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Tech Support Brief

How PhotoByte Works with *Client Type* and *Keywords* Fields

On the Profile > Client/Keywords screen are two important fields: *Client Type* and *Keywords*.

In *Client Type* you will enter one of three basic client categories:

- ◆ Advertising
- ◆ Editorial
- ◆ Corporate

There are other choices and the list is editable, but it is recommended that you use one of the three basic categories. Almost every commercial job falls into one of them. This field works in tandem with the *Keywords* field to describe what kinds of jobs a particular client is most likely to hire you to shoot. It will be used to create reports.

For example, if a Corporate client is most likely to assign you to shoot **people**, or **industrial**, or **aerial** pictures, enter one or all of those keywords in the *Keywords* field. If an Advertising client is most likely to assign you to shoot jewelry, enter **jewelry** in the *Keywords* field. If an Editorial client is most likely to assign you to shoot **people**, or **fashion**, or **aerial**, or **architecture**, enter those keywords.

Do not use the *Keywords* field to indicate that a contact is a client. It's not necessary—in fact it's redundant—to use the word *client* as a keyword. PhotoByte “assumes” that a record indicates a client if the *Client Type* field is not empty.

An exception to that rule is to select **Not a Client or Prospect** in the *Client Type* field. The exception applies when the Profile record represents the proprietor of a restaurant, your dry cleaner, or a family member. Insofar as those other examples are

concerned, you can type **restaurant Italian; dry cleaner laundry; or family cousin** in the *Keywords* field for those records, respectively.

You can easily find a list of all your clients by clicking the appropriate button on the Market Reports screen. Various methods are described in the on-screen User's Guide.

The system of data entry suggested for the *Client Type* and *Keywords* fields makes it easier to use two special features from the Market Reports screen: the Customer Referral Report and the PostMaster[™].

With a Customer Referral Report you can see how much bang for your bucks is associated with each of your various self-promo campaigns. You can also see a breakdown listed under each category of "hits" (a percentage of responses to various media in which you have bought advertising space, i.e., placed ads) for the types of photo assignments each client/respondent is most likely to hire you to shoot.* As for utilizing the PostMaster report, you can refine your self-promo mailing lists to target clients in specific geographic regions who can assign you to shoot the specific kinds of jobs you wish to promote. You will quickly learn how this feature is invaluable for qualifying and quantifying your marketing reports as well as for finding and sorting particular groups of clients and personal contacts. It too will be explained in a later Part of the book.

< END >

Tech Info Brief

Managing Letter and Envelope Layouts

Unfortunately, not every printer on the market can be tested with PhotoByte. Nonetheless, the process for printing envelopes has been automated as much as possible by pre-scripting layouts that correspond to commonly available printers.

If you have already exhausted the possible settings on the Preferences > Print Prefs screen and you still cannot align an envelope layout to print correctly, you may have to modify the envelope layout itself, just as you would with any other database program.

Note: You will need a copy of FileMaker v5.x to make some of these adjustments.

Caution! When using FileMaker to modify PhotoByte envelope layouts, do not change any other layouts, or you may cause PhotoByte to malfunction. No technical support is provided by PhotoByte for using FileMaker. Contact FileMaker, Inc. for technical support (http://www.filemaker.com/support/technical_support.html). Make a back up copy of PhotoByte before attempting any layout modifications!

Letter Layout Modification

- ◆ First, quit PhotoByte.
- ◆ Open FileMaker.
- ◆ From within FileMaker use the File menu Open command to open the Activity file inside the PhotoByte folder. Hold down the Option key (Shift key for PC) while you open the file.
- ◆ When you are asked for a password, type **special access**, then click *OK*.

Note: This is tricky!

Immediately after clicking *OK*, you must press **Command – period** on your keyboard. On a PC press the **Esc** key instead.

- ◆ You will next see a screen that says *Access Denied* when the file opens.

- ◆ If you don't see the Status Area along the left side of your screen, press Command – 3 (or Ctrl – 3 for PC).
- ◆ Press Command – L (or Ctrl – L) to enter Layout mode.
- ◆ Above the Flip Book in the Status Area is a pop-up Layout menu. Click on this pop-up menu to select and work with each letter layout.

Note: The Layout pop-up menu is only available while you are in Layout mode. Drag your mouse down the list until you see a grouping of layouts that begin with the word *Letter*.

To edit envelopes:

- ◆ Press Command – 3 (or Ctrl – 3) to open the Contacts database.

Once there, you will again see the Access Denied legend.

- ◆ Again, press Command – L (or Ctrl – L) to enter Layout mode.
- ◆ Click on the pop-up menu above the Flip Book to select and work with each envelope layout.
- ◆ Drag your mouse down the list until you see a grouping of layouts that begin with *#10 Envelope*.

At this point you are free to edit layouts according to FileMaker instructions. Basically this means simply dragging fields to any other position on the layout, even changing fonts and font sizes to your liking, and testing the output to your printer.

If you are using one printer for all of your envelopes, or if you are not sure which layout to modify, there is no harm in making them all the same. That will preclude any problems associated with the settings on the Preferences > Print Prefs screen; i.e., the settings will become irrelevant. All the layouts will work for your particular printer.

- ◆ Close Contacts and quit FileMaker.
- ◆ Reopen PhotoByte.

<End>

Tech Support Brief

Explanation of the Recover Process

The information in your PhotoByte files (databases) is quite valuable and represents a tremendous investment of time and energy that is often irreplaceable. Therefore, safeguarding data is an important aspect of using PhotoByte wisely.

PhotoByte provides two built-in mechanisms for restoring damaged databases: AutoRepair and Recover. As their names imply, AutoRepair is run automatically, if necessary, when a file is opened. (You will see the message: *This file was not closed properly. PhotoByte is performing a brief consistency check.*) Recover is a utility that must be manually invoked should a database require more extensive repairs.

An important aspect of these facilities—and particularly of Recover—is that they do not guarantee that the structure of a file has been completely repaired. It gives precedence to recovering the data contained within the structure of the file in question. Exhaustively examining and repairing every part of the underlying structure of a large and complex database would be extremely time consuming, so both AutoRepair and Recover are designed to trade completeness for expediency. This tradeoff is carefully made, with an emphasis on thoroughly checking those aspects of database structure that are most likely to affect whether the database can be opened. Therefore, users should take adequate precautions after managing to get a damaged database open. “Adequate precautions” normally include immediately saving a backup copy of the recovered database and, depending on the severity of the problem, possibly exporting the data as a text file. The text file can later be imported into a master copy of PhotoByte.

The most important safety measure is making regular and frequent backups. This cannot be stressed enough. Consider it an insurance policy. Without it, you may be balancing your business on a high wire without a safety net. Always assume that the worst can happen, and never allow a significant period of PhotoByte-using time to go by without making a full backup. One good rule of thumb with any important database is that it should be backed up frequently enough so you can add or update lost information without losing more than one day of work.

File problems

The most frequent cause of difficulty occurs when a PhotoByte file is not closed properly. A less likely problem is related to disk-media failure, where the data file cannot be read by PhotoByte. A file is not closed properly when a file is open and then:

- ◆ Your computer freezes, due to another application (e.g., the Finder in Mac OS or Windows itself on a PC) crashing, while PhotoByte is running, forcing a manual restart
- ◆ PhotoByte runs into a problem and presents a dialog that requires the user to quit the application (e.g., disk-read error or file-damaged error)
- ◆ External power is interrupted, shutting down the computer abruptly

PhotoByte memory management

Some databases, are “RAM-based.” RAM-based applications require that the entire document or database fit into memory (Random Access Memory) at once. That means it is volatile, because the digital data are not stored magnetically (or optically) on a disk. It remains as electronic signals within a chip. When you turn off the power to that chip, *poof!* It disappears. If an application with a RAM-based architecture crashes, only the most recently-*saved* version is stored on disk. As a result, the document can be opened again intact, less the most recent changes before the crash.

In contrast, PhotoByte is disk based. The records created within it are not restricted in size by the available RAM memory. Instead, small portions of the much larger document or database are brought into memory as needed. The work you create is written and saved to disk as you go along.

In the case of PhotoByte, the information is brought into memory one disk block at a time. As memory becomes full (or when PhotoByte is idle for several seconds), blocks in memory that have been changed by you are written back to the disk; i.e., they are automatically saved. A single simple operation, such as typing a new name, may alter many physical disk blocks that are widely dispersed on the disk. In order for an operation to be successfully completed and for the stored database to be in a consistent state, all of the blocks related to any change must be written back to disk. Obviously, if even one of the blocks (these are all the ones and zeroes) related to an operation is not written out to disk in a specific order, the database on the disk is not left in a consistent state. This inconsistency may result in problems opening the database, or other difficulties while performing operations later.

When PhotoByte is unexpectedly terminated, the extent of damage to the database depends on the state of the database at the time of the crash. For example, if the file in question was a lookup file that was not changed while PhotoByte was operating, the file should be in a consistent state and AutoRepair should allow the file to be opened without

further difficulty. Other examples of files that should be in a consistent state are files that have been idle long enough for all of the modified blocks to have been written to disk, or any file that is open but is not the currently active database. On the other hand, if the database was being actively updated at the time of the shutdown, as could be the case in the middle of executing a script to create, say, a new invoice, the database may require the more serious repair measures provided by the Recover procedure.

Typical error messages

Depending on the state of the database when PhotoByte unexpectedly terminates, the warning that appears when the database is reopened may be one of a variety of messages.

In the case that PhotoByte was able to open the database successfully but has detected that it was not closed properly the last time it was used, AutoRepair is automatically called to validate the database. Consistent with PhotoByte's philosophy of eliminating what can easily be recreated (to avoid possible problems), any Found Set and sort order (both easily recreated by you once the file is opened) is discarded as the database is repaired. In addition, PhotoByte checks for records that may have been partially updated and triggers calculations in those records.

Keep in mind that any operations in progress prior to the failure (such as Replace or Delete) will not be completed by AutoRepair. As a general rule, after a repaired or recovered database has been successfully opened, the file should be checked for consistent content. This is especially true if there was an active operation under way at the time of the shutdown.

A similar message may be seen in other cases where the database was shut down improperly. In this case, PhotoByte was able to open the database successfully but has again detected that it was not closed properly the last time it was used. Furthermore, PhotoByte has detected that free blocks associated with the database were not released the last time it was closed. This condition may cause the database to grow larger, taking up more disk space, because these particular empty blocks cannot be reused. The error alert suggests running Recover if there are problems, and suggests a method for compressing the database if everything works properly. Generally, saving a compressed copy after the database has been opened is sufficient to compress empty space out of the database. Generally, however, this is nothing you should worry about.

Sometimes the problems with a database are more severe, and AutoRepair does not work. In these cases, a more extensive process must be performed in order to resuscitate damaged files. Recover is provided as a separate feature that performs this operation. Recover creates a new empty database, and copies the information over block by block before validating various aspects of the database structure.

More serious problems that prevent the file from being opened are usually the result of problems in the structure of the database. Structural problems include references to invalid block numbers or invalid information in the signature blocks of the database that identify a file as a PhotoByte database. These are related to media failure. Depending on the severity of the problem, PhotoByte may be unable to Recover the database, and reverting to a backup (restore) of the database will be necessary.

Recover step by step

To recover a database, launch PhotoByte and select the Recover function from the file menu. (See *Recover a Damaged File*.) After selecting the file to be recovered, specify a name for the new database that will be created by Recover (it must be a different name than the file being recovered, so the word *Recovered* will usually be added to the file name). A status dialog then appears and reports the progress of the Recover operation.

The first step in Recover is to open the damaged database and create a new empty database to hold data blocks that are about to be copied from the damaged file.

Next, PhotoByte resets the logical End of File (EOF) in the damaged database to be equal to the physical EOF (more *ones-and-zeroes* stuff) and starts copying each block of the damaged database over to the new target file. As each block is copied, it is examined to validate its internal structure. If any problem is found, the block is repaired.

The name of this step is a bit of a misnomer. Rather than rebuilding the status information, PhotoByte actually reverts the database to a default state similar to a brand new database. Once again, this is consistent with the philosophy of removing what can easily be recreated in order to concentrate on capturing as much of the old content as possible. The items that are removed or reverted include:

- Record Count
- Summaries
- Sub-summary
- Sorted Order
- Custom Sort Order
- List of Found Records
- Import Order
- Export Order
- Calculation Trigger Table
- Find Patterns
- Sort Specification

Note: Because some of the above-named steps are included in repetitive scripts, and to prevent any loss of information which might culminate in PhotoByte's inability to perform such scripts in the background, it's probably wise to export the records in your entire PhotoByte solution into a virgin, master copy after you

have recovered a file. This is done exactly the same way you upgrade from an older to a newer version.

Next, PhotoByte validates each record in the database. This process involves fetching each of the records and checking to make sure that it has valid header information. Also, each field within the record is checked for a valid key and valid (non-zero) length. If any invalid fields or records are discovered in this process, they are removed from the database.

As each field is validated, it is checked against a master list of existing fields. If a field is encountered that does not already exist in the master list, the key is added to the list so that a temporary field can be created automatically later. Again, this is consistent with PhotoByte's philosophy of preserving as much of the information as possible. It is easy to delete unwanted fields after the database is recovered; much easier than attempting to recreate lost information. However, the likelihood of finding an extra field is remote.

Each layout is then examined for consistency. Every layout must have a name (or it is given a default name), parts (at least one) with valid options and valid size, and a valid object list. The object list is a structure that contains a reference to each object (i.e., field, rectangle, line, text, etc.) on the layout. Each object referenced in the object list is fetched to make sure it is present and that it is a valid object type. Any objects that cannot be examined or are not of valid type are deleted from the layout. If any invalid parts are encountered, they are also deleted. If no parts are left after this process, a default part is added to the layout to make it accessible.

Next, PhotoByte validates all field definitions and scripts. First, lists used by PhotoByte to quickly access the field names and information about the custom field order are deleted. While validating field definitions, any fields without matching definitions (discovered while checking the records) will have new field definitions automatically created. Each automatically generated field is named "Recovered Field n", where "n" is a number starting at 1 and incrementing with each field ("n" is automatically generated during recovery). PhotoByte also fetches each field definition from the database and verifies that it has a valid field name and valid field type. If the field type is missing or invalid PhotoByte makes the field a text field (the most flexible field type), so any data can be retrieved from the field. In the case of calculations and summaries, the formula is fetched and validated. If any of the formulas are invalid or cannot be found a default (empty) formula is created for the field. Finally PhotoByte writes the count of the number of fields into the file.

When it has finished processing field definitions, PhotoByte validates the scripts in the database. As was done for layouts and field definitions, PhotoByte starts by deleting the custom order information for scripts. Every script is then checked to make sure it has a valid name, valid status information and valid options. If a problem is detected with any of these important components of a script, the script is deleted.

After checking each record and rebuilding the field definitions, PhotoByte is finally ready to reconstruct the inverted list or index. The index is used to assist PhotoByte in locating data quickly. After completely deleting the existing index, PhotoByte fetches each record; and, based on the data in the record, reconstructs the index. This step is necessary to maintain consistency in the database. If the index were not rebuilt, it would be possible for PhotoByte Find requests to return records that did not match the specified request.

Finally, PhotoByte frees unused space in the file. All of the disk blocks that may be unused after recovery are coalesced to the end of the file and removed.

Recovery Results

When recovery is completed, a status dialog is displayed showing what was done to the database during recovery. The dialog (Figure 5) shows:

- The number of bytes copied from the damaged database into the new database
- The number of records that had to be skipped (deleted) from the recovered database
- The number of field values that had to be skipped (deleted) from the database
- The number of field definitions that had to be recreated

If any of the values shown, other than the number of bytes copied, is greater than zero, you should carefully check the file for consistent content. For example, if field definitions are recreated by Recover, you can create a new layout with the “recovered” fields and search for records where the field values are not empty. Based on the contents of each field, you may decide to delete the field again.

In many cases, a successfully recovered database may be larger than the original database. This is normal and is caused by new disk blocks being allocated as the database is recovered. For example, rebuilding the index field by field and record by record can cause data distribution that is different (and possibly larger) than the original file.

A newly recovered database will also take longer to open than a database that was closed properly the last time it was used. This only happens the first time a recovered database is opened and is the result of rebuilding various internal structures that were deleted during recovery.

Stabilizing your database system

There are a number of things you can do that will have a direct impact on the stability of your system and on the reliability of your databases. The following general guidelines will help protect your investment in your data.

Make frequent backups. This cannot be stressed enough. Many users do not have adequate protection against data loss. In many cases, they do not have their databases backed up at all. A backup not only prevents loss of data if a database cannot be successfully recovered, it can actually be an excellent alternative to Recover. Instead of recovering a damaged file, it often pays to restore a backup copy of the database, even if it needs some work to bring it up to date. For a large database the time required to perform a full recover will generally be much longer than the time required to restore and update the backup.

Remove as many suspicious system extensions as you can get along without, at least until you are convinced they are not having deleterious effects. There are various third party products available that allow you to turn selected extensions on and off so you don't have to physically remove them from your system.

Make sure there are no viruses in your system and data files. Although PhotoByte does internal checks on the application for viruses at launch time, data files can still be infected. Therefore, use a current copy of a virus detection program to check your system. Using the most recent copy of virus detection software is important because these programs are periodically updated to detect new virus strains.

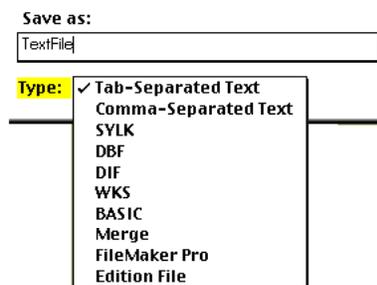
If you experience frequent power outages in your location, think about getting an uninterruptible power supply (UPS). A UPS will quickly pay for itself in terms of work hours saved by not having to repair files that were improperly closed as the result of a power failure.

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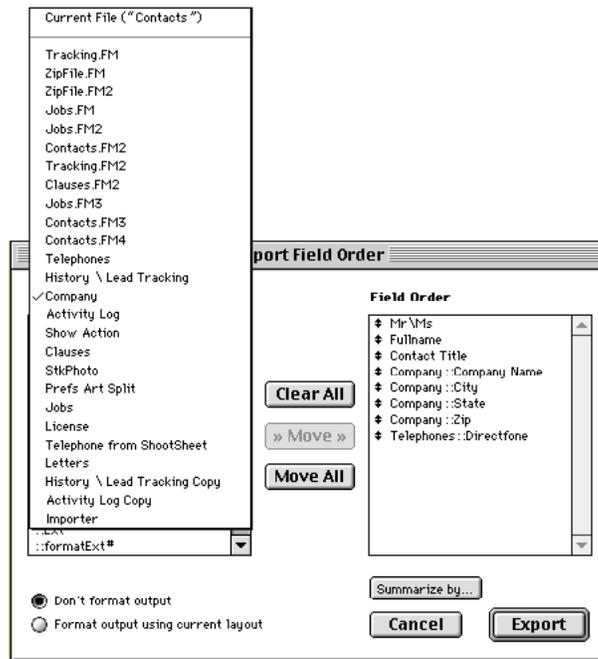
Exporting Contacts to an External File

Exporting records from a relational database file (such as those comprising the PhotoByte contacts database) to, say, a Palm™ is, while not particularly difficult, nevertheless a complex operation. You will be selecting export fields from *three separate database files* to be exported to a single text file. The three files are: Contacts, Company, and Phones.

- ◆ Select **Import/Export>Export Records** from the File menu.
- ◆ In the next dialog box, give the new text file a name and...
- ◆ Select the type of file you want to save from the pop-up menu illustrated below.



In the Export Field Order window, after you select the contact's name field, use the pop-up menu just above (where it says *Current File "Contacts"*) to select **Telephones**, then select the *Directfone* field. *Directfone* is always the first one in the scrollable section of phone numbers.



Again, in the Export Field Order window, after you select the contact's *Fullname* field, *Contact Title*, and *Directfone* (from Telephone), use the pop-up menu just above it (where it says *Current File "Contacts"*) to select **Company**, instead, then select the *MainAddress*, *City*, *State*, and *Zip* fields. Only use the fields called *Other Address*, *Other City*, *Other State*, and *Other Zip* if you wish to export home addresses.

Remember: This is a relational database. Your contacts' addresses are not located in the Contacts database file; they're in the Company file.

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Recovering a Damaged File in PhotoByte

A file recovery should be a last resort. In order for a file to become damaged enough to require a Recover procedure, it must have undergone either repeated crashing or, perhaps, a crash occurred before the file could be saved to disk.

Preventive Measure: *PhotoByte saves new data and records you enter automatically, as soon as you begin the next operation. For instance, if you have just entered the text of a fax, simply click somewhere outside of that particular text field—even in the margin—to initiate an automatic Save. Otherwise, you might enter the text and immediately switch to another application, while the cursor is still in the text field of the fax layout. If that other application causes a crash, the Activity file in which the fax document you were composing “lives” could become damaged.*

Whatever it is that might be causing your computer to crash should be investigated immediately using System Extension conflict resolution software such as Conflict Catcher™ and a disk utility, such as Norton Disk Doctor™ on the Mac OS or similar utilities for PCs. We mention this only because it is rare for a PhotoByte file to become that damaged.

Instead of resorting to the last-ditch effort of a Recover procedure, we recommend that you *restore* the files, using your backup file folder and copying it back onto your hard drive, then recreating any missing records (i.e., re-entering a contact’s Profile or redoing an invoice), if you can. It is often easier that way.

Note: Always restore the entire PhotoByte folder, never individual files!

During the Recover process PhotoByte does the following:

- It creates a new file.
- It renames the damaged file, adding *Old* to the end of the file’s name. For example, *Billings* is renamed *Billings Old*.
- It gives the repaired/recovered file its original name.

To Recover a file you must start PhotoByte while holding down:

- ***Option + Command* keys together** for Mac OS
- ***Ctrl + Shift*** for PC.

You will see the Recover dialog box.

- Select the file you wish to recover. Let the process of Recovery continue.
- Remove the original file (the damaged one with the *Old* suffix) from your PhotoByte folder and place it temporarily on your Desktop, or somewhere safe on your hard drive
- Start PhotoByte

Do not forget to back up your entire PhotoByte regularly and often!

A simple backup procedure, which takes just a minute or so each day, will prevent the necessity for a Recover procedure from occurring in the future. Not backing up is like balancing on a high wire in 80mph winds without a safety net.

Tech-Info Brief

Importing First and Last Names from Another Database

In many databases, including PhotoByte, *fields* are separated by *tabs*, and *records* are separated by *carriage returns*. There are special text characters (ASCII) representing tabs and carriage returns that tell PhotoByte exactly where to put the data from exported text files when you import them.

PhotoByte uses a single field to represent a whole name. It concatenates this field, called *Fullname*, into separate first- and last-name fields, even middle names and suffixes (i.e., James Adam Wilson, Jr.) when creating reports within the database. If your previous database included separate fields for first-name and last-name, you must perform two separate export/import maneuvers, instead of one, to put both names back into one field within PhotoByte.

- Export two separate ASCII text files: Export the first file without the first and last names at all; the second including *only* the first and last name fields, excluding all other fields. Now, following instructions in the PhotoByte User's Guide, import the file that does *not* contain the names.
- Open the text file containing only the names with a word processor. You are going to do a "universal search-and-replace" operation following the directions for your particular word processor.

Search for *tabs* throughout the text file, replacing each one with a single *space*. (*Spaces* too are represented by ASCII characters.) This is done in one step, and it takes seconds. The text file is modified so that the names, both first and last, are concatenated into a single field. In effect you have created a number of records, each one containing a single field with the full name of your contact. Each record is followed by a carriage return, so PhotoByte knows to put each (name)field into a separate record.

Import this text file of names into PhotoByte, making sure that you are *replacing* data in records, not *adding* new records. Therefore, you must be sure that the records in both of your ASCII files were exported in the same order.

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Importing a Text File into Contacts

- ◆ Follow the directions that came with your FileMaker Pro or other database to export its records, to be saved as an ASCII text file. Each field should be *tab delineated* with a *carriage return* between each record. This is a standard setting in the FileMaker Pro Open File dialog box that you will see when you select **Export** from the File menu. (Tab delineated text file.)
- ◆ Once you have created the ASCII file, move it the Macintosh Desktop.
- ◆ Give the file a name: *Text Import* (two words) so that the import pathway can be determined automatically.
- ◆ Start PhotoByte.
- ◆ From the Main Menu click *Preferences*, then *Import/Export*, then *Import Text File*.

The latter button initiates a script that will locate your ASCII file (named *Text Import*) on the Desktop. It will open to a split-window screen. Your text data will appear on the left side of the window and the PhotoByte field names will appear on the right. You can now manually align the data with the field names by dragging them one at a time so that they correspond to the actual data on the left. For instance, if on the left side of the window you see *123 Main St.*, you will know that you should place the PhotoByte field for *Main Address* opposite it. PhotoByte will make sure that all of the data go into the right places in all of the many separate PhotoByte files that, together, make up the entire application.

Do not be concerned that there are more fields on the PhotoByte side than on the data/text side.

You must only perform this operation for the first record to align the data for all of your other records.

- ◆ Make certain that the default button *Add New Records* is selected. It is in the bottom left corner of the screen.

- ◆ Then, click the *Import* button. In the next window, or screen, check the *Perform auto enter...* button and leave the other button, *Keeping them in the original record*, set as the default.
- ◆ Finally, click *OK*.

<End>

Tech Info Brief

Managing Label Layouts

Sometimes it's difficult for PhotoByte to automatically align labels for use with some printers. Unfortunately, not every printer on the market can be tested with PhotoByte. Nonetheless, the process for printing labels has been automated as much as possible by pre-scripting layouts that correspond to commonly available printers. It is sometimes necessary to adjust the label layouts themselves. These instructions will show you how to adjust the labels to print correctly for any printer.

Note: You will need a copy of FileMaker® 5.x to make some of these adjustments.

Here are the steps:

- ◆ From within FileMaker, Browse to the PhotoByte folder through the *Open New – or Existing File* dialog box and select **Activity**.

Note: You may have to select **All Files (*.*)** In the *Files of Type* pop-up menu in the dialog box itself to see the available files.

- ◆ Hold the Shift key down as you open the file.

You will be prompted for a password.

- ◆ Type **Special Access**.
- ◆ Click the *OK* button..

Note: This is tricky! *Immediately* after clicking *OK*, you must press the Esc key on your keyboard.

You will open to an otherwise blank screen displaying only the words *access denied*.

- ◆ Press **Ctrl – 3** to view the Profile screen in the Contacts database where the Status Area is visible on the left side of your screen.

The word *Profile* will be visible in the Layout pop-up menu just above the Flip Book at the top-left of the Status Area. This tells you the name of the currently selected layout. You are about to navigate to some different layouts that support label printing.

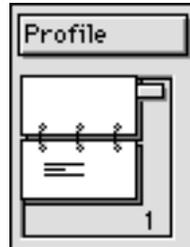


Figure 1

- ◆ Press Ctrl- L on your keyboard to enter the Layout mode.

Now you can use the FlipBook to scroll through the various layouts in the Contacts database. You will be able to see and have access to the pop-up layout menu above the FlipBook. (See Figure 1, above, and Figure 2, next page.)

Once you enter the Layout mode (Ctrl - L), you can navigate to layouts that are both printable and editable. Layouts that are not editable will not be visible; you'll see only the *Access Denied* screen.

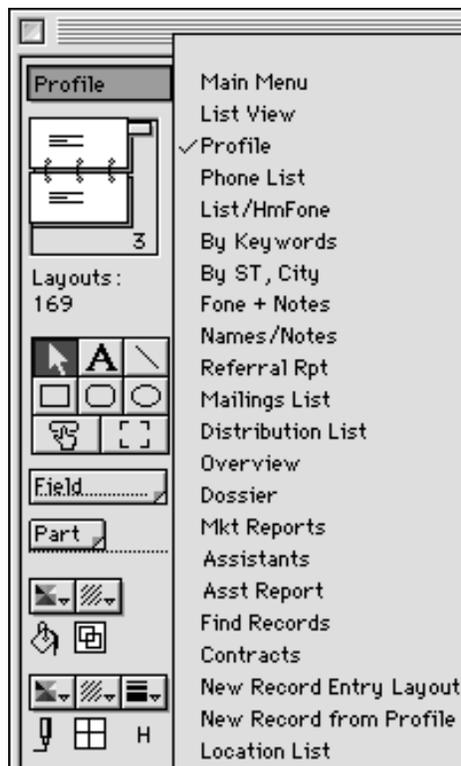


Figure 2

It is also possible to click on the Layout pop-up menu itself and scroll down to a specific layout, instead of using the Flip Book to move one layout at a time in consecutive order. For example, you may use this feature to scroll directly down to **Layout #28, Address1 – 5160**.

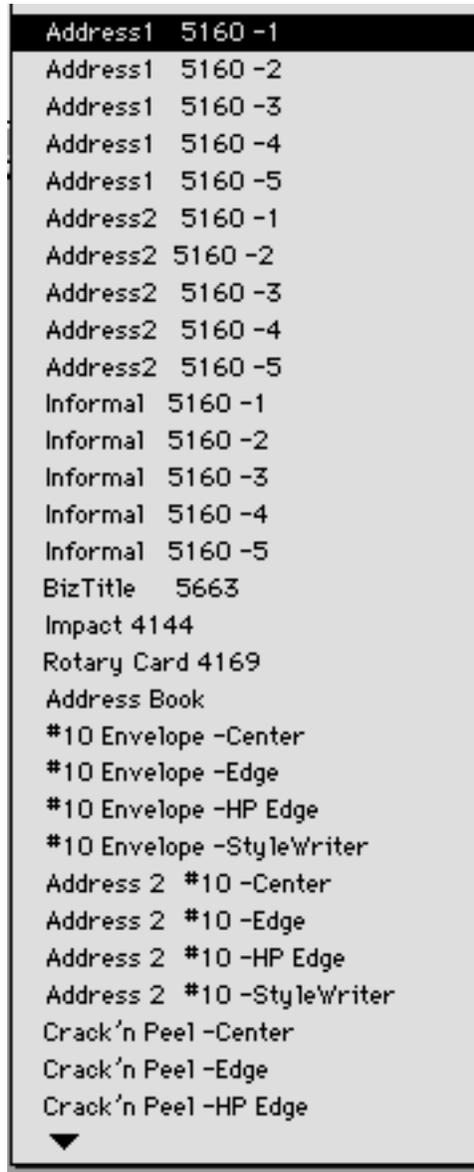


Figure 3

Note: It will most likely be necessary to modify each layout in a particular series; i.e. the 5160 Avery label set. *Address1* refers to the main address (usually

business address) listed in the Profile screen of each Contact record. *Address2* refers to the home address.

Slide Label Modification & “Label Creep”

When labels “creep” or gradually shift up (or down) when printed out, it usually means that the size of the body must be adjusted. Small movements may result in a lot of shifting or creeping, because the discrepancy in size can add across records. For example, a movement of 1/16" on the first label will result in the 10th label moving 5/8", or 10/16".

If it is necessary to change the size of the Header (to make sure that your printer and the label printout are aligned, avoiding “label creep”) you can do so by dragging the Header itself up or down.

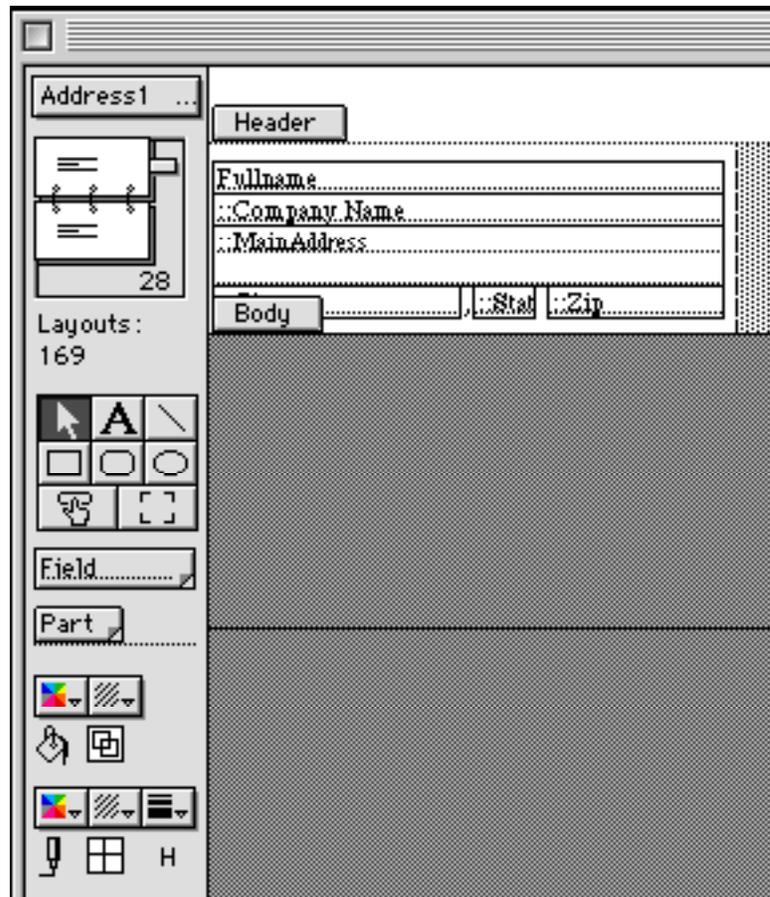


Figure 4

Adjusting label layouts to print correctly is relatively easy if you follow these steps. There are hints at the end of this article.

- ◆ Make sure that the upper left-hand label is printing in the correct place. If it is too low, you might delete or reduce the size of the header. If it is too high, you might increase the size of the header. (See Hint 1).

To select and resize the Header, click where it says Header on the layout and slide it up and down with your mouse.

- ◆ If the upper left-hand label is in the correct place but the labels creep up the page (the labels are printing too high): The Body is not tall enough. Try increasing slightly the size of the Header. (Also, see Hint 1). To reiterate, if the labels creep up the page, increase the height of the body.
- ◆ If the labels “creep” down the page, (the labels are printing too low): The Body is too tall (see Hint 1). If the labels creep down the page, decrease the height of the body.

Hint 1

The Size floater tells you the size of each object or part of your layout. To use it, go under the Layout menu and choose Size. The smallest amount you can move something on a layout is 1/72", so it is easiest to work in pixels. To get the numbers to show in pixels, click right on the Size floater where it says *in* to change it to *cm*, then hit it again to change it to *px*.

When you are adjusting the size of a part, ignore any of the numbers in the Size floater except for the very bottom one. That is the height of the part you have clicked on. To get it to show the height of the body, just click the label that says *Body* right on the layout. Then increase the number in the bottom box of the Size floater. If the body needs to be 1" taller, then add 72 to the number. If it needs to be 1/2" taller, increase it 36 pixels, etc.

You can also change the height of a part by dragging the dotted horizontal line at the bottom of the part up or down.

Hint 2

Laser printers have an unprintable area all the way around the page. Most printer drivers have an option that allows you to reduce the size of the unprintable area. This is important if your labels do not have a margin at the top or the bottom.

For an Apple LaserWriter you can reduce the size of that unprintable area by going to Page Setup and clicking the Options button. You will see an item to check that says *Larger Print Area (Fewer Downloadable Fonts)*. Clicking this button will reduce that unprintable area.

Hint 3

If you have sheets of labels that do not have a margin at the top or bottom, double click on the word **Body** on the layout to bring up the part definition dialog. Click on the options that say *Allow part to break across page boundaries* and *Discard remainder of part before new page*. This will allow it to print the last row of labels even if they do not quite fit on the page.

Tech Support Brief

Minimizing the Quantity of Company Records

If you have imported records from a “flat-file” database (including older versions of PhotoByte) into PhotoByte you may have more company records than you need. That means you have multiple, duplicate company records in your Company database file. This can cause confusion when entering new contact records, because the popup menu for selecting an existing company name and address to associate with that new record will contain many identical choices. With a relational database such as PhotoByte it is only necessary to have one company record for as many contacts as there are who work at that company.

Here’s how to clean up your database:

- 1) Click the *Search* button to find the name of a company for which you suspect there are duplicate records: on the Search screen click *People, Companies, Locations*. Press Tab and type the company’s name. Click *Continue*. A Found Set of contacts will appear on the List View screen.
- 2) Click the *Company & Contact ID#* button in the header of the screen. (If your screen is small, you may have to scroll to the right to see this button.)
- 3) Sort by Company Name by clicking the Sort icon in the Company column heading.
- 4) Make sure that the Company ID#s all agree, that they are all the same. If not, change them so only the same number appears in the *Company ID* field for each record.
- 5) While looking at the Main Menu, select **Edit Company Database** from the Shortcuts menu. You are now viewing the Company database. Enter the Find mode (click the *Find* button in the header of the Company screen) to search for duplicate company records.
- 6) In Find mode put your cursor in the *Company* field and type the company’s name once again. Click *Continue* in the Status Area. A Found Set of duplicate company records will be displayed (if any) in the Company database List View.

Hint: If you wish to see all of the duplicate company records in the Company database at one time, go to List View, then click the *Magnifying Glass* button (adjacent to the *Search* button) in the screen header to enter the Find mode. Then, Tab to the *Company* field and type an exclamation point (!). Click *Continue*.

- 7) In the end, what you want to see is only one record corresponding to each company name at each discrete address. (You may have two or more identical company names if each one has a different address.) You will decide which record(s) you want to keep and which to delete. The company record to keep will usually be the first one listed (the lowest Company ID number) in the Found Set.
- 8) Individually delete the duplicate records by selecting them one by one and clicking the *Delete Selected Record* button.
- 9) Press **Command/Ctrl - 2** to return to the Contacts database List View.

<END>

Tech Support Brief

Modifying Layouts in PhotoByte

With a copy of FileMaker® v5.x and our secret password (which happens to be Special Access) you can gain access to layouts. But since you must use FileMaker to do so, you must also be a licensed user of that product. So, if you are into database design, you must rely on FileMaker for tech support.

PhotoByte users can modify most of the document layouts they use to suit their custom needs. It is not recommended that you do so, however, because PhotoByte is designed to be a “plug-and-play” system, precisely to allow photographers to forget about the computer “literacy” required for this kind of work. Nonetheless, it has made it as easy as possible to make changes. For instance, you can move an invoice number from the top-right corner to the top-left corner of a page by dragging the field corresponding to the invoice number where you want it to appear. Even though it may seem to be overlapping—or “underlapping”—another graphic or text element of the layout on your screen (i.e., it might lie underneath a button) you will see that it still prints correctly on paper. This can be verified by displaying any document in Preview mode.

The invoice number field has been left unlocked on each invoice layout. So, too, are all of the other graphic elements of most document layouts. These layouts nevertheless contain a multiplicity of linked and overlapping fields, thousands of them in fact. But to help you avoid inadvertent deletions or misplacements of some fields that are imperative to PhotoByte’s operational capabilities, they have been bound together into graphic “blocks” or elements. **We recommend that you never ungroup these elements.** You do so at your own risk!

Caution: Buttons are always locked. *Do not unlock them!*

It is easy, however, to drag an entire locked block of elements a few centimeters over to one direction or another to accommodate the placement of your logo on a document layout, or to change the width of a margin on one side of the printed, paper document.

Note: At this point you have decided to become a database designer. You have decided to bypass the system that was created for your convenience. Please realize that significantly changing layouts requires a considerable amount of expertise. You alone are responsible for the consequences of your own actions. Since you must use FileMaker to make the layout changes, you must already

be a licensed user of that product. So, if you get into database-designing trouble, you must rely on FileMaker's technical support.

To access any printable layout within PhotoByte you must, first, note which file it belongs to; i.e. Contacts, Activity, Billings, etc. Then, you must quit PhotoByte and open FileMaker.

Here are the steps:

- ◆ From within FileMaker, open the Activity file in PhotoByte.
- ◆ Hold the Option key (Shift key for PC) down as you open the file.
- ◆ Click the *OK* button.

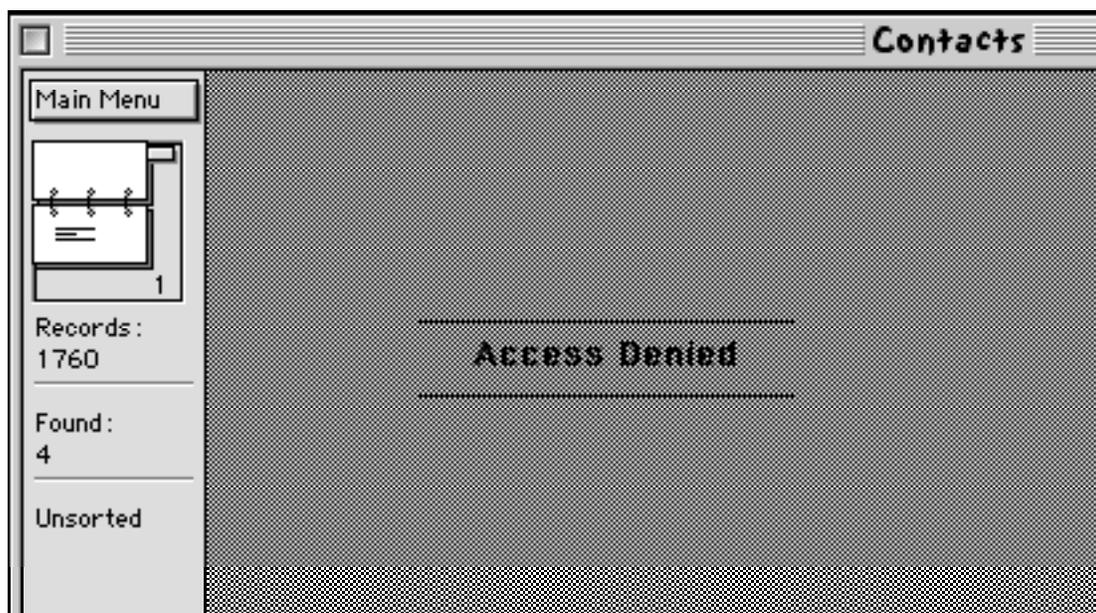
Note: This is tricky!

Immediately after clicking *OK*, you must press Command – period (or the Esc key for PC) on your keyboard.

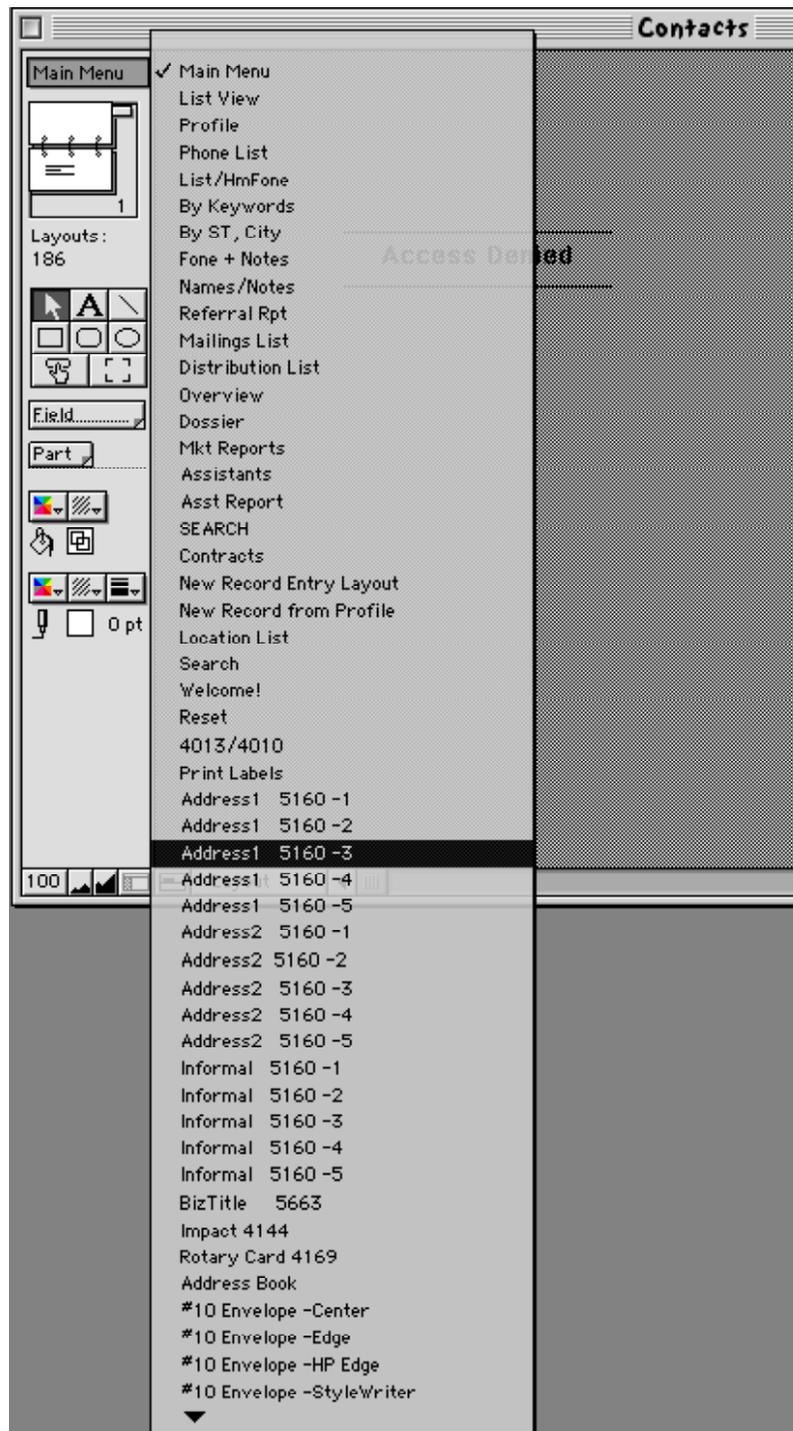
- ◆ You will be prompted to enter a password. Type **Special Access**.

At first, you will probably see a screen displaying only the words *access denied*. If so, press Command – 3 (Ctrl- 3 for PC) to display the Status Area on the left side of the screen. This will put you in the Contacts database.

Note: If you wish to modify layouts in PhotoByte database files other than Contacts, select that file under the Windows menu at the top of your screen. Usually, it will be either the Billings file or the Jobs file that you will want to change. The others, generally speaking, should be left alone.



- ◆ Once you enter the Layout mode (press Command – L for Mac or Ctrl- L for PC), you can navigate to the layouts within the database file that are both printable and editable. Using your mouse, place your cursor over the Popup Layout menu above the Flip Book and drag to select the various layouts. Only layouts that are intended to be modified can be seen. All others display the *access denied* legend.



Caution! Do not move or delete any fields you do not wish to change! You can cause permanent damage to PhotoByte.

BACK UP YOUR FILES FIRST!

No matter what the reason, if you want to modify the multiplicity of graphic elements on pre-formatted PhotoByte documents, you will either: 1) wait many weeks or months and spend thousands of dollars to hire a database design consultant to perform the work, with no guarantee that it will function the way you want; or 2) spend months to *years* doing it yourself. Still, you will have no guarantee that you will get the results you want. It's like pushing on a rope.

That said, the customization process has been made as easy as possible—and at least as easy as any other option available to you to run your business—by grouping the graphic elements and individual data fields on each layout into “blocks” that can be moved around on a “page.” For instance, you can isolate the document title (i.e., *Invoice/License of Rights* or *Job Estimate*) or the invoice number at the top of an invoice and slide it from right to left.

To include your own customized graphic elements extending, for example, down a wide margin on the side of a page, you must consider the complete graphical redesign of a database with the incumbent danger of inadvertently deleting or moving fields that must remain carefully placed to allow the total solution to function properly. You might have to move or resize every field on the page—every element on several hundreds of layouts, or pages!

Insofar as the amount of time you might spend trying to redesign this or any other business application, it is—by an order of magnitude—much more efficient to have some additional letterhead stationery printed to accommodate the space provided on PhotoByte's forms (layouts). This does not mean you must throw away the pre-printed letterhead you already have. You would simply continue to use it for business letters and other correspondence. The new stationery would be used exclusively for Estimates, Invoices, and Delivery Memos, etc. You would certainly retain your company identity. However, your clients will appreciate the uniformity of your documentation. It will help you get paid faster.

- ◆ **Special Note:** When modifying layout elements on documents in the Billings file (i.e., estimates and invoices, etc.) you must, first, temporarily slide a very large single field out of the way—being careful not to delete it!¹

Slide it to the right or slide it down. (It will only slide down about two inches; enough to gain access to the invoice number field.) It is transparent and covers the entire the page. This field is used to mask certain elements that would be too confusing to see, if you inadvertently browsed a particular document in the wrong layout.

Such a circumstance would occurs, for example, if you mistakenly used the Flip Book to scroll through a list of estimates after clicking the Browse All Estimates button on the Estimates List View screen, when PhotoByte recommends that you use the Continue button, instead. This field, when you are in Browse mode, displays a gray mask covering the entire document layout and prompts you to press Command - 1 (Ctrl - 1 for PC) to go to the correct layout.

Don't forget to slide the field back when you are done!

¹ It is called the MainInvType Mrkr Copy field and is grouped with a second, similarly named field, mainInvType Mrkr. The names of the fields are difficult to see, though. This field is also referred to in footnote N° 1 of this brief.

Tech Support Brief

Searching for Records in the Contacts Database

To find records, one must specify criteria (the values you want to find) in the fields of a FIND screen. There are two ways to put PhotoByte into Find mode so you can enter your criteria:

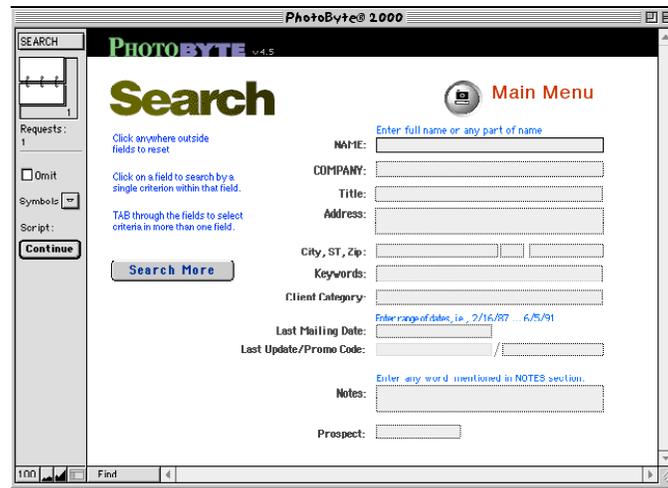
- ◆ Click either the *Search Records* button on the Main Menu or the *Search* button on List View and Profile screens
- ◆ Click the *Magnifying Glass* button on either a List View or Profile screen.



If you click the *Search* button you will branch onto the Search screen which gives you a choice to search PhotoByte data files other than just Contacts.



To search within the Contacts database, you'll click the *People, Companies, Locations* button. Then, you will see this screen in which it is obvious how to enter search criteria:



This Tech Support Brief, however, deals with making more elaborate searches while remaining at the Profile screen of your Contacts database, as well as various ways to view the results of your search.

When you search for and match all of the criteria you specify, you have created a Found Set. You may think of a Found Set as a list of people or companies corresponding to the criteria of your search. To Browse a Found Set, record by record, or by one Profile at a time, you can either click on the Flip Book pages in the upper left corner of the Status Area on your screen, or press **Command/Ctrl – 2** to see the same records in List View.

To find and display all records:

- ◆ Click the *Show All* button in the header of the List View screen (or press Command – J).

When you find all records in Profile view, they may be displayed one at a time by using the Flip Book described above.

A great advantage of PhotoByte in finding contact records is to use virtually all of the fields on the Profile screen itself as data-entry points for search criteria.

To find a subset of records from the Profile screen:

- ◆ Click the **magnifying glass** icon/button in the header of the screen.
- ◆ In the FIND request, enter or select criteria for as many fields as you want to search.

If you enter search criteria in more than one field, you will perform a logical “and” search;. I.e., your Find request returns an “intersection” of the criteria in two or more fields.

For example, on the Profile > Client/Keywords screen, type *Johnson* in the *Name* field and *aerial* in the *Keywords* field to find all employees named Johnson who might hire you to photograph aerial assignments. When you enter criteria in more than one field, you narrow your search.

To perform a logical “or” search, you look for a “union” of two criteria, or broaden your search, finding both people named Johnson in addition to those answering to any name who might hire you to shoot aerial photos. You may use more than two Find requests. See *Making Multiple Find Requests* below for more information.

If necessary, choose an operator from the Symbols pop-up menu in the Status Area to refine your search. Operators are located in the Status Area only when you are in Find mode.

Operators are explained on the following page.

<u>To find values that are</u>	<u>Use this operator</u>	<u>For example</u>
Less than what you type next	<	<40 or <09/09/1998
Less than or equal to what you type next	≤	≤zzzz or ≤05:00:00
Greater than what you type next	>	>95129 or >10/10/1998
Greater than or equal to what you type next	≥	≥aaa or ≥8:00
Some or all of a field's contents	=	=Smith (finds Smith or John Smith but not Smithson)
An exact match of the field's contents	==	==Smith (finds Smith but not John Smith or Smithson)
Within the range you specify	...(three periods or ellipsis character)	12:30...17:30
Duplicate values	!	! or !Smith
Today's date	//	//
Invalid dates or times	?	?
One unknown or variable text character	@	@on
Zero or more unknown or variable text characters	*	*smith*
Literal text in a field	""	"Jean-Louis" or ", Ltd."
Empty fields (for example, records of unfilled orders)	=	=

- ◆ Finally, click *Find* in the Status Area to see the results of your search.

Hint: To revert the find request to the way it was before you entered any search criteria, click the *Refind* button (just above the Name column) on the List View screen.

To repeat or edit a FIND request:

Click the *Refind* button on the List View. For additional criteria, press **Command/Ctrl – N** on your keyboard.

- ◆ If necessary, edit the search criteria.
- ◆ Click the *Find* button.

Making Multiple Find Requests

You can make several find requests with different criteria and then search for records all at once. For example, if New York, Paris, and Istanbul are all values in the same field, you can make three requests to create a found set of records containing all New York, Paris, and Istanbul records.

To specify multiple search criteria:

- ◆ Click the *Magnifying Glass* icon/button
- ◆ In the FIND request, enter or select criteria for the first request.
- ◆ Press **Command/Ctrl – N**).
- ◆ Enter criteria for the second request.
- ◆ Repeat the first two steps until you have finished defining search criteria.
- ◆ Click *Find* in the Status Area.

To navigate between find requests:

- ◆ Click the Flip Book icon, just as you do for records in Browse mode.

To make multiple requests where many of the search criteria are the same:

- ◆ Choose **Duplicate Request** from the Mode menu instead of **New Request**. Then change the search criteria that are different.

To revert the FIND request to the way it was before you entered search criteria:

- ◆ Click the *Refind* button in the header of the List View screen.

To delete a find request:

- ◆ Press **Command/Ctrl – E**).

Tech Support Brief

Default Slide Numbering

On each stock photo screen are two fields: *Category* and *N°*. Clicking on *Category* displays a View Index window. It will “remember” and display as many categories as you have previously entered in that field.

The first three letters of the category entered in this field will concatenate onto the beginning of your serial number. The *N°* field is a popup list with the numbers 1 through 20 that correspond to the number of sleeves on a plastic slide file page. The number you choose will appear after a dot at the end of your serial number.

For example, you might have a Scenic category, so a typical serial number for that slide, which might be in the 12th sleeve, will now look like this: SCE#1234.12. You can tell at a glance that it belongs in the drawer labeled “Scenic” on page #1234 in sleeve number 12.

You may also choose to dispense with this numbering scheme altogether and simply use the default numbers entered automatically. You would not use the *N°* field for prints or larger size transparencies, for instance; and you can still make your own alpha-numeric entries by typing directly into the Serial Number field.

Clone Button: There is a small button in the bottom, left corner of the slide mount depicted on your screen. Clicking this button creates a duplicate record of the slide but, also, increments the serial number, first, by increasing the *N°* field until it hits 20, then it starts over at 1 while, at the same time, it increments the page number up by 1, as well.

If you leave the *N°* field blank and do not use the *Clone* button, PhotoByte enters consecutive integers, or whole numbers, starting with whatever number you determine in Preferences.

Accumulated Revenue: When you enter a new revenue figure in the *Earned* field for an image and click *Continue*, PhotoByte will add that amount to the accumulated total for that particular image. This figure can be reset by choosing **Clear Cumulative Earnings** from the Scripts menu. Incidentally, it is set automatically by copying the usage fee for an assignment if the new stock photo record is created by clicking the *Stock* button on a ShootSheet.

Tech Support Brief

Tracking Self-promo Mailings

Each time you produce a mailing targeted at a particular set of prospects and clients, it is imperative to make note of what piece was sent, to whom it was sent, and when it was sent. Otherwise, it's hard to follow up, and you will be ill-prepared to mail the next promo in your campaign. You need to track the intervals between mailings too, so they are consistently spaced. And, when you make personal contact with individual clients or prospects, you must be able to tell quickly which promo pieces they have already received.

Note: Obviously, it is more efficient to send out many pieces in a single mailing. Nevertheless, as you augment your list with new names, you may have to send out individual pieces occasionally to allow recent additions to “catch up” with your mailing schedule. But that is the exception.

Tracking “mass mailings” used to be cumbersome and tedious. It wasn't practical to make individual entries in an ordinary database, let alone on hundreds of individual 3x5 cards. Sorting data to provide useful information was virtually impossible; i.e., eighty-seven art directors specializing in food assignments in New York City were sent Promo Poster A on July 17, 2001, and their names are... Or, on July 28, one hundred twenty-two art directors who assign “people shoots” in New York City were sent Promo C and B. The same two groups were sent Promo Cards C and D respectively three weeks later, etc. You need the capability to collate those names with phone numbers in an orderly fashion so you can make follow-up telephone calls without confusion, especially if the mailings contain “personalized” notes. More about that coming up.

Of course, you could purchase a computer-generated list on pre-printed labels every time you had a mailing to do. But those lists are rented; you neither own the list nor have the means to enter the names and addresses into a database without typing them one after another. In fact, doing so is probably a violation of the list owner's rights. Even if you could dump the list into a PC, it wouldn't be the kind of carefully managed and targeted list that you learned how to compile by doing your own research. And, *still*, you would have no way to accurately track the outflow of your promo campaign and solicit responses by making follow-up calls. You couldn't easily keep track of unsolicited responses (the best kind) either.

Well, that was the bad news. There is much more good news. You can track large mailings quite easily with the software you already have. PhotoByte utilizes an eight-section column (it's actually a multi-part field called *Direct Promo*) found on every Profile screen to accomplish this task for all of the records in a Found Set of contacts in one fell swoop.

Exercise:

Log In a Mass Mailing for Tracking Purposes

For the purpose of this exercise, you have decided to send a postcard (for which you have created a code called "card 1") to all of the advertising art directors in your Contacts database.

- ◆ Open PhotoByte to the Main Menu.
- ◆ Click the *Search Records* button.

You will see the Search Screen.

- ◆ Click the *People, Companies, Locations* button.

You will see the Contacts Search screen.

- ◆ Tab to the *Title* field and type: **art director**.

- ◆ Tab to the *Client Category* field and type **Advertising**.

Note: Clicking on—instead of tabbing to—either of the above two fields will present a View Index window listing all previously entered choices from which, as an alternative method, you may also select criteria to enter. This method prevents typographical errors in data entry.

- ◆ Click the *Continue* button.

A list of all the people in your Contacts database fulfilling those two criteria will appear on your screen. This is the Found Set of records for your search.

- ◆ Click on any name in the list to take you to that person's Profile screen.

On the right side of the Profile screen, notice the eight-section *Direct Promo* field. It will have some data in it already. The first two sections will contain “card 1” and “Poster #3” respectively.

- ◆ Click on section 1 reading “card 1” and Tab to section 3, which is empty.
- ◆ Type **card 2** in section 3.
- ◆ Click the *Fill* button located directly above the *Direct Promo* field.

You will see the Replace window appear.

- ◆ Read the contents of the window and click the *Replace* button at the bottom of the window and to the left of the *Cancel* button.

When you click the *Replace* button, the entry “**card 2**” will appear in section 3 of the *Direct Promo* field on all of the records in the current Found Set.

- ◆ Next, click on the *Last Promo* field at the bottom of the Profile screen. (This is one of the three Date fields on the Profile > Correspondence screen.)
- ◆ Enter the current date.

Tip: A short cut is to press Command/Ctrl – *minus sign* to yield today's days.

- ◆ Leaving the *Last Promo* field selected, click on the *Fill* button again.
- ◆ Click the *Replace* button again to fill in the same date for a last promo mailing on all the records in this Found Set.

All of your selected records are now coded to show that they have been sent “card 2” in the mail. Here's how to search for a set of contacts, all who have been sent the same mailing on the same date.

- ◆ From any Profile screen click the *Magnifying Glass* button.

You are still looking at the Profile screen, but it is now in Find mode. That means you can use each field to enter search criteria.

- ◆ Enter the date of the mailing you wish to specify in the *Last Promo* field.
- ◆ Click on the *Direct Promo* field and type: **card 2** (or whatever mailing code you wish to find).
- ◆ Click the *Continue* button on the left side of the screen.

You will have created a Found Set of all the contacts who were sent that mailing on that date. You may use the Flip Book to scroll through each Profile record of the Found Set or view the entire Found Set as a list by clicking the *List View* button. (Command/Ctrl – 2).

Either way, you have separated only those records indicating recipients of your self-promo from all of the other records in your database. You, now, also have the capability to produce a printed report as described in the section above.

< END >