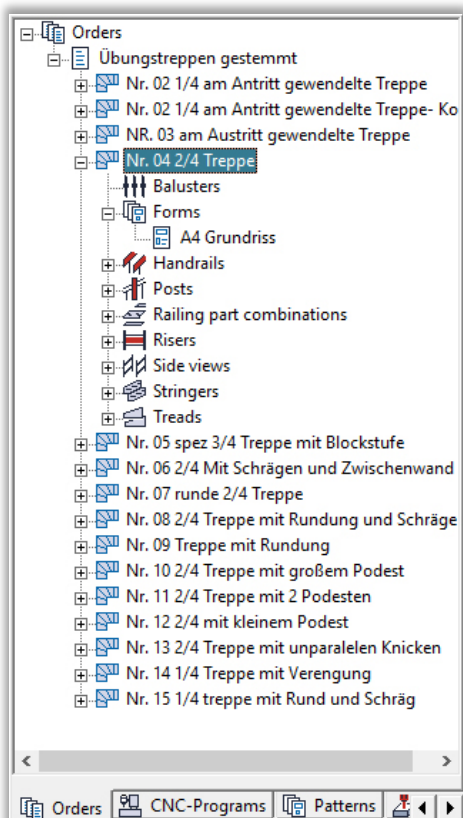


- The window **legend mapping** will open. Select the appropriate form template, e.g., the form template **floor plan**. You can assign more than one form here by keeping the Ctrl. key pressed down while selecting your form templates.

Manual Forms



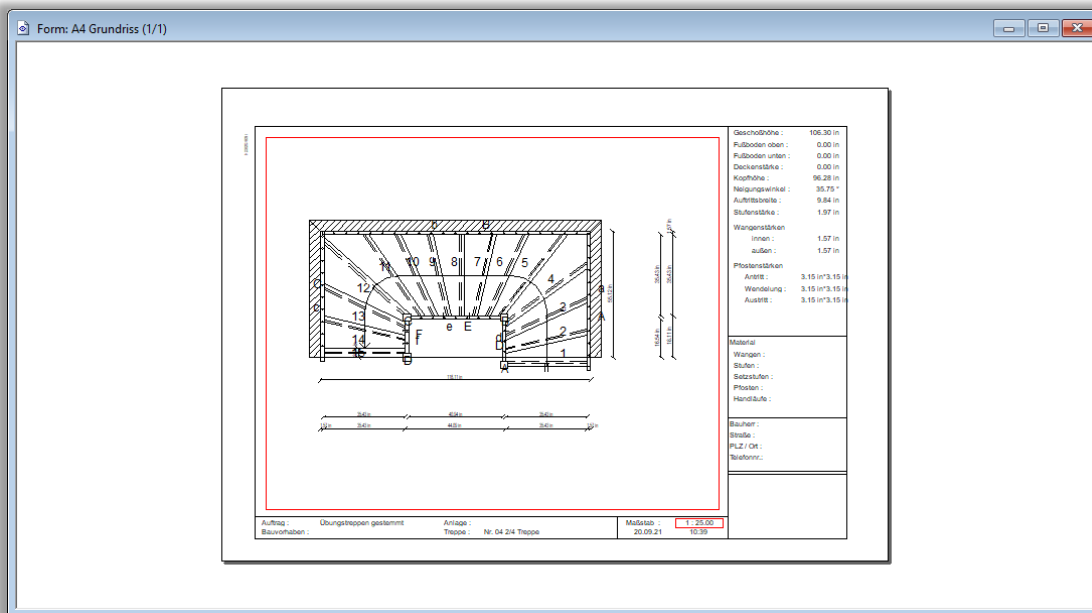
- Confirm your selection with **OK**.
- Left click on the + icon in front of the staircase. The stair details will now be shown. Now you can also find a node called forms here, which contains all your forms.
- Now left click on the + icon in front of forms. All assigned forms will be listed here. You can open the individual forms with a double-click.



Manual Forms

1.1.5 Initiating the Measurement Tool

- Unhide your order tree.
- Open the floor plan form.
- Double-click with the left mouse key on the form and the measurement tool will be initiated.



The measurement tool can be used to measure and display the measurements for each individual component in your floor plan.

