

WHAT'S NEW IN VERSION 11?

Welcome to an overview highlighting the main new features/changes in Version 11. Most new features will be available in all editions, except for certain advanced settings.

Note: If you are upgrading from the prior version 10 and need to transfer and update custom data, please also see the special upgrading and migration instructions that were included with your upgrade.

ABILITY TO RUN VERSION 10.1 AND VERSION 11 CONCURRENTLY

Version 11 has undergone so much development, it's really a whole new product! You will enjoy standardized and expanded capabilities never available before! Because of significant changes in the components used, the latest version of 10 and version 11 may both be installed alongside each other so both programs may continue to be used. This is especially useful while initially tweaking customized data migrated from version 10 to version 11, as well as being able to use version 10 to access older inspections.

By default, the new Version 11 installs into separate program and data folders, keeping existing version 10 information separate, safe, and intact. Afterward, you will likely want to transfer customized forms and document templates from your version 10 data folder to your new version 11 data folder.

If you use Pocket3D, please note that pocket forms compiled in version 11 can only be used by the newer Pocket3D. Also, reports saved in the new Pocket3D format cannot be converted or used by any prior versions of 3D. However, the regular version 11 can still convert prior version 10 pocket reports. So you may wish to wait until your main version 11 program is ready to go before upgrading Pocket3D. That may be more convenient than switching back and forth between Pocket3D editions and compiled versions of forms.

Please Note: ONLY version 10.1 or higher can run after version 11 is installed. Any older versions prior to 10.1 cannot run on the same computer along with version 11.

PRINTING / PREVIEWING USES A NEW PRINT ENGINE AND FEATURE SET

Version 11 uses a brand new standardized print engine, which allows it to save narrative inspections to other file types without losing formatting. The new engine also expands the ability to use new formats and elements. This also means some features now work differently than in prior versions.

Preview screen and options are different

In conjunction with the new standardized print engine, the report preview is now searchable with new toolbar options: The new Thumbnails toggle with Pages and Outline modes makes navigation easier. The Save option lets you create a PDF or Word document directly from preview, formatted exactly as shown. Previews may also remain open while viewing or working with the original report.

All attached "documents" are now considered part of the final report itself, and therefore are seen when the entire report is previewed, and share its same header/footer and page numbering.

To quickly preview to proofread or review inspection findings, a new "Preview Current Form" button is provided. Report is not reorganized per any 'Category' settings during such a preview.

Reset page in documents attached to the inspection – option removed

This feature is going away. Why? Our new .NET-based print engine component now works in a

standard fashion, which means it can export to Word and other formats. These formats do not support resetting page numbers, headers, or footers in the middle of a document, and the component itself simply does not have the ability to do so.

So what can people do to include a document with a report, that they want treated as an independent entity with separate page numbering and headers or footers? A new feature was added to the Report Writer lower pane Attachments tab that will allow you to include additional documents with your report at final print or email time, but formatted independently if desired. However, you may find that the more standard way of including Attached Documents as part of the report itself is more desirable.

Changes to lower pane Attachment features

The lower Attachments pane in Report Writer now has two tabs- “Documents” and “Attached Files”.

The Documents tab shows documents attached directly to the report. This works similar to the prior Attached Documents feature, except these documents actually become part of the final inspection itself, sharing the inspection page numbering, header and footer, and included in the report preview.

However, the new Attached Files tab now lets you attach “any” type of file to your inspection, and choose whether it is emailed with the report. “Attached Files” are treated as separate attachment entities that do not share the report header, footer, or page numbering. If the attached item is a .W3D document, it is automatically appended to the end of the report PDF as a separate entity when printed or emailed. If “Before Inspection” is also selected for .W3D files, then it appends that document to the beginning of the report PDF as a separate entity (separate header/footer), with the report itself continuing the page numbering. Attached Files after the report start with fresh page numbering.

You can also use the Attached Files feature to combine graphical and narrative inspection reports together in a single PDF by exporting the narrative report to .W3D format. For instance, say you created regular and pest inspection reports for a particular job. You could open the narrative inspection, preview it, and Save it to a .W3D file. Then you may open your graphical report and attach the .W3D file you exported as an Attached File, so it will automatically be joined to the end of the graphical report PDF when printed or emailed.

Other types of “Attached Files” are included as separate attachments when a report is emailed automatically from 3D. This is a great way to include extra photos, PDF pamphlets, voice recordings, video segments, or other items with an emailed report, and keep those items archived with your report. If the attached files are not ticked, then they are not emailed but are archived with the report. This may be a great way to archive extra photos or voice notes you took, but didn’t want to send to a client.

To attach a file, access the Attachments, Attached Files tab, and right-click your mouse. Choose Add New and choose the desired file. Right-clicking and opening an attached file simply launches it using your Windows file association settings.

A new type of Action is also available to quickly attach certain files or handouts you frequently include.

Changes in functionality of header/footer documents

In prior versions of 3D, Header/footer documents for reports worked like a “background” document, over which the report would “overlay” at print time. However, in version 11 the header/footer document IS now a real header/footer. When printing or previewing a report, the program opens your Header/footer document and then inserts the body of all your attached documents and report into that document to create your final report. Thus anything included in body of the header/footer document will become the first part of your combined report document– not part of a background overlay. This also means the final report really becomes a single combined document rather than a series of

separate documents. Any headers or footers in attached documents are simply ignored at print time.

What advantages does this provide? Previously, headers and footers has to be set up separately for each and ever document attached to your report. Now this is no longer necessary, since the Header/Footer document automatically applies to all attached documents. This ensures consistency throughout all report pages and prevents overlapping data, makes it compatible with other formats (for easy saving to Word for example), and finally, all documents attached to the report can now be included in the report preview as a single final inspection document, sharing the same header/footer.

Also, the document editor allows you to set a separate first page header and footer. This can be used to suppress or create a special header or footer for the first or cover page of the report. Open your Header/Footer document in Page Setup and use the Insert tool to set up an alternate first header/footer. Leave it empty to suppress.

What if you still want certain documents to be treated as separate entities with a different header or footer? Use the new Attached Files tab (explained previously) to include your document.

Bonus PDF Improvements

The new print engine component is also device independent, which means the page formatting of your preview, printouts, and PDF files remain consistent on all computers, always matching!

Saving to PDF also now auto-creates a very nice index of bookmarks to main form sections, as part of the PDF itself. Check it out- very cool!

Auto-detecting and creating live web links in reports and word processor documents was also improved. URLs in the body of reports and documents are automatically underlined blue at preview and print time. You may manually format any URLs located in headers and footers as desired.

REPORT WRITER PAGE SETUP

The changes to standardize printing and previewing also mean certain formatting options differ somewhat from prior versions. Subheadings and narrative text are now treated as a combined element, with most settings applying to the entity as a whole. Spacing of printed items may also vary slightly from prior versions. Use Page Setup options to make any custom tweaks desired.

Regular edition users may also create a totally custom look and spacing for certain elements by designing custom templates— More about this new feature later.

A new full “Justify” setting was also added for Narrative text, Imported text, and Reference text elements in page setup for a neat crisp look.

New Findings/Recommendations feature

Another brand new feature is a way to include inspection Findings and Recommendations for a particular heading in a side by side column type style on final printed reports.

Page Setup Styles settings for Findings/Recommendations set the overall margin area and style of those subheading labels. The margin area is simply split into 2 equal columns for printing those items. Note: If auto subheading numbering is used, the numbering itself is not printed for Findings/Recommendations items, although they are included in the numbering calculations.

As long as two subheadings with the exact names of “Findings:” and “Recommendations:” are included in a report immediately adjacent, the program will recognize them as a

Findings/Recommendations pair and apply the special print layout. Although such subheading labels can be manually added to reports or forms, a option to easily insert the pair was added to the Custom Form Studio Insert menu. We recommend using the Heading above the subheading pair to label or describe your actual component or item.

New page setup Advanced feature – Custom template options (certain editions only)

If Preferences > Preferences “Enable advanced features” is turned on, Page Setup options will include the option to use either style settings or templates. We recommend using regular “style settings” to format most inspection elements, which automatically creates internal templates used at print time.

However, the new “template” option allows advanced users to create a advanced custom appearance for printing certain report elements instead of using "styles". Note: Creating custom templates is an advanced feature that requires careful planning to achieve desired results. See report writer help topic and resources about templates to learn about specific design rules that should be followed to ensure templates work properly.

Custom templates may also be added to specific form items in Custom Form Studio, and accessible by right-clicking report items, by using the "Override print layout" option. Again, we recommend this for advanced use only, when it is really necessary or desired for a single report item to print differently than the rest.

Other new Page Setup tabs

Several new inspection elements were also added to the Page Setup tabs. These are not necessarily needed or used by all reports, so you may ignore any unused items.

Rating Header (advanced only)- The Rating Header is the legend that prints for rated items, if used (i.e. MM, RR, OK). One would generally only adjust the Page Setup for this item when advanced Template options have also been created to customize the positioning and formatting of Rated Subheadings and their comments. Those items might be used for instance, to print ratings and their legend along the right side of the page instead of the left- by formatting both the rating header and rating subheading ratings elements in a table column on the right, using columns set up with similar or matching formatting. Or the Rating Header could be positioned in another appropriate location as desired.

Rated Subheading- allows one to specify different format for subheadings containing ratings vs. subheadings without ratings.

Findings/Recommendations- specifies formatting for new Findings and Recommendations type subheadings (previously discussed).

Image Section- formats area for images set to print “below” when inserted. This new feature is described in the Image Feature Improvements later in this document,

Page Setups may now be permanently attached to a particular form group or form item

Need to print certain types of inspections differently from others? Although you can still quickly select alternate layouts using Actions, or by loading them into Page Setup, you can now permanently attach a particular Page Setup layout file to a particular form group by assigning it to the group preferences in the Custom Form Studio and compiling it into the group. Right-click a form group to access Preferences. When report created with the form group are created or loaded, the specific Page Setup template is automatically loaded for printing and preview.

WORD PROCESSOR / DOCUMENT EDITOR CHANGES

The entire document editor component was updated, with prior menu functions like Insert, Zoom level, and Table now toolbar items. Insert Date field options for importing the current date (i.e. when document is produced/printed now merge the windows long/short formats, determined by your windows Control Panel Regional and Language options. Office Management date merge fields work as before. Insert Image toolbar button only inserts images "in text", which may now be resized afterward using the mouse.

Form Fill Fields in documents—removed

This item is going away. Why? It has always had conflicts with other types of fields, causing various formatting and other issues. Over the years, newer merge options such as Field From Inspection virtually eliminated the need to use Form Fill fields.

If you used this feature previously, what should you do? Just replace any areas where you previously used form fill fields with real merge fields instead. Use the Insert menu to include Office Management fields that automatically merge the appropriate job information. Or Insert Field from Inspection to merge report specific information into your documents.

The archaic Auto-print feature has also been removed as it also has been replaced over the years with better and more standard ways of attaching documents to inspections.

NEW REPORT WRITER "SENTENCE COMPLETER" PLACEHOLDER FEATURE

When a menu comment containing a special placeholder code [___] (3 underscores bracketed) is selected, the cursor automatically highlights it, so that other menu selections or typed comments inserts automatically into the middle of sentences to enter details or specifics. The Custom Form Studio editor Insert menu includes a "Menu placeholder" item to easily insert the placeholder into menu item comments where desired. See the Report Writer topic about Menu Placeholders for further details and tricks!

NEW REPORT WRITER MENU "GROUPING" FEATURE FORMATS LISTS OF FINDINGS

A new "Menu grouping" feature can automatically apply special formatting to groups of findings, so that groups of items are automatically enumerated or punctuated in series using either commas, numbers, or letters. For example, selecting a menu item with the text "**Shingle observations:**" followed by 4 menu items set for "Grouping" as follows "**Shingle observations: cupping curling lifting splitting**" may be automatically formatted as one of these layouts, depending on your settings:

"Shingle observations: A) cupping B) curling C) lifting D) splitting."

"Shingle observations: 1) cupping 2) curling 3) lifting 4) splitting."

"Shingle observations: cupping, curling, lifting, and splitting."

See the Report Writer help topic about Menu Placeholders for details and tricks!

IMAGE FEATURE IMPROVEMENTS

Images now automatically scale down when inserted into inspection reports to eliminate excessive file size and pixilation often caused by using the default high resolution settings of many cameras. Also, thumbnails were modified to use the image "Date picture taken" date if stored internally in the image header. This lets the bookmark time-stamp feature match up images even after being modified by certain other software or image wizards. Some older cameras may not include a "taken" date, in which case the normal image modified date is used. Since the date/time can't be accessed by 3D until the thumbnail is created, wait until thumbnails load for filters or sort orders to use the "taken" date.

A new right-click Sort option for thumbnails allows ordering them by filename or date. In addition, a shortcut to "My Pictures" added to the top of the folder tree listing provides quick access to images stored in My Pictures in either XP or Vista.

The Report Writer Preferences > Preferences option to add frames to images now adds them directly to images as they are inserted. If automatic borders are not turned on, one may selectively use the "Border" tool in View and Edit Images to quickly add one to the current image when desired. A color option is also provided in preferences for your frames.

Other View and edit image improvements include a new "magnification" tool to enlarge a selected area of the image for the benefit of clients. Arrow objects were adjusted to be thinner, and we added the ability to size the edges of placed items using the corner in the image editor.

A new alternate way of printing and grouping images together in a separate Image Section that prints "below" narrative comment areas has been added. You'll notice a new image position setting of "below" when inserting images, which may also be set as the default positioning setting if desired. Instead of printing within the narrative text field for a subheading, any images set to print "below" a given subheading or series of copied subheading fields, are automatically moved to a new Image Section printed below the narrative text area. Images are simply added to the Image Section area like text, so that different sized images may be placed side by side, or wrap across the page if desired. If a copied subheading label is the same and contains no text, as in the case when quickly adding new images using Thumbnails, then it also skips that subheading template (to avoid extra lines). However, this doesn't apply if an image in the middle of a group of copied subheadings is set to different positioning, or for special items like Findings/Recommendations pairs of subheadings. The new "Image Section" area may use separate margins and layout settings than other report elements- use the new Image Section item in Page Setup for this purpose. For instance, the Image Sections could be adjusted to all the way across the page if desired, even if narrative comments or other items do not.

OTHER EXCITING FEATURES & CHANGES

Inspector Notes are now located in a much more useful and prominent place in the lower pane. If you desire, you may leave that tab visible while working to easily see any helpful notes that were included ahead of time in the inspection forms (such as SOP information, items to check, how to use form items, or other helpful tips included by the form designer). Add your own form notes to various subheadings using the Custom Form Studio. Inspectors who simply want to add non-printing notes to a specific report may simply type them into the pane as desired. You'll also notice new visually friendly icons dress up the lower pane tabs.

Add/Copy button in Report Writer toolbar now includes an option to add a "Schematic" as you work.

Automatically include images in summaries!

New Summary > Preferences option allows automatically including images on your summary if desired. When enabled, any images in fields containing items marked for summary are automatically replicated on the summary page along with the comments.

Spell checker now retains underlining for misspelled words in most areas

Prior limitations of 60 menu items per subheading is now gone!

Adjust width and height resolution of schematics

New setting in Custom Form Studio form group preferences allows the width and height resolution of schematics to be adjusted. This makes it easier to include wider rectangular schematics instead of square ones if preferred, or where needed for certain mandated forms, like pest forms for instance. On a graphical form, the schematic will keep aspect ratio and center its self into the area provided, so a single wider schematic can be used.

Checksheets options were redesigned to work with new print engine. An automatic general pleasing layout is now used.

Custom Form Studio, group setting Modify Ratings has been expanded and a new ratings wizard added to assist setup. New text based ratings are now available that can print MUCH crisper and cleaner (and use less memory) than image based ratings. Since prior check box or circle type ratings were image-based, we recommend after migrating older forms containing ratings to version 11 to run the Ratings wizard for that group and replace the prior checkbox ratings with new text-based checkbox ratings. Also, one may now select wingding symbols as text-based ratings if preferred.

New RapidSketch Integration allows expanded Schematics ability. Option to turn on RapidSketch interface is available in Preferences > Preferences. When not enabled, schematic uses the 3D default. If enabled, RapidSketch becomes the schematic editor, with its impressive professional feature set that allows us to meet the needs of users who need those options (pest inspectors or others), while focusing our own resources on other development projects.

One may use the Preferences > Preferences, RapidSketch option to "enable" it simply to try the Rapidsketch interface for 90 days. Currently RapidSketch only offers their SDK on a per license basis, so you may purchase a license for it if you want to continue using it. Or one can turn off the interface and continue using our normal schematic features for new reports.

However, even after an evaluation period is ended, any schematics created and included in existing reports will still print in those reports afterward. The user just would not be able to re-access those RS schematics for further editing without a licensed copy of RS, nor create new ones using the RS interface without a license once the trial has expired.

To adjust the relative size of printed schematics or diagrams, use the Report Writer File > Page Setup, General tab option "Diagram scale percentage". You may also use the Preferences > Preferences RapidSketch option to "Hide dimensions on sketches when printed". When enabled, dimensions are still seen when drawing and editing, but are not saved in the diagram for printing.

Improved Backup & Restore options: The software Home page now reminds you when you last used the Backup option. Also a new Office Management File > Restore option was added which makes it really easy to choose a backup zip file and selective restore (or transfer) the desired types of files into the program. Where filenames already exists, you are prompted whether to overwrite. Both data and user files types are now included, automatically backed up and restored to the correct folders. The Preferences > Preferences, File Locations, "Open folder" buttons also allow convenient access to those files directly in Explorer.

"Enabled advanced options" in Report Writer Preferences > Preferences allows only users who need the advanced template options to display them. In normal mode (advanced options disabled), advanced template options are hidden unless already included in a form group or layout. This keeps some screens simpler and more user friendly for most users. As installed, advanced options are initially hidden, and they are not available in Focus editions, unless templates are already set up for form elements.

POCKET3D CHANGES

Pocket3D engine and formats were also rebuilt for version 11 to make it much more efficient to collect your data. Initial loading and saving of reports may take slightly longer, but navigation between report areas while working is now instantaneous!

New On the fly editing features

The new engine brings additional benefits like on the fly form editing functions. Now that headings and subheadings can be copied on the fly as needed, we recommend removing any unnecessary repeated sections from your master forms, as that also will make your form footprint smaller and the forms easier to navigate in Pocket3D.

- View and Style options were moved to the new Tools menu.
- New Copy and Add options were added there. Copy > Heading/Subheading button copies the currently displayed item and adds it to the current report only, just like the main program.
- The Add > Menu Items option allows adding a new menu comment for selection. When the report is converted, any new menu items added to existing form items prompt one to add them permanently to the master forms.

Image Path Setting

An alternate image path besides My Documents can now be set for inserting images into Pocket3D reports directly, such as from a memory card, etc. In Pocket3D, you may use File->Set Image Path to choose an alternate location from the tree. During conversion, the regular report writer still initially looks for images in the same folder as the pocket report .RCE file by default. However, if it doesn't find them there, then it will prompt you to navigate to the folder where the images are present (e.g. a memory card reader drive).

Converting and merging reports

During conversion and merging, only physically "changed" fields are imported as the program scrolls through the report fields. Also when converting any images inserted directly into Pocket3D for any given field, these are converted as separate images in duplicated fields, allowing separate captions and editing, additional flexibility with image sizing, and the ability for us to expand the number of images per field in the future.

Merging Pocket3D inspections logic was also adjusted to better handle different work flow scenarios. When merging a Pocket3D report into a converted or regular report of the same filename, any fields in the regular .r3d report that have been marked as changed are ignored during the merge (thus duplicate defaults and other duplicated information is avoided). This supports a work flow where users like converting a completed portion of a Pocket report to edit it further in a laptop, then continue in Pocket3D to complete another section, convert and edit again, and so forth. When merging a Pocket report of the same filename, one should consider any used fields in the main program as the master information, since new additions or changes to those fields in Pocket3D will not affect the main report.

However, if a Pocket .rce report is merged into a regular report that has a different filename, then all fields are merged, with fields containing information in both areas getting copied, so that all data is included. This supports the work flow model where multiple inspectors on the same job may use several devices or computers to complete report information and then merge it together when done. Inspectors must use differently named pocket reports to use this method.