Intec Project

User Guide – Last Revision 27/08/2009 10:00:00

Table of Contents

Installing the program 5
- System Requirements 5
- Special notes 5
  - Users with limited permissions 5
  - Windows 2000 users 5
- Multi-user and Terminal Server (MSTS) installation 5
- Web Installation 5
- Manual Installation 6
- Changing installation location 6

Starting the program 6
- Activation 6
- Logging in 7

Main Window 7
- Project Type 7
  - Quotation 7
  - Schedule 7
  - House Type Schedule 7
- Searching for a Project 7
  - Sorting the list 8
- Buttons 8
  - Open button 8
  - New button 8
  - Copy button 8
  - Delete button 8
  - Settings button 8
  - Products on Project 8
- Creating a new project 8
- Copying a project 9

Maintenance options (“Maintain” menu) 9
- Contacts 9
  - About Contacts 9
  - Creating a new contact 10
  - Editing an existing contact 10
  - Delete a contact 10
- Editing Groups, Types and Reps 11
  - Contact Types 11

Product Groups....11
Product Types....11
Reps....11
Editing process....11
Adding a record....11
Deleting a record....11
Defining Special Codes....11
Product Maintenance....12
Adding or deleting products....12
Selecting a product to edit....12
The “General” tab....12
Images....12
Copy Product button....12
Add Special to Project button....12
Costs Tab....13
Description Tab....13
Finding a product....13
Searching....13
Changing the Report Header/Footer....14
Header....14
Footer text....14
Using a watermark....14
User Management....15
“User Maintenance” Form....15
Adding a user....15
Deleting a user....15
Editing a user....15
Unlocking a user (“User is already logged in”)....15
Unlocking a user from the login screen....15
Warning....15
Editing a Project....16
Common tabs....16
“Project” tab....16
Rep/Estimator menus....16
Contact....16
Automatically update cost summary....16
“Begin Text/End Text”....17
“Products” tab....17
Products on project....17
Editing products....17
Adding a product....17
Deleting a product....17

Replacing products 18
Special products 18
Excel Door matrix (Schedule projects only) 18
"Cost Summary" Tab 19
"Door Sets" tab (all project types except quotes) 20
Editing sets 20
Selecting the set to edit 20
Adding products to the set 20
Assigning an image to the set 20
Deleting products from the set 20
Modifying the set text 20
Deleting the current set 20
Comparing sets 20
Creating a New Set 20
Copying an existing set 21
Assigning doors to the current set 22
Adding doors 22
Removing doors 22
Adding a range of doors 22
Door Schedule projects 23
"Door Summary" tab 23
Moving doors 23
Deleting doors 23
Excel Door List 24
Set List 25
House Type projects 25
Defining House Types 25
Selecting a house type 25
Editing the current house type 25
Notes field 25
Adding/Changing sets 25
Removing sets 25
Adding a house type 26
Deleting a house type 26
Managing plots 26
Modifying existing plots 26
Adding a plot 26
Deleting plots 26
Creating reports 26
The Report Menu 26
General Layout 27
"By Sequence" option (Door Schedule reports only) 27

Previewing a report 28
Printing a report 28
Emailing reports 29
Packing Lists and Labels 30
Creating a packing list 30
Selecting doors to print 30
Deselecting doors 30
Reprinting doors 30
Creating Labels 30
IPMaintenance utility 31
Setting data paths 31
Compacting the Intec Project database 32
Backing up the database 32

Installing the program

System Requirements

Intec Project is intended for use on computer systems that meet the following minimum requirements. Most modern computers should meet these requirements.

- Microsoft Windows 2000, XP, 2003 or Vista
- 1GHz processor
- At least 256Mb of RAM
- Minimum 500Mb free hard drive space
- Screen resolution of 1024x768 or higher

Other operating systems or hardware may work, but we may be unable to offer support to users of these systems and we do not accept responsibility for any problems that may occur by using Intec Project on an incompatible system.

Special notes

Users with limited permissions

Due to problems with Windows Vista's built in User Account Control (UAC) feature, Intec Project's default installation directory has been changed to **C:\IntecProject**. You must ensure that you have write permissions for the root directory of the hard drive – if you do not, please install Intec Project to another location.

Windows 2000 users

Windows 2000 users may need to install the Microsoft Data Access Components (MDAC) Library in order to run Intec Project. If you are experiencing problems with running the software under Windows 2000, please download and install the MDAC library from:

http://www.microsoft.com/downloads/details.aspx?familyid=6c050fe3-c795-4b7d-b037-185d0506396c&displaylang=en

Multi-user and Terminal Server (MSTS) installation

A fully licensed copy of Intec Project can be installed in a multi-user environment, whether over a network or on a Terminal Server.

Multi-user installation and setup is beyond the scope of this document. Please contact Intec Systems for more information.

Web Installation

Intec Project can be installed automatically from the internet. This will automatically download and install any additional components that may be required.

To use the web installer, go to the following address in your web browser:

http://www.intec-systems.co.uk/download/websetup.exe

Alternatively, visit http://www.doorscheduling.com and click on the "Download Now" link.

Manual Installation

If you have problems with the web installation, you need to install Intec Project on a computer without an internet connection, or you plan to deploy the software on a large scale, you may wish to download the files and install them manually.

1. Download the installation program from the following location:

   http://www.intec-systems.co.uk/download/intecproject/setup.exe

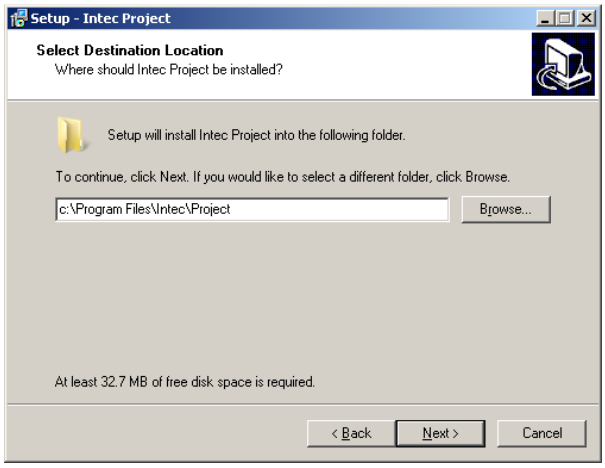
   Run the installation program. Follow the wizard through to completion.

2. Download and install the Microsoft Office Web Components from the following location:
   http://www.microsoft.com/downloads/details.aspx?FamilyID=982B0359-0A86-4FB2-A7EE-5F3A499515DD&displaylang=EN
3. Download and install the Microsoft Access 2002 Runtime from:

   http://www.intec-systems.co.uk/download/intecproject/Runtime2002.exe

Changing installation location

At the "Select Destination Location" screen, you are given the option to change the location where Intec Project is installed.



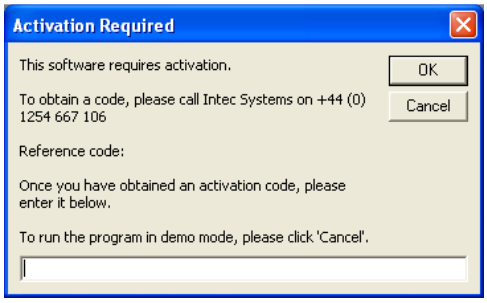
Most users will not need to change the default location. Only change this location if you have been advised to do so by Intec Systems or your network administrator, or if you are using Windows Vista (see Windows Vista users).

Starting the program

Start the Intec Project system by double-clicking on the "Intec Project" icon, or selecting "Start Menu>Programs>Intec Project >Intec Project".

Activation

If you have not yet activated the system, the "Activation Required" dialog box will be displayed (shown below).

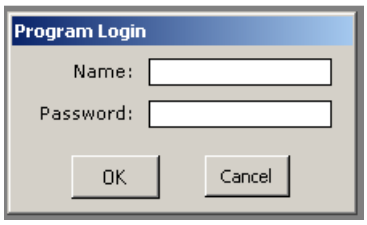


You must phone Intec Systems to obtain a valid activation code. If you wish to operate the software in demo mode, click the "Cancel" button.

Logging in

Upon starting the program, you will receive the Login prompt (shown below).

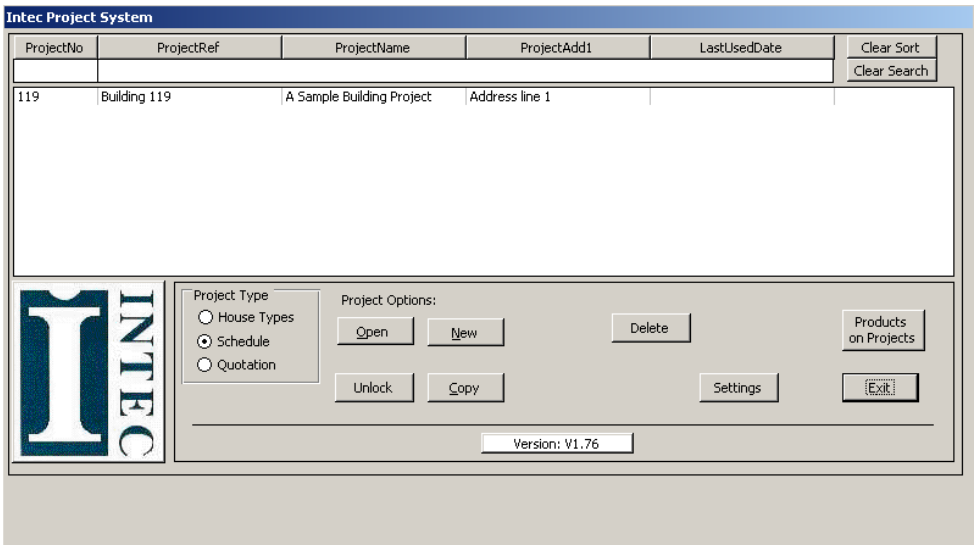
Note: If you are operating the program in Demo mode, this prompt will not be displayed.



Enter your username and password and click the "OK" button to continue.

The default username and password is "User1". See "User Management" (Page 15) for more details on users, or if you encounter a problem logging in to the system.

Main Window



From the main screen you can find, open or manage projects stored on the system. The demo version contains three sample projects, one of each type.

Project Type

Select which type of project you would like to display from the "Project Type" box.

Intec Project supports three main types of project:

Quotation

Create a simple quotation with products only. Quotations can later be converted to full schedules.

Schedule

Create a fully featured schedule containing door sets and doors.

House Type Schedule

For large building projects – create house types containing a number of sets, and then assign a plot to each house type.

Searching for a Project

You may search for a specific project using the search fields at the top of the window. Simply click on the field you wish to search by, enter the search term and then press the "Enter" key.

If you wish to further refine your search, do so by entering another search term. To clear all search terms, click the "Clear Search" button.

Sorting the list

Sort the list of projects by clicking on the field headings at the top of the window. To return to the default sort order, click “Clear Sort”.

Buttons

Open button

Loads the selected project and displays the “Project” window. See “Editing a Project” (Page 16).

New button

Creates a new project of the selected type. See “Creating a New Project” (Page 8).

Copy button

Allows you to copy the selected project. This can be useful when making revisions of a particular schedule. See “Copying a Project” (Page 9).

Delete button

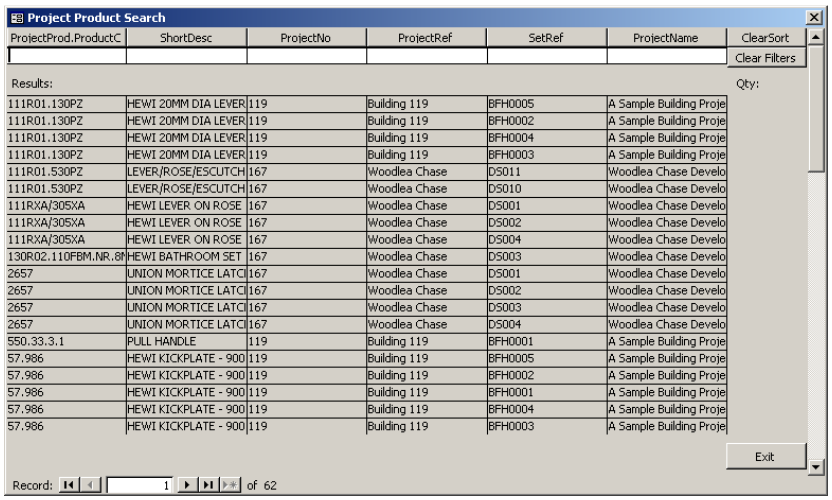
Deletes the selected project.

Settings button

This button changes system settings.

Products on Project

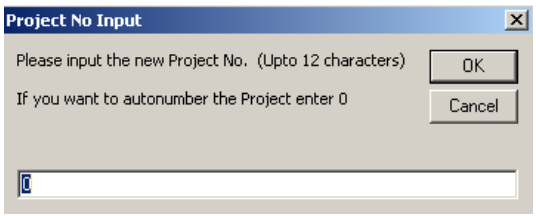
Opens the “Products on Project” window, shown below:



This provides the facility to search for projects that use a specific product. You can sort or filter on specific fields in the same manner as the main window.

Creating a new project

Upon selecting the “New Project” option, you will be presented with the dialog box shown below.

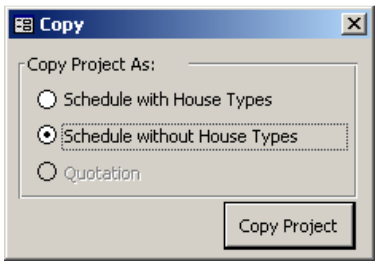


If you wish to manually define the project number, you may enter it now. Otherwise, click “OK” to create a number automatically.

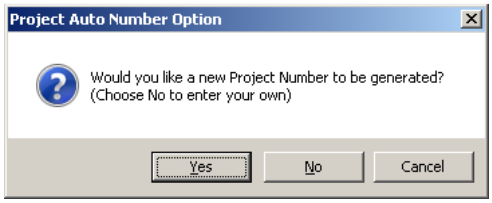
Click “Cancel” to abort the process of creating a new project.

Copying a project

After selecting the “Copy” option, you will be asked to select the type of the destination project. The example shown below is for copying a Schedule.



Select the required type and click “Copy Project”.

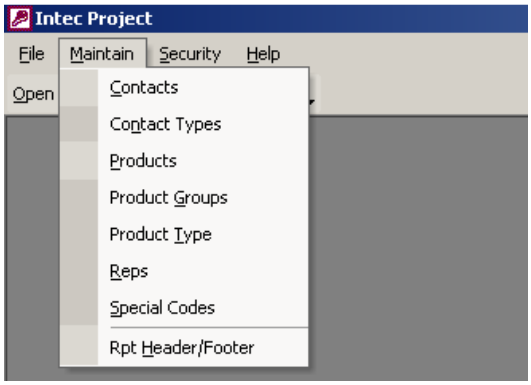


If you wish to manually define the project number, click “No”. Otherwise, the project number will be chosen automatically.

Maintenance options (“Maintain” menu)

The maintenance options allow you to create, amend or delete contacts, products, reps, estimators and other core data stored in the system.

Click the “Maintain” menu at the top of the screen to access these options.

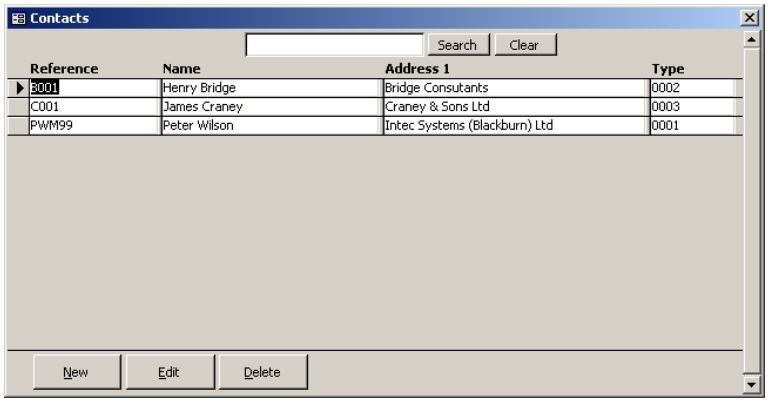


Contacts

About Contacts

Contacts are used to store name and address details of the primary contact relating to a building project.

The “Contacts” option in the “Maintain” menu enables you to create, amend or delete contacts stored in the system, through the Contacts window.

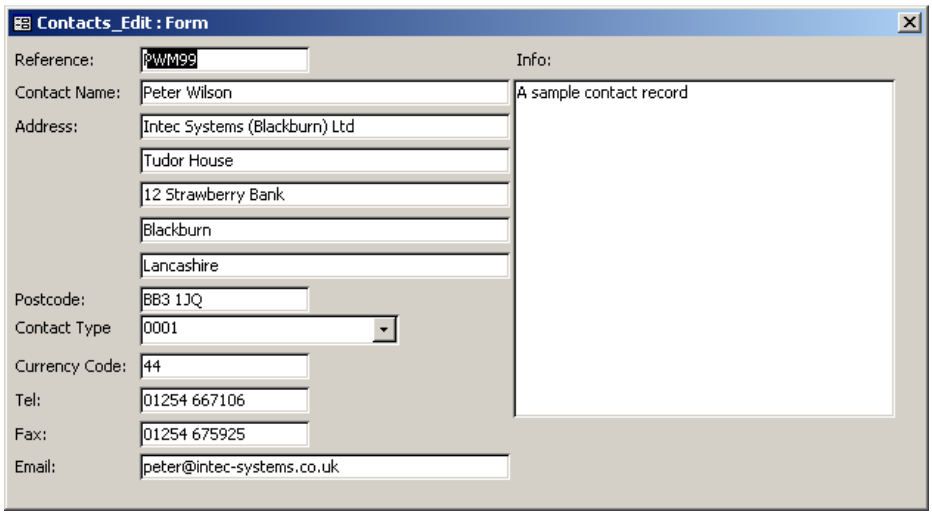


Creating a new contact

Click the "New" button. Enter a reference for your new contact, and then click "Ok". You will then be directed to the "Edit" window (shown below).

Editing an existing contact

Select a contact and click the "Edit" button. The "Edit" window will be shown.



You can select a type category for the contact using the "Contact Type" pull down menu. See "Contact Types" (Page 11) for more details.

Close the window to save your changes to the record.

Delete a contact

Click the "Delete" button to delete the selected contact.

Editing Groups, Types and Reps

You can edit contact types, product groups, product types and rep names using the corresponding option in the “Maintain” menu.

Contact Types

Defines types to categorise your contacts.

Product Groups

The “Product Groups” feature is used to group products. A product can have more than one group assigned.

Product Types

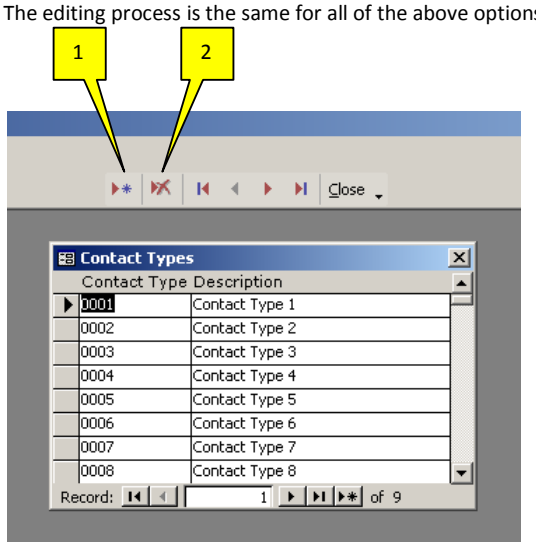
Group your products into individual types, for instance handles, locks, kick plates, closers, etc.

Reps

D codes, names and territories for your sales representatives. These can be entered into a project under the “Rep” and “Estimator” fields.

Editing process

The editing process is the same for all of the above options.



Adding a record

Click the “Add” button (1) to add a new record.

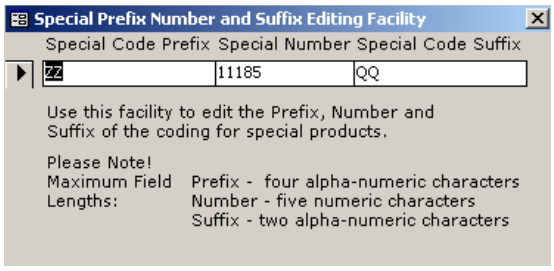
Deleting a record

Click the “Delete” button (2) to delete the currently selected record.

Close the window to save your changes.

Defining Special Codes

This allows you to define the default prefix, starting number and suffix when creating a special item. This option is accessed through the “Maintain" menu.

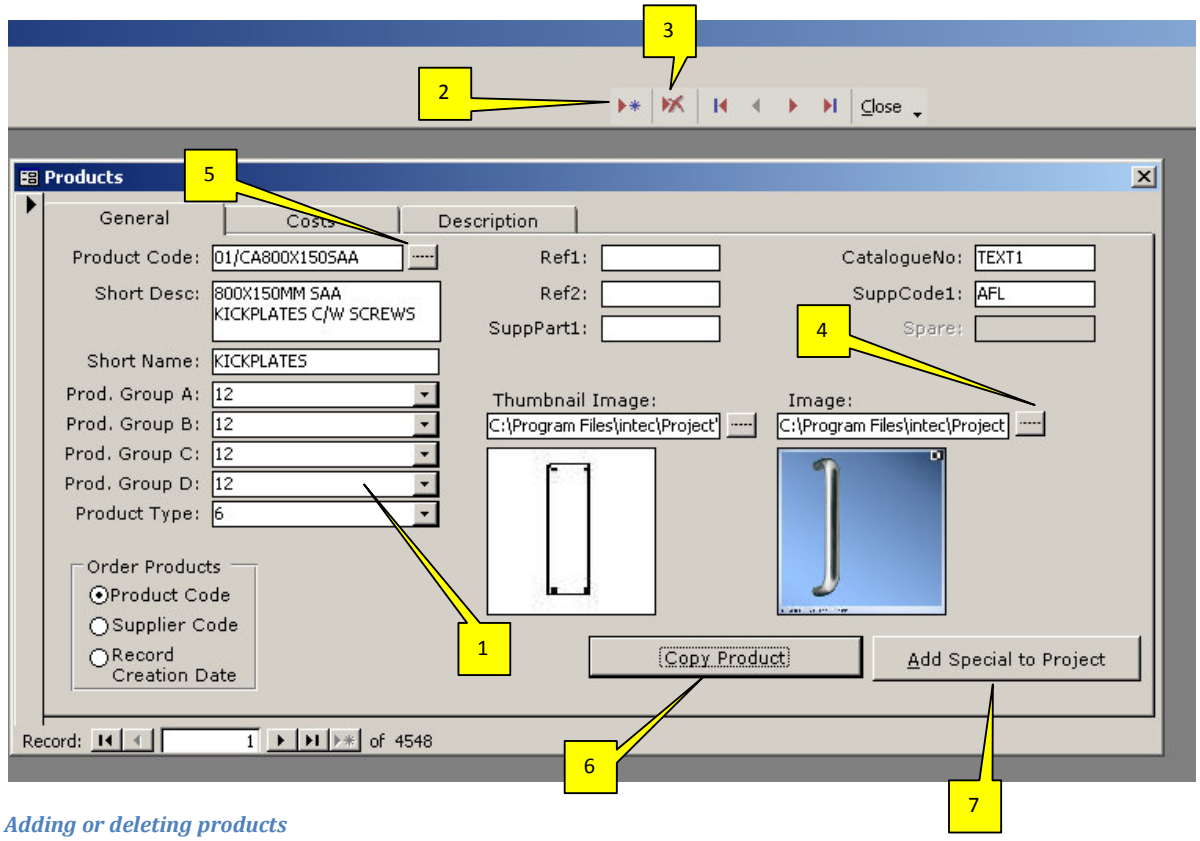


See “Special Products” (Page 18) for more information.

Product Maintenance

You can edit the products stored on your system using the "Products" option in the "Maintain" menu.

Note: changing or deleting a product in this window will not change it on the projects on which it is in use.



Adding or deleting products

Click the "Add" button (2) to add a new product to the system.

Use the "Delete" button (3) to delete the current product.

Selecting a product to edit

Use the "Search" button (5) to search for the product you would like to edit. For more information, see "Finding a Product" (Page 13).

The "General" tab

On this tab you may enter the short description, short name, reference, catalogue number and product group/type of a product.

Select the desired product group and type using the pull-down menus (1). See "Product Group" and "Product Type" (Page 11) for more information on these fields.

Images

You can set two images for each product – a thumbnail image (which can be shown on Product Summary prints) and a larger image. Click on the "…" button (4) next to either image to select an image.

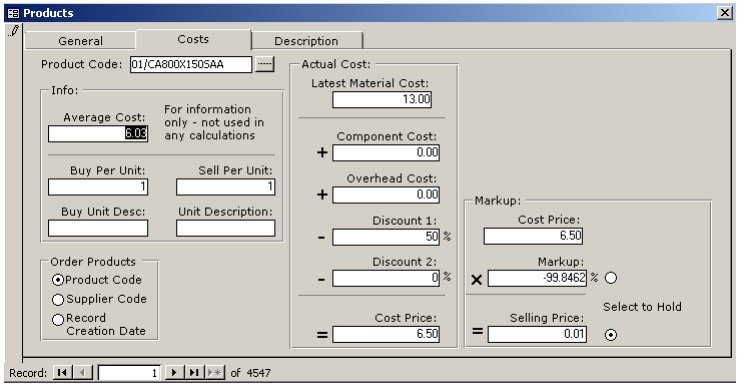
Copy Product button

The "Copy Product" button (6) is used to copy the current product to another product code.

Add Special to Project button

When editing a project, this button (7) adds the selected product directly to the project.

Costs Tab



The “Costs” tab enables you to edit prices and units of measurement.

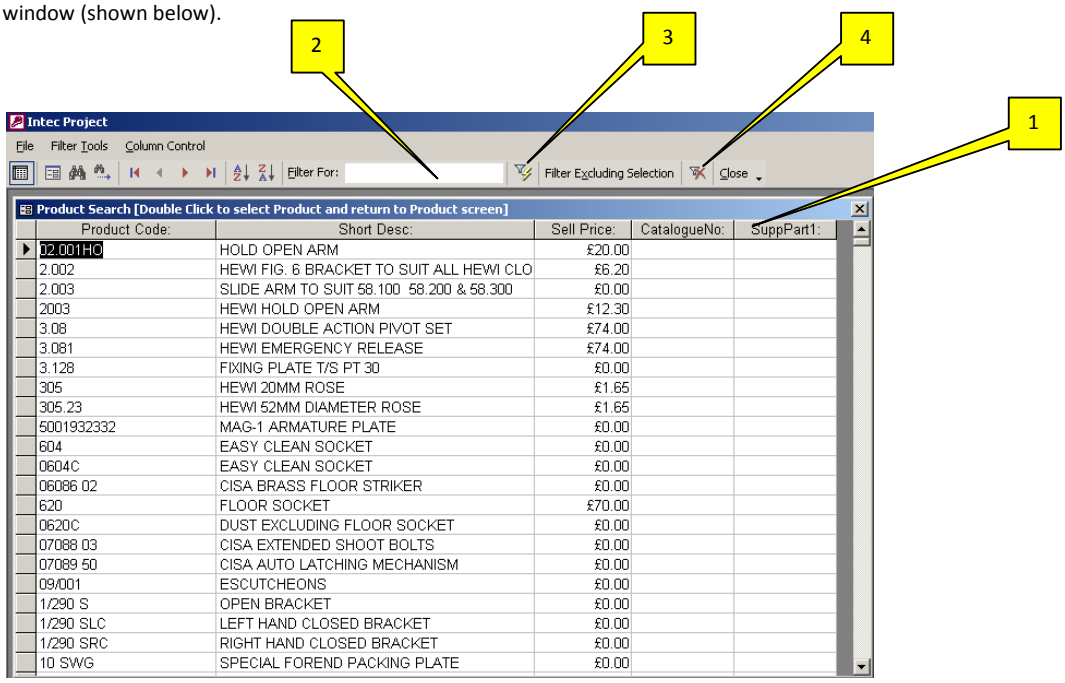
There are two ways to edit the selling price – edit the markup from the cost price, or edit the selling price directly. To edit the selling price, select the “Hold” option next to “Markup”. The markup will now be changed automatically.

Description Tab

Use this tab to edit the descriptions associated with the product. The “Info” description is purely for informational purposes and is not used in any reports.

Finding a product

Search for the product you wish to edit by clicking on the “…” button next to the “Product Code” field. This will open the “Product Search” window (shown below).



Product Code:	Short Desc:	Sell Price:	CatalogueNo:	SuppPart1:
02.001HO	HOLD OPEN ARM	£20.00		
2.002	HEWI FIG. 6 BRACKET TO SUIT ALL HEWI CLO	£6.20		
2.003	SLIDE ARM TO SUIT 58.100 58.200 & 58.300	£0.00		
2003	HEWI HOLD OPEN ARM	£12.30		
3.08	HEWI DOUBLE ACTION PIVOT SET	£74.00		
3.081	HEWI EMERGENCY RELEASE	£74.00		
3.128	FIXING PLATE T/S PT 30	£0.00		
305	HEWI 20MM ROSE	£1.65		
305.23	HEWI 52MM DIAMETER ROSE	£1.65		
5001932332	MAG-1 ARMATURE PLATE	£0.00		
604	EASY CLEAN SOCKET	£0.00		
0604C	EASY CLEAN SOCKET	£0.00		
06086 02	CISA BRASS FLOOR STRIKER	£0.00		
620	FLOOR SOCKET	£70.00		
0620C	DUST EXCLUDING FLOOR SOCKET	£0.00		
07088 03	CISA EXTENDED SHOOT BOLTS	£0.00		
07089 50	CISA AUTO LATCHING MECHANISM	£0.00		
09/001	ESCUTCHEONS	£0.00		
1/290 S	OPEN BRACKET	£0.00		
1/290 SLC	LEFT HAND CLOSED BRACKET	£0.00		
1/290 SRC	RIGHT HAND CLOSED BRACKET	£0.00		
10 SWG	SPECIAL FOREND PACKING PLATE	£0.00		

Searching

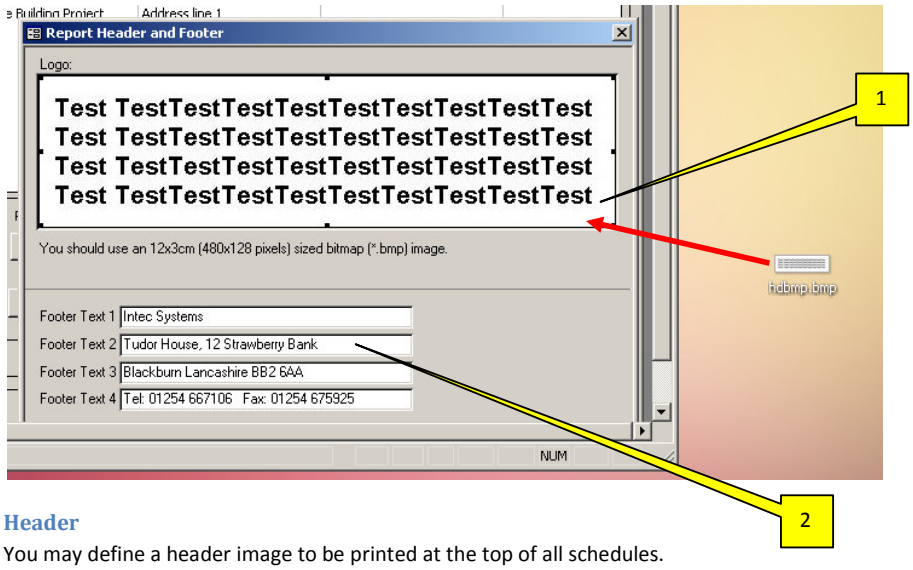
To search for a product, select the field you wish to search by selecting a column at the top of the window (1) and enter your search term in the “Filter For” box at the top of the screen (2). Click the “Filter” button (3) to search. To clear the filter, click the “Cancel Filter” button (4).

Double-click on a product to select it.

Changing the Report Header/Footer

You can change the header image and footer text that is displayed on reports. Select the “Rpt Header/Footer” option from the Maintain menu.

Note: This option is not available while a project is open.



Header

You may define a header image to be printed at the top of all schedules.

This image MUST be a 480x128 pixel sized 24-bit bitmap image, with a resolution of 96dpi. The image will occupy a space of 12x3cm when printed on the page.

To set a header image, drag and drop the image file into the “Logo” box (1).

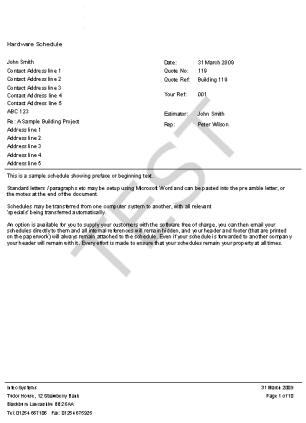
Footer text

You may define up to 4 lines of footer text which will be printed at the bottom of all schedules. Simple edit the contents of the “Footer Text” boxes 1-4 (2).

Close the window to save your changes.

Using a watermark

Intec Project includes the facility to add a watermark which will be printed in the background on all schedules.

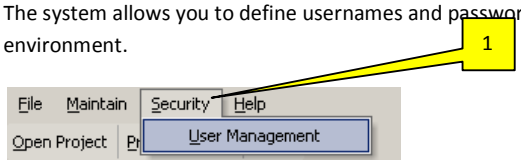


This image should be in JPEG format. It must be scaled to fit on an A4 page (for example 2480x3508 pixels).

Name the image “watermark.jpg” and place it in the Intec Project program directory (usually **c:\IntecProject**).

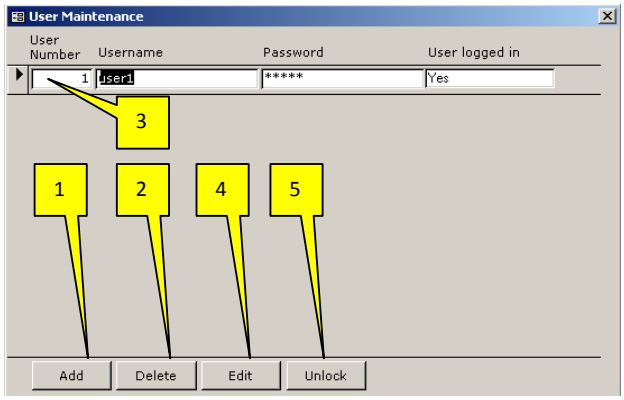
User Management

The system allows you to define usernames and passwords for each user of the system, whether you are in a multi- or single-user environment.



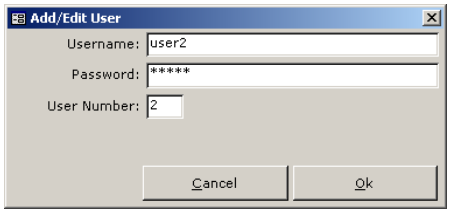
Select “User Management” from the “Security” menu (1).

“User Maintenance” Form



Adding a user

Click “Add” (1) on the “User Maintenance” form.



Enter the desired username, password and user number. A user number must be set for every user.

Deleting a user

Select the record you wish to delete using the record selectors (3) and click “Delete” (2) on the “User Maintenance” form.

Editing a user

Select the record you wish to edit using the record selectors (3) and then click the “Edit” button (4).

Unlocking a user (“User is already logged in”)

If the program terminates abnormally (for instance, a user switches off their computer without exiting the program), the user may be “locked”. This is when the system reports that they are still logged in. If this happens, they will receive the message shown below when they try to log in:

“User <username> is already logged in.”

On a multi-user system, you may unlock a user by selecting their username and then clicking the “Unlock” button (5).

Unlocking a user from the login screen

If no user is able to log in to perform the unlock procedure, users may manually perform the unlock procedure by entering their username as normal and “reset” as the password.

Warning

You should not unlock a user while they are still actively using the system. The “locked” condition may also occur if the application stops working unexpectedly (“crashes”). If this happens, you should contact Intec Systems for support, as there may be a problem with your system.

Editing a Project

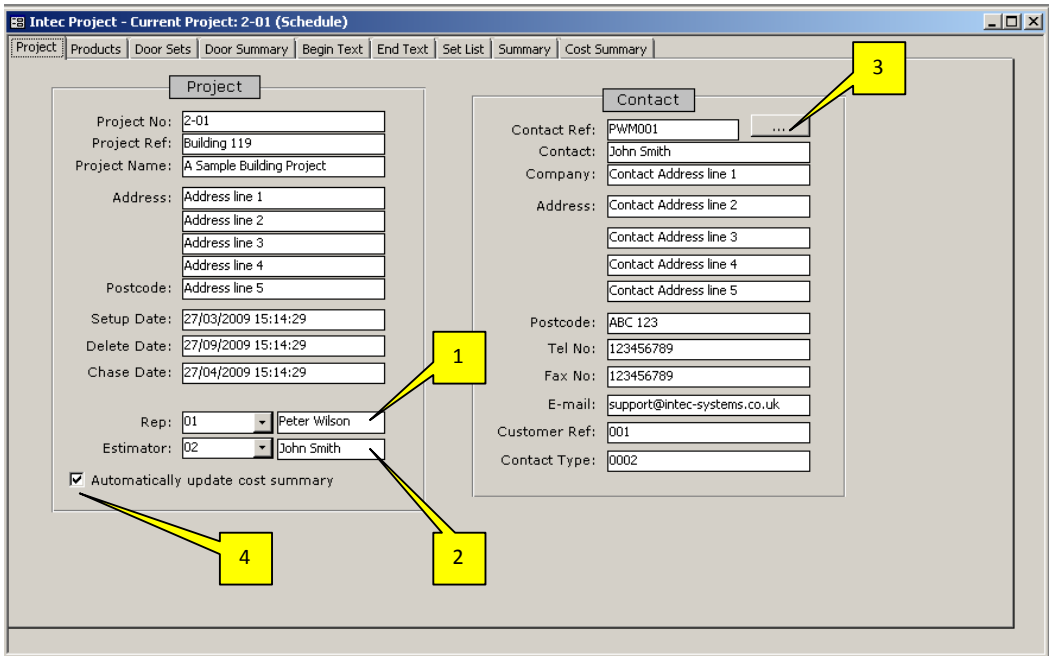
The “Project” window (shown below) allows you to amend the schedule. It is split up into tabs for each part of the schedule.

Common tabs

The following tabs are common to all project types:

“Project” tab

This tab stores header and contact information about the schedule.



Rep/Estimator menus

The “Rep” and “Estimator” drop-down menus (1, 2) allow you to select the sales rep and estimator associated with the schedule. See “Reps” (Page 11) for information on defining rep details.

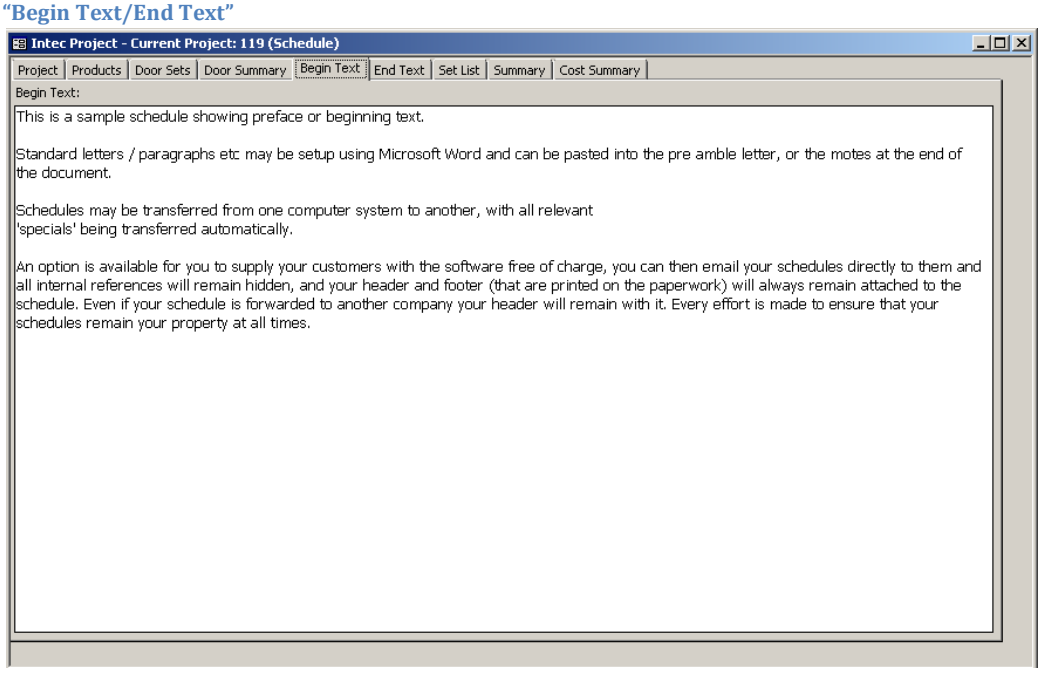
Contact

Select the contact associated with the project by clicking the “Search for contact” button (3). All schedules must have a valid contact assigned.

Automatically update cost summary

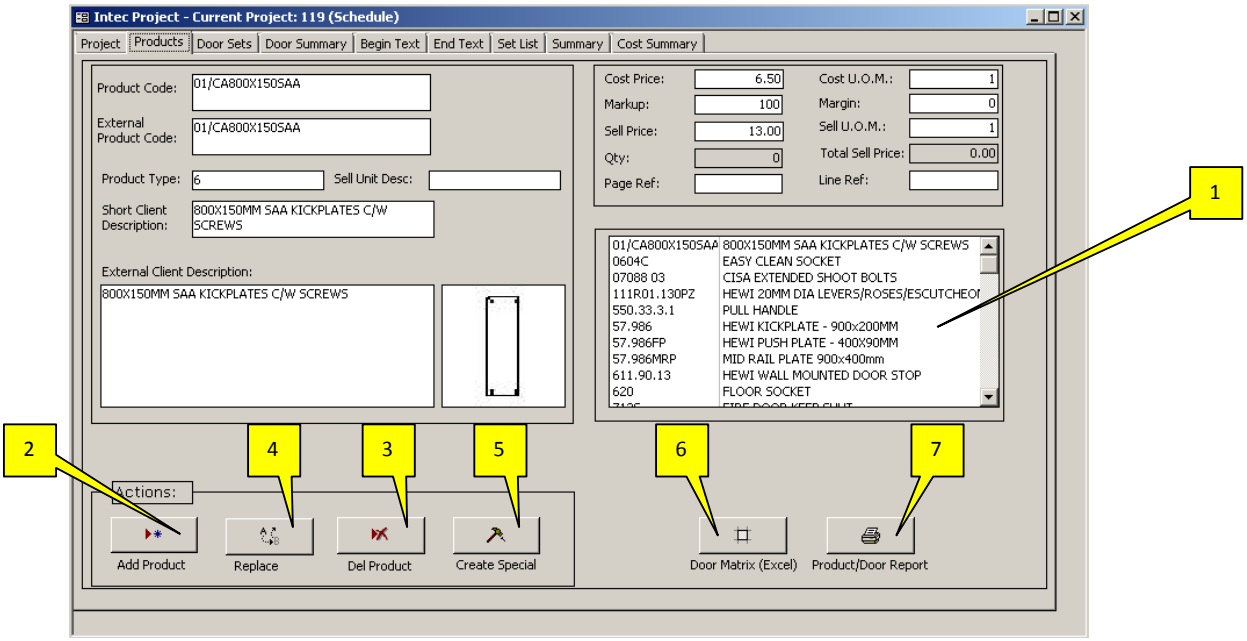
The “Automatically update cost summary” checkbox (4) controls whether or not recalculations for prices and totals take place automatically. You may wish to deselect this option on large projects to avoid the delay that can be associated with recalculation. Please note that you must then manually recalculate prices after changing the schedule. See “Cost Summary” for more information.

"Begin Text/End Text"



These are custom texts that are printed at the beginning and end of the current schedule. They can be as long as required. To edit these texts, simply click on the relevant tab and make changes.

"Products" tab



Products on project

The "Products on project" box (1) lists all products that are in use on the current schedule. Click on a product to view or edit its details.

Editing products

Changes that are made to products in the "Products" tab will only affect the current schedule. You may wish, for instance, to price certain items for this schedule only, or change the description of a particular item.

Adding a product

Click the "Add Product" button (2) to add a product to the schedule. The "Product Search" window will appear - select a product by double-clicking. For more information, see "Searching for a product" (Page 13).

Deleting a product

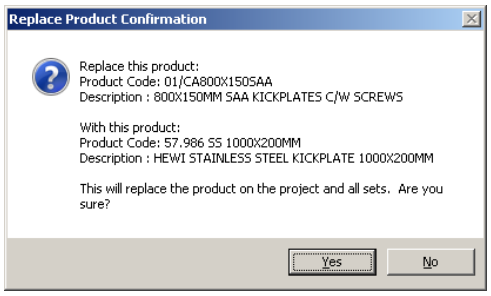
Click the "Del product" button (3) to delete the selected product from the schedule.

Replacing products

This feature replaces the selected product with another product. This change will apply to all sets that use the product.

Click the "Replace" button (4). The "Product Search" window will appear. For more information, see "Searching for a product" (Page 13).

Select the new product you wish to use. The following message will appear:

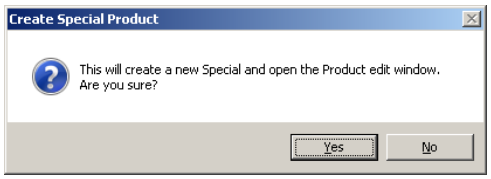


Click "Yes" to confirm the replacement product.

Special products

Intec Project provides the facility to use special products. These are unique to a particular schedule.

To create a special product click the "Create Special" button (5). The following message will appear:



Click "Yes" to continue. The new product will be created, with a unique product code in the predefined format. See "Defining Special Codes" (Page 11) for information on changing the default format.

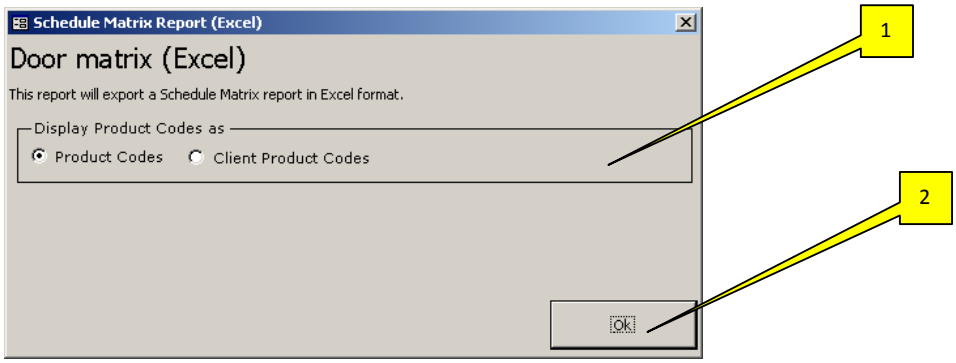
The new product will then be shown for editing in the "Product Maintenance" window - for more information, see "Product Maintenance" (Page 12).

When you are ready to add the new product to the project, click the "Add Special to Project" button.

Excel Door matrix (Schedule projects only)

Note: This option is only available in a door schedule project. Your system needs to have Microsoft Excel (2000+) installed to use this option.

The "Door Matrix" feature outputs a matrix to an Excel spreadsheet, showing the quantity of each product on a particular door. To use this feature, click the "Door Matrix (Excel)" button (6). The following window will appear:



Select whether you would like to use external or internal product codes from the "Display Product Codes as" option (1). Click the "Ok" button (2) to generate the report - the Matrix report should now be displayed in Excel.

Door Matrix Report

Project: 119 Building 119

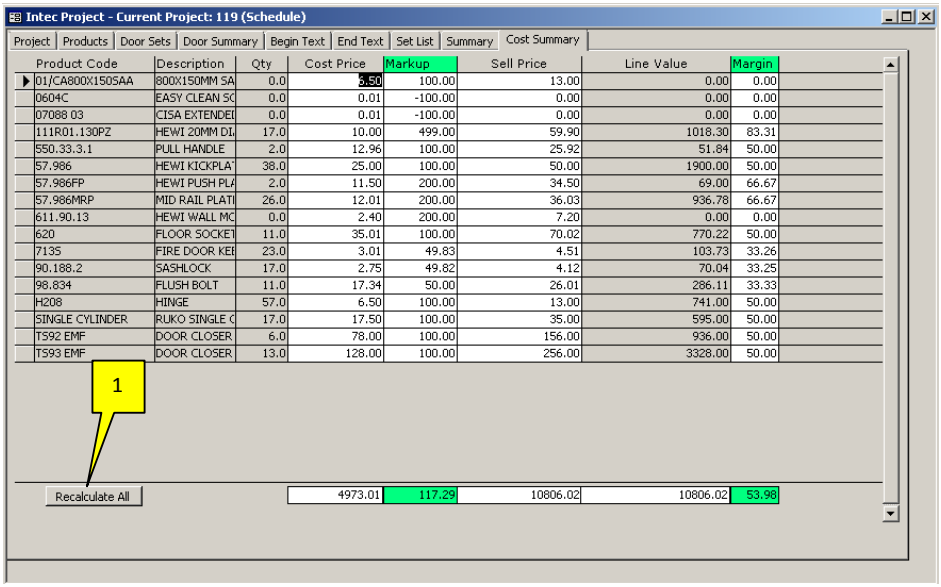
Product Code	Description	G01	G03	G15	G11	G07	F15	F16	F17	F18	F19	F20	F21	F22	F23	F24	F02	G16	F11
550.33.3.1	PULL HANDLE	2																	
57.986FP	HEWI PUSH PLATE - 400X90MM	2																	
713S	FIRE DOOR KEEP SHUT	4	2	1	1	1	1	1	1	1	1	1	1	1	1	1	2	1	1
57.986	HEWI KICKPLATE - 900x200MM	4	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
57.986MRP	MID RAIL PLATE 900x400mm	4				2	2	2	2	2	2	2	2	2	2	2			
611.90.13	HEWI WALL MOUNTED DOOR STOP																		
H208	HINGE	6	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
TS93 EMF	DOOR CLOSER	2				1	1	1	1	1	1	1	1	1	1	1			
111R01.130PZ	HEWI 20MM DIA LEVERS/ROSES/ESCUTCHEON		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
90.188.2	SASHLOCK		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
SINGLE CYLINDER	RUKO SINGLE CYLINDER MASTER SYSTEM		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
TS92 EMF	DOOR CLOSER		1	1	1												1	1	1
98.834	FLUSH BOLT					1	1	1	1	1	1	1	1	1	1	1			
620	FLOOR SOCKET					1	1	1	1	1	1	1	1	1	1	1			
01/CA800X150SAA	800X150MM SAA KICKPLATES C/W SCREWS																		
0604C	EASY CLEAN SOCKET																		
07088 03	CISA EXTENDED SHOOT BOLTS																		

A sample matrix report

"Cost Summary" Tab

This tab provides a summary of all products on the project, their quantities, the selling and cost price, margin (including the total average margin) and line values.

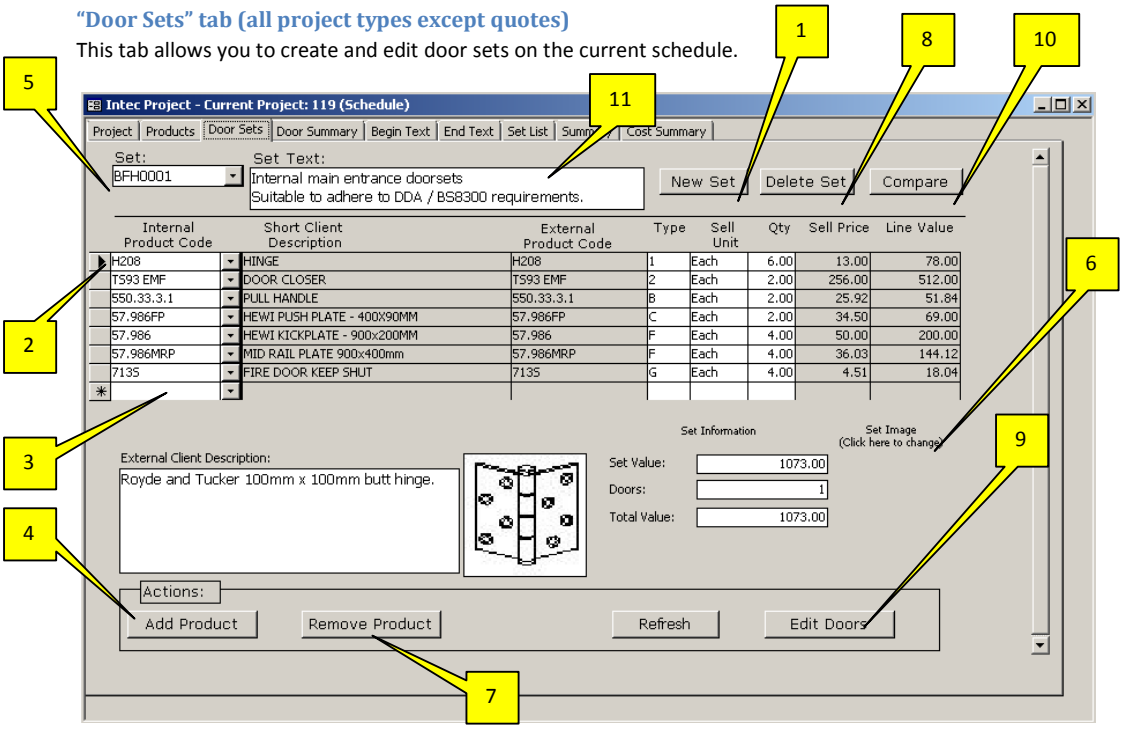
The values in this tab will usually be recalculated automatically after making a change to related parts of the project, unless "Automatically Update Cost Summary" in the "Products" tab (See page 16) is deselected.



Click the "Recalculate All" button (1) to manually recalculate.

"Door Sets" tab (all project types except quotes)

This tab allows you to create and edit door sets on the current schedule.



Editing sets

Selecting the set to edit

Select the set to edit using the "Set:" dropdown menu (5). This will show a list of all sets currently on the project.

Adding products to the set

Add a new product to the set by selecting it from the "Product Code" dropdown menu (3), or by clicking the "Add Product" button (4).

Assigning an image to the set

Intec Project offers the facility to assign images to a door set. Click the "Set Image" label (6) to select the image you wish to use from your computer's hard drive.

Deleting products from the set

To delete a product from the set, select the product you wish to delete by using the record selectors (2), and then click the "Remove Product" button (7).

Modifying the set text

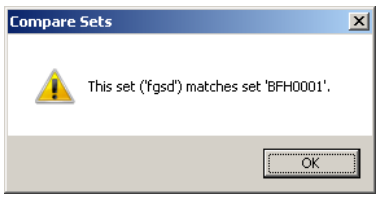
The "Set Text" box (11) allows you to define a description associated with the set, for instance "Hall doors" or "Main entrance".

Deleting the current set

Delete the currently selected set by pressing the "Delete Set" button (8).

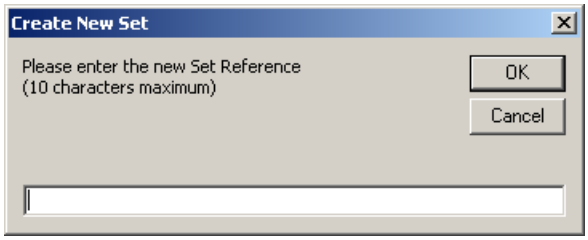
Comparing sets

You can compare the currently selected sets with other sets on the project by pressing the "Compare" button (10). This can be useful if you want to eliminate duplicate sets on your project. If the set matches, you will see the message:

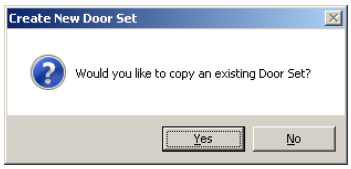


Creating a New Set

To add a new door set to the current schedule, click the "New Set" button (1). The following message will appear:



Enter the reference number for the new door set and click “Ok”. Next, you will be asked if you wish to copy an existing set:

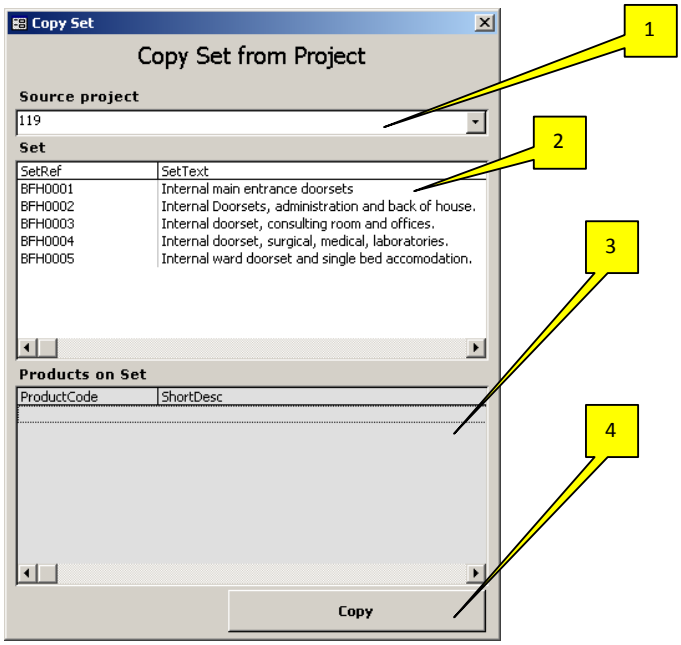


Select “Yes” to copy an existing set from any project. See “Copying an existing set” (Page 21) for more details.

After you complete the process, the new set will be created.

Copying an existing set

If you choose to copy an existing door set, the “Copy Set from Project” window will appear.



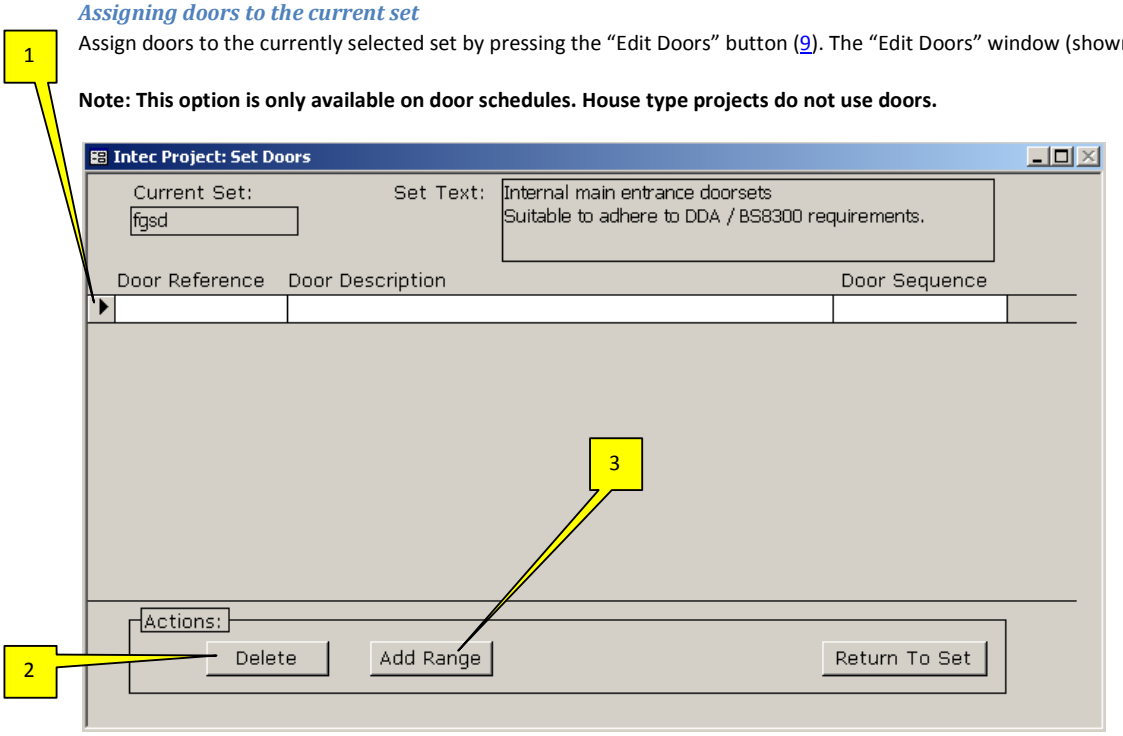
Select the source project (1, defaults to the current project) and source set (2). The “Products on Set” list will show which products are present on the set (3).

Click “Copy” (4) to confirm. Close the window if you wish to cancel.

Assigning doors to the current set

Assign doors to the currently selected set by pressing the “Edit Doors” button (9). The “Edit Doors” window (shown below) will appear.

Note: This option is only available on door schedules. House type projects do not use doors.



Adding doors

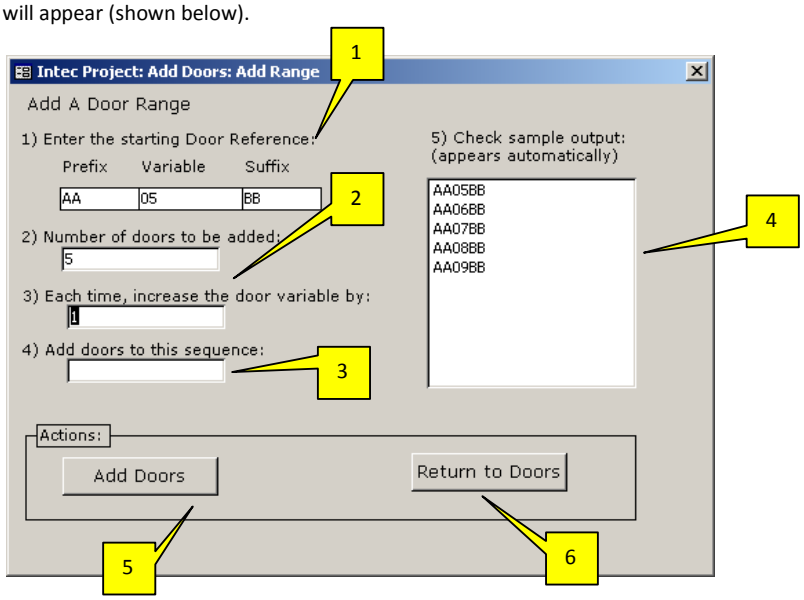
Add doors to the set by entering the door reference, description and sequence.

Removing doors

Select the door you wish to remove using the record selectors (1). Click the “Delete” button (2) to delete the door.

Adding a range of doors

You can add a range of doors, with the prefix and numbers you specify. Click the “Add Range” button (3). The “Add Doors: Add Range” window will appear (shown below).



Enter the desired prefix, start number and suffix under “Enter the starting door reference” (1).

Input the number of doors you would like added and the value by which the door number is to be incremented each time (2). If you would like to add your doors to a specific sequence, enter it in “Add Doors to this Sequence” (3).

A sample of the doors to be added will appear in the “Check Sample Output” list (4).

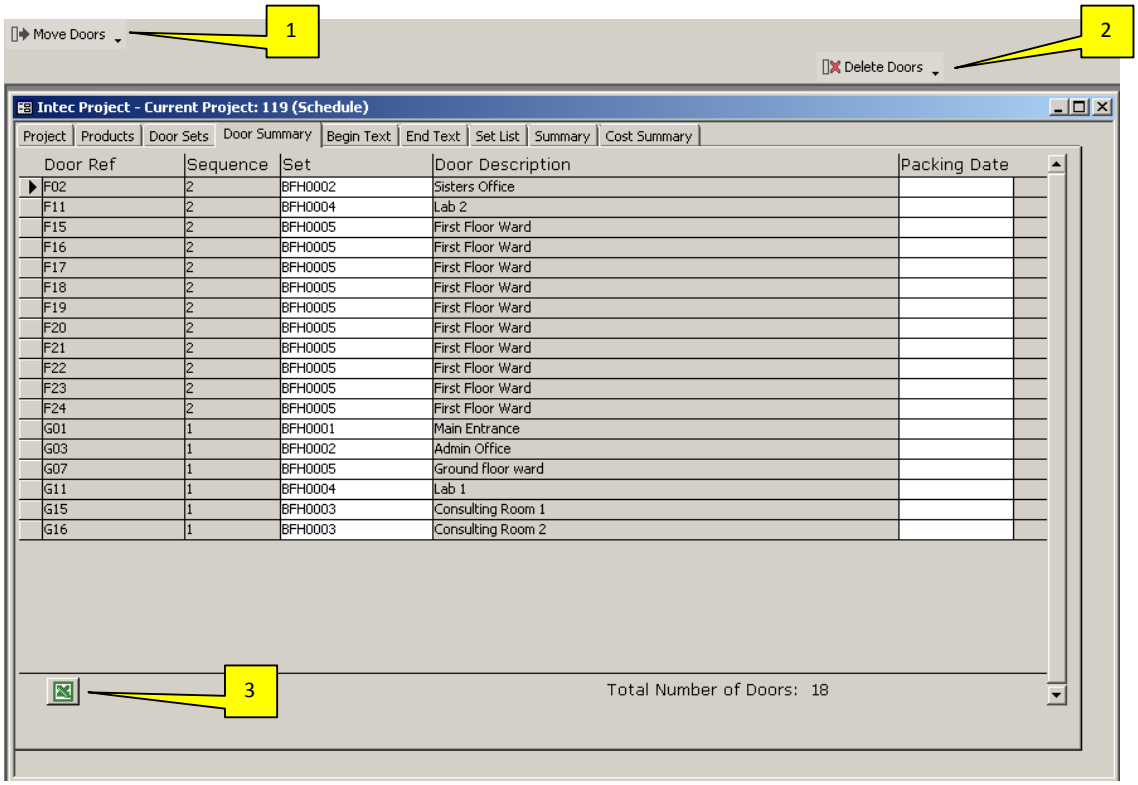
Click the “Add Doors” button (5) to confirm, or “Return to Doors” (6) to cancel.

Door Schedule projects

The following tabs are available on door schedule projects only.

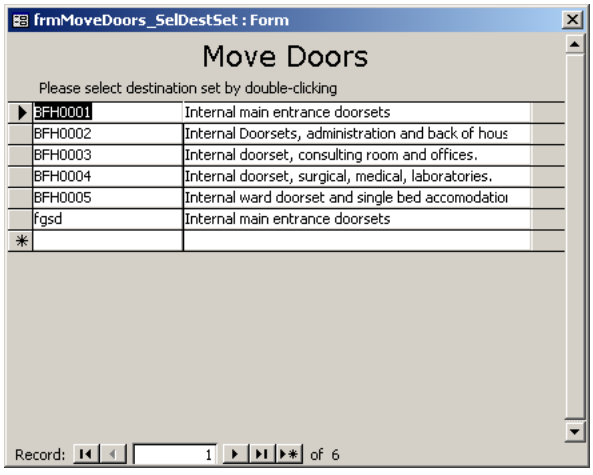
"Door Summary" tab

This tab lists all doors on the project, the set they belong to, and the date packed (see Packing Lists for more information)



Moving doors

The "Move Doors" button (1) allows you to move the selected door(s) to another set. Upon clicking this button, the following window will appear:



Double-click on the destination set to select it. Close the window if you wish to cancel the operation.

Deleting doors

Select the door(s) you wish to delete and click on "Delete Doors" (2). In the following confirmation window, select "Yes" to go ahead with the deletion.

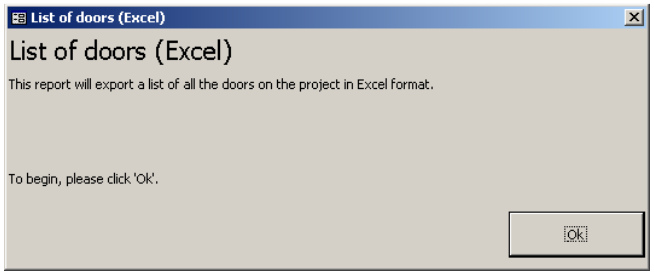
Note: this operation cannot be undone.

Excel Door List

The software includes the ability to export a list of all doors on the project to an Excel spreadsheet.

Note: Your system needs to have Microsoft Excel (2000+) installed to use this option.

Press the "Excel" button (3). The following message will appear:



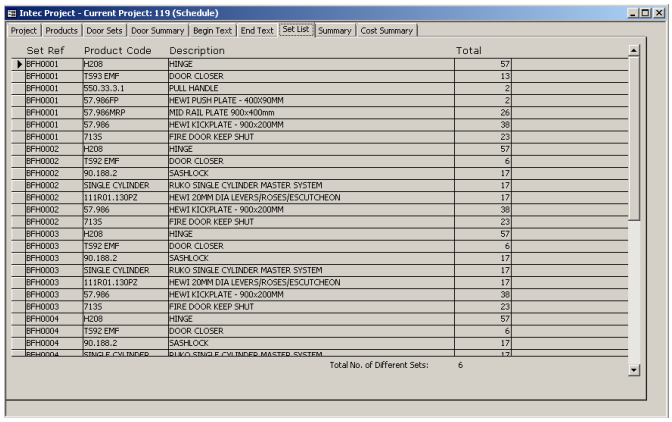
Click "Ok" to continue. Excel should now open.

1	**Project:**	119 Building 119		
2				
3	**Door Reference**	**Door Description**		
4	G01	Main Entrance		
5	G03	Admin Office		
6	G15	Consulting Room 1		
7	G11	Lab 1		
8	G07	Ground floor ward		
9	F15	First Floor Ward		
10	F16	First Floor Ward		
11	F17	First Floor Ward		
12	F18	First Floor Ward		
13	F19	First Floor Ward		
14	F20	First Floor Ward		
15	F21	First Floor Ward		
16	F22	First Floor Ward		
17	F23	First Floor Ward		
18	F24	First Floor Ward		
19	F02	Sisters Office		
20	G16	Consulting Room 2		
21	F11	Lab 2		

A sample Excel door list

Set List

The “Set List” tab shows a summary of products on the project organised by set.



The “Total” field refers to the total occurrences of the specific product on the schedule.

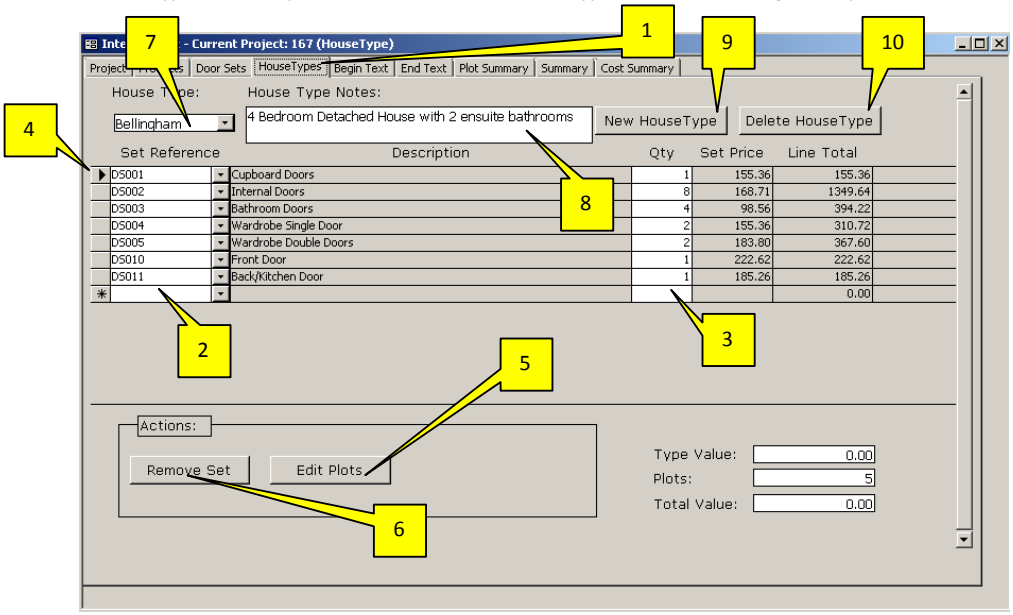
House Type projects

A house type is made up of a collection of sets. House types can then be assigned to plots.

Defining House Types

Use the “House Types” tab (1) to add, edit and remove house types on the current project.

A house type is made up of a collection of sets. House types can then be assigned to plots.



Selecting a house type

Select the house type you wish to edit using the “House Type” drop down menu (7).

Editing the current house type

Notes field

Type a short description for the current house type in the “House Type Notes” field (8).

Adding/Changing sets

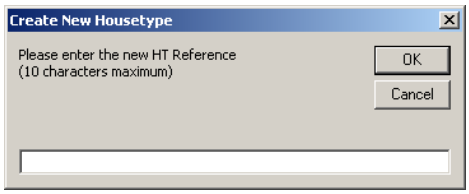
Select the set you wish to use from the “Set Reference” dropdown menu (2). Enter the quantity of the selected set to be used in this house type in the “Qty” box (3).

Removing sets

Select the set you wish to remove using the record selectors (4). Use the “Remove Set” button (6) to remove the currently selected set.

Adding a house type

Click the "New House Type" button (9) to add a new house type to the project. You will be prompted for a reference to assign to the new house type.



Enter the desired reference and click the "Ok" button to add the new house type to the project.

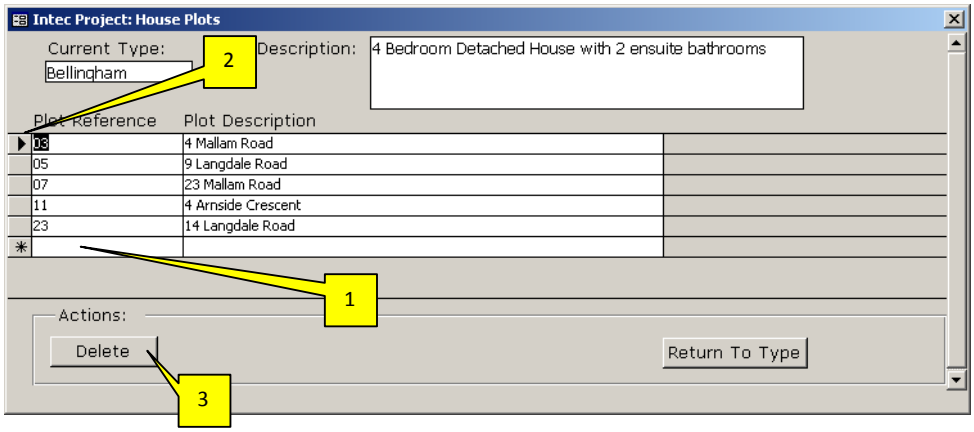
Deleting a house type

Click the "Delete House Type" button (10) to delete the currently selected house type. The "Confirm Delete" dialog (shown below) will appear.

This will remove the house type and all associated plots from the project.

Managing plots

Click the "Edit Plots" button (5) to define the plots that a house type is associated with. The "House Plots" window (shown below) will be displayed.



Modifying existing plots

The "Plot Reference" and "Plot Description" fields can be freely edited.

Adding a plot

Assign a new plot to the current house type by entering the reference and description (1).

Deleting plots

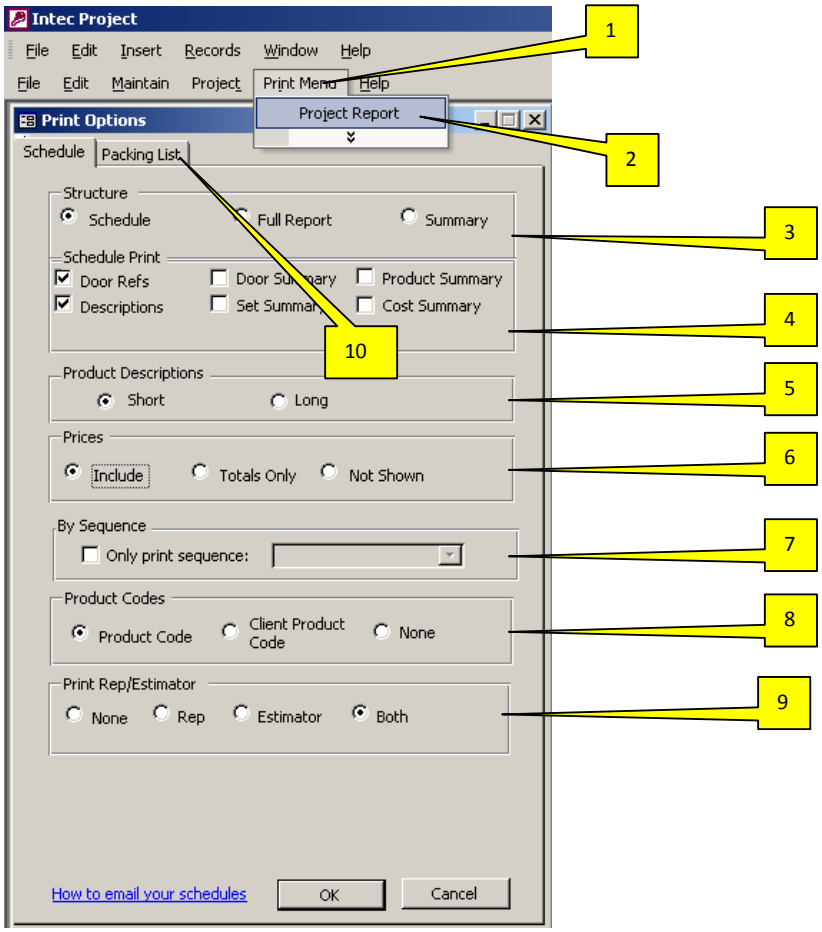
Select the plot you wish to delete using the record selectors (2), and then click the "Delete" button (3) to delete.

Creating reports

Intec Project includes a wide variety of printable reports, from a full door schedule to summary reports for internal use and picking/packing lists.

The Report Menu

All reports are generated from the "Print Options" dialog. To access this dialog, click the "Print" menu (1), then the "Project Report" menu option (2).



General Layout

The "Print Options" dialog is presented in the same layout for all project types, although certain types may include extra options.

- The "Structure" option (3) allows you to select the structure of the report that you would like to print.
- The "Schedule Print" option (4) lets you select which parts of the report you would like printed. See the section corresponding to the project type.
- The "Product Descriptions" option (5) enables you to choose whether you would like to print long or short descriptions. See Product Maintenance (Page 12) for more information on modifying product descriptions.
- The "Prices" option (6) allows you to specify whether prices are included for products printed on the schedule. If set to "Totals Only", individual item prices will not be shown.
- The "Product Codes" option (8) allows you to choose between normal or client product codes. This can be used to hide manufacturer codes from the client. If set to "None", no product codes will be displayed on the schedule.
- "Print Rep/Estimator" (9) enables you to select whether the rep and estimator details are shown on the cover page of the schedule.

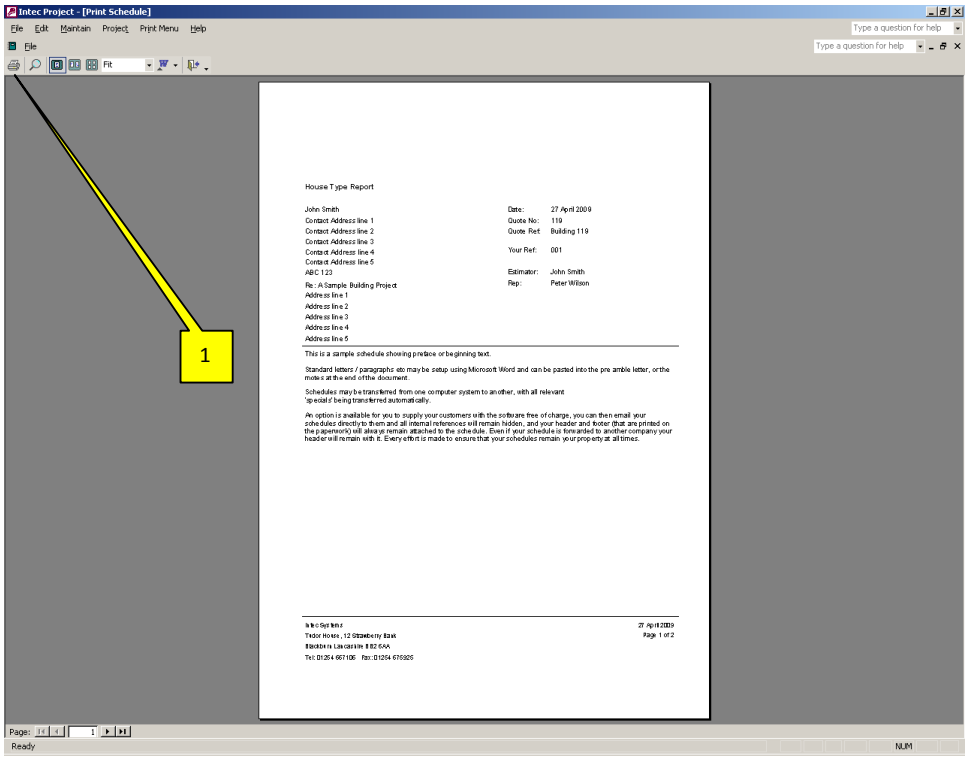
"By Sequence" option (Door Schedule reports only)

The "By Sequence" option (7) allows you to print a schedule for a single door sequence only, for instance the doors on a single floor of a building.

See "Assigning Doors" (Page 22) for more information on adding or changing door sequence numbers.

Previewing a report

To preview the report, select the desired report options and then click the “Ok” button. The “Preview” window (shown below) will be displayed.



Printing a report

To print the currently displayed report, click the “Print” button (1) at the top of the screen.

Emailing reports

Clicking the "How to email your schedules" link on the Report menu takes you to a webpage detailing how to send your printed schedules to clients in Adobe Acrobat (.PDF) format. This information is reproduced below for your convenience.

Instructions for configuring your system to enable creation of Adobe Acrobat documents

The following instructions will enable schedules and other documents to be saved as Adobe Acrobat (.pdf) files.

1. **Install a PDF printer driver on your system**

There are a variety of freeware and shareware programs available that allow creation of PDF documents from any application that supports printing.

A selection of these is provided, for your convenience, below. Please note that these links are provided purely for informational purposes. Intec Systems does not warrant the content of, and is not affiliated with, any external sites, or the software programs contained within.

PrimoPDF - http://www.primopdf.com/

CutePDF Writer - http://www.cutepdf.com/

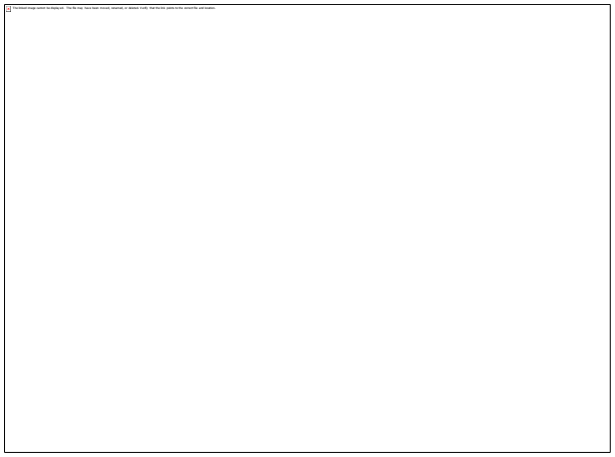
PDF995 (Shareware) - http://www.pdf995.com/

2. **Use the printer driver to create an Acrobat document**

1. Create your schedule or report as normal.

2. Click the 'Print' button as if you were going to print the report to paper.

3. When asked which printer you would like to use, select the installed PDF printer driver as shown below (the following example is for PDF995, other printer drivers should be similar).



4. Click the 'Ok' button. You will now be asked where you want to save the PDF document. Select a location and click 'Save'.

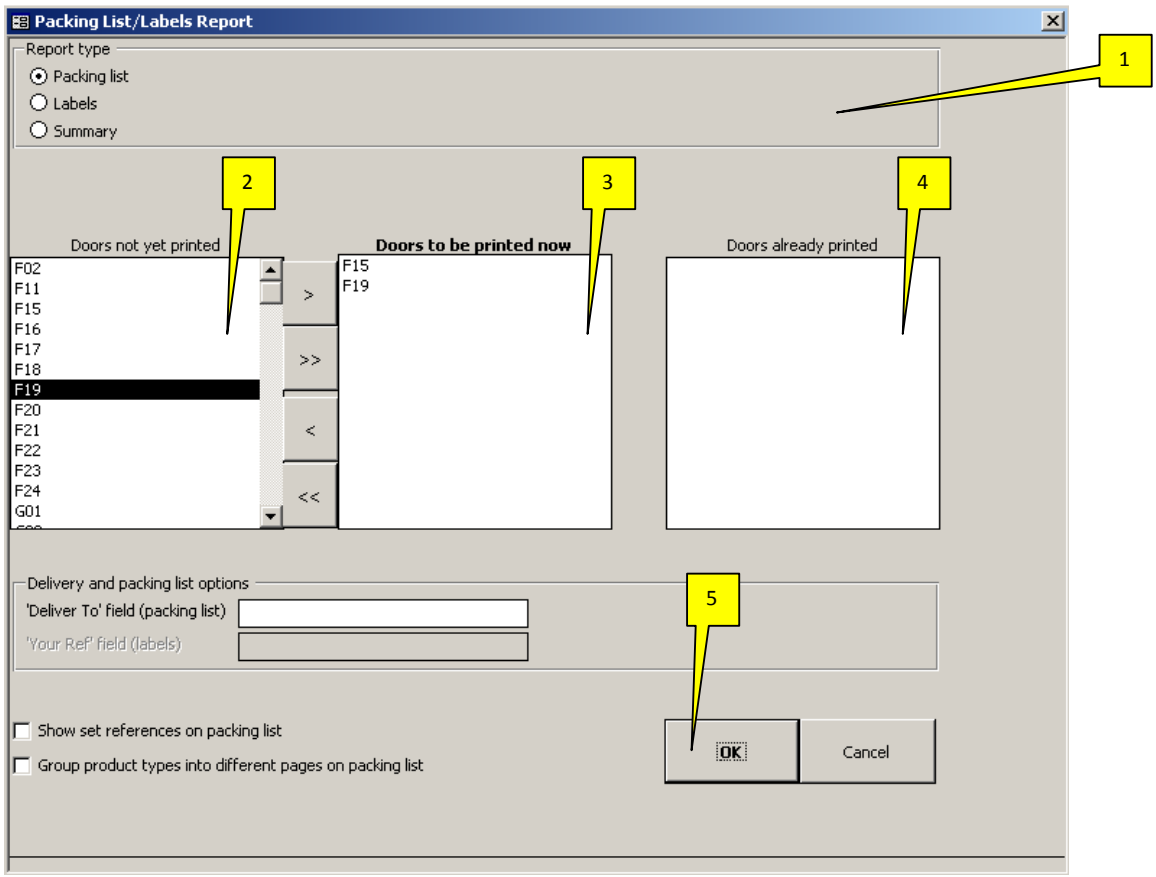
6. After a short period, you will be shown the resulting Acrobat document in Acrobat Reader.

In order to view this document, the recipient must have Acrobat Reader installed on their system. This can be downloaded from http://www.adobe.com/

Packing Lists and Labels

Intec Project provides the feature to create packing lists and labels from house type and door schedules.

Select the “Packing List” tab (10). click on the “Create Packing List” button. The “Packing List/Labels Report” dialog (shown below) will appear.



Creating a packing list

Select “Packing List” from the “Report Type” menu (1).

Selecting doors to print

Select the door you wish to print from the “Doors not yet printed” list (2). Click the “>” button to add the selected door to the current packing list.

Click the “>>” button to add all doors to the packing list.

Click the “OK” button (5) to print the packing list.

Deselecting doors

If you wish to remove a door from the current list, select it from the “Doors to be printed now” list (3). Use the “<” button to remove the door, or the “<<” button to remove all doors.

Reprinting doors

If a door has already been printed, it will appear in the “Doors already printed” list (4). In order to reprint this door, you must reset the “Packing Date” field on the Door Summary tab. See Page 23 for more information.

Creating Labels

The facility is provided to create packing labels for each door. This will create a document which can be printed to Avery® L7161 (63.5 x 46.6mm x 18) Laser Address Labels.

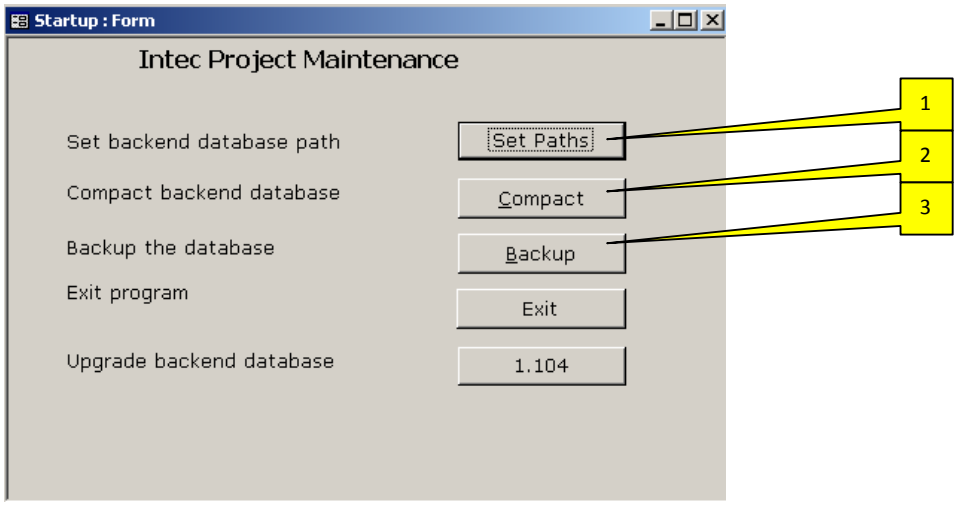
Select “Labels” from the “Report Type” menu (1). Select the doors you wish to print, as described under “Selecting doors to print”. Click the “Ok” button (5) to create the labels.

IPMaintenance utility

The information contained within this section is intended for the use of system administrators only. Other users should not attempt to use this utility unless advised by Intec Systems.

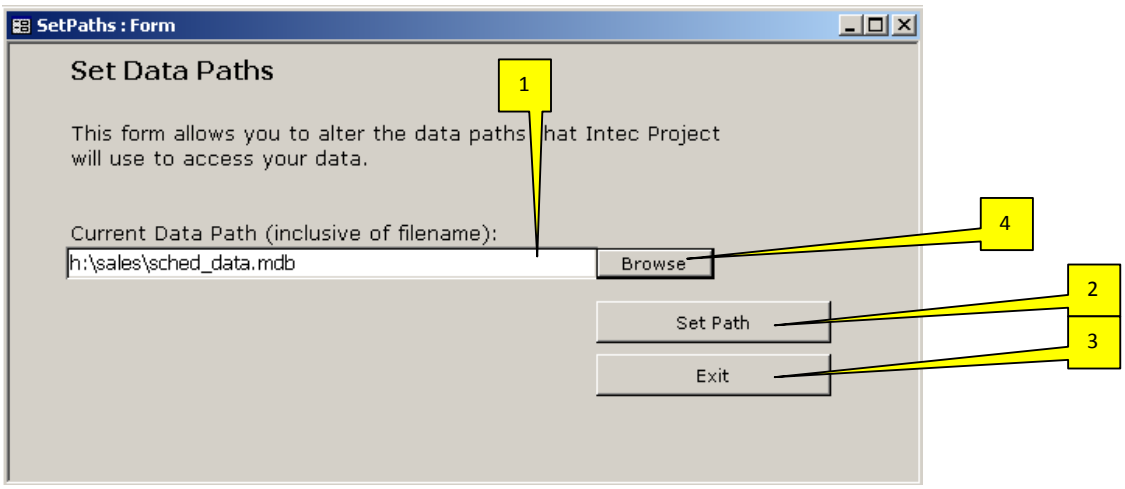
The IPMaintenance utility allows you to perform administrative operations on the Intec Project database and client.

To access the utility, navigate to Start Menu > Programs > Intec Project > IPMaintenance.



Setting data paths

Clicking the "Set Paths" button (1) allows you to change the location of the back-end database file. This is used when setting up a multi-user system.



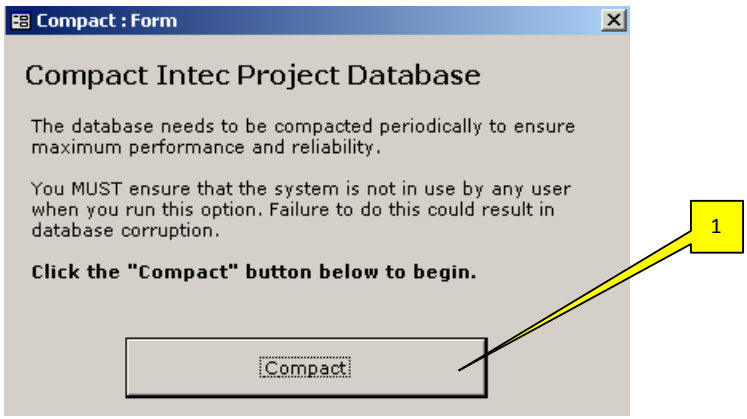
Enter the full path to the backend data in the "Current Data Path" textbox (1). Click the "Browse" button (4) if you wish to manually browse for the file.

Click "Set Path" (2) to apply the changes, or "Exit" (3) to cancel.

Compacting the Intec Project database

Intec Project includes a feature to compact the backend database. This will both shrink and reorganize the backend database to ensure that data is held in the most efficient way and to reduce the amount of disk space used by the database.

Click the “Compact” button (2) to access this feature. The “Compact” window (shown below) will appear.



Warning: you must ensure that no users have Intec Project open when you compact the database. Please read carefully all warnings on the “Compact” window before continuing.

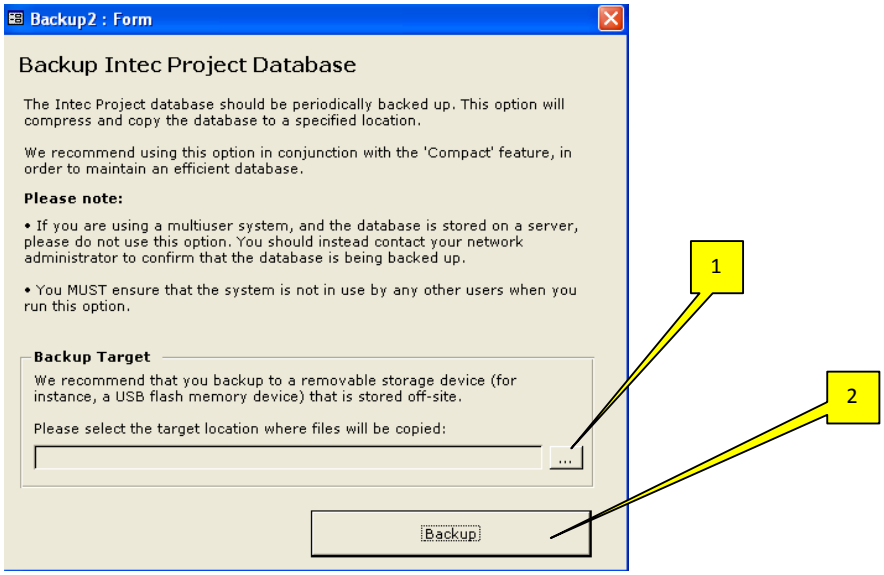
Click the “Compact” button (1) to begin the process. You will be notified when the compacting process has successfully completed.

Backing up the database

Intec Systems recommend that you regularly back up your database.

A feature is now available within the IPmaintenance program to simplify this process.

Click the “Backup” button (3) to begin. The “Backup” window (shown below) will appear.



Firstly, select the target path using the “…” button (1). This path will be saved for later use after the backup is complete.

Then click the “Backup” button (2) to backup. A file will be created in the target location using today’s date as the filename. This file can be used to restore your Intec Project system in full.

We recommend backing up to removable media that is stored off site, to minimise data loss in unforeseen circumstances.