



ClarisWorks Journal

ClarisWorks Users Group

Special Sample Issue

Tips from This Issue

Here is a digest of the tips in this issue of the *ClarisWorks Journal*. Details and step-by-step instructions appear on the page indicated after each tip.

General Tips

1. If you increase ClarisWorks' "Preferred Memory" setting you will get better performance and fewer "Insufficient memory" messages. (page 2)
2. You can control ClarisWorks' default font and document settings by creating a file named "ClarisWorks WP Options". (page 3)
3. You can use text and graphic frames to simulate removable Post-It notes. (page 6)
4. You can use commercially available "designer" paper to add pizzazz to your documents. (page 8)

Database Tips

1. Display both layout and browse views whenever you change a database layout. (page 4)
2. Pressing Option-minus automatically enters today's date or time into date and time fields. (page 4)
3. The easiest way to move a database label and its associated field is to select both objects and use the Arrow Keys. (page 14)

Spreadsheet Tips

1. Use ClarisWorks' spreadsheet charting capabilities whenever you need a chart or table in a document. (page 4)
2. Use ClarisWorks' Copy Table command when you want to insert downloaded data into a spreadsheet. (page 4)
3. Use ClarisWorks' BEEP and ALERT functions to automatically check all data entered into a spreadsheet file. (page 5)
4. Use ClarisWorks' Lock Titles command when you want to lock the titles on your spreadsheet screen. (page 5)

(Continued on back cover)

From the Editors

Welcome to this sample issue of the *ClarisWorks Journal*, the popular ClarisWorks newsletter from the ClarisWorks Users Group (C•WUG, pronounced "SEE-wug"). We published this abbreviated newsletter because we want you to know about C•WUG, our independent association of more than 15,000 ClarisWorks users in the United States and 51 other countries. C•WUG has one goal – to enhance your productivity with ClarisWorks.

C•WUG members receive these valuable services:

- Home or office delivery of a full year (ten issues) of the *ClarisWorks Journal*. Each 24-page issue is filled with hints, tips, news, and ideas that will enhance your productivity with ClarisWorks.
- Unlimited ClarisWorks telephone support from C•WUG's 65 volunteer-consultants.
- Access to C•WUG's ClarisWorks support site on the World Wide Web and to the C•WUG areas on America Online and CompuServe. These services give you immediate access to C•WUG's ClarisWorks templates, fonts, and graphics, and 24-hour-a-day answers to your ClarisWorks questions.
- Access to C•WUG's Public Domain Library with more than 550 disks filled with ClarisWorks templates, graphics and ClarisWorks-compatible fonts and utilities.
- Significant discounts on ClarisWorks-compatible products and other special offers that we negotiate for our members.

You'll find more information about C•WUG and a special discount membership offer in the brochure we enclosed with this issue. We're so sure you'll like our offerings that we maintain a "satisfaction guaranteed or all your money back" policy for our members.

Give us a try – it's risk free. We hope you'll join C•WUG and enjoy the *ClarisWorks Journal* and all our other valuable member services.

Greetings
from C•WUG!

Managing the Memory in Your Mac

Dear C•WUG,

I have eight megabytes of memory in my Macintosh, yet I get occasional messages indicating I need more memory in my system. Don't I have enough memory to run ClarisWorks?

Jennifer Erb-Downward
Evanston, Illinois

[Ed: You have more than enough memory to run ClarisWorks, Jennifer, but you probably never told ClarisWorks to use that memory.]

Memory management in a Macintosh is a two-part process. First, you add the memory chips to your computer (or use a software-based enhancement that simulates more memory). Second, you must tell your applications to “grab” more memory when you launch the program. Unless you change ClarisWorks’ default settings, the program will only capture 1400K of RAM. That setting lets you run ClarisWorks on almost any Macintosh system but can cause occasional “out of memory” messages even if you have lots of memory installed in your computer.

You should change this setting if you have four megabytes or more of RAM in your system. Follow these steps:

1. Quit ClarisWorks and return to the Macintosh Finder. (You cannot change the amount of memory used by an application with the program running on your computer.)
2. Click once on the ClarisWorks application icon and select “Get Info” from the File Menu to display the ClarisWorks Info Dialog Box in Figure 1.

The Memory Requirements section of the dialog box tells ClarisWorks how much memory to reserve when you launch the program. Figure 1 depicts the default settings that tell ClarisWorks to capture and run within only 1400K of memory, no matter how much memory you have in your system. (The “Minimum size” setting tells ClarisWorks to launch even if it can find only 1000K of available RAM.)

3. Change the “Preferred size” setting to at least 2000K. That tells ClarisWorks to capture more

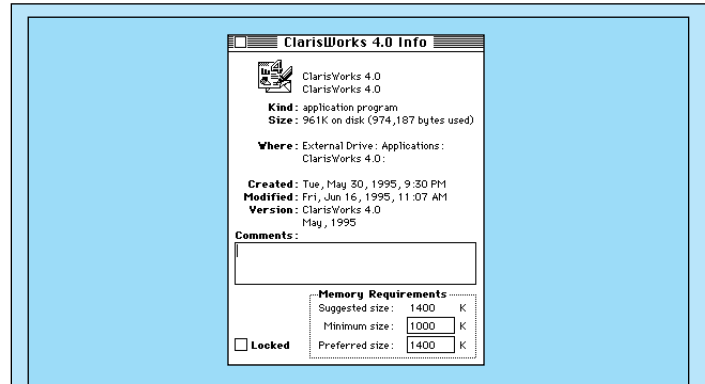


Figure 1: ClarisWorks Info Dialog Box

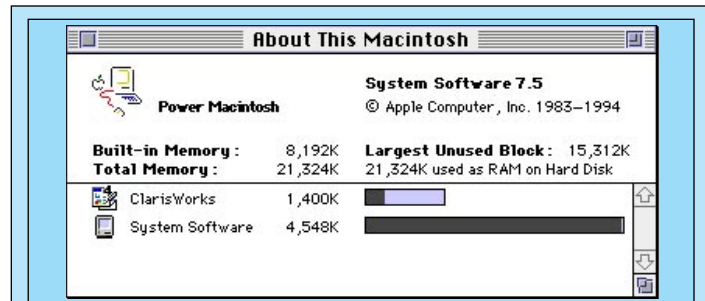


Figure 2: About this Macintosh

memory when you launch the program, which should eliminate the “insufficient memory” messages. Then close the dialog box and launch ClarisWorks.

You can monitor the memory usage in your Macintosh by returning to the Finder and selecting “About this Macintosh” from the Apple Menu. Your system will display the About this Macintosh Window in Figure 2. The “Built-in Memory” value should correspond to the amount of memory installed in your computer. (One megabyte of memory is 1024K of RAM. The computer in Figure 2 contains eight megabytes (or 8,192K) of RAM.) You can use the size of the largest unused block of memory to help you determine the maximum amount of memory you can make available to ClarisWorks on your computer.

The data to the right of “ClarisWorks 4.0” indicates that the program captured 1400K of RAM. The solid segment within the horizontal bar displays the proportion of the 1400K currently used by the program and your open ClarisWorks documents. ClarisWorks will generate insufficient memory error messages when the solid bar fills the rectangle no matter how much unused memory you have in your computer.]

C•WUG's Top Ten ClarisWorks Tips

by Warren Williams and Cathleen Merritt

Turn back the clock for a moment, back to the days of journeymen and apprentices. It's easy to picture an apprentice watching the journeyman and trying each new technique demonstrated by the master.

With time, the apprentice becomes a master himself, embellishes what he learned from his teacher, and passes his knowledge to the next generation of artisans.

So it should be with ClarisWorks. Spend a few minutes with a master and you will learn more about the program than you can from the best of books. Ask questions. Probe. Stop his work in mid-stream. And be prepared to remember all the techniques before you.

That is how we prepared this article. We watched, asked, and probed C•WUG's experts looking for the most useful ClarisWorks tips. Here are the ten most interesting tips we encountered in our explorations.

I. Create your own default settings.

ClarisWorks gives you complete control over the default fonts, margin settings, and other options that appear when you create a new document. But the procedure you follow to define your defaults is not intuitive.

The trick is to create ClarisWorks stationery documents that contain your preferences. You create a

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*Cathleen Merritt, the Director of C•WUG, has published more than 350 articles in the **ClarisWorks Journal** and in other computer newsletters and magazines.*

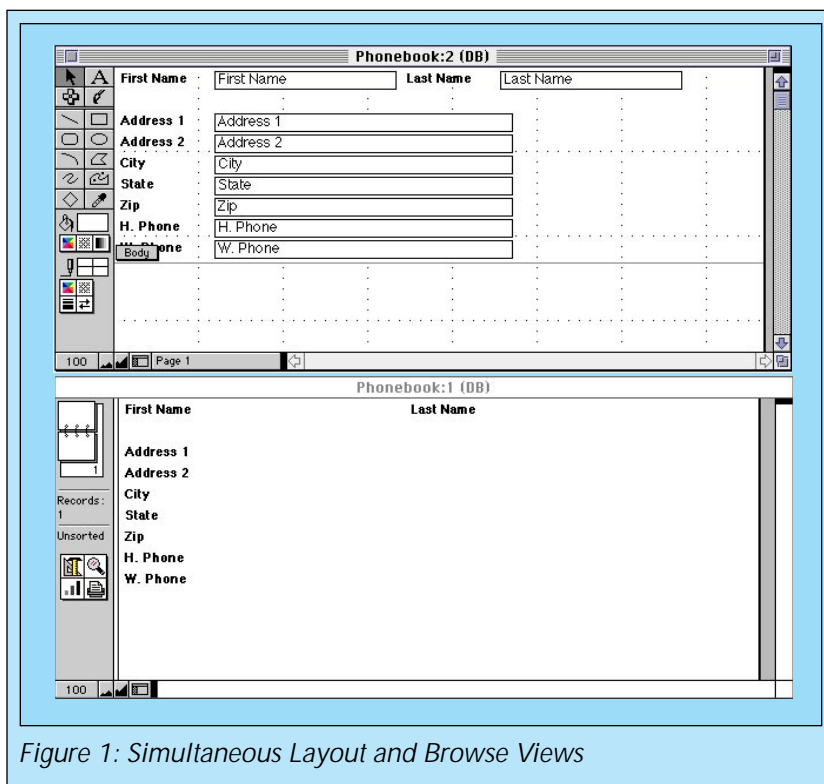


Figure 1: Simultaneous Layout and Browse Views

separate stationery document for each ClarisWorks environment. Then you save the documents in files named "ClarisWorks xx Options"; ClarisWorks will use those files as the basis for every new document you create.

The letters that replace the "xx" in the file name tell ClarisWorks which file to use. For example, the file "ClarisWorks WP Options" contains the default settings for all new word processor documents. "DB" defines the database defaults, "SS" controls your spreadsheets, "DR" defines the drawing document defaults, "PT" is for painting, and "CM" for communications. You then store the default files in the Claris folder within the System folder.

Try it. Follow these steps:

1. Create a new word processor document.
2. Switch to the font and size you want to use in your future documents.

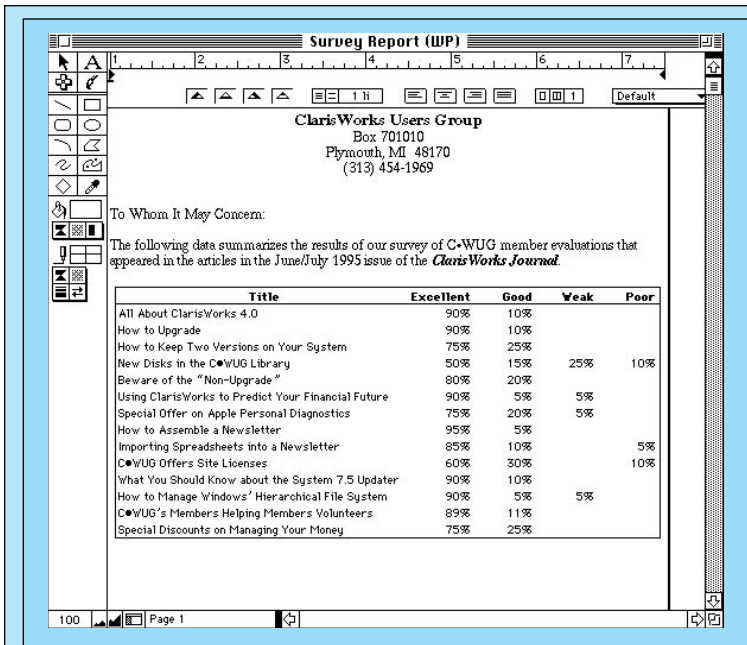


Figure 2: Using a Spreadsheet to Create a Table

3. Change the margin and/or tab settings to your new defaults.
4. Save the file as a ClarisWorks Stationery document named "ClarisWorks WP Options" in the Claris folder within your System folder.
5. Close the document. Respond "No" to the "Do you want to save your changes?" prompt.

Now you will test your template. Create a new word processor document and type a few characters. ClarisWorks should use the font you used in your "ClarisWorks WP Options" document.

II. Create two views of your database documents.

Changing a database layout requires you to switch between Layout mode (where you change the layout) and Browse mode (where you see the effects of your changes). Repeatedly switching between Layout and Browse modes can be tedious.

To increase your efficiency, create two views of the same data. Then you can display your document in both modes simultaneously and immediately see your changes on the screen (see *Figure 1*).

Follow these steps to create separate Layout and Browse views of a database file:

1. Display the database in Browse mode.

2. Choose "New View" from the View Menu. ClarisWorks will open a second window with the same view of your document.
3. Choose "Layout" from the Layout Menu to change the new view to Layout mode.
4. Choose "Tile Windows" from the View or Window Menu. ClarisWorks will arrange the windows so you can see both views on the screen. Any changes you make in Layout mode will immediately appear in the Browse mode view.

III. Use the ⌘-(minus) keystroke to save time entering database data.

Pressing ⌘-(minus) enters the current date, time, or record number in date, time, and number fields respectively. That makes it easy to enter dates and times in your database records. (Windows users: Press Control-minus to enter the date or time. A complete table of Windows keystroke equivalents appears on page 10.)

IV. Use ClarisWorks' Table Assistant to create your tables and charts.

ClarisWorks' word processor environment provides tabbing tools that you can use to create tables and charts. But ClarisWorks' Table Assistant makes it even easier to create lists and tables in your documents. For example, examine *Figure 2* which depicts a word processor document that contains a spreadsheet-based table with the formatted data. You can then use ClarisWorks' charting capabilities to create graphs for your documents.

Try it. Create a word processor document and then launch the assistant from the Balloon Help icon in the top right-hand corner of your screen.

V. Use the "Copy Table" Command.

ClarisWorks for Macintosh's communications environment offers a Copy Table Command that automatically copies and pastes tables from a communications document into a spreadsheet. That makes it easy to copy financial information and other tabular data received from your on-line service into any ClarisWorks document.

Follow these steps to copy tabular data captured from a bulletin board service into a spreadsheet:

1. Click and drag to highlight the information in the communications document on your screen.
2. Choose "Copy Table" from the Edit Menu.
3. Create a new spreadsheet or switch to an existing spreadsheet template.
4. Click in the cell where you want the first piece of tabular data to appear.
5. Choose "Paste" from the Edit Menu. ClarisWorks will paste each piece of data into a separate cell.

VI. Use ClarisWorks' BEEP and ALERT functions to improve your spreadsheets and databases.

ClarisWorks' BEEP and ALERT functions let you warn users of mistakes they make when using a ClarisWorks spreadsheet or database template.

BEEP sounds the system beep; ALERT sounds the beep and displays an alert box with the message you specify (see *Figure 3*).

For example, the formula

`=IF(A10<0, ALERT("Illegal negative value in Cell A10"),A3*A10)`

displays a warning message if cell A10 contains a negative number. Otherwise, this formula displays the product of cells A3 and A10.

VII. Use ClarisWorks' Lock Titles Option to lock titles on your spreadsheet screen.

ClarisWorks lets you lock the top rows and the left-hand columns of your spreadsheet templates as "titles" on the screen. The titles stay on the screen when you scroll around a large worksheet; that makes it easier to read the column and row headings in your template.

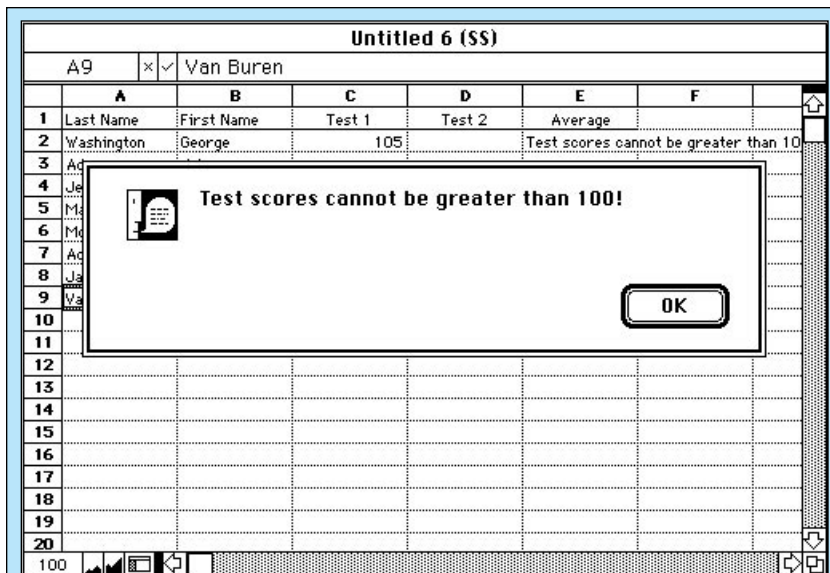


Figure 3: Warning Message Generated by the ALERT Function

	A	B	C	D	E	F	G	H	I	J
1										
2	Loan Amount		\$185,000							
3	Annual Rate		11.00%							
4	Term (Years)		2							
5	Pmts/Year		12							
6	Start Date		1/1/95							
7										
8	# of Pmts		50							
9	Payment		\$4,629.10							
10	Total Pmts		\$231,455.15							
11										
12	Pmt									
13	#	Date	Balance	Interest	Principal	Ending Balance	Cumulative Interest	Year End Interest	Year End Principal	
14										
15	15	3/1/96	141,395.41	1,296.12	3,332.98	138,062.43	22,498.93			
16	16	4/1/96	138,062.43	1,265.57	3,363.53	134,698.90	23,764.50			
17	17	5/1/96	134,698.90	1,234.74	3,394.36	131,304.54	24,999.24			
18	18	6/1/96	131,304.54	1,203.62	3,425.48	127,879.06	26,202.86			
19	19	7/1/96	127,879.06	1,172.22	3,456.88	124,422.18	27,375.08			
20	20	8/1/96	124,422.18	1,140.54	3,488.56	120,933.62	28,515.62			
21	21	9/1/96	120,933.62	1,108.56	3,520.54	117,413.08	29,624.18			
22	22	10/1/96	117,413.08	1,076.29	3,552.81	113,860.27	30,700.47			
23	23	11/1/96	113,860.27	1,043.72	3,585.38	110,274.89	31,744.19			
24	24	12/1/96	110,274.89	1,010.85	3,618.25	106,656.64	32,755.04			

Figure 4: Spreadsheet with Titles

To lock the titles, put the cursor on the cell that defines the lowest row and right-most column that contains the titles. Then select "Lock Title Position" from ClarisWorks' Options Menu (see *Figure 4*).

You cannot edit locked titles. To unlock the titles, re-select "Lock Title Position" from the Options Menu.

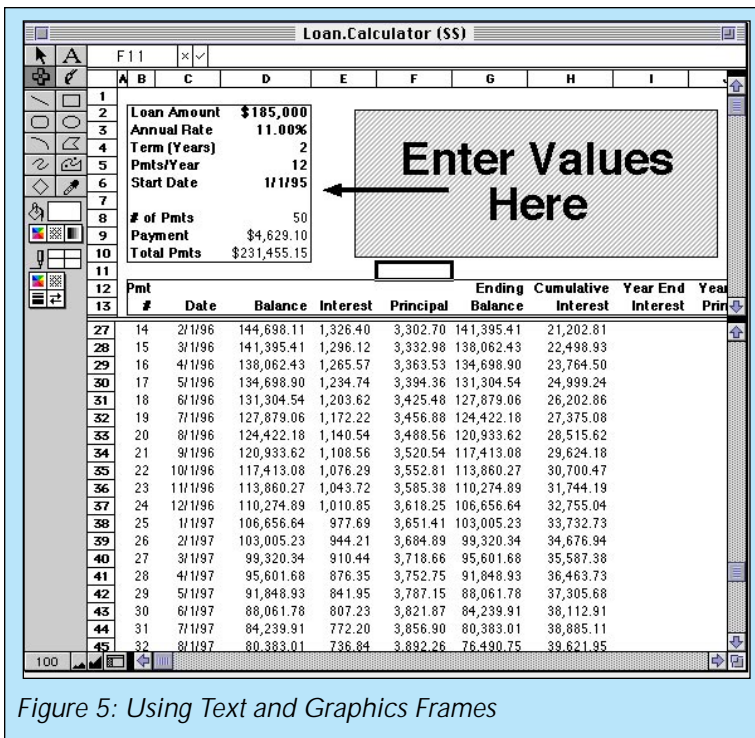


Figure 5: Using Text and Graphics Frames

VIII. Use the NOW function to enter the current date or time in a spreadsheet cell or a database record.

ClarisWorks' NOW function displays the current date or time in a spreadsheet cell or database record.

In a spreadsheet, enter `=NOW()` as the formula and set the number format of the cell to display a date or time. In the database environment, define the field as a calculated field, enter the formula `NOW()`, and select "Date" or "Time" from the "Format result as..." pull-down menu.

IX. Use text and graphic frames for your notes.

ClarisWorks lets you create text and graphic frames to present instructions and notes. For example, examine Figure 5 which uses a graphic frame in a spreadsheet to display instructions for the template.

To annotate a cell, select the Text Tool and click and drag to create a text frame next to the information you want to annotate. Then enter the text you want in the note. You can leave the text frame selected when you save your template and tell the readers to delete the frame by pressing the Delete Key after they read the note.

You can also use ClarisWorks' graphic tools to create an attractive border around the message like the example in Figure 5. Follow these steps:

1. Select the Rectangle Tool. Then click and drag in the spreadsheet to create a rectangle. Drag the rectangle into its final position in the spreadsheet.
2. Select a fill pattern from the Fill Palette.
3. Select the Text Tool and click within the rectangle.
4. Select a font, font style, and font size from the Font, Size, and Style Menus. Then type the text you want in your label.
5. Select the Arrow Tool. Then click once on the text and re-size and re-position the text block within the graphic.

X. Use the tear-off fill and pen tool palettes.

ClarisWorks offers "tear-off" fill and pen tool palettes that you can put anywhere on your screen. To save time and effort, put the palettes next to the objects you are creating or modifying. The torn-off palettes remain open until you click on their Close Boxes.

To tear off a palette, click on the tool to open the palette and drag to the right until the palette moves away from the left edge of the screen.

Conclusion

These are just ten of the dozens of tips and suggestions we receive from our C•WUG colleagues. Collecting and sharing your ideas is one of our most important jobs; please send your ClarisWorks tips to "My Favorite Tip", C•WUG, Box 701010, Plymouth, Michigan 48170 or fax your ideas and suggestions to (313) 454-1965.

How to Create a Tri-fold Brochure

by Nanette Luoma

Growing numbers of small business owners use ClarisWorks to prepare their correspondence and manage their finances. And many users are discovering that ClarisWorks is also flexible and powerful enough to handle their company's advertising and promotions.

Brochures are a perfect way to promote your business; a well-designed brochure can evoke a gratifying response from existing and potential customers. You can display your brochure at the front desk or checkout counter, or you can create a brochure that you mail to customers. Either way, a tri-fold flyer provides an opportunity to highlight your company's products or services.

This article describes how to create a ClarisWorks template you can customize to create your own two-sided, tri-fold brochure like the example in *Figure 1*.

Since there are as many brochure styles as there are ClarisWorks users, you should feel free to copy or "tweak" this layout to suit your taste. The informal look I chose is appropriate for a fictitious lawn service such as Keep It Green, but my design is equally at home in a consignment shop or bed and breakfast inn. By contrast, a law office might want to project a more formal image.

The paper you use can enhance your message, so you should choose your paper carefully. Solid color paper is a low-cost alternative, but designer papers like those offered by the suppliers listed in the "Colorful Options" sidebar can make your customers sit up and take notice. And that is what this template is all about.

Creating the Brochure Template

Follow these steps to create your own tri-fold brochure:

Nanette Luoma is the former Graphic Designer, Page Layout Specialist, and Public Domain Librarian for the ClarisWorks Users Group.



Figure 1: A Tri-fold Brochure

1. Launch ClarisWorks and begin a new drawing document.
2. Choose "Page Setup" from the File Menu and select the landscape page orientation.
3. Select "Page View" from the View Menu for a more WYSIWYG (what you see is what you get) look at your work-in-progress.
4. Choose "Document" from the Format Menu and set all the margins to zero inches. (All measurements in this template are in inches.) That lets you divide each page into three balanced columns. Set "Pages Across" to "2" and click on "OK".
5. Select "Rulers" from the Format Menu, click on the Graphics Button, and set the ruler divisions to "16". Although ClarisWorks will divide the rulers on the screen into eighth-inch increments,

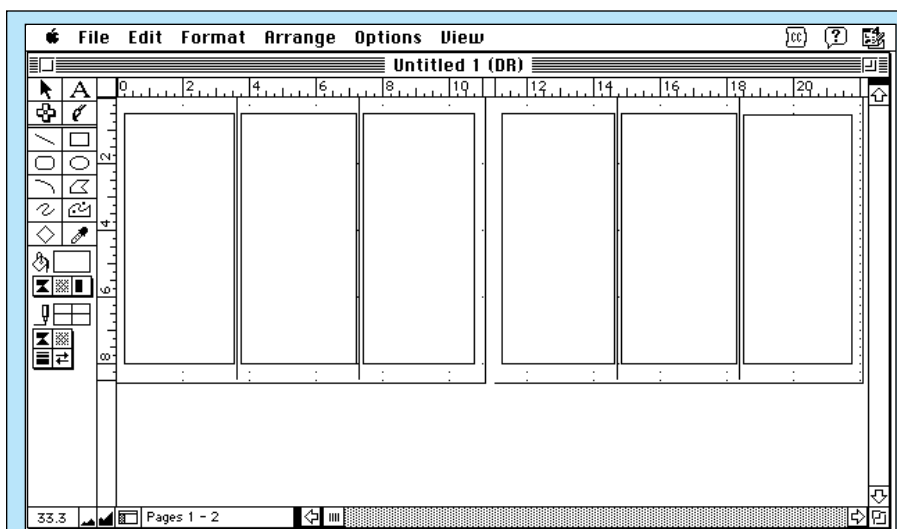


Figure 2: Brochure with Text Frames

6. Double-click on the line tool to “permanently” select that tool. (Double-clicking on the tool lets you create all four lines without jumping back to the Tool Palette. Clicking on any other tool turns off the line tool selection.)
7. Draw lines down the page starting at the following points on the ruler at the top of the screen:
 - 3 $\frac{5}{8}$ -inches
 - 7 $\frac{5}{16}$ -inches
 - 14 $\frac{11}{16}$ -inches
 - 18 $\frac{3}{8}$ -inches

To draw straight lines, click on the starting point of the line, then hold down the Shift Key to “constrain” ClarisWorks while you draw the line. (“Constraining” makes the line perfectly straight.)

8. Press ⌘-A to select all the lines and ⌘-G to group them as a unit. Grouping the lines makes it easier to delete them before you print your finished brochure. Click anywhere on the page to de-select the temporary guides.
9. Select “Frame Links” from the Options Menu. This displays the text frames you will create in the next step and makes it easier to select the correct frame.

Now you will draw the text frames for your template. Continue as follows:

10. Double-click on the text tool and draw the following text frames. Begin each frame one-half inch from the top of the appropriate page and end each frame at the 8-inch mark near the bottom.

Text Frame	Left Edge Begins at:	Right Edge Ends at:
Panel 1	$\frac{1}{4}$	3 $\frac{1}{2}$
Panel 2	3 $\frac{3}{4}$	7 $\frac{3}{16}$
Panel 3	7 $\frac{7}{16}$	10 $\frac{3}{4}$
Panel 4	11 $\frac{1}{4}$	14 $\frac{9}{16}$
Panel 5	14 $\frac{13}{16}$	18 $\frac{1}{4}$
Panel 6	18 $\frac{1}{2}$	21 $\frac{3}{4}$

Colorful Options

Here are five sources of attractive colored papers that can enhance your flyers. Call the companies’ toll-free numbers to request free, full-color catalogs. Designer paper is pricey but, to paraphrase an old saying, “Using the best paper for your brochure doesn’t cost, it pays.”

IdeaArt

Box 291505
Nashville, TN 37229
(800) 433-2278
(800) 435-2278 (fax)

Paper Access

23 West 18th Street
New York, NY 10011
(800) PAPER-01
(212) 463-7022 (fax)

PaperDirect

205 Chubb Avenue
Lyndhurst, NJ 07071
(800) A-PAPERS
(201) 507-5488
(201) 507-0817 (fax)

Queblo

1000 Florida Avenue
Hagerstown, MD 21741
(800) 523-9080
(800) 55-HURRY (fax)

Quill

Box 94080
Palatine, IL 60094
(800) 789-0057
(800) 789-8955 (fax)

ClarisWorks’ Autogrid feature will accommodate precision to one-sixteenth-of-an-inch when you lay out your brochure. Then click on “OK”.

Now you will draw vertical lines to serve as guides for the layout on each page. The settings I suggest leave room for the folds between the pages. Continue as follows:

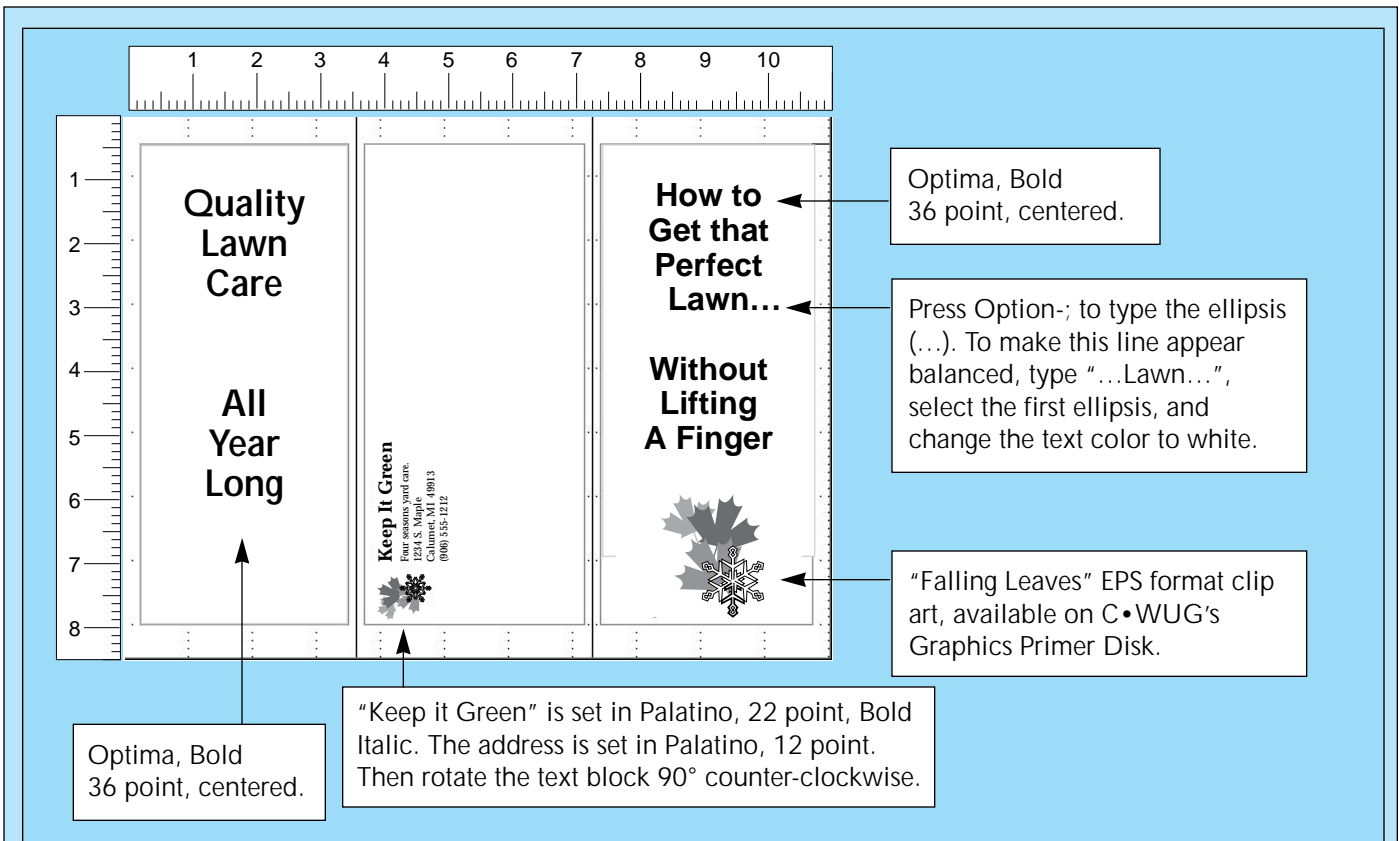


Figure 3A: Page One of Brochure

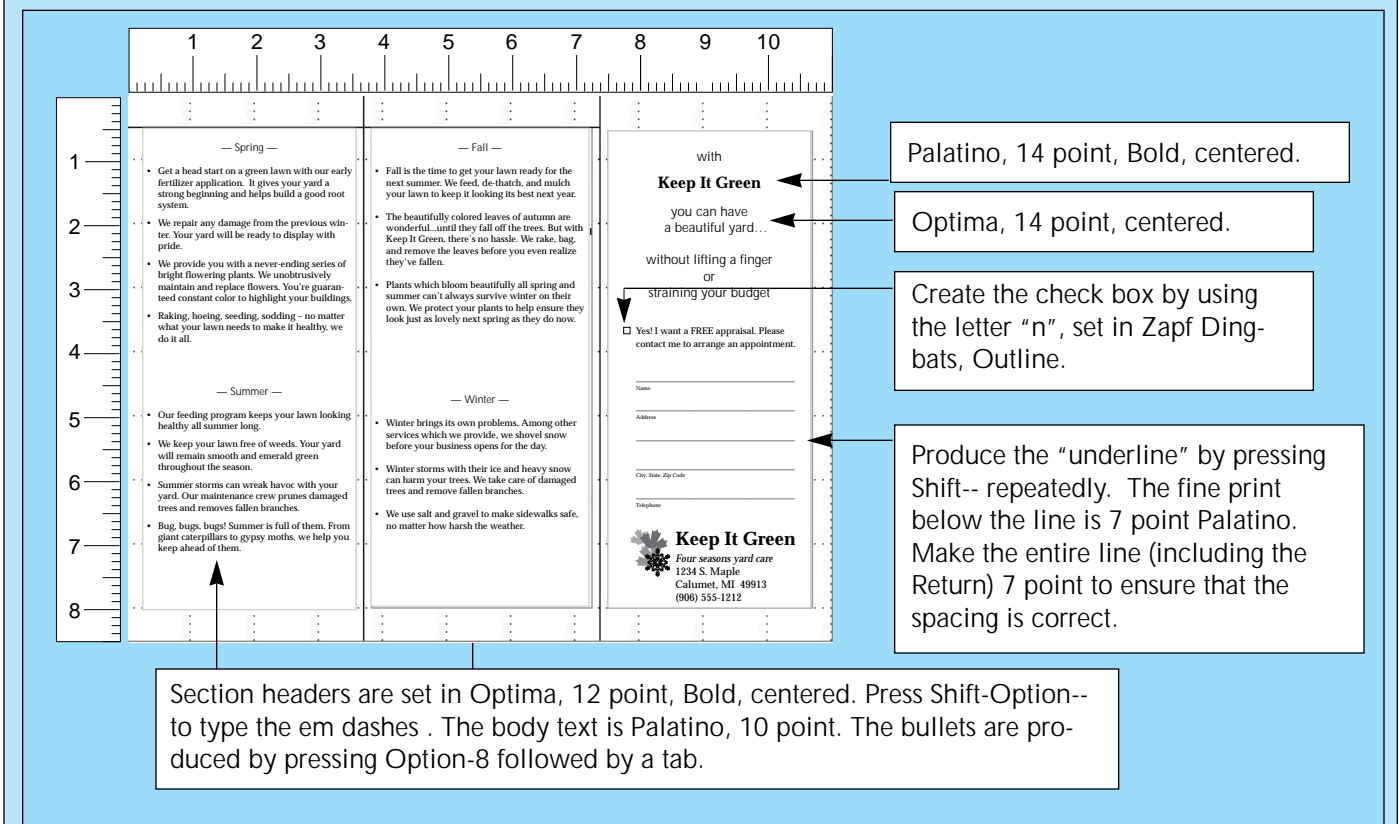


Figure 3B: Page Two of Brochure

How to Handle Printing Problems

Some printers do not print closer than .42 inches from the edge of the page. If your printer clips the edges of your document, use the following margins in step #10:

Text Frame	Left Edge Begins at:	Right Edge Ends at:
Panel 1	1/2	3 1/2
Panel 2	3 7/8	7 3/16
Panel 3	7 9/16	10 1/2
Panel 4	11 1/2	14 1/2
Panel 5	14 7/8	18 3/16
Panel 6	18 9/16	21 1/2

Your layout should look like the example in *Figure 2*.

11. Follow these steps to add your return address to the mailing panel:
 - A. Select the text tool and draw a small text frame in the middle panel of the first page.
 - B. Type and format your return address information.
 - C. Click on the the arrow tool and select the text frame. Then choose "Transform" from the Arrange Menu and select "Rotate". Select "Rotate" two more times to orient the return address block properly.
12. Save your template in a ClarisWorks stationery file named "Brochure Template". Then close the document.

Using the Template

Follow these steps to use the template:

1. Open the stationery template to create a new document and create a brochure to suit your needs. The possibilities are beyond the scope of this article, but you can get some ideas from the example in *Figures 3A and 3B*.
2. When you are done, select one of the temporary guides and press $\text{⌘}-X$ to delete all four lines. Then save your design.

Now you will print the brochure. Continue as follows:

3. If you use a LaserWriter, select "Page Setup" from the File Menu and choose "Larger Print Area (fewer downloadable fonts)" from the LaserWriter Setup Menu.
4. Select "Print" from the File Menu (or press $\text{⌘}-P$). ClarisWorks will warn you that the document's margins are too small and may cause the printout to be clipped. Ignore the warning by clicking on "OK". Then print your work.
5. Examine the edges of each page carefully for missing text or graphics. See the sidebar entitled "How to Handle Printing Problems" if your output is not acceptable.

Conclusion

As you can see, it is easy to prepare your own tri-fold brochures with ClarisWorks. Simply print a master copy and then take it to a local quick printer for double-sided copying. Fold the brochures, attach mailing labels, and send your promotional piece on its way.



Keyboard Reminders

C•WUG uses Macintosh keyboard conventions in the *ClarisWorks Journal*. Windows users should substitute the following keystrokes when completing the tutorials in each issue:

Mac	Windows
⌘	Press the Control Key (or Ctrl Key). For example, press Control-S when an author says "Press $\text{⌘}-S$ ".
Option	Press and hold down the Alt Key when an author tells you to use the Option Key.
Return	Press the Return, Enter, \leftarrow , or \downarrow key on the keyboard when asked to "Press the Return Key". (Windows keyboards label this key differently.) Do not press the Enter Key on the numeric keypad unless specifically instructed to do so.

How to Create Your First Database Report

by Keith Bernhard

This article describes how to create and print database reports. You will need the coin collection database included on the C•WUG's Best Templates disk that accompanies this issue.

Much of your work with database files can be classified as “overhead”; operations you must perform if you want to store your data on a computer. Necessary “overhead” includes creating the database and entering and maintaining your data. Of course, all that work pays off when you view or print your records.

ClarisWorks gives you three ways to use your data: (1) You can view the contents of one or more records on your screen, (2) You can use the program's mail merge capability to combine information from your database into any string of text, and (3) You can print reports that list or summarize the information in your file.

This article describes the reporting process. By the time you complete this tutorial, you will be able to create and print ClarisWorks database reports.

You need a database for this project. Rather than having you create one from scratch, I created the file for you. It's the coin collection database on the disk that Claris shipped along with this issue. [Ed: The author selected a coin collection example because it requires calculated and summary fields. That will help you develop the skills you need to work with different types of database files.] Your final report will list the contents of each coin collection case (see Figure 1).

Four Stages

Producing a report is a four stage process:

Dr. Keith Bernhard is an Associate Professor of Visual Communication and Technology Education at Bowling Green State University.

Coin Case #	Coin Type	Year/Mint	Condition	Count
04 A	Penny, Lincoln Head	1921	Fine	1
04 A	Penny, Lincoln Head	1923 S	Good	1
Total Count				2
12 B	Nickel, Indian Head	1921	Fine	1
12 B	Nickel, Indian Head	1923 S	Fine	1
Total Count				2
16 B	Dime, Mercury	1921	Fine	1
16 B	Dime, Mercury	1921	Good	1
16 B	Dime, Mercury	1923 S	Fine	1
16 B	Dime, Mercury	1924 D	Fine	1
16 B	Dime, Mercury	1927 D	Fine	1
16 B	Dime, Mercury	1929 D	Good	1
Total Count				6

Figure 1: Coin Case Directory Report

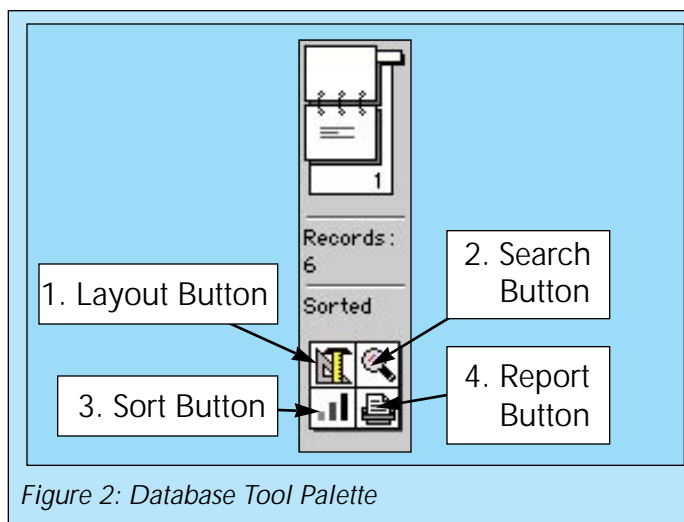


Figure 2: Database Tool Palette

Stage I: Create a layout.

Stage II: Select the records for the report.

Stage III: Sort the data.

Stage IV: Save the report.

It's easy to remember the sequence of these operations because they follow the order of the four buttons on ClarisWorks' database Tool Palette (see Figure 2).

This tutorial will take you step-by-step through the reporting process. I suggest that you launch Claris-

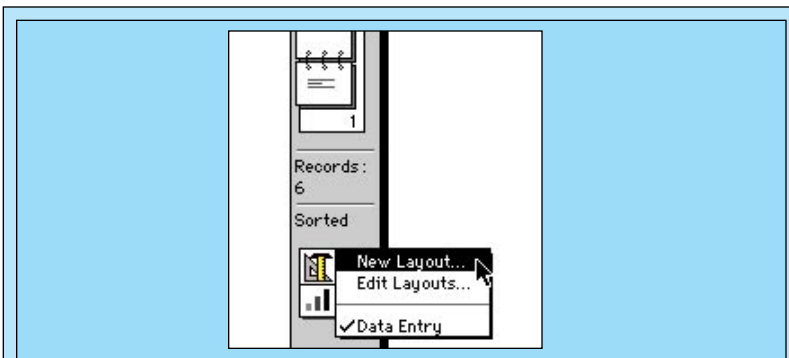


Figure 3: Creating a New Layout



Figure 4: New Layout Dialog Box

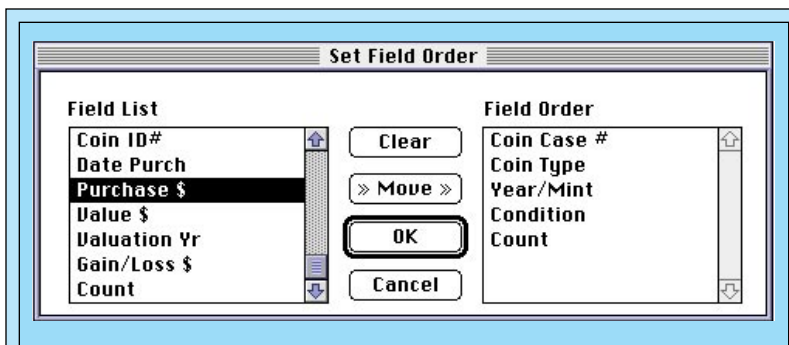


Figure 5: Selecting Fields for the Report

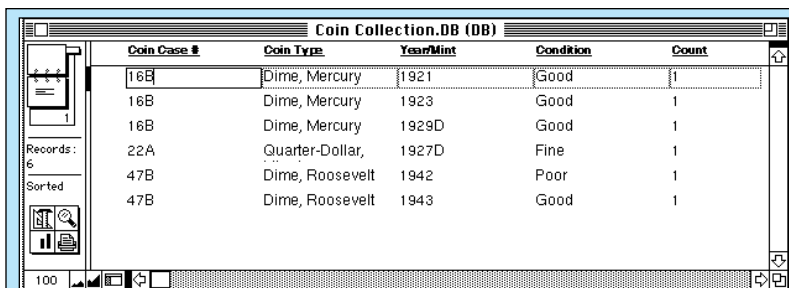


Figure 6: Unenhanced Columnar Layout

Works, open the “Coin Collection.DB” database on the accompanying disk, and work along with this tutorial. (Windows users: Open the file “COINS.CWK”.)

Stage I: Creating the Layout

You will start by creating the layout for the Coin Case Directory report in *Figure 1*. Follow these steps:

1. Click on the Layout Button on the Tool Palette and select “New Layout” (see *Figure 3*).
2. With the New Layout Dialog Box on the screen, select “Columnar Report”. Name the layout “Coin Case Directory”, and click on “OK” (see *Figure 4*). ClarisWorks will display the Set Field Order Window (see *Figure 5*).

Now you will choose the fields you want to print in the report and the order they will appear across the top of the page.

3. Click on the Coin Case # field name in the Field List, then click on “Move” to put that field in the Field Order Window.
4. Repeat this process for the Coin Type, Year/Mint, Condition, and Count fields. Then click on “OK”. The columnar layout that appears will look like the example in *Figure 6*.
5. Select “Layout” from the Layout Menu. Your screen will look like the example in *Figure 7*. The field names appear as labels in the Header Section at the top of the page. The Body Section shows where ClarisWorks will print each row of data.

Now you will use the Arrow Tool to adjust the size and location of the fields and field labels.

6. Click on the Coin Case # field (not the field label) to select that field. “Handles” will appear at the corners of the field box.

7. Click on the lower-right handle, hold down the mouse button, and drag the mouse to the left to reduce the size of the box. Re-size the field so it looks like the example in *Figure 7*.
8. Next, you will re-position the Coin Type field and its associated label. Click in the center of the Coin Type field, then hold down the Shift Key and click on the Coin Type label in the Header Section at the top of the screen. That selects both the field and the associated label.

Release the Shift Key and the mouse button. Then press the Left Arrow Key eight times to move both objects into the position shown in *Figure 7*. Then click elsewhere on the layout to de-select these objects.

9. Re-size the Coin Type field by clicking and dragging the lower-right handle to the right.
10. Re-size and re-position the remaining fields and labels so your screen looks like the example in *Figure 7*. Owners of small monitors will have to scroll to the right to re-size and move the Count field and its associated label.
11. Select Browse Mode (Shift-⌘-B) and check that you allocated enough space to each field and to the space between the rows of data.
12. If your layout does not display all the data, press Shift-⌘-L to return to the Layout Mode, and modify the layout. Then repeat step #11. The space between the row of fields and the Body Line determines the amount of space between the rows of data in your report. You can adjust this space by moving the Body Box up or down on the layout. Experiment with different settings. Press Shift-⌘-B to display the results of your changes and Shift-⌘-L to return to Layout Mode.

Adding Summaries

Now you will add a “Sub-Summary” section to your layout. This summary will count and report the number of coins in each coin book or case.

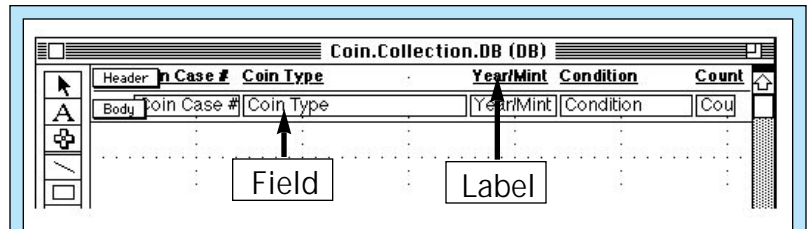


Figure 7: Fields Re-Sized and Re-Positioned

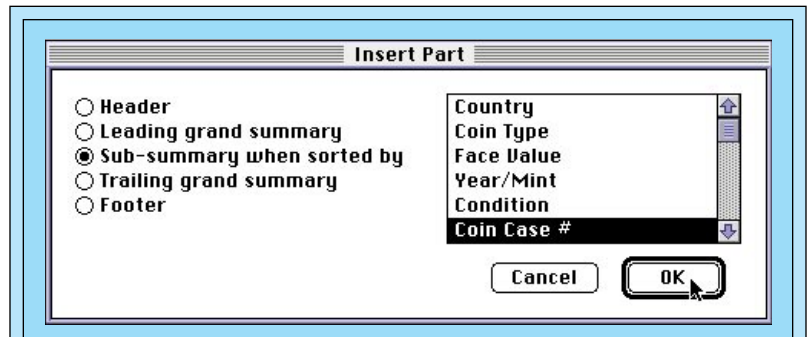


Figure 8: Insert Part Dialog Box

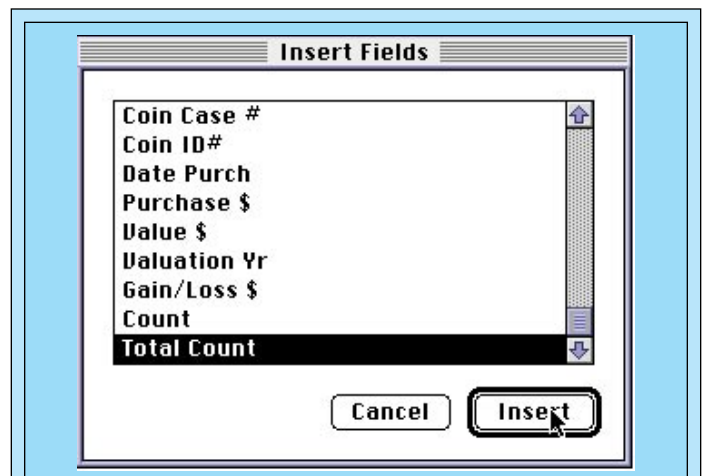


Figure 9: Adding the “Total Count” Summary Field

1. Go to the Layout Menu and select “Layout” (or press Shift-⌘-L). Then select “Insert Part” from the Layout Menu.
2. ClarisWorks selects “Sub-Summary when sorted by...”. Click on “Coin Case #” and click on “OK” (see *Figure 8*). That tells ClarisWorks to print a sub-summary section each time it switches to the next coin case number.
3. Sub-Summary sections can appear above or below the body of the report. Click on “Below”. The layout will re-appear with the Sub-Summary section below the Body section.

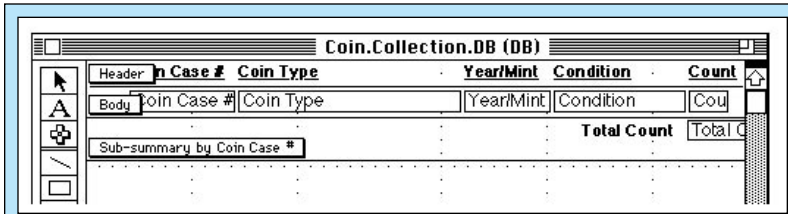


Figure 10: Sub-Summary Area and Summary Field in Place

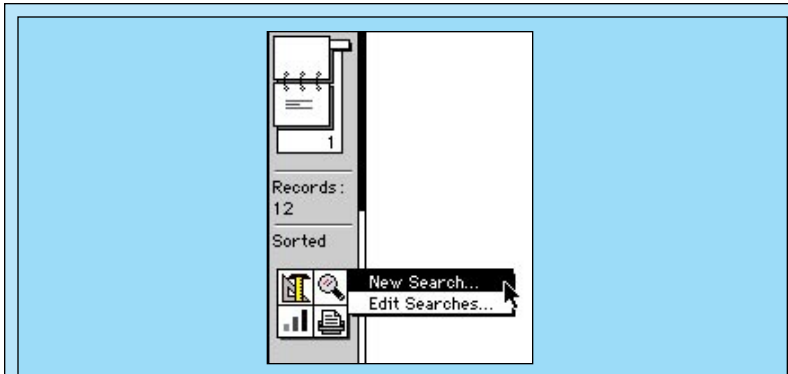


Figure 11: Defining a Search

Next, you will insert the Total Count summary field that will display the total number of coins in each coin case.

4. Go to the Layout Menu and select "Insert Field".
5. Select "Total Count" from the Insert Field Window and click on "Insert" (see Figure 9). The Total Count field and its associated label will appear in the body of the layout.
6. Select both the Total Count field and field label by holding down the Shift Key as you click on the field and its associated label. Then release the Shift Key, click on either the Total Count field or its label, and re-position the two objects in the Sub-Summary area (see Figure 10). [Ed: You can also use the Arrow Keys to move the objects into their final positions.]
7. Click and drag the Body Line to adjust the spacing so it matches Figure 10.
8. Select Browse Mode (Shift-⌘-B) to see the effects of your changes. [Ed: The Total Count field will not appear on your screen until you sort your data in Stage III below.] If necessary, return to Layout Mode (Shift-⌘-L) and adjust your layout.

9. That completes the report layout. Press ⌘-S to save your work.

Stage II: Selecting Records

Your next task is to select the records for your report. Your sample report will include all the records in the file, so you will not enter record selection criteria in this tutorial. But here are the steps to follow when you select records for other reports [Ed: See the article entitled "How to Locate Specific Records" in the December 1993 issue of the *ClarisWorks Journal* for help using ClarisWorks' Find Command.]

1. Click on the Select Records Button on the Tool Palette and choose "New Search" (see Figure 11).
2. Enter a name such as "Pennies" for the search. Enter a search name that will help you remember the selection criteria established for that search.
3. Click on the field(s) you want to include in the search and enter the search criteria. Then click on "Store".
4. Click on the Select Records Button and select the search name from the pop-up menu. ClarisWorks will select the records you specified in step #3 above. Select "Show All Records" from the Organize Menu to display all the data in your file.

Stage III: Defining a Sort

Next, you will define the rules you will use to sort the records in the report. You want your Coin Case Directory to list the records by Coin Case #. Then, within each case, you want to list the coins by Coin Type, and finally, within each Coin Type, by Year/Mint (see Figure 1).

Follow these steps to define the sort:

1. Press Shift-⌘-B to enter Browse Mode.
2. Click on the Sort Records Button on the Tool Palette and choose "New Sort". ClarisWorks will display the Sort Records Dialog Box in Figure 12.

3. Name the sort “Coin Case Directory”.
4. Select “Coin Case #” in the left window and click on the Move Button. The default sorting order is “ascending”, and since you want the coin cases listed in ascending order (that is, from 1 to 10), accept this ClarisWorks default.
5. Select “Coin Type” and click on the Move Button. Then select “Year/Mint” and click on “Move”. Once again, ascending order is appropriate. Your screen should look like the example in *Figure 12*.
6. Click on “OK” to define the sort.
7. Now you will sort the data. Click on the Sort Records Button and select “Coin Case Directory” from the menu. ClarisWorks will sort the coins by their case number, by coin type, and then by year minted within each coin type.
8. Now you can see the effects of your changes. Press Shift-⌘-P (or select “Page View” from the View or Windows Menu) to display the report in *Figure 1*.
9. Press ⌘-S to save your work.

Stage IV: Saving the Report

Finally, you will save the report layout, search, and sort criteria so you can print the report with a single mouse-click. Follow these steps to save your report format:

1. Click on the Report Button on the Tool Palette and choose “New Report” (see *Figure 13*).
2. Name the report “Coin Case Directory”.
3. Select “Coin Case Directory” from the Layout pop-up menu.
4. Select “Coin Case Directory” from the Sort pop-up menu.
5. Click on “Print Report”. That tells ClarisWorks you will want to print the report instead of just viewing the results on the screen.
6. Click on “OK” to save the settings.

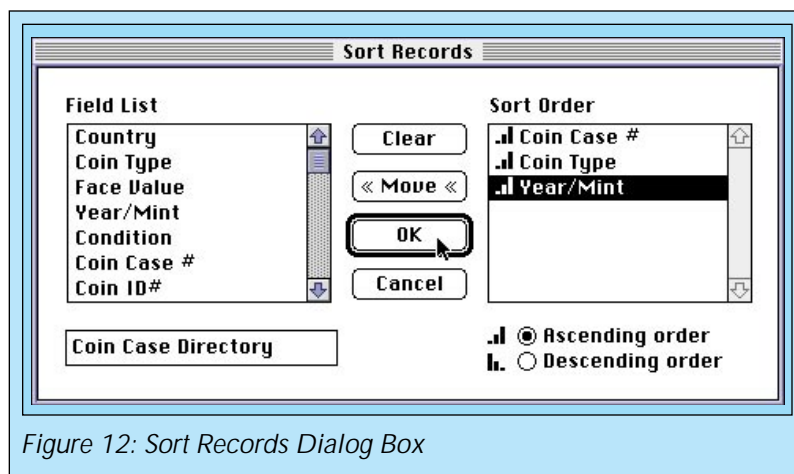


Figure 12: Sort Records Dialog Box

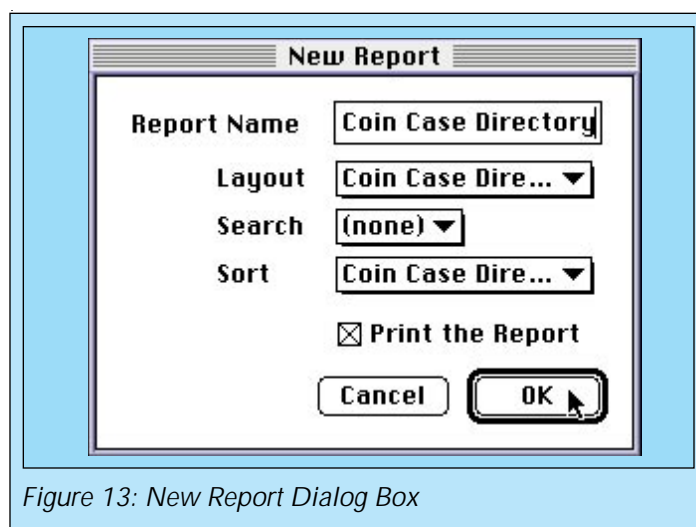


Figure 13: New Report Dialog Box

Now you can print the report. Just click on the Report Button on the Tool Palette and select “Coin Case Directory”. ClarisWorks will switch to the correct layout, sort your data, and print the report.

Conclusion

Well, you’ve done it. You created your first report. As you saw, the process involves more than two dozen steps, but each step is easily “do-able”. And the overall process flows in a logical, sequential order guided by the four buttons on ClarisWorks’ database Tool Palette.

Since ClarisWorks saves your report specifications, printing each report is as simple as selecting the saved report from the database Tool Palette. ■

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TIME VALUE MATERIAL

Special Sample Issue

Tips from This Issue

(Continued from page 1)

5. Use ClarisWorks' NOW function to automatically enter today's date in a spreadsheet cell or a database record. (page 6)

Graphics Tips

1. For easier formatting, "tear off" the Fill and Pen Palettes when you need to modify a graphic object. (page 6)
2. Use Page View to help you visualize a heavily formatted document. (page 7)
3. Double-clicking on a tool lets you create multiple objects with the tool without returning to the Tool Palette. (page 8)
4. Try drawing vertical lines to help you visualize the panels on your layouts. (page 8)
5. For perfectly straight lines, hold down the Shift Key when you draw the line. (page 8)
6. Tri-fold brochures require unequal-size panels. (page 8)

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