

**StairBiz Manual**

**v9.00.0**

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# Chapter 1 : How to use this Manual

StairBiz will be at the heart of your business. If you know how to drive it under the most demanding circumstances you will find it a totally indispensable tool – powerful and adaptable. But the secret is knowledge – learning what the program does, why, and how.

This manual is the key to using StairBiz successfully. We recommend that you study it like you would study a subject in college.

The most important first step is to familiarize yourself with the tables of contents.

There are three in this manual:

1. **The chapter headings**
2. **The table of contents in detail**
3. **A topics list in alphabetical order**

The topics list is very useful for cross referencing. Every topic reference in this manual is underlined with a straight line, for example “see the Setout window”. So whenever you see an underlined reference, refer to the topics list for the page number of the topic.

A topic heading that is referenced from WITHIN that topic, rather than being underlined, is in bold. For example, with the topic on Setout window you would see “the **Setout window** is used to …”

Buttons and other controls in a window which are referred to by name are also in bold, for example “click the **Save** button”.

There is also a glossary of terms. Ever reference to a word or phrase which contains a definition in the glossary of terms is underline with a wavy line, for example “the balcony newel”.

Some of the features listed in this manual do not apply to certain types of licenses.

## How to view this manual – the Document Map

It is HIGHLY recommended that you use the MS Word **Document Map** (select it from the View menu). This shows a collapsible table of contents in a separate pane at the left of your screen which allows quick navigation to the topics you are reading on the right of your screen.

Right-click the Document Map and select **Show Heading 1**. From there you can click the “+” symbol to temporarily expand whatever chapter you are reading.

This is by far the easiest way to navigate around this manual.

## The optional “Estimate” module

If you have not purchased the Estimate module, some things in this manual will not apply. The Estimate module consists of all things related to costing labour and materials for jobs, including the use of filters to do “take-offs” (converting items in your Cutting List to parts from your Parts window).

Following is a list of the windows that you don’t have:

**Defaults windows:**

Parts

Part Filters

Labour Filters

**Process Windows:**

Materials Cost

Labour Cost

Quote Calculation

Quote

Invoice

Payments

Receipt

**View Windows:**

Project

Materials Cost

Labour Cost

Quote Calculation

Quote

Invoice

Receipt

**Others:**

Inventory (Project menu)

QuickBooks (Export menu)

Following is a list of the windows that contain less information than usual:

**Defaults windows:**

Timbers (no timber costs)

Miscellaneous (categories relating to costing)

## Customizing this Manual

The main reason this manual comes as a MSWord document is so you can customize it for style and terminology.

You can set a **font** (or size) more to your liking – we traditionally use ZaptEllipt, but have set it to Arial in case you don’t have ZaptEllipt. To set the font for the entire manual, it’s best NOT to select all the text and set a font – go to **Style** (from the **Format** menu), select the “Normal” style, select the **Modify** button, select the **Format** button, select **Font**, and change the font name. For best results all fonts and sizes should be changed by changing the style.

Note that we have removed almost all the pictures from this manual to get the size down for a web down-load. With pictures the size is enormous.

If your terminology is different to ours (most likely), you can do a find/replace on those terms so that the manual feels more familiar to you. Below is a list of the terms most likely to need customization, and instructions on how to change them.

Note that you can also change the terminology in every window and menu used in StairBiz (see Language window). The terminology changes you make to this manual should match those you make in that window – see the **Terminology** section of the Language window for a quick way to do this).

1. The following terminology has been specially chosen to facilitate a quick and trouble-free global find/replace.
2. The following terms do not conflict with any other words in this manual. For example, the term “going” – sometimes called the “run” - is not used in this manual other than to mean the horizontal distance from nose to nose. So you can safely do a global find/replace knowing you will not encounter something like “he was going to the shop”.
3. Part of this strategy required that we use only single words in the terminology, however this doesn’t stop you for replacing a single word with two or more words (e.g. “balconyplate” could be changed to “return plate”, “closedstring” could be changed to “box string”)

When doing a global find/replace, in Word’s **Find and Replace** window:

1. Click the **More** button to expose the **Search Options**.
2. Be sure the **Match case** option is UN-SELECTED (Word will auto set for upper and lower case as it finds it)
3. Be sure the **Find whole words only** option is UN-SELECTED (this will replace singular and plural in one hit)
4. All other options should also be UN-SELECTED
5. For each of the following terms (i.e. those that you want to change), copy/past the term shown below into the **Find What** text box, type the replacement (i.e. your terminology for that term) into the **Replace With** text box, then click the **Replace All** button.
6. Do not use capital letters in either the find or the replace (if the **Match Case** option is ticked, Word will deal with this appropriately).

After you have made your changes, it’s best to regenerate the table of contents.

1. Insert your cursor at the beginning of “Table of Contents” (the first line after the “Full Table of Contents” heading on page ii, Sec 3).
2. Go to menu Insert / Reference / Index and Tables.
3. Click OK.
4. You will be prompted to replace the existing – say Yes.

acorn The turned portion of a newel above the upper flat. It is entirely ornamental. Sometimes called “knob”, “ball” etc.

balcony The area around the cut-out in the upper floor. For example, balcony balustrade is the horizontal balustrade around the cut-out in the upper floor. Sometimes called a “return”.

balconyplate A horizontal piece of timber sitting on the upper floor along the well cut-out down into which run the balusters of the balcony balustrade. Sometimes called a “plate”.

balconytrim A moulding which covers the gap between the balconyplate and the inside of the well cut-out in the upper floor.

baluster The vertical elements (often turned) that create a barrier between the handrail and the stair. Sometimes called a “spindle” or “picket”.

bearer Horizontal pieces of timber beneath a landing that give or add support to that landing. Sometimes called a “tread support”.

blank A plain piece of timber prior to being Profiled, turned or otherwise worked. It’s the piece of timber you pull from your timber rack.

bullnose One or more treads at the bottom of the stair that extend past the line of the string and often have rounded ends. Sometimes called “starter step”.

closedrise Refers to a flight where the riser boards are included. Usually called “closed rise”.

closedstring A string which is not sawtooth. The treads trenched into the side of the string and are normally wedged. Sometimes called a “box string” or “routed string”.

detachednose The nosing of a landing tread that has been detached from that landing tread for the purposes of facilitating installation.

fillet The piece of timber used between balusters in the plow of handrail, shoerail and balconyplate. They are used to space the balusters accurately and tidy up the general appearance.

flat The portion or portions of a newel that is not turned. For example, the part of a newel that the handrail runs into.

fret A (roughly triangular) shaped piece of timber used on a sawtooth strings. It is fixed under the sidenosing of a tread and mitred into the end of the riser below the tread. It is purely cosmetic. Sometimes called a “bracket” or “stringer bracket”.

going The horizontal distance between adjacent nosings (or adjacent risers) in a stair. Sometimes called the “run”.

halflanding A single tread landing of a U-shaped stair which has a length the same as the combined widths of the upper and lower flights.

hockey Refers to a string which is made up of a straight flight string combined with a landing string (to form the shape of a hockey stick). In other words the two strings are joined to become a single string. For the sake of the exercise it can also refer to two straight flight strings joined together to be continuous (this is possible in StairBiz). The word “hockey” in this manual would almost always be followed by the word “string”. Sometimes called “continuous”.

kitelanding A quarterlanding with 3 treads, the second tread being in the shape of a kite. We sometime use this term to describe a quarterlanding with anything more than two treads.

lining Material used to line the underside of a stair (hiding the underside of the treads, risers etc.). Sometimes called “soffit”.

MDF Medium density fibreboard material (rather than grained material).

newel The vertical square elements used to support handrail. Sometimes called a “post” or “knewel”.

openrise Refers to a flight where the riser boards are excluded. Usually called “open rise”.

outstep The top nosing of the stair, which normally rebates over the trimmer and is flush with the upper flooring. Sometimes called a “landing nose” or “lander”.

platform An existing level landing (either created by the builder, or by the stair maker as something not part of the stair as designed by StairBiz).

plow The groove in handrail, shoerail and balconyplate made specifically to house balusters. Sometimes called a “rebate” or “groove”.

quarterlanding A square shaped single-tread landing (like the ones used in an L-shape stair). Sometimes called a “level landing”.

sawtooth Refers to a string which is cut such that the treads sit on the string rather than being trenched and wedged into the side of it. Sometimes called “open”, “cut” or “horse cut” string.

shoerail The piece of timber which sits on a box string (either tenonside or wallside) down into which runs the stair balusters. Although it would be more usual to have shoerail with a tenonstring, if a wallstring has balustrading, then shoerail would apply. Sometimes called “string cap”, “bottom rail”, “bottom plate”.

sidenosing Used only on sawtooth strings, it is a nosing fixed to the end of the tread to hide the exposed end-grain of the tread. Sometimes called a “returned tread”, “return nosing” or “false end cap”.

skirting Where a landing does not have strings (i.e. is existing, or the landing is supported by bearers rather than strings), and the adjoining flights have closedstrings, skirting may be used to trim the top-side of the landing to give the appearance that the adjacent closedstrings continue around the landing.

splitlanding A square landing (i.e. quarterlanding) with 2 treads.

string The element of the stair that runs up either side of the treads and support those treads. Sometimes called a “stringer”, “carriage” or “apron”.

tenonside We use tenonside and wallside to refer to a particular side of the stair. The tenonside side refers to the side which is (under normal circumstances) the open side (as opposed to the wallside side). For example, for a normal L-shape stair that goes up and to the left, it would be the left hand side when going up. Sometimes called “tenon”, “open” or “inside”. Usage includes “tenonside newel”, “tenonside bullnose”, “tenonside side of the stair”.

tenonstring A string on the tenonside side of the stair. Sometimes called a “tenon string”, “inside string” or “open string” (i.e. the string on the open side of the stair).

timber Material that comes from a tree. Sometimes called “lumber”.

trenched Refers to one component being “housed” or “logged” into some other component. For example, treads into strings, handrail into newels, etc.

wallbracket A piece of hardware used to fix wallrail to the wall.

wallrail Handrail which is fixed to the wall (using wallbrackets) rather than being fixed to newels.

wallside We use tenonside and wallside to refer to a particular side of the stair. For a normal L-shape stair that goes up and to the left, it would be the right hand side when going up. Sometimes called “wall”, “outside” or “closed” (being normally the closed side of the stair). Usage includes “wallside newel”, “wallside bullnose”, “wallside side of the stair”.

wallstring A string on the wallside side of the stair. In this manual, the term wallstring does not necessarily mean the string is adjacent to a wall - just that it would more usually be. Sometimes called a “wall string”, “outside string” or “closed string” (being the string on the closed side of the stair).

walltrim The piece of timber which covers the gap between a string and a wall.

winder Normally refers to a tread when that tread is part of a landing containing more than one tread such that the treads are angled. At times is may refer to the strings of such landing (winder strings) or the number of treads in such a landing (winder count) etc. The terms is used in many such contexts and it’s probably best not to change it unless you find the term confusing.

There are three other very important definitions (which probably should not be changed in order to maintain clarity through this manual) which are very important to understand up-front. All items in your BOM will be one of the following three types:

blank item A component of the stair or balustrade which has been created from a piece of timber (a blank) that has been pulled from your timber rack. In some cases it is simply cut to length (e.g. strings); in other cases it must be cut and profiled. Every component of a stair is treated as a blank item (with the exception of wallbrackets, and hardware) until such time as it is (optionally) converted into a part.

part A finished component usually purchased from a supplier in its finished state. It may need trimming to length. It has a fixed price. It always has a PartId (SKU), whether this PartId has been assigned by the supplier or by you. Parts are what you enter into the Parts window.

line item A line item is neither a blank item nor a part, but rather something a little less tangible. For example, some clients price stairs based on a certain price per tread/rise/string combination. This tread/rise/string combination could be generated in the part filter as a line item (it doesn’t exist in your parts window).

Another definition which ties all this together (and again probably shouldn’t be changed for the sake of clarity):

style A style is a name/size combination. For example, “Colonial 40x40” is the style of a baluster. Styles for a job are selected in the Components window. A timber is then allocated to the style. Based on the style properties, the timber, and the stair/balustrade as designed in the Design window, StairBiz generates blank items. These blank items may then (optionally) be converted into parts.

# Chapter 2 : Installing and Un-installing StairBiz

## StairBiz on an employee’s computer

You are strongly advised against installing any of your full-license copies of StairBiz on a computer owned by an employee or contractor. If they leave (taking their computer with them) without uninstalling StairBiz and providing a valid de-registration verification code (which you get by typing ‘UNREG’ as the password in the Password window), we are not obliged to replace that license for you.

## Installing StairBiz for the first time

The following helps you to install StairBiz onto a single computer. If you are networking StairBiz (i.e. multiple copies of StairBiz on multiple computers), also see Chapter 18.

#### 1. Date settings

From your Control Panel, open the **Regional and Language Options** file and check that the Date format is set correctly according to the normal format used in your country (usually day/month/year or month/day/year). It must be set the same way on all computers on a StairBiz network.

#### 2. If you are using Vista

Vista has a complicated permissions structure which can under some circumstances confuse StairBiz. Before installing StairBiz, please do as follows:

From your Control Panel, open the **User Accounts & Family Safety** window (on some computers this might be simply **User Accounts**).

If you see at the bottom of this window a **Use User Account Control (UAC) to help protect your computer** check-box, be sure it is turned OFF.

If there is not this check-box, you need to go a little deeper to find it: click on the **User Accounts & Family Safety** heading; then click on the **User Accounts** heading; then click on the **Turn User Account Control on or off** heading; then untick **Use User Account Control (UAC) to help protect your computer**.

Close the window.

#### 3. If you are using Windows 7

Do NOT use "XP Compatibility mode" for StairBiz. By default, XP Compatibility mode is not set, and it should remain that way (to view this setting, right-click the StairBiz.exe application file, select "Properties", then select the Compatibility tab).

#### 4. Download & Install

Go to our web site ([www.stair.biz](http://www.stair.biz)), and select the **Downloads** page.

Download and run the **Full Installation** (File #1).

#### 5. Launch StairBiz

To run StairBiz, double click StairBiz.exe (in the **StairBiz Program** folder, or from the shortcut on your Desktop).

If you get the message *Error 1001 - It seems you don't have file read/write access to the StairBiz Program folder* it means that your Windows User Account or some other permissions setting does not allow you (as the user who logged in to your computer) to write data to files within the StairBiz Program folder (or sub-folders). If you logged into your computer as "Guest", that is probably the problem. If you are senior in your company and your User Type is "Standard User" then one possibility may be to elevate your user account to "Administrator". Otherwise, please consult with your network administrator for a solution.

#### 6. Password

You have a seven day grace period in which to request a password for a one-month evaluation. During this grace period you do not need a password to enter StairBiz – just click the OK button.

To request a one-month evaluation password, click on the **Passwords** button in the Password window and follow the instructions.

After you register StairBiz with a registration password, you can set up a user-friendly password (in the Users and Networking window).

For more information see Passwords.

#### 7. Update

If you have just installed StairBiz, but have not yet launched it (run it) for the first time, do that now. StairBiz needs to register itself before you do an update. Then quit StairBiz.

The full installation you installed above may not be the most recent version of StairBiz.

Go to our web site ([www.stair.biz](http://www.stair.biz)), and select the **Downloads** page.

Check the difference in versions between File #1 and File #4 (the update). If File #4 is a more recent version, you may like to download and run it.

#### 8. Custom Sheets

There are some standard Custom Sheets (Quote, Job Sheet etc.) that come as samples with StairBiz. It’ possible that the page set-up for these are not correct (e.g. Letter, A4). You may need to do the following before seriously using Custom Sheets. After you launch StairBiz, open the Custom Editor from the Defaults menu. Open each Custom Sheet (from the File menu), do a Page Setup (from the File menu) and check that the Paper Size is correct for your location.

## Important note about back-ups

One day you will turn your computer on and it won’t work. Sometimes when this happens you lose all files. It happens to EVERYONE at some time. So you have to work on the basis that that time will be the VERY NEXT time you try to turn your computer on.

Memory sticks are a fast, convenient way to keep a back-up of your important StairBiz files on a daily basis. See Chapter 22 – Backing up your files.

## Un-installing StairBiz

If your StairBiz license is a temporary one (e.g. and evaluation license), go straight to **Un-install StairBiz** (below), otherwise pay attention to **Un-register StairBiz license**.

### Un-register StairBiz license:

Under the terms of your StairBiz Software License Agreement, your company is responsible for each computer containing a copy of StairBiz registered under your company’s name. If a staff with a copy of StairBiz on his personal computer leaves your employ, or you are selling a computer, it is essential that you un-register StairBiz on that computer.

1. Launch StairBiz
2. Type "**UNREG**" as your password in the Password window You will be given a verification code. You must send this verification code to StairBiz Support. If you do not, you may have difficulty obtaining a new password for your new computer.

If you computer has totally crashed and you are unable to un-register StairBiz

### Un-install StairBiz:

NOTE: The following will KILL your jobs database and your defaults database. You will not be able to retrieve them. If in any doubt, make a back-up of your Defaults folder before continuing.

1. Quit StairBiz
2. From your **Start** menu select **Settings**/**Control Panel** to open the **Control Panel** window.
3. Launch the **Add/Remove Programs** file contained in this window.
4. Select **StairBiz** from the list and click **Add/Remove**.
5. If you are prompted to remove shared components, choose **No**.
6. If you have NO intention of re-installing StairBiz, manually trash the StairBiz Folder from your “C” drive (and all its contents).

## Re-installing StairBiz over existing StairBiz

If you suspect that there are files which are corrupted, you can re-install StairBiz over the top of the existing copy (there is no need to first un-install the existing copy), as follows:

1. First, back-up the following folders from your existing StairBiz Program folder – during the re-installation StairBiz will try hard not to upset the original files, but better to be safe than sorry:  
   Defaults  
   Custom Sheets  
   CNC Files  
   CNC GT Editor
2. Download and run the latest full installation (File #1 in the <http://www.stair.biz/downloads.asp> page).
3. Usually the latest available full installation is a less recent version than the Update installation. Download the latest StairBiz update (File #4 in the <http://www.stair.biz/downloads.asp> page) and run it.
4. If you have other computers running StairBiz, and the version of StairBiz is less than the update file you’ve just run, also run the UPDATE file on those other computers. All computers running StairBiz (including the server computer) must be using the same version.

Your Registration Password and user password will not change.

## Re-installing StairBiz after computer crash

If you are normally networking StairBiz, go to Chapter 18 - Adding a new computer to a StairBiz network. If you are normally not networked, do as follows:

If your C drive has crashed and you have re-built it (i.e. re-installed the Windows operating system), and you now need to reinstate StairBiz to its original condition:

1. Install StairBiz as if for the first time (see Installing StairBiz for the first time).
2. Copy the following folders from your back-up (you DO have a recent back-up, right?) and place them in the StairBiz Program folder (overwriting the existing files):  
    Defaults  
    Custom Sheets  
    Jobs (if relevant – this folder only contains jobs that you have exported)  
    CNC Files (if relevant)
3. Contact StairBiz for a replacement password (you will need to provide your current Software Code). As it is normally not possible to un-register your previous license, We will un-register it programmatically within StairBiz.
4. You may need to reset your personal password in the Users & Networking window.

## Moving StairBiz to a new computer

The following helps you to move StairBiz from one computer to another (e.g. you buy a new computer). If you are networking StairBiz, also see Chapter 18.

1. Copy your entire **StairBiz Program** folder across from your old computer to your new computer. This folder is directly on your C drive (i.e. C:\StairBiz Program)
2. Install the full StairBiz installation on your new computer: Go to our web site (www.stair.biz), and select the Downloads page. Download and run the Full Installation (File #1).
3. For Windows 7 or 8 you will need to install a patch for the 3D: Go to our web site ([www.stair.biz](http://www.stair.biz)), and select the Downloads page. Download and run the 3D Patch (File #6).
4. Launch StairBiz on the new computer and make sure that everything appears exactly the same as your old computer. When you are sure, un-register the copy of StairBiz on your old computer - read the section Un-installing StairBiz (above).
5. You will need a new password (you have a week to get it) – click the “Passwords” button in the Password window and send Support the software code shown. At the same time provide the Unregister Verification code (see **Un-register StairBiz license**, above).
6. If you normally network StairBiz, and it appears you have lost this connection, you may need to re-enter your server's IP address into the Users & Networking window (see Defaults menu). You can get this address from the same window on somebody else's StairBiz. If you need further information see Chapter 18.
7. If you wish, you can now un-install StairBiz on the old computer - see **Un-install StairBiz** (above). Note that un-installing StairBiz also deletes all user data and jobs.
8. If you have other computers running StairBiz (networked or otherwise), and the version of StairBiz is less than the version (or update) you just installed on your new computer, also run the UPDATE file on those other computers. All computers running StairBiz (including the server computer if you are networked) must be using the same version.

## Converting an evaluation license to full license

If you have been running an evaluation version of StairBiz, installing the full version is as simple as contacting us to obtain your full license Registration Password. Use the Email Support window (see Chapter 13).

# Chapter 3 : Starting StairBiz the first time

## Launching StairBiz

1. Switch on your computer.
2. Double click the StairBiz shortcut on your Desktop.
3. Double-click on the StairBiz folder to open it (i.e. move your mouse over the folder, then click the mouse button twice in rapid succession). Then double-click on the StairBiz.exe file in the StairBiz folder (this file may be called ‘StairBiz’, without the ‘.exe’ extension, depending on the files options your system is using).

An alternative to the above is to double-click on the StairBiz folder to open it (i.e. move your mouse over the folder, then click the mouse button twice in rapid succession), then double-click on the StairBiz.exe file in the StairBiz folder (this file may be called ‘StairBiz’, without the ‘.exe’ extension, depending on the files options your system is using).

The StairBiz program will be launched.

Another alternative is to launch StairBiz is via the Start menu. Click the Start menu at the bottom left of your screen, click the **Programs** menu-item, and select **StairBiz** from the list.

## The Password window

The first window to open when you launch StairBiz for the first time will prompt you for a Registration Password (if the grace period has expired), or a User Password if you have set them. See Password window, Registration Password and User Passwords for more information.

## Page Setup

StairBiz can automatically choose the paper size and orientation when printing sheets, but we need to set this up for your current default printer. Do a Page Setup (from the Project menu).

For more information see Page Setup.

## Dimension system, and nosings vs. face of riser

There are two settings you need to fix so that you can feel at home right away:

1. In the Preferences window (open from the Defaults menu), choose your preferred measurement system (metric, imperial etc.).
2. In the Setout Defaults window, the first item in the list relates to whether the fundamental setouts of you stairs are to the nosings, or to the face of the riser.

## What do you call things

StairBiz has a feature whereby any or every label or text in every window, menu, button etc. can be changed by you to reflect your own terminology. See Languages window.

# Chapter 4 : A quick tutorial

## Overview

### If you are not confident with your computer

If you are new to your computer, it is essential that you first learn how to use it and feel comfortable with it. StairBiz is a remarkable easy to use considering what it does, however, it is still a large and involved program. If you are fumbling with the basics of general computer use, obviously you will have difficulty with StairBiz.

If you have a lap-top computer without a mouse, we highly recommend that you buy one. Touch pads or other mouse-alternatives are ONLY for experts and will get the beginner into a lot of trouble.

If you have a cheap computer but have a quality mouse and mouse pad, you can run the system like a expert. Regardless of the quality of your computer, if you have a cheap mouse and mouse pad, you will always be frustrated. The Microsoft IntelliMouse or similar is highly recommended.

### If you are confident with your computer

If you have just installed StairBiz, are confident with your computer, and want a quick tutorial - this section is for you. It will walk you through the most basic steps involved in processing a simple job.

Before you start this tutorial, be sure that you have read How to use this Help. This will show you how to jump to more detailed information on any window or topic if you want to, and then return to where you were in the tutorial.

This tutorial will not explain much. In fact, the best way to approach this tutorial is to NOT to try and understand everything for now. The intention here is simply to give you a general feel for the way StairBiz works. There are many options that will not be discussed. For more information on each of the windows discussed here, refer to the specific window in The windows in alphabetical order.

All the default settings will be the ones that came with StairBiz – you’ll get a chance to create your own later.

Follow the instructions, in the sequence in which they are given. If you get lost, just back-track to where you feel confident and continue from there. In most cases it shouldn’t matter much.

If you get totally lost, select **Close Project** from the Project menu and start again.

Typically, the scenario is as follows:

1. **The client phones for a measure**
2. **You design & quote the job**
3. **The client accepts the quote**
4. **You build the stair**
5. **You install the stair**
6. **You invoice the client**

## The client phones for a measure

### Process window

1. When you first launch StairBiz, the Process window opens. If this window is not open, select it from the Process menu.
2. Click the **New** button to start a new project.
3. Type a job name into the **Job Name** field.
4. If a quote number is not automatically inserted (discussed elsewhere) double-click the word (i.e. the title) **Quote#** and StairBiz will put the next-in-sequence quote number into the **Quote#** field.

From here you progress through the various stages of the job as follows. We’ll leave the Process window open.

### Client window

1. Open the Client window by clicking the **Client** button in the Process window, or choose it from the **Process** menu.
2. Type in the details for your client. Anything you don’t understand – leave it for now.
3. Let’s add this client to your client database - click the **Paste to Client List** button.
4. Let’s open the Client List and find this client – from the Process menu, select **Client List** (it’s at the very bottom). Find your client in the list on the left and click on it. In the future, instead of typing this client’s details into the Client window for the job, you can paste them from your client list.
5. Close the Client List window.
6. Close the Client window.

### Site window

1. Open the Site window by clicking the **Site** button in the Process window, or choose it from the Process menu.
2. Type in the details for the site. Anything you don’t understand – leave it for now.
3. Close the Site window.

### Print, Save, Close

1. At this stage, you might print out a measure sheet. There is a sample one – to open it select **Measure** from the Custom menu. With this window open, select **Print Page** from the Project menu. Click **Print** to print the page. Close the **Measure sheet**.
2. Now we should probably save the job – click the **Save** button in the Process window..
3. We’ll assume now that you need to go out and measure the job. In the Process window, click the **Close** button.

## You design & quote the job

Assume now you’ve measured the job.

Click the **Open** button in the Process window. Find your job in the list and double-click it. The Process window will open.

There are alternative ways of opening a particular job;

1. You can locate it in a variety of ways in the Directory window (which you open by clicking the top tool at the very left of your screen). Select the job and click the Open button.
2. If you know the job name, you can type it in to the Job Name field in the process window, then click the Open button.
3. If you know the quote number or job number, you can type it in to the relevant field in the process window, then click the Open button.

### Job Details window

Open the Job Details window by clicking the **Details** button in the Process window, or choose it from the Process menu.

1. Type in the details and select the relevant buttons. Anything you don’t understand – leave it for now.
2. Close the Job Details window.

### Components window

Open the Components window by clicking the **Components** button in the Process window, or choose it from the Process menu.

1. Select the required styles and timbers from the pop-up lists. Anything you don’t understand – leave it for now.
2. Close the Components window.

### Setout window

This Setout window holds various default settings for the design in this specific job. These settings come from your Setout Defaults window which we’ll discuss later. You can edit the values by double clicking on the value, editing it, then pressing the Return key.

### Design window

Open the Design window by clicking the **Design** button in the Process window, or choose it from the Process menu.

If the window is not full size, best to enlarge it now, but don’t do it by using the Maximize button – maximizing one window maximizes all windows, which is not the most convenient way to operate in StairBiz. All window sizes and positions are saved for the next time you open them, so just manually resize the window.

There are many ‘panes’ (or sub-windows) to this Design window, corresponding to the buttons at the top-left of the window. You don’t necessarily have to go through them in order – if the button is active then you can use the pane. For example, you could first create a stair for it in the **Stair Design** pane, and then create a well in the **Well Design** pane, etc. You can also go back and modify things in any pane you have previously been in.

There is a menu below the buttons in the panel at the left of the Design window. The menu is called the “context menu” and the menu-items shown are contextual – meaning that you’ll get a different menu depending on the window, what’s in the window, what mode the window is in, and what you’ve clicked on. If you prefer to work with pop-up menus, you can right click various components – the pop-up menu created will match the menu-items shown on the left.

The panes are discussed in much greater detail later in the manual. For now we’ll use them to create a simple stair, and balcony balustrade:

#### Levels

No need to worry about this pane at this stage – we’ll discuss it later.

#### Well Design

**Create a new well**; in the list on the left (called the **Well Templates** list) double-click the “Square” unit (it will then appear on the right). You have just created a typical square-shaped well.

You can click-drag the lines or the junctions at the end of each line for rough positioning (you will notice that you dragging is “constrained” – for total drag freedom hold the Shift key down).

For more precise positioning edit the dimensions. When you edit a length, junctions at either end of the line become coloured – one yellow and one green. After you change a dimension, and before you click anywhere else, click on one of these junctions to tell StairBiz which end of the line you want the edit to effect. Pressing Enter is the same as clicking on the green junction.

You can have as many wells in a design as you like (e.g. existing landings etc.).

You will see later how this square well can be used to create virtually any well shape you can imagine, and how the modified wells can be saved back into the Well Templates list for future use.

Various features and edit modes can be accessed by right-clicking a well-line, a junction, or white space. Have a play.

Some attributes of the well templates (in the list on the left) can be changed by right-clicking the template.

#### Stair Templates

A stair template is a stair that you have previously created or modified, and saved so that you can quickly call it up in the future. It does not contain information about the job, client, well etc. – it’s just a stair.

This pane shows any number of these stair templates. You can also organise these templates in folders (more about this later). Various features can be accessed by right-clicking a stair template or white space.

We won’t do anything in this window for now.

#### Stair Design

Click the **Stair Design** button at the top-left of the Design window to switch to this pane.

**Start a new stair**; in the list on the left (called the **Unit Templates** list) double-click the “Straight” unit (it will then appear on the right). Now double-click the “Corner” unit. Finally double-click the “Straight” unit again. You have just created a typical “L” shaped stair.

You will see later how these two units can be used to create virtually any stair you can imagine, and how the modified units can be saved back into the this Unit Templates list for future use, and the stairs can be saved in the Stair Templates pane for future use. You will also see how to set up these units (and therefore any stair templates that derive from them) with your own setout dimensions.

Various features can be accessed by right-clicking a unit within the stair, a string, a newel, or white space. Left-click newels to select or un-select them. Have a play.

Some attributes of the unit templates (in the list on the left) can be changed by right-clicking.

#### Stair Setout

Here we set out the stair in a more precise way - virtually everything about this configuration can be changed.

The main thing that should be discussed here is basic dimension editing:

**Amending the basic stair dimensions:** Edit the dimension, then press the return key. Sometimes when you edit a dimension, other dimensions turn yellow or green. These are the “take-up” dimensions. After you edit a dimension, you can left-click a take-up dimension to tell StairBiz how you want what you have edited to affect the rest of the stair. This saves having to do double or triple edits. For example, you have five treads in the upper flight and you want to reduce it to four; click on the “5” and change it to “4”. The yellow and green dimensions are asking where you want to “put” this tread. You have a choice of the landing, lower flight, or risers. The risers dimension is green, meaning it’s the *default* take-up dimension (pressing the return key is the same as clicking on this green dimension). Or, click either of the yellows.

Clicking a green take-up dimension is like saying “do not take-up” (e.g. don’t put the extra tread anywhere).

In the middle of the lower flight there is a “5”, being the number of lower treads. In the landing is a “1” being the number of landing treads. Change the lower treads dimension from 5 to 3, then before clicking anywhere else click on the yellow landing treads dimensions, then press the Enter key. You end up with 3 lower treads and 3 landing treads.

Change the upper width dimension to whatever you want, then press the enter key.

If you don’t like what you’ve done, click the **Undo** button.

**Setting the floor-to-floor dimension**: Edit the dimension at the bottom of the window. The floor-to-floor dimension “floats” with each change in the treads numbers of riser height, until such time as it is edited directly (after which the riser height will float).

Various features can be accessed by right-clicking a unit within the stair, a string, a newel, or white space. Some dimensions can even be right-clicked – to set a **tag** or some other attribute (more about this later). Left-click newels to select or un-select them. Have a play.

**Selecting newels**: Click the top tenonside newel to select it. Click the bottom tenonside newel to select it.

Various features and amend modes can be accessed by right-clicking a tread, string, newel, or white space. Have a play.

For more information see Amending the stair design.

#### Curves

Allows you to add a curve or curves to the strings of existing straight flights. Right-click on the straight flight and select from the list.

#### Bullnose

**Create a new bullnose**; in the list on the left (called the **Bullnose Templates** list) double-click the “Small Round” bullnose (it will appear on the tenonside side of the stair). You have just created a typical bullnose.

You will see later how this one bullnose can be used to create virtually any bullnose shape you can imagine, and how the modified bullnoses can be saved back into the Bullnose Templates list for future use.

Various features can be accessed by right-clicking a bullnose, or right-clicking a bullnose template in the templates list. Have a play.

#### Rake Balustrade

If not already selected, select **Show All** and **Selections** from the context menu.

In this mode you can select (include) balustrading and newels on the strings of a stair. Each length of balustrading is called a “section”.

By default, balustrading will be automatically selected for strings where there is a newel selected at the top and bottom of the section. You can unselect sections that have been auto selected, or you can select sections that did not auto select.

Once you make a manual selection in this window, all section selections in this window need to be done manually (i.e. the auto-selection feature is switched off).

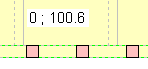
In this pane you can also specify the properties and characteristics of each selected section of balustrading, and the components within each section (handrail, shoerail, balusters and newels). Mostly you would not need to change anything from the default settings, but if required you can adjust the positions and lengths of each component, and adjust the spacings of the balustrading.

##### Amending Baluster Spacing

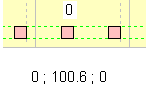
Select **Show Balusters** and **Amend Spacing** from the context menu.

**Normal Balusters:**

**For box strings**; In the middle of each selected section this are two values; the second is the distance between the balusters, the first (“0”) allows you to increase or decrease the default number of balusters. To see the effect, change the “0” to “1” or “-2”, then press the Enter key.



**For sawtooth strings**; In the middle of each selected section this are three values; the second is the distance between the balusters, the first (“0”) allows you to add to or subtract from the number of the balusters at the top end of the string; the third (“0”) does the same for the bottom end of the string. To see the effect, change the “0” to “1” or “-2”, then press the Enter key.

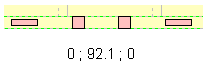


The “0” shown above the balusters allows you to override the number of balusters per tread. “0” means let StairBiz calculate the minimum required number to stay within building code. If you override this with a “1” or “3” etc. StairBiz does not do the calculation and will put this many balusters on each tread.

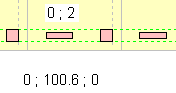
**Combo Balusters:**

**For box strings**;

The setting below the balusters works the same as for normal balusters/ sawtooth strings (see above).



**For sawtooth strings**, The settings shown below the balusters behave the same as for normal balusters. The first of the two settings shown above the balusters behaves the same as for normal balusters. The second shows the position of the combo baluster on the tread (“2” is the default, meaning that the combo baluster will be the second baluster on the tread.



#### String Elevations

Shows the elevations of the strings and allows you to select handrail fittings if your default fittings are not appropriate.

Click the **Bal Space** button at the top-left of the Design window to switch to the Stair Balusters window.

Click one of the toggles then press the **Enter** key.

#### Balcony Balustrade

This pane works in the same way as the Rake Balustrade pane, except that obviously it relates to balcony balustrade.

If not already selected, select **Show All** and **Selections** from the context menu.

In this mode you select (by clicking) the balustrading sections you want included in the balcony.

Newels can also be selected (by clicking). Clicking a termination junction (one where there is no balustrading after it) toggles between a newel, a half newel, of nothing. Clicking a mid junction (one where there is balustrading either side) toggles between a newel and a mitre.

- - - - - - - - - - -

That’s the end of our design. Note that only the most basic features have been discussed, for a more detailed discussion on each pane see Design window.

Close the Design window. Let’s continue with the remaining Process windows.

### Material Cost window

Open the Material Cost window by clicking the **Material $** button in the Process window, or choose it from the Process menu.

1. For now, just have a look, or play around.
2. Close the window.

### Labour window

Open the Labour window by clicking the **Labour $** button in the Process window, or choose it from the Process menu.

1. For now, just have a look, or play around.
2. Close the window.

Open the Labour Cost window by clicking the **Labour $** button in the Process window, or choose it from the Process menu.

1. Click the **Inst** (install) button under the **Print** section at the top of the window.
2. Click the **Inst** (install) button under the **Contract** section at the top of the window.
3. Close the window.

### Quote Calculation window

Open the Quote Calculation window by clicking the **Quote Calc** button in the Process window, or choose it from the Process menu.

1. Type in ’60.00’ in the **Truck** field.
2. Click the **Lock** button.
3. Change the value in the Quote Total field to round it off.
4. Close the window.

### Quote window

Open the Quote window by clicking the **Quote** button in the Process window, or choose it from the Process menu.

1. Click the **Open** button and choose an alternative quotation template to suit this particular client (i.e. for now just choose any of the files shown by double-clicking it).
2. Close the window.

### Print the quote, Save, Close

1. At this stage, you might print out a quotation sheet. There is a sample one –
2. To open it select **Quote** from the Custom menu.
3. With this window open, select **Print Page** from the Project menu.
4. Click **Print** to print the page.
5. Close the **Quote custom sheet**.
6. You may also like to print out a quote covering letter.
7. To open it select **Quote** from the View menu.
8. With this window open, select **Print Page** from the Project menu.
9. Click **Print** to print the page.
10. Close the window.
11. In the Process window, select **Confirm** from the Status list at the top right of the window.
12. Save the job – click the **Save Job** button in the Process window.
13. Click the **Close** button in the Process window.

## The client accepts the quote

Assume now that the client has accepted your quotation –

1. Click the **Open** button in the Process window. Find your job in the list and double-click it.
2. In the Process window, select **Build** from the Status list at the top right of the window.

### Payments window

Open the Payments window by clicking the **Payments** button in the Process window, or choose it from the Process menu.

1. Type in details for the deposit paid to you by the client.
2. Close the window.

### Receipt window

This window can be used to print a receipt. Alternatively a customized sheet can be used. Ignore for now.

### Notes window

Open the Notes window by clicking the **Notes** button in the Process window, or choose it from the Process menu.

1. Type in any note you want saved with the job.
2. Close the window

### Save, Close

1. Click the **Save** button in the Process window.
2. Click the **Close** button in the Process window.

## You build the stair

1. At this stage, you might print out some customized job sheets for your factory staff. There is a sample one –
2. To open it select **Job Sheet** from the Custom menu.
3. With this window open, select **Print Page** from the Project menu.
4. Click **Print** to print the page.
5. Close the **Quote** custom sheet.
6. You may also like to print out some specification sheets. For example …
7. Open the **Treads** sheet by selecting it from the **Stair** menu-item under the View menu (or you could try the **Cutting List**).
8. With this window open, select **Print Page** from the Project menu.
9. Click **Print** to print the page.
10. Close the window.

## You install the stair

1. At this stage, you might print out some customized job sheets for your installation staff. There is a sample one –
2. To open it select **Install** from the Custom menu.
3. With this window open, select **Print Page** from the Project menu.
4. Click **Print** to print the page.
5. Close the **Quote** custom sheet.
6. You may also like to print out some specification sheets. For example …

Open the **Spacings** sheet by selecting it from the **Balcony** menu-item under the View menu.

1. With this window open, select **Print Page** from the Project menu.
2. Click **Print** to print the page.
3. Close the window.
4. Close the project by clicking the **Close** button in the Process window.

## You invoice the client

You can invoice the client in the same ways that you quoted for him - using the Invoice window in conjunction with the **Invoice** sheet, and/or by using a Custom sheet.

## Tracking jobs

Jobs and the status of jobs can be tracked using the Directory window.

# Chapter 5 : Learning your way around

## Windows in StairBiz

Note that windows relating to estimating are not shown if you do not have the Estimate module (see Chapter 1 : How to use this Manual/ The optional “Estimate” module).

Everything in StairBiz happens in a window. You can do things in them and view things in them. The currently open windows are listed in the **Windows** menu. Select the menu-item to bring that window to the front.

For different ways of opening each of the StairBiz windows, see Opening Windows. Also see Window Size & Position.

A shortcut for closing any currently active window is the **Control+F4** key combination.

Windows in StairBiz are in seven major categories. These categories correspond to the main menus in StairBiz, and are as follows:

* Defaults windows
* Process windows
* View windows
* Custom windows
* Draw windows
* Schedule windows
* CNC windows

### Defaults windows

Your business has a particular way of doing things. You have your own timbers, sizes, styles, names, stair-setout dimensions, assembly methods, quotation sheets, Job sheets etc. etc.

StairBiz has to learn how you do things, and this is done mostly in the **Defaults windows**.

See Setting Up for Your Business.

**Defaults windows** are opened via the Defaults menu.

They are as follows:

* Styles
* Timbers
* Miscellaneous
* Setout
* Extra Lengths
* Parts
* Part Filters
* Labour Filters
* My Data Defaults
* Overheads
* Preferences
* Users & Networking
* Language
* Colours
* Job Numbers
* Folders
* Building Codes
* Print Settings
* Custom Editor
* Custom Menus
* Export Templates

### Process windows

The Process window is the control centre for all the windows used specifically to process a job (called **Process windows**).

**Process windows** can be opened from the Process menu (and in other ways – see Opening Windows).

See also Processing a Job.

Following is the list of **Process windows**:

* Client
* Site
* Job Details
* Components
* Setout
* Design
* Labour
* Quote Calculation
* Quote
* Schedule
* Invoice
* Payments
* Receipt
* My Data
* Notes

In addition, the Client List window shows a list of your regular clients, which can be useful in processing the Client window of a job.

### View windows

**View windows** are used to view Job sheets. The layout and content of these windows is fixed (you can’t change it). They can be printed individually, or all at once using the Print Job window.

They are opened via the View menu (and in other ways – see Opening Windows).

Various View sheets (Project, Mat Cost, Mat List, BOM and Labour Cost) can be exported to Excel - click the ‘Export’ button at the bottom/right of the sheet.

### Custom windows

**Custom windows** are used to view Custom sheets. The layout and content of these windows can be anything you like. They can be printed individually, or all at once using the Print Job window.

They are opened via the Custom menu (and in other ways – see Opening Windows).

### Draw windows

**Draw windows** are used to create your own drawings or to modify existing StairBiz drawings. These drawing are in bitmap format and are saved with the relevant job. These drawings can also be pasted into Custom sheets to override the drawings StairBiz generates automatically in those sheets.

They are opened via the Draw menu.

See Draw windows.

### CNC windows

**CNC windows** relate to using StairBiz in conjunction with CNC router tables.

They are opened via the CNC menu.

See the separate Users Manual CNC (in the StairBiz Program folder).

## Opening windows

### Windows generally

Click any visible part of a background window to bring that window to the front.

If the menu relating to the menu-item that opens the window has a shortcut (one of the characters in the menu-heading is underlined), press **Alt-Char** (where “Char” is the character underlined). This opens the menu. From here you can use the arrows keys to scroll down or up and menu-items, then press **Enter** when the correct menu-item is selected. Alternatively, if the required menu-item has an underlined character, simply press this character on the keyboard.

Some menu-items which open windows have a direct shortcut (e.g. the **Job Directly** menu-item has **Ctrl+D** written after it). To produce the same effect as selecting this menu-item, press the **Control** key and the character at the same time.

The currently open windows are listed in the **Windows** menu. Select the menu-item to bring that window to the front.

### Directory window

1. Select the **Directory** menu-item from the Project menu.
2. Click its icon in the Tool-bar.
3. **Control+D**

### Print Job window

1. Select the **Print Job** menu-item from the Project menu.
2. **Control+M**

### Defaults windows

To open any Defaults window – select it from the Defaults menu.

### Process window

1. **Control+J**
2. Select it from the Process menu
3. Click it’s icon in the Tool-bar.

Note that a Custom sheets (and some other windows) can be opened from a button in the Process window – see Chapter 13/ Process window/ Customizing buttons in Process window.

### Process windows

Process windows are sub-windows of the Process window and can be opened from

1. The Process menu
2. The picture buttons in the Process window
3. Many of these windows can be opened from the Tool-bar.
4. **Control+W** will open the next one (after the previous one opened).
5. You can open the Notes window from the Process window by clicking the **MyData** button while holding down the Control Key (alternatively it can be opened from the Process menu).

### View windows

These windows show Job sheets and can only be opened by selecting them from the View menu.

### Custom windows

These windows show Custom sheets and can be opened by selecting them from the Custom menu. A Custom sheet (and some other windows) can also be opened from a button in the Process window – see Chapter 13/ Process window/ Customizing buttons in Process window.

### Draw windows

These windows show manually generated drawings and can only be opened by selecting them from the Draw menu.

### CNC windows

These windows can only be opened by selecting them from the CNC menu.

### Design sub-windows

These windows can only be opened from the buttons at the left of the Design window.

### Client List window

1. The **Client List** menu-item under the Process menu.
2. The **Open Client List** button in the Client window of a job.

## Closing windows

Any window can be closed by either clicking on the “X” at the far top-right of the window, or (where available) by clicking the “Close”, “OK” or “Done” buttons. In the case of “Modal” windows (windows that must close before you can proceed with anything else), in most cases clicking any button will close the window.

All job windows (i.e. non-default windows) close when you close a job (the Process window will reopen).

To close ALL windows except the Process window, select **Close All Open Windows** from the Windows menu, or click the **Process window** button in the main tool bar. In both cases this does not close the job.

## Window size & position

Most of the windows in StairBiz are resizable. To re-size a window click the bottom right corner of the window and drag to the desired size. Resizable windows can also be maximized and minimized (click the buttons at the top right of the window), but if you maximize one window you maximize all of them, which is generally not the effect you want – best to resize them manually.

Windows in StairBiz open in the same size and position as they were last closed (except if they were maximized or minimized at the time, in which case they open in the same position they were last closed when not maximized or minimized).

NOTE:

This last point can cause confusion in the unlikely event that you change to a smaller monitor, or a lower monitor resolution, or (more likely) leave a window partly off-screen when you close it – your windows can open partly off-screen and cause Microsoft to show extra scroll bars (the ones that allow you to scroll the windows on-screen if necessary without changing their position in the overall scheme of things).

Because StairBiz uses many windows, the situation can become confusing.

The solution is to tick the **Fix Off-screen Windows** button in the Preferences window. Ticking this button will cause StairBiz, upon opening any window, to bring it fully within the viewing area of the monitor if it is not already so. If the window is larger than the monitor, StairBiz will position it at the top left corner. An alternative is to click the **Reset Window Positions** button in the Preferences window. This resets your saved window positions and sizes to those current when you first installed StairBiz. It only affects windows that are not currently open.

## Working within windows

There are some things that you do in windows often, and are referred to in this help often. It will help you to know the following definitions.

**input**

Something you, as the user of the program, does. It could be clicking a button or toggle, selecting from a menu, typing into a text-field, etc.

**select, selected**

1. Text on the screen which is inverted (highlighted). Select text by double-clicking or click-dragging it. Also see Editing.
2. A radio button which is the one which is marked. Select a radio button by clicking on it.
3. A check box which has a tick. Select a check box by clicking on it once.
4. An item in a list. Select by clicking on the item.
5. Some other object that is highlighted or otherwise distinguished from its normal state. Select it usually by clicking on it.

**unselect, unselects, unselected**

1. Text on the screen which is not inverted (highlighted). Unselect text by clicking once somewhere on the text. Also see Editing.
2. A radio button which is not the one which is marked. Unselect a radio button by clicking on another radio button in the group.
3. A check box which does not have a tick. Unselect a check box by clicking on it once.
4. An item in a list. Unselect by clicking on another item.
5. Some other object that is not highlighted or otherwise distinguished from its normal state. Unselect usually by clicking on it, or clicking somewhere else.

**enabled**

A term given to a button, menu-item or text box when it is available for clicking, selection or input. The button, menu-item or text box is not grey or dimmed.

**disabled**

A term given to a button, menu-item or text box when it is not available for clicking, selection or input. The button, menu-item or text box is grey or dimmed.

**click**

The action of depressing the button on top of the mouse while the cursor is placed over something “clickable” in a window. A double-click involves depressing the mouse button twice in rapid succession.

**click-drag**

A click-drag involves clicking and, while keeping the mouse button depressed, dragging the cursor across the screen to a desired destination before releasing, usually creating a rectangle.

## The main StairBiz toolbar

At the very left of your screen (normally) is a vertical toolbar containing icons associated with the most frequently used menu-items. This is for convenience – it’s often faster to click on the toolbar than to select from the menu.

##### Moving the toolbar

At the very beginning of the toolbar is a drag point (represented by two lines). You can click the drag point and drag the toolbar to wherever you want. It you drop the toolbar close to the left, top, right or bottom edges of the screen, it will snap to those positions, otherwise it will free-float wherever you drop it.

##### Additional Tools

Right-click the toolbar and select Additional Tools to add further functionality.

##### Customizing the toolbar

Coming soon.

##### Toolbar has disappeared

If you either deliberately or accidentally hid the toolbar, you can get it back by trashing the following file:

C:\StairBiz Program\Defaults\UserTools.tb

# Chapter 6 : The menus

Menus are listed horizontally across the very top of your screen. The menu-items they each contain perform a variety of functions in StairBiz. Some deal with opening, closing, saving and printing jobs. Many of them help you to navigate through the many windows in StairBiz.

Select a menu-item by clicking on the menu title, then click on your selection.

Note that menus relating to estimating are not shown if you do not have the Estimate module (see Chapter 1 : How to use this Manual/ The optional “Estimate” module).

There are ten menus in StairBiz, as follows:

## Project menu

The **Project menu** deals with issues involving files, or printing. They are described as follows:

#### Directory

Opens or makes active the Directory window where the information of your choice from all jobs is listed.

#### Schedule

Opens or makes active the Schedule window where the information of your choice from all jobs is listed.

#### New project

Creates a new project.

If the Process window is closed, it will open it.

This menu-item is disabled when a job is in progress (the current project has to be closed before a new one can be opened).

This menu-item performs the same function as the **New** button in the Process window.

Also see Starting a new project.

By default the project folder for a new job is the same as the last folder used to open or save a project. If you want to change this behaviour see Chapter 13; Windows in Alphabetical Order / Open Project window.

#### Open Project

Opens a dialog window from which you can select and open any previously saved job.

This menu-item performs the same function as the **Open** button in the Process window.

Also see Opening a saved project.

By default the project folder selected in the Open Project window is the same as the last folder used to open or save a project. If you want to change this behaviour see Chapter 13; Windows in Alphabetical Order / Open Project window.

#### Open Template

Opens a dialog window from which you can select and open any previously saved job template. See Job Templates.

#### Revert Job

Reverts the current job or scenario to the state it was in at the last save. All changes since the last save will be lost.

#### Close Project

Closes all the windows of the current project.

If a project has been changed since it was last saved, you will be prompted to save it. If you don’t, the changes will be lost.

This menu-item performs the same function as the **Close** button in the Process window.

See also Closing a Job.

#### Delete Project

Deletes the current project. See Deleting a Job.

#### Save Job

Saves the current job.

If there have been no changes since the last save, this menu-item will be disabled.

This menu-item performs the same function as the **Save** button in the Process window.

See also Saving a job.

#### Save Job As...

Opens the current job (as is) in a new project. If there is more than one job in the project, the other jobs will be ignored.

You will need to name and save the project.

#### Open Archive

Presents a list of previously created job archive files. Selecting an archive file makes that file the current job database file. See Archiving Jobs.

#### Export Job

Exports the current job to an independent file (i.e. not in the database). By default, the folder selected is the Jobs folder located in the StairBiz folder. The file extension is “.sbj”. If there is more than one job in the project, the other jobs are ignored (not exported).

This is useful if you are experiencing a problem with a job and you wish to send the job to StairBiz Support, or if you otherwise wish to share files with other users (e.g. a sales rep can email jobs to the office).

#### Import Job

Allows you to locate on disc and import a StairBiz job (file extension “.sbj”) previously exported using the Export menu. The imported job opens in a new project. You will need to name and save the project.

#### Import Job from Text

Allows you to define various aspects of a job in a text file, then import that text file, thus creating the job. Can also be used to create clients in the Client List.

See Chapter 22: Miscellaneous Topics/ Import Job from Text.

#### Compact Database

When a job is deleted from the database, certain aspects of that job may be shared with other jobs in the project. The process of resolving whether or not they are shared takes time. So those potentially shared components are not immediately deleted from the database – they are resolved and deleted (where appropriate) on a **Database Compact**.

Even items are that are immediately deleted from the database are not necessarily removed from it - for the sake of speed they may simply be tagged as deleted, but continue to take up space. These are also resolved on a **Database Compact**.

You should do a **Database Compact** every month or so.

#### Page Setup

Allows you to select a printer and choose various print settings.

StairBiz automatically selects the correct page orientation (portrait or landscape) for each page being printed, so you don’t have to worry about this.

Job sheets have been programmed to scale most satisfactorily on A4 or US Letter size paper with portrait orientation (the default in StairBiz).

Custom sheet orientation can be pre-set to Portrait or Landscape in the Custom Editor window (Page Setup).

StairBiz remembers your most recent printer name and the print properties for this and will attempt to automatically set these when you launch StairBiz, This saves you have to do it each time.

If StairBiz generates a printing error when you launch StairBiz, or when you do a Page Setup or Print, Do a Page Setup. If that fails to stop the error message, try un-ticking the “Full Printer Features” check-box in the Preferences window. If you still get errors with this un-ticked, please advise us.

The size of a sheet as seen in a View window or Custom Sheet window will correspond to your choice of paper size in **Page Setup** or **Print**. The size corresponds to the printable area of the page (i.e. it will be a little less than the actual size of the sheet of paper.). There is an exception to this – see the **Scale** text box in the Preferences window.

#### Print Page

If the active window is a Job sheet or a Custom sheet, this menu-item will be enabled. Clicking it will send that sheet to your printer. At all other times this menu-item is disabled.

See also Printing a Single Sheet.

#### Print Job

If a job is open, and a stair and/or balcony has been designed, this menu-item will be enabled. It brings up the Print Job window, which allows you to print selected sheets in a batch (rather than one by one).

See Printing Multiple Sheets and Print Job window.

#### Quit

Clicking this menu-item closes the StairBiz program.

If a job is open, StairBiz will close the project first. If the job needs saving, StairBiz will alert you.

See Quitting StairBiz.

## Defaults menu

The Defaults menu deals with many aspects of setting StairBiz up for your business.

See Setting up for your business.

Also see the following references;

1. **Styles** See Style Defaults window.
2. **Timbers** See Timbers window.
3. **Timber Themes** See Timber Themes window.
4. **Job Details** See Job Details Defaults window.
5. **Miscellaneous Defaults** See Miscellaneous Defaults window.
6. **Setout** See Setout Defaults window.
7. **Fittings** See Fittings window.
8. **Extra Lengths** See Extra Length Defaults window.
9. **Parts** See Parts window.
10. **Part Filters** See Part Filters window.
11. **Labour Filters** See Labour Filters window.
12. **My Data** See My Data Defaults window.
13. **Custom Categories** See Custom Categories window.
14. **Custom Tags** See Custom Tags window.
15. **Preferences** See Preferences window.
16. **Users and Networking** See Users window.
17. **Language** See Language window.
18. **Colours** See Colours window.
19. **Job Numbers** See Job Numbers window.
20. **Folders** See Folders window.
21. **Building Codes** See Building Codes window.
22. **Print Settings** See Print Settings window.
23. **Custom Editor** See Custom Editor window.
24. **Custom Menus** See Custom Menus window.
25. **Export Templates** See Export Templates window.

## Jobs menu

The **Jobs menu** deals with multiple jobs within a project. See Multiple jobs within a project.

#### Add Job

Creates a new job within the current project. Shared windows will hold the same information as the shared windows for the project. Windows relating to the specific design will be empty, waiting for you to create a design. See Adding a job to a project.

#### Duplicate Current Job

Creates a new job within the current project. Shared windows will hold the same information as the shared windows for the project. Windows relating to the specific design will hold an exact copy of the corresponding windows of the previous job. See Adding a job to a project.

#### Delete Current Job

Deletes the current job from the project. This menu will be disabled if there is only one job in the project.

## Scenarios menu

The **Scenarios menu** deals with multiple scenarios within a job. See Multiple scenarios within a job.

#### Add Scenario

Creates a new scenario within the current job. Shared windows will hold the same information as the shared windows for the project. Windows relating to the specific design will be empty, waiting for you to create a design. See Adding a scenario to a project.

#### Duplicate Current Scenario

Creates a new scenario within the current job. Shared windows will hold the same information as the shared windows for the project. Windows relating to the specific design will hold an exact copy of the corresponding windows of the previous scenario. See Adding a scenario to a project.

#### Delete Current Scenario

Deletes the current scenario from the job.

## Process menu

The Process menu opens the Process window, any of the Process windows, and the Client List window.

If any process is currently unavailable, the relevant menu-item will be disabled.

To place a tick on any of the menu-items, select the **Done** button in the relevant window (this is the sole purpose of the **Done** button).

See Process window and Using StairBiz to process your jobs.

#### Process

Opens or makes active the Process window, which is the home-base window for processing jobs.

#### Client … Notes

Opens or makes active the relevant Process window, which is the home-base window for processing jobs.

These menu-items correspond to each stage in processing a job. They have a corresponding button in the Process window. They will open the relevant Process window if it is closed, or make it the active window if it is currently open but in the background.

Also see the following references;

1. **Client** See Client window
2. **Site** See Site window
3. **Job Details** See Job Details window
4. **Components** See Components window
5. **Setout** See Setout window
6. **Design** See Design window
7. **Material Cost** See Material Cost window
8. **Labour** See Labour window
9. **Quote Calculation** See Quote Calculation window
10. **Quote** See Quote window
11. **Schedule** See Schedule window
12. **Invoice** See Invoice window
13. **Payments** See Payments window
14. **Receipt** See Receipt window
15. **My Data** See My Data window
16. **Notes** See Notes window

#### Related Files

Opens the Related Files window where files on your computer which relate to the current job can be "attached" to the job for easy future reference. Most such files can be opened directly from this window (if your computer has the relevant application).

#### Client List

Opens or makes active the Client List window where details of your regular clients are kept.

The Client List window is technically not one of the Process windows, but is closely related to the Client window.

#### Show 3D Drawing

Opens or makes active the 3D window where you can arrange then photo render a 3D image of the design.

## View menu

Opens or makes active the each of the Job sheets which show specifications and drawings related to the current job.

The **Stair** and **Balcony** menu-items lead to sub-menus which open Job sheets relating to those categories.

See Viewing a Job.

## Custom menu

#### Custom drawing

Opens the Custom Drawing window where you can create a drawing or the stair and/or well including whatever elements you select from the list.

#### Other menu-items

Opens or makes active each of your Custom sheets which show user defined specifications and drawings related to the current job.

The Custom sheets shown under this menu are selected in the Custom Menus window.

Note that the first six custom sheets under this menu can also be opened using the “C1” to “C6” buttons in the main tool bar (down the left of your screen).

Note that a Custom sheets (and some other windows) can also be opened from a button in the Process window – see Chapter 13/ Process window/ Customizing buttons in Process window.

## Draw menu

Opens or makes active **Scrap Pad** and **Draw** windows which allow you to manually create or modify drawings. These drawings can then be inserted into Custom sheets or printed as they are.

Apart from **Scrap Pads**, these Draw windows relate only to the current job and are saved with the current job.

To create a new Scrap Pad, select the **New Scrap Pad** menu-item.

To create a new Draw window, select the **New Draw** menu-item.

The windows function in the same way as a paint program.

#### New Scrap Pad

**Scrap Pads** are pages where you can manually draw anything. Things drawn in **Scrap Pads** are not saved with the job - they are available for all jobs. If you quit StairBiz and re-launch, the drawings will still be there.

Each Scrap Pad created is listed below this menu-item

#### New Draw

Opens a new Draw window for the current job.

Each Draw window created for the current job is listed below this menu-item

## CNC menu

See the separate **Users Manual CNC** (in the StairBiz Program folder).

#### Show Bed

Opens the CNC Bed window. This is a simulation of the actual bed, where you can add, delete and manipulate components and export sessions to a CNC machine

#### Preferences

Opens the CNC Preferences window where you can set preferences for one or more CNC machines.

#### Session List

Opens the CNC Session List window, which shows a list of exported CNC sessions.

## Windows menu

#### Close All Open Windows

Closes all open windows except for the Process window.

#### Restore Toolbar

If you lose the toolbar down the very left of the StairBiz window, you can get it back here.

#### Other open windows ...

All open windows are listed here. You can bring a window to the front by selecting it here..

## Export menu

#### DXF Drawing

Export the current window to a DXF drawing (file with a .dxf extension). If the current window is not suitable for DXF export you will be alerted. Most CAD programs can open DXF files.

This exports all lines shown in drawings in the current window. These lines are not necessarily polygons, and are not necessarily arranged, ordered or grouped in any particular way. For example, a tread might be comprised of four separate DXF lines (rather than a four-sided polygon). Lines that are hidden in the drawing may or may not exist as DXF lines.

These files are not necessarily suitable for creating g-code files without significant intervention (for powerful CNC g-code exporting, see the CNC window).

You cannot export the CNC Bed window from here (there are other, more powerful and appropriate ways to export DXF from the CNC Bed, in the very rare cases where you would actually need to export DXF).

#### SVG Drawing

SVG drawings can be shown in some web browsers (if the appropriate plug-in is installed), and in SVG Viewer programs.

#### QuickBooks

Certain information about the current job can be communicated directly to some versions of QuickBooks.

#### Others ...

From here you can do an export according to the export templates you created in the Export window (Defaults menu). Select the template

## Help menu

#### Show Help

Opens the on-screen Help window.

#### Users Manual

Opens the latest User’s Manual (a Microsoft Word document stored in the StairBiz Program folder on your C drive).

#### End User License Agreement

Shows the software license agreement (a Microsoft Word document stored in the StairBiz Program folder on your C drive. If you do not agree to the terms and conditions it contains you may not use StairBiz.

#### Connect with Support

This allows StairBiz support to see what’s on your screen, concurrent with talking to you on the phone. It allows us to help you troubleshoot a problem more easily.

StairBiz support has no access to any aspect of your computer unless you follow the specific steps to allow it. During the remote support session the only access support has to your computer is that they can see your screen (exactly as you see it) and they can take over your mouse and keyboard to help demonstrate something (if you wish them to). Under no circumstances is there any access to your computer that you cannot see directly on your screen.

When we have finished with the remote support session you can terminate the session, after which time we have no further access.

You must phone StairBiz support before using remote support so the person you speak to can divert the connection to himself.

#### Screen Capture

If you email us with a problem, small screen captures help us enormously. There is an F3 key screen capture in the Design, Custom and View windows. You can also initiate screen capture using this Help menu-item, so that you can use this utility at any time in any window. After you select this menu-item, your cursor changes to a cross-hair – click-drag a rectangle to place the bit-map contents of the rectangle onto the Window clipboard, after which you can paste into any Paint or Word document, or directly into the body of your email.

#### About StairBiz

See Pass Protect window.

# Chapter 7 : Setting up for your business

## Overview

Your business has a particular way of doing things. For example, you might mostly use strings of 280x33 mm but sometimes your strings are 280x42 mm. Your risers are usually 200x19 mm. You have six main types of newels known by particular names, each with its own turning setout. You trench your treads 12 mm into the strings. Some components you buy in as parts and other you manufacture in the factory.

These are just some examples of defaults. They are the dimensions or settings you usually use, but which might occasionally change on a job-by-job basis. They are the initial settings StairBiz uses to process all jobs, until such time as you change them for a particular job if necessary.

The success and accuracy of the StairBiz program depends largely on how you set the program up in the Defaults windows.

* If you haven’t yet told StairBiz what you call things, see Starting StairBiz the first time.

## Clearing the existing defaults

When you install StairBiz for the first time, all defaults windows have been set up to reflect a fictitious stair manufacturing company. This allows you to experiment and learn your way around.

Most defaults windows can have their contents cleared window at a time (usually by selecting an item and clicking the **Delete** button while holding down both Shift and Control keys. Refer to each window for more details).

Do not attempt to start a new project until you have entered new Style and Timber items (it’s not a problem – it just may confuse you).

Note; if you’re ready to get down to work with StairBiz, you might want to also delete all existing projects. The easiest way is to select them in the Directory window and click the **Delete** button (that way you don’t need to open them first).

## Defaults used to Design and Cost Jobs

Most design defaults are created in the Design window and saved as templates. The following does not discuss these defaults – for a full explanation see Design window.

When initially setting up StairBiz for your business, start by working through the following menu-items under the Defaults menu (in order of importance). These are the windows that are most critical for the effective and accurate use of StairBiz by your business. Refer to the relevant topic for more detailed information on each.

Note that windows relating to estimating are not shown if you do not have the Estimate module (see Chapter 1 : How to use this Manual/ The optional “Estimate” module).

Note: before doing anything, see the heading **A Strategy for setting up you defaults** (below).

1. Language allows you to personalize all terminology used in StairBiz (or do a complete and total translation into another language). See the **Terminology** section in the Language window.
2. Preferences allows you to set some aspects of the way StairBiz writes and draws in its windows, and choose your preferred measurement system. See Preferences window.
3. Styles holds information about all generic stair components. See Style Defaults window.
4. Timbers holds the timbers, and costs for each timber and size. See Timbers window.
5. Miscellaneous Defaults holds certain default information that StairBiz needs to cost your stairs, or is used for the default terms-of-trade for a new client. See Miscellaneous Defaults window.
6. Setout holds some information about how you set your stairs out (most stair setout defaults are created in the Design window and saved to templates). See Default Setout window.

After you’ve set the above windows, and you’ve had a chance to use StairBiz for a little while to learn your way around and get a good feel for how things fit together, you’re now in a position to tackle the following windows.

1. Extra Lengths sets the default extra length for each component in a stair; i.e. a nominal length added to the exact length calculated by StairBiz. See Extra Length Defaults window.
2. Parts allows you to set a list of parts used in stairs, and information about those parts. A part is a component which is purchased in its finished state at a fixed price. Also note that there is a way to set up all parts, timers, styles and timber themes using a simple import or a Parts spreadsheet. See Parts window.
3. Part Filters allows you to specify which parts are used in what situations in stairs. See Part Filters window.
4. Labour Filters allows you to specify labour cost for every activity in manufacturing, delivering and installing stairs. See Labour Filters window.
5. Timber Themes allows you to restrict timber selections for each style selected in the Components window of a job.

NOTES:

The information in these windows (and all Defaults windows) are stored on your disc (in the StairBiz Defaults.mdb file in the Defaults folder). When you start a new project, StairBiz looks in this file for all the settings it will need, and imports those settings into the job. StairBiz then closes the file and will never refer to it again for that particular job. Many of these default settings are then displayed (and are amendable for that job only) in the job’s Process windows.

When you save the job, the default settings you used for that job (or the amended settings if you changed any of them in one of the job’s windows), are saved as part of the job. If you close the project and re-open it at a later date, StairBiz does not refer to the defaults file - it will use the settings saved with the job.

So ...

* The defaults are not associated with any one job - they provides the initial (default) settings for all jobs.
* Settings amended in any of these Defaults windows will not impact any previously saved job, even if you re-open that job and make changes to it.
* Settings amended in these Defaults windows effect only new projects (i.e. jobs started afresh in the future).
* Once imported into a new project, settings can be changed for that job only (from within one or more of the job’s window). These changes will not impact the Defaults windows.

## Other Defaults windows

Once again, the following does not discuss design defaults – for a full explanation see Design window.

After you have completed the setup of the main defaults windows above, finish off by working through the following six windows (not including the first one, which you should be familiar with but does not require a setup). Refer to the relevant topic for more detailed information on each.

1. My Data allows you to create user fields for your jobs (fields in which you can store any and all information not provided for by StairBiz). See My Data Defaults window.
2. Colours allows you to personalize the colours you see in StairBiz. See Colours window.
3. Job Numbers is where you set the initial next-in-sequence job and quote numbers (these numbers can then be incremented automatically for each job). See Job Numbers window.
4. Folders allows you to create folders within which you can save stair, unit, well and bullnose templates, and also projects. See Folders window.
5. Building Codes allows you to set minimum and maximum values for various aspects of a job’s design which, when exceeded, generates an alert. See Building Codes window.
6. Print Settings allows you to specify which Job sheets you would normally print for each job (these can be modified for each individual job as required). See Print Settings window.
7. Custom Editor is where you design your Custom sheets (user designed quote and job sheets). This is actually a separate application which resides in the StairBiz Folder and can be booted from this menu. See Custom Editor window.
8. Custom Menus allows you to set which of the Custom Sheets currently in your Custom Sheets folder will show up in the Custom menu, and in which order. See Custom Menus window.
9. Export Templates allows you to create templates for exporting tab delimited fields from a StairBiz job to the clipboard, from where you can paste them into any application (word processing, databases etc.) See Export Templates window.

## A strategy for setting up defaults

There is no *one* way to set up StairBiz. Businesses very enormously in their approach, particularly in the areas of parts and costing, and they vary enormously in the level of sophistication required.

However, there is one piece of advice we would offer to all businesses – start simple, then get a good feel for the way StairBiz works before adding complexity.

So how do you do that in a way that doesn’t require any back-tracking later?

1. Do a lot of “playing” before you start to set up. Get a feel for the way StairBiz works. Read this manual, particularly the topics How StairBiz costs jobs, Blank items and Parts, and Part and labour cost filters.
2. Forget about part filters. This is perhaps the most complex aspect of StairBiz (only because of its power and flexibility). It is not an area to work on until you understand what you’re doing – a change of strategy mid-way through the process can cost you a lot of time. You do *not* need part filters to use StairBiz effectively, even if you take an entirely “Parts” approach to stairs.

For example, if you set up your Styles and Timbers, you can start to process jobs that will give you a perfectly legitimate Cutting List. If you take a parts approach to stairs, initially you can do quick and accurate take-offs (generating a parts list based on the Cutting List) manually. After you’ve got a feel for this, you can set up your part filters to do this automatically.

1. To what extend you need to set up timber costs in the Timbers window will depend on the extent to which you use parts, so it may make sense to stay simple initially (unless you already have spread sheets or databases which contain all you timbers and costs, in which case setting these up using the **Import** feature is very quick). A temporary simple alternative is to set each timber’s cost method to **Cubic Meters All** or **Super Feet All** or **Base Percentage** (in which case a single cost will cover all sizes).
2. Once again for those who take a parts approach to stairs: In the Styles window there are two ways you can assign a part to a particular style (**Part Is** and **Part From Filter**). If you select **Part Is**, you will need to have a separate style for every part associated with that style (e.g. a separate style for each combination of style/size/timber). This could lead to quite massive lists of styles. This is one reason for part filters – they allow you to have just one style/size without regard for timber (the timber can be selected from your timbers list in the Components window of a job), and the part filter checks the match between the style and the timber and comes up with the correct part.
3. There is a way to create your entire Parts window, Timbers window, Styles windows and Timber Themes window from a single import from a Parts spreadsheet. If you use this method, then don’t waste time setting up these windows individually. See Parts window – Import Parts.

## Error checking

When amending or adding to the default settings, in many cases StairBiz won’t allow you to accidentally set an absurd value, but at the same time it’s impossible for StairBiz to cross check every combination. So it doesn’t try to. The rule is this: If the values you set are values that have been working for you before you started using StairBiz, then StairBiz should be able to work with them. If the values you set wouldn’t work outside of StairBiz, then StairBiz won’t be able to make them work either. The responsibility is yours to ensure that your default settings are workable in real life, and in the combinations of them that you impose upon StairBiz. If they are not, then StairBiz may operate erratically, or may give you incorrect results.

# Chapter 8 : Using StairBiz to process your jobs

## Starting a new project

There are four ways you can create a new project:

1. Click the **New** button in the Process window
2. Click the **New** icon in the Tool-bar
3. Press **Control+N**
4. Select the **New Project** menu-item under the Project menu

When you start a new project, a new job is automatically created within that project – you do NOT need to use the Jobs menu to create the first job.

When you start a new project, all default settings are brought into the project and saved with the project. The project will never again refer to your default settings.

The Process window is like home base when processing a job. From this window you can start a new project, open a previously saved job, navigate your way through the various Process windows, save the job, close the project and kill (delete) the project (you can also do most of these things using the Project menu and Process menu).

Open the Process window (if it is not already open) by selecting the **Process** menu-item from the Process menu.

## Processing a job

A job has up to 16 stages, represented by the 15 picture buttons on the right side of the Process window (all 16 are represented under the Process menu, and many are also represented in the tool bar at the far left of your screen). Each button opens the relevant window for that stage, as follows:

1. Client window Details about the client (person or company) that has ordered the job, including their terms of trade
2. Site window Details about the site (if required)
3. Job Details window Certain details about the job.
4. Components window Changing (if necessary) the default size, timber and cost of each component of the stair.
5. Setout window Changing (if necessary) the default setout values relating to the design of the stair.
6. Design window Designing and amending the stair and balcony balustrade.
7. Materials window Costing materials for the job.
8. Labour window Costing labour for the job.
9. Quote Calculation window Calculating the quote total for the job.
10. Quote window Preparing a quote to be presented to the client.
11. Schedule window Placing the job on a time line for assembly and delivery and/or installation.
12. Invoice window Preparing an invoice to be presented to the client.
13. Payments window Recording payments for the job.
14. Receipt window Preparing a receipt for payments, to be presented to the client.
15. My Data window Your own data fields for the job.
16. Notes window Your own notes or memos associated with the job.

Apart from its own specific characteristics, each Process window has a **Done** button. If selected (you click on it), a tick is placed against the corresponding menu-item in the Process menu. This is a reminder that you have completed that process of the job (or a reminder of which processes remain to be dealt with). You do not have to use it.

The information in every Process window can be viewed and/or printed using the sheets opened from the View menu and Custom menu (see Viewing a job).

Some Process windows are unavailable to a Level-3 password clearance (see Passwords).

## Processing a job; the sequence

On Starting a new job, all **Process** buttons (in the Process window), **Process** menu-items (under the Process menu) and Process Tool-bar items become enabled.

The order in which you work through the processes is not important, however, common sense would suggest it’s best to start at the first process (Client window) and work your way through the processes (horizontally) in order. For example if you wanted to change the size of the newels (in the Components window) you would want to do it before you designed the stair (in the Design window).

However, keep in mind that changes to ANY window will change ALL related details in EVERY other window. For example, if you designed and quoted a stair, then went back to the Components window and changed the size of the treads, this new information will automatically update the Design, Materials, Quote Calculation, Quote, Invoice and Receipt windows, plus all relevant Job sheets and Custom sheets.

## Viewing a job

A sheet is a window where you can view and print information and drawings related to the current scenario of the current job. (To view a different scenario for the job, or a different job in the project, use the Jobs and Scenarios menus to toggle between the jobs and scenarios – the sheets can stay open (only the information shown in them changes).

There are 20 Job sheets, any number of Custom sheets which are user defined, and any number of Draw windows which are user defined.

Sheets are designed to present information to the user, the client, the factory staff or to contractors.

Sheets are accessible from the View menu, Custom menu and Draw menu.

### Job sheets

Job sheets relating to the current job are accessible from the View menu.

Job sheets are pre-set by StairBiz. You are not able to change them (although you can annotate them with text and graphics).

Job sheets which are unavailable (either because that part of the job has not been completed, or because the sheet is not relevant to the job) are disabled in the View menu.

Some sheets are unavailable to a Level-3 password clearance. See Passwords.

A Job sheet may show one or more pages (if there is more than one page, there will be page buttons at the top right of the window).

In job sheets where there are columns, the width of the columns are often automatic (based on the width of the longest text shown in each column). The spacing between the columns can sometimes be influenced by your system software, so StairBiz gives you a way to adjust it in the Preferences window (Prefs 2 tab, Column Spacing).

#### Job Info sheet

This sheet displays information about the job, the client, the site, the method and date of dispatch, and the quote total, payments and terms.

It might be useful to you as an office record, and to the delivery/installation staff.

The information comes from the Process window, Client window, Site window, Quote Calculation window and Payments window.

#### Project Info sheet

This sheet displays financial information about all jobs in the project, with totals at the bottom. The totals are as your client would see them. The Price is a pre-discount price and includes Profit and Adjustment. If you have permission, there will also be a Net Profit column, which shows your net profit for the job (i.e. after deducting Discount and Adjustment).

#### Stair Plan sheet

This sheet shows the stair as designed (with all significant dimensions), and shows the balcony configuration (without dimensions).

The information comes from the Design: Stair Design window and the Design: Balcony Balusters window.

#### Strings sheet

This sheet shows the setout and end-cuts for all the stair’s strings. They are calculated from the stair as designed.

If hockey strings apply, the glue-up details for those strings will be shown on the last page of this sheet.

To find out how StairBiz treats landing strings, see Strings at a landing.

Also see Strings.

#### Treads sheet

This sheet shows the setout for each tread in the stair, including landing and bullnose treads. Newels are deducted from the treads where those newels are not floating. Dimensions are running dimensions from the bottom/left of the tread.

Each drawing indicates:

* **Tread Id**; the tread number from the bottom or top of the stair (as specified in the Preferences window)
* **Qty**; for identical treads, only one is drawn and the quantity is indicated.
* **Size**; the overall minimum rectangle needed to obtain the tread.

#### Tread Glue-up sheet

Where a tread cannot be obtained in a single piece from the size selected in the Components window, that tread may need to be built up from a blank of the selected size. This sheet shows the set-out of the blanks for cutting the glue-ups.

A “wastage” or “working margin” in taken into account. This is taken from item ~190 in the Setout window. This margin is added to all sides of the tread (except for the nosing) prior to the calculations. This wastage does not apply to straight-flight treads which are perfectly rectangular.

Note that a Method 1 setout (see Setout window, Glue-ups) can be put on the CNC bed for cutting.

#### Newel Turning sheet

This sheet shows how to set out the newels prior to turning.

Dimensions are RUNNING dimensions. Dimensions include provision for turning wastage at the top and bottom of the newel (item ~53 in the Setout window).

#### Newel Routs sheet

This sheet shows the setout of the newels for trenching.

The dimensions down the side of each newel are RUNNING dimensions, with the zero mark normally at the top of the upper string housing (it’s usually more practical this way). These dimensions do not include provision for turning wastage - they are finished dimensions.

#### Stair Balustrade sheet

This sheet shows the setout for each section of stair balustrading for both rail and bottom plate. They show each section as having been levelled (i.e. it is not simply a plan view of how they would appear looking down on the stair), so that the spacings for balusters will be wider than in plan view.

Centres of balusters are shown.

#### Balcony Plan sheet

The first drawing shows the dimensions for the well.

If there is balcony balustrading, the this drawing will also show offsets from the well to the balconyplate, and a second drawing will show balusters spacings and baluster extensions.

#### Balcony Balustrade sheet

This is the same as the **Stair Balustrade sheet**, except that it relates to the balcony.

#### Cutting List sheet

This sheet shows the style, timber, quantity, exact finished size, and exact finished length of every blank item in the current design PRIOR to any blank items being (optionally) converted into parts. So parts from the part filters and loose items from the Materials window are not included. This sheet would be useful for staff doing the preparation and assembly of the job.

If the column spacing in this sheet is too narrow or too wide, see Preferences window (Prefs 2 tab, **Column Spacing**).

If a component in the Components window has the **Part From Filter** option selected, StairBiz ignores this **Part From Filter** setting for the purposes of calculating this list. StairBiz also ignores any **Manual Mode** setting in the Materials window.

In other words, if you were using no part filters and were not in **Manual Mode** in the Materials window, this list would be identical to the **Bill Of Materials** sheet (see next heading).

Note that the **Don’t Process** menu-item when you right-click a stair unit in the Stair Setout pane of the Design window can force StairBiz to ignore certain units of a stair for the purposes of spec’ing and costing labour and materials.

#### Bill Of Materials (BOM) sheet

This sheet shows all components for the job. If those components are blank items, it will show them as per the Cutting List (see above). If any blank items have been converted to parts by your part filters, it will show the parts. It also shows loose items added in your Materials window.

This sheet is what many would call a Pick List. The total cost of materials is derived from adding up every item in this list.

There is an reference number at the end of each line in the sheet. If the preparation staff wrote this number on the relevant components, this sheet could also be useful to the assembly staff for identification purposes. The lengths are exact (except for walltrim in certain cases, where an over-length approximate is used), plus any EXTRA as specified in the Extra Lengths window. Cutting a blank too much over length would lead to wastage. Cutting it under length makes the blank unusable.

If the column spacing in this sheet is too narrow or too wide, see Preferences window (Prefs 2 tab, **Column Spacing**).

#### Materials Cost sheet

This sheet gives a summary of the components by size and timber, and shows the total cost.

It comes directly from the Materials window.

If the column spacing in this sheet is too narrow or too wide, see Preferences window (Prefs 2 tab, **Column Spacing**).

#### Labour sheet

This sheet gives the labour times and cost and/or contract rates for every task in the job. It comes directly from the Labour window. It may be useful as an office copy.

The information displayed on this sheet can be determined by the **Print** buttons at the bottom of the Labour window. This can be especially useful for creating reverse invoices for your contract workers.

See the note under the previous heading regarding **Don’t Process**.

The Labor sheet shows, in the very bottom row, total time for the job (if you have not included times for any items costed as “Contract”, then obviously they won’t be included).

#### Quote Calculation sheet

This sheet shows the basis for calculating the final quote, and shows the schedule of payments.

It comes directly from the Quote Calculation window.

#### Quote, Invoice and Receipt sheets

These sheets are ready for presentation to the client. They would normally be printed on your business letter-head. They are different to the other sheets in that they have no border or title block.

They comes directly from the Quote window, Invoice window and Receipt window.

There may be more than one page to these sheets (use the scroll bar).

#### Notes sheet

This is derived solely from the Notes window (i.e. it contains your personal notes).

#### Alert sheet

This sheet shows alerts or problems associated with the current stair design. It shows if you have exceeded your limits set in the Building Codes window (as selected in the Site window for the job). It also shows any alerts triggered in your Part Filters or Labour Cost Filters. It is updated every time the user amends the stair design.

When there are any items listed in the **Alerts sheet**, the red **Alert** button is enabled in the Design window. Clicking this button is an alternative way to open this sheet.

If alerts are current for a job the **Alerts Current** field of the Job Directory window will indicate such.

### Custom sheets

**Custom sheets** relating to the current job can be opened from the Custom menu.

They contain whatever you have set them up to contain (see Custom Editor window).

The sheets shown in the Custom menu (and their order) are set in the Custom Menus window.

### Draw windows

**Draw windows** can be opened from the Draw menu.

They contain whatever you have drawn in them (see Draw window).

### Annotation

Any sheet can have user text and/or graphics inserted into it. See Annotation.

## Printing a job

There are two ways to print Job sheets, Custom sheets and Draw windows:

1. One at a time (see Printing a Single Sheet)
2. In a batch (see Printing Multiple Sheets)

### Printing a Single Sheet

To print a single Job sheet, Custom sheet or Draw window:

1. The sheet must be the active window on your screen.
2. Select the **Print Page** menu-item from the Project menu (or press **Control+P** on the keyboard).
3. The **Print** dialog window will open and request the details of the printing.
4. Click the **Print** button.

If the **Print Page** menu-item is not enabled, it means that there is not a printable sheet active.

You do not have to manually select different page orientations – StairBiz does it automatically. See Page Setup.

### Printing Multiple Sheets

It may be more convenient to print many sheets for a job in a single hit rather than one at a time (even if the sheets are not open).

1. Select the **Print Job** menu-item from the Project menu.
2. The **Print Job** window will open and request the details of the printing.
3. Click the **Print** button.

The Print Settings window allows you to nominate a default set of sheets to be pre-selected when you open the Print Job window of a new job. It can be accessed from the **Print Settings** menu-item under the Defaults menu.

Also see Print Job window.

To print more than one copy of a Custom sheet in a single hit (even pages that are slightly different, e.g. different copies of a quotation page), see Custom Editor window.

You do not have to manually select different page orientations – StairBiz does it automatically. See Page Setup.

## Naming a project

A project needs a **Project Name** in the Process window before it can be saved. A **Project Name** must be different from any other **Project Name** (StairBiz will alert you if there is a problem here).

If there is only one job in the project, you can set the **Project Name** OR the **Job Name** OR both in the Process window – if there is no **Project Name** set, StairBiz will use the **Job Name** to set the **Project Name**; if there is no **Job Name** set, StairBiz will use the **Project Name** to set the **Job Name**.

If there is more than one job in the project, each job will need a **Job Name** different from any other **Job Name** within the project (but it may be the same as a Job name in some other project).

Project names and job names can be changed at any time, even after the project has been saved.

If you want to set the **Project Name** to that of the **Client Name** (assuming you have already set the Client Name in the Client window), you can simply double-click the “Project Name” label to the left of the Project Name field. To set it instead to the Site Street, hold down the SHIFT key while double clicking. Alternatively you can define which fields become a default project name under these circumstances (see Preferences window/ **Def Project Name** and **Def Job Name**)

## Saving a job

#### Overview

When you do work on a job, or any scenario within that job, the job is marked as needing a save and the **Save** button, menu and toolbar item become enabled.

Saving a job saves the current job (there can only be one job loaded at one time), plus all scenarios in that job. Any other job in the project has already been saved and stays as is.

There are four ways to save a job:

1. Click the **Save** button in the Process window (this button is enabled only when a job has been changed since it was started, opened, or last saved)
2. Press **Control+S** on the keyboard.
3. Select the **Save** menu-item from the Project menu.
4. Click the **Save** icon in the Tool-bar.

If you are opening a new or existing job (either within the project or outside of the project), and the current job needs saving, you will be alerted and given the opportunity to save it prior to the new job opening.

See also Naming a Project, Naming a Job and Project Folders.

#### Saving – a good habit

Note that it is good practice to regularly save your work as you progress through a job. If anything should go wrong, or you make a major mistake, you can always revert to your last saved situation (see the **Revert Job** menu-item under the Files menu).

Get into the habit of pressing **Control+S** (i.e. Save) every few minutes. Saving to disc takes a fraction of a second.

## Project folders

Projects are saved in folders. This makes it easier to categorize and find particular projects. You could have a “Main” project folder, plus folders for particular builders or projects or cities or sales reps etc. You could have a “Confirmed” folder (for jobs that have been confirmed but not yet processed), a “Done” folder (for jobs that are finished but not yet archived), a “Dead” folder (for jobs that have not been confirmed after a certain period of time), etc.

The Project Folder is one of the fields available in the Directory window and as such is very useful for grouping or sorting jobs in that window. You can also change a project’s folder in this window.

Projects are also grouped according to their folder in the Open Project window.

The folder the project will be (or is already) saved in is shown in the **Project Folder** field to the right of the **Project Name** in the Process window. You can change it any time (whether the project has previously been saved or not) - click the drop-down list.

To create, delete or amend project folders, see Folders window.

## Opening a saved project

Note that when you have a sizeable number of jobs, the Directory window in the ideal tool to manage, track, find and open jobs. The following method is useful when you have a smaller number of jobs, or where you know exactly what you’re looking for.

The following assumes that no project is currently open.

You cannot open a project without opening a specific job (a project is a container for jobs). The following methods open both a project and a specific job within that project:

1. Click the **Open** button in the Process window
2. Click the **Open** icon in the Tool-bar
3. Press **Control+O** (the letter, not zero)
4. Select the **Open Project** menu-item under the Project menu
5. Select the job in the Directory window, and click the **Open Job** button.
6. If you know the project name, you can type it in to the **Project Name** field in the process window, then click the **Open** button (or press ENTER). The first job in the project will be opened.
7. If you know the job name, quote number, job number or purchase order, you can type it in to the relevant field in the process window, then click the **Open** button (or press ENTER).

Methods 1, 2, 3 and 4 above opens the Open Projects window, showing projects (on the left) and their related jobs (on the right). Select the project from the left hand list. If there is only a single job in the project (as indicated by a single job name in the list on the right), or if there are multiple jobs but the job you want is already selected on the right (i.e. is the first in the list), you may simply double-click this project name to open the job. If there are more than one job and the job you want is not selected, double-click the job you want.

Methods 6 & 7: Note that if **Enable SpeedSearch Job Find** in the **Prefs 2** tab of the Preferences window is ticked, as you type you get a list of jobs that correspond with what you have typed so far – at any time you can click the item in the list to open that job. Note that if you are networked and have a slow internet connection, and you get errors (or crashes) while using this feature, you should untick **Enable SpeedSearch Job Find** (your connection speed cannot handle it).

All other lists in this window can be speed searched – see Speed Search Lists.

##### Project Folders

To locate a project in a folder different to the one displayed at the top of the Open Projects window, select the folder name (or “All”) from the pull-down list (see Folders window and Saving a job).

See also Opening a saved job within a project.

##### Project History

The second folder in the **Folders List** at the top of the Open Projects window is the **Project History folder**. This folder simply shows up to the last 30 projects you opened or created. The most recent project at the top of the list, and so on down (these projects are also listed in their normal project folder).

The **Project History folder** is useful for easily locating and opening your most recent projects. It is unique to the current user, so that even when connected to a server it will show only your history.

There are no “doubles” in the list – if the fourth in the list is opened, it is removed from its fourth place and inserted in first place.

The **project history** survives a shutdown (it will still be intact the next time you launch StairBiz).

##### Project History shortcut

If you know which item in the History Folder list you want to open (i.e. the first, second, third, etc.), you do not even have to use the Open Projects window to open that project – just type the *number* into the **Project Name** field in the Process window and click the **Open** button (or press ENTER). For example, if you want to re-open the last project opened, type a “1”. If you want to open the project opened the time before last, type a “2” and so on.

Using this shortcut it becomes very easy to toggle between two projects. For example, open ProjectA, then close it. Open ProjectB, then close it. To re-open ProjectA, type “2”. To re-open ProjectB, type “2”. To re-open ProjectA, type “2”, etc. (because the project opened the time before last is always 2nd in the history list).

##### Filter check

On opening a job, StairBiz will check to see that all filters current at the time the job was saved are still available; see Chapter 22 : Filter check on opening job

## Adding a job to a project

The first job of a project is automatically added when you start a new project.

For subsequent jobs, either:

1. From the Jobs menu, select **Add Job**. A new job will be added. The information contained in the shared windows will be the same (obviously) as the shared windows in the first job. All windows that relate to the specific design of the new job (Design window, Materials window, Labour window, Quote Calc window and Payments window) will contain nothing (you haven’t yet created a design for this job), or
2. From the Jobs menu, select **Duplicate Current Job**. A new job containing an exact duplicate of the previous job will open. Shared windows are shared. Other windows contain a COPY of the contents of the same windows in the previous job.

In both cases, if the previous job needs saving before the new job is created, you will be alerted and given the opportunity.

## Naming a job

Your first job (i.e. the one created automatically for each new project) doesn’t need a name in the **Job Name** field of the Process window – if it’s left empty the job is called whatever the project is called. If you want this job named something other than the Project Name, you can enter a name.

Each additional job will need a name, and that name must be different to any other **Job Name** in the project (but may be the same as job names in other projects). StairBiz will alert you if there is a name clash.

If you want to change a **Job Name** you can at any time.

A change in **Job Name** won’t show up in the Jobs menu until the next time you save.

## Opening a job within a project

The following assumes that a project is currently open.

If the project contains only one job, it will already be open (you cannot have an open project without having an open job).

Otherwise, from the Jobs menu, select the job you wish to open.

## Deleting a job from a project

From the Jobs menu, select **Delete Current Job**.

## Adding a scenario to a job

The first scenario of a job is automatically added when you start a new job.

For subsequent scenarios, either:

1. From the Scenarios menu, select **Add Scenario**. A new scenario will be added. The information contained in the shared windows will be the same (obviously) as the shared windows in the first scenario. All windows that relate to the specific design of the new scenario (Design window, Materials window, Labour window, Quote Calc window and Payments window) will contain nothing (you haven’t yet created a design for this scenario), or
2. From the Scenarios menu, select **Duplicate Current Scenario**. A new scenario containing an exact duplicate of the previous scenario will open. Shared windows are shared. Other windows contain a COPY of the contents of the same windows in the previous scenario.

In both cases the new scenario will become the current scenario (the one the job is using to cost and quote and specify).

## Naming a scenario

By default, scenarios are automatically named “Scenario 1”, “Scenario 2” etc. When you have more than one scenario in a job, the Process window will show an extra field being the **Scenario Name** field. If you want to change the Scenario Name you can at any time.

A change in scenario name won’t show up in the Scenarios menu until the next time you save.

## Opening a scenario within a job

From the Scenarios menu, select the scenario you wish to open. It becomes the current scenario.

## Deleting a scenario from a job

From the Scenarios menu, select **Delete Current Scenario**.

## Closing a Job

A job can be closed at any time. There are four ways:

1. Click the **Close** button in the Process window
2. Click the **Close project** icon in the Tool-bar
3. Press **Control+E**
4. Select the **Close Project** menu-item under the Project menu

If the job needs saving, you will be alerted.

All windows will close except the Process window. All buttons and text boxes in the Process window becomes disabled except for the **New** button and **Open** button.

To start a new project, click the **New** button.

## Deleting a Job

Also see Deleting a Project

If the job to be deleted has not been saved simply close the job as described in Closing a Job. When you are asked if you want to save the job, click the **No** button.

Otherwise, with the job closed, select the job in the Directory window and click the Delete Job toolbar button. If there is more than one job in the project, StairBiz will ask whether you wish to delete the entire project or just the one job.

## Deleting a Project

Also see Deleting a Job

If the project to be deleted contains only one job which has not been saved simply close the job as described in Closing a Job. When you are asked if you want to save the job, click the **No** button. Otherwise, there are two methods ...

1. With all jobs in the project closed, select one of the jobs in the Directory window and click the **Delete Job** toolbar button. If there is more than one job in the project, StairBiz will ask whether you wish to delete the entire project or just the one job.
2. With all jobs in the project closed, select Delete Project from the Project menu.

## Archiving a job or project

To send a job to an archive database, close the job, open the Directory window, select the job, and click the  toolbar button. You will have the option to create a new archive file or select and existing archive file. You will also have the option to delete the archived job from the current jobs database.

## Quitting StairBiz

There are three ways to quit StairBiz:

1. Select the **Quit** menu-item under the Project menu
2. Press **Control+Q** on the keyboard.
3. Click the **Close** box at the top right of the **StairBiz window**. You will be asked if you want to quit (this button is easy to click accidentally).

If a project is open and needs saving, you will be alerted and given the opportunity.

Any project open will automatically close.

## Managing your jobs

#### Directory window

Generally, when our client is more than a two man show, they do not use the ‘Open Project’ button in the Process window to find and open a job. They use the Directory window, and it is often permanently left open.

In the Directory window you can elect to show whatever columns you like (e.g. Project name, Quote Number, Job Number, Site Address, Client etc.). Note that you can also have multiple “views” of the Directory window.

In the Directory window you can sort (forwards/backwards) by an column. You can speed search (click a column and start typing – the window scrolls in an attempt to match as you type). You can group (by client, job status, etc.) and even sub-group using the Group panel. You can filter.

When you double click on a job in the Directory window, the job opens.

In other words, the Directory window is a powerful way to manage, track and find your jobs. We have some clients that have many thousands of jobs active at any one time, and the Directory window works well for them.

See Chapter 13 : The windows in alphabetical order/ Directory window

Chapter 8 : Using StairBiz to process your jobs/ Opening a saved project

#### Project Names

You can “auto-fill” the **Project Name** field in the Process window by double clicking on the ‘Project Name’ label. In the Preferences window you can set the default behaviour for this feature (i.e. insert any combination of current Client Name, Job Number, Quote Number, Site address etc.), so it’s very easy to get your project names unique.

See Chapter 8 : Using StairBiz to process your jobs/ Naming a project

See Chapter 13 : The windows in alphabetical order/ Preferences window/ Prefs 1

#### Project Folders

You also have the Project Folders feature as yet another way of organizing jobs (although I suggest you only use this if you have a compelling reason to do so).

See Chapter 8 : Using StairBiz to process your jobs/ Project folders

See Chapter 13 : The windows in alphabetical order/ Folders window

# Chapter 9 : Projects, jobs and scenarios

## How jobs are organized

**Unit** A **unit** is a basic building block of a **stair**. There are only two types – straight and corner. All **stairs** are comprised of combinations of these two **units**, arranged in different ways and given different properties.

In the unit templates list at the left side of the Stair Design pane in the Design window, you may see many different examples of unit templates. However, the two named “Straight” and “Corner” are the two most basic. Every other unit has been made from one of these (or made from a unit that was made from one of these, etc.)

**Stair** A **stair** is comprised of one or more **units** in a single un-broken run from top to bottom.

**Well** A **well** is a hole in the upper floor, and/or pre-existing landings (platforms). It may have one or more sections of horizontal balustrading.

**Design** A **design** consists of one or more **stairs** and/or one or more **wells**. It is what you see in the Design window at any one time, so it is assumed that the **stair**(s) and **well**(s) are somehow related (although this doesn’t have to be the case).

**Job** A **job** consists of a **design**, plus all the support windows for that design (e.g. Site, Job Details, Setout, Components, Quote Calculations etc.).

**Project** When you create a new **job**, you are actually creating a **project** containing a single job. However, more jobs can be added to that project. So a project is a “container” of “folder” for one or more jobs.

However, a **project** goes beyond being simply a folder. If there is more than one job in the project, each job can (and by default does) share some windows (and therefore the information in those windows). The window that is *always* shared is the Client window (so, by definition, all jobs in a project share a common client). The other windows that are shared are: Site; Details; Components; Setout; My Data; Quote/Invoice/Receipt.

In each of these windows there is a **Shared** checkbox, which is ticked by default. If you set or change something in one of these shared windows for one job in the project, that setting or change will apply to all the jobs in the project. If you un-tick this button, this window (for this job) is no longer shared - any setting or change you make in it now will apply only to the current job. See Shared Windows.

If the idea of projects sounds complicated – just ignore it until the time when you have a need for this kind of flexibility. You can pretend that they don’t even exist by simply treating a project as a job (when you start a new project, it opens with a single job; when you save the project, it saves that job; end of story).

For more information, see Multiple jobs in a project.

**Scenarios:**

Just to make things interesting, a job can act as a container for more than one **design**. Each different design is called a **scenario**. Scenarios are useful when a client wants a quote on different options for the same job (e.g. give me a price on this stair *with* a bullnose, and *without* a bullnose). Rather than create separate jobs, you can create two (or more) scenarios within the *same* job. The discussion above about **shared** windows can also apply to scenarios.

For more information, see Multiple scenarios in a job.

You can also use scenarios like “sub-jobs” - see “All Scenarios Active”

To wrap it up; a **project** consists of one or more **jobs**, each of which consists of one or more **scenarios**, each of which consists of a **design** containing one or more **stairs** and/or **wells** and various supporting data and specifications.

In 90% of cases the **project** and **scenario** features would probably not be used - there would be a single **job** containing a single **stair** and/or **well**. In these cases these unneeded **project** and **scenario** features are practically invisible – not cluttering your workspace, but available in an instant should they be required.

## Multiple jobs in a project

##### Overview

A project is simply a container for one or more jobs, however …

All jobs in a project share a common client - anything you do in the Client window of one job shows up in the client window of all other jobs within the project.

All jobs in a project may also (and by default, do) share the information contained in the Site, Details, Components, Setout, MyData and Quote/Invoice/Receipt windows.

Any of these windows (except the client window) can be set to “un-shared”, meaning that anything you do in that window thereafter will only impact the current job.

Also see How jobs are organized and Shared Windows.

##### Why would you want more than one job in a project?

The “Project” feature could be used in the following situations:

1. You have a client undertaking an apartment, townhouse or tract project. Many (or all or none) of the stairs use the same timbers, sizes, styles, setout etc. The stair design for each job might be all the same or all different - it’s irrelevant.
2. You have a project home builder who builds stairs for single dwellings at different sites over a period of time.

The disadvantage of this is that a project imports most of its defaults (and prices) at the time it is created. Thereafter any job created in the project shares those defaults and prices (which may have changed over the intervening period of time). Whereas it is possible to update defaults and prices within one job of a project without affecting other jobs in the project (by un-sharing the relevant windows and reloading them from the defaults), it becomes a bit impractical (there are alternatives – see below).

1. You have a single dwelling that has two or more stairs.

In this situation an alternative is to create multiple stairs and/or wells in the same Design window of a single job. Obviously this becomes impractical (though still possible) if there are more than two stairs because of the space available in the Design window.

Note that if you have two or more designs which are identical (especially for the purposes of quoting), you can use the **Quantity** field in the Quote Calculation window.

##### The advantages of multiple jobs in a project

1. Easier to find; When you want to open a particular job, in the Open Project window select the project from the list on the left and select one of its jobs from the list on the right.
2. Faster to open; If the project is already open, you can select the job from the Jobs menu.
3. Easier to organise; In the Directory window, jobs can be grouped or sorted according to their Project Name.
4. Easier to make bulk changes; Changing something in a shared window of one job will update that window for all jobs in the project (if the window is shared in those other jobs). Also see Shared Windows.
5. Switch jobs without closing windows; When you switch from job to job using the Jobs menu, the currently open windows do not close – they are simply updated with the different job.
6. Summarize costs; the Project Info sheet lists all jobs in the current project and shows various quotation information, with totals at the bottom.
7. Smaller file footprint; because many windows are shared between jobs, each job does not hold a unique copy of that information – shared information is held by the project. This can amount to considerable size savings in the jobs database.

##### Other options besides multiple jobs in a project

The alternative to using multiple jobs in a project is to take the one-job-per-project approach, then organise those projects using one or more of the following strategies:

1. Project folders; multiple projects can be given their own Project Folder.
2. Project Name Prefix; all projects within the group could be given a common prefix in front of their project name, which would group them in the Open Project window and in the Directory window.
3. Job Notes field; this field in the Process window could be used to tag similar projects in the Directory window.
4. Job Templates; you could create each project in the group by opening a Job Template (so that all projects start with the same information)
5. Stair Templates; Similar stairs in a design can be created using a stair template. Stair templates could be saved in folders according to the project group.
6. Multiple stairs in the same Design window; more than one stair and/or well can be created in the same design of a single job.

See also:

Adding a job to a project

Naming a job

Opening a job within a project

Deleting a job from a project

## Multiple scenarios in a job

Also see How jobs are organized and Shared Windows.

Scenarios are useful when a client wants a quote on different options for the same job (e.g. give me a price on this stair *with* a bullnose, and *without* a bullnose). Rather than create separate jobs, you can create two (or more) scenarios within the *same* job.

The best way to think of scenarios is as follows: Imagine that everything you’ve read about a **job** so far is actually talking about a **scenario**, and that a **job** is simply a container for one or more scenarios. When you start a new job, your first scenario is automatically created (you can see it listed in the Scenarios menu). If you only have one scenario in a job, the concept of scenarios is redundant – the one and only scenario is saved when you save the job (which is saved when you save the project).

Only one scenario can be open at a time, so there’s never any confusion here. As far as the job is concerned (with regards quoting, cutting lists etc), it comprises only the current scenario. If you have Scenario 2 (or whatever you want to call it) open, and the save and close the job, the next time you open this job, Scenario 2 will be the current scenario. The other scenario will exist (you can select it from the Scenarios menu), but it s not the current one.

The same applies with the Directory window. You will never see scenarios mentioned here. The job in the Directory window is always the current scenario.

Scenarios follow the same shared windows concept as do jobs – you can un-share a window in a scenario and that same window in the other scenarios of the job can stay shared – see Shared Windows.

See:

Adding a scenario to a job

Naming a scenario

Opening a scenario within a job

Deleting a scenario from a job

## Shared Windows

See also Multiple jobs in a project and Multiple scenarios in a job.

Multiple jobs in a project can share information. The information in the following windows can be (and by default is) shared:

Client window

Site window

Details window

Components window

Setout window

Quote window / Invoice window / Receipt window

The other process windows (Design window, Materials window, Labour window, Quote Calc window and Payments window) cannot be shared because they relate to the unique design for the job.

The Client window is always shared - by definition, all jobs in a project share a common client.

So let's use a different example – the Site window. Imagine you have a project comprised of three jobs (say three units in a small apartment block).

The address and site details for this job are identical, so we don’t need three different Site windows. You don’t have to do the following – just follow the logic…

Open the first job in the project and open the Site widow. You’ll notice at the bottom of the Site window a ticked **Shared** button. Type in the site details. Save and close the job. Open the second job in the project, and open the site window. You’ll see those same details.

Un-tick the **Shared** button in this window, then type a different **Measure Date**. Save and close the job.

Open the third job – you’ll notice that it has the same details as the first job (because both are shared).

So now we have jobs 1 and 3 with shared Site windows holding the same (and always the same) information, and job 2 with an unshared window holding different information.

That’s basically how it all works. Simply apply the same logic to the other windows.

Note that you could un-share all three site windows. In this situation the shared window doesn’t die (the project still holds it) - it's just that no job is actually using it at the moment. If you click the **Shared** button in the site window of one of the jobs, you’ll get back your shared window (with the information it contained the last time it was edited).

##### Shared windows and scenarios

I’ve been a little deceptive (for the sake of simplicity) when discussing shared windows in terms of jobs - the shared window concept actually operates on a scenario level.

If your job has only one scenario (ALL jobs have at least ONE scenario), then you don’t need to bother with this concept.

If your job has more than one scenario, then un-sharing a window only un-shares it for the current scenario. Once again let’s use the above Site window example. If Job 2 has two scenarios (Scenario 1 and Scenario 2), and you un-tick the shared button in the Site window of Scenario 2, the Site window in Scenario 1 is still shared (with the Site window in the other two jobs). This allows for complete flexibility.

# Chapter 10 : The Design window

From : Process menu ; **Design** menu-item

The **Design window** is where most of the action happens. Here you create and setout stairs, wells and balcony balustrading. See Chapter 4; A quick tutorial.

The **Design window** has nine **panes** (sub-windows), corresponding to each of the nine design stages, each accessible via one of the nine buttons at the left of the window (or you can press the **Up** and **Down** keys on the keyboard to more to the previous or next pane). The function of each **pane** is summarized as follows:

* **Levels** pane

Set levels for the stairs/wells.

* **Well Design** pane

Create/modify a well configuration from previously saved well templates.

* **Stair Templates** pane

Select a previously saved stair template.

* **Stair Design** pane

Create a stair configuration from previously saved unit templates.

* **Stair Setout** pane

Dimension and setout the stair configuration

* **Curves** pane

Create and manipulate curved flights

* **Bullnose** pane

Create one or more bullnoses from previously saved bullnose templates.

* **Rake Balustrade** pane

Select and set-out balustrading and newels for the stair

* **String Elevation** pane

String, newel and balustrade side elevations

* **Balcony Balustrading** pane

Select and set-out balustrading and newels for the balcony

To open a **Design** sub-window, click on the relevant button. You will notice that not all buttons are enabled - some things have to be completed before others can be started. Apart from that, there is no particular order that you have to follow in working through the Design stages.

Arrows drawn on stairs in the Design sub-windows always indicate the direction specified in the Preferences window.

### Context Menus

When you left-click anything (string, newel, unit, template, bullnose, handrail, white space etc. etc.) in the Design window, the context menu in the gray menu-panel at the left of your screen will change to remain relevant to whatever you’ve clicked on, what window you’re in, what’s current in that window etc.

If under normal circumstances a left-click selects of un-selects something, you can usually suppress the selection/un-selection by holding down the CONTROL key. This would normally only be done if you want to see the relevant context menu in the menu-panel without selecting/unselecting the component.

If you right-click anything, you will get exactly the same menu but as a pop-up.

Which one you use will depend on your preference.

### Dimensions

Dimensions are amended by clicking the dimension (to activate it), editing the current value, and pressing the Enter key. In some cases you can choose between pressing the Enter key or clicking a green option (which has the same effect), or clicking a yellow option (which steers the edit in a particular direction).

See Amending the Stair Design

Note that you can enter calculations into StairBiz dimension fields (e.g. 5.6 + 1.5) – see Miscellaneous topics / Editing / Editing Dimensions / Dimension Calculations

### Buttons in the Design window



Opens the Layers window where you can decide which stairs/wells are shown, outlined or hidden – useful when you have a stair-over-stair situation. See Layers window.



Allows you to create temporary separations (spacings) of stairs and wells – useful when you have a stair-over-stair situation. See Chapter 11: Temporary Separations.

#### Undo

Reverts the most recent edit, provided that you have not since changed windows or panes.

#### Zoom

Click the **Zoom** button and drag a rectangle bounding the area of the drawing you want to expand – that part of the drawing will expand to fill the design-area of the window (perhaps with some adjustment if the dragged rectangle is not the same proportion as the design-area).

Click it again to revert to normal scale.

Holding the CONTROL key down while clicking the Zoom button will expand the drawing by 10% each time. Holding the CONTROL and SHIFT keys down while clicking the Zoom button will reduce the drawing by 10% each time.

An ALTERNATIVE method of zooming is to simply do a click-drag using the mouse wheel instead of the mouse button (if your mouse has a wheel). Click the mouse wheel once again to revert the zoom.

You can also multi-zoom (zoom in, then zoom in again) by holding the control key down while you select the new rectangle for the second and subsequent zooms (this only works if you’re using the centre mouse button for the zooming).

#### Dimension Tools

See Chapter 11; Dimension Tools

#### (What can I …)

Shows what elements of the current design can be left-clicked, right-clicked, double-clicked, click-dragged or edited.

Click anything in the drawing to switch **What Can I** off.

If you click this button with the Control key held down it will display a identification code for every dimension shown in the Design window. This can be useful for communicating with StairBiz support by being able to refer to a particular dimension by its identification code.

#### Alert

This button is only visible when an alert is current.

An alert is current is some aspect of your design violates the tolerances in the Building Codes window (as selected in the Site window for the job), or if any alert has been triggered by your Part filters or Labour Cost filters.

If you click the button, it will open the Alerts sheet where you can view the nature of the violation.

If alerts are current for a job the **Alerts Current** field of the Job Directory window will indicate such

#### Copy drawing bitmap to clipboard

You can create a bitmap image of any drawing (or part of a drawing) in the Design window. Press the **F3** key (the function key). The cursor changes to a cross-hair. Click-drag the cursor to create a selection rectangle around the drawing (or part of the drawing) you wish to copy. When you release the mouse button, the selection is automatically copied to the clipboard. (As a matter of interest, this is how we created the images of the buttons shown above.)

## Levels pane

This window shows the levels of the current design. If you have only one stair and/or well, you need never go into this pane (actually, even then you don't ever need to).

By default, each new job starts with two levels. Depending on the **LEVELS; Ground Floor is called First** setting in the Setout window, these levels are called "Ground" and "First", or "First" and "Second". In the discussion that follows, we will refer to the ground/base floor as the "first", the one above that as "second", etc.

You can add new full-floor levels by right-clicking and selecting **Add Floor Above** or **Add Floor Below**.

You can add mezzanine levels by dragging a full-floor level line up or down with your mouse. Mezzanine levels are useful for creating platforms (where you want to create separate stairs running to/from the platform), and are also useful (necessary) where you have multiple stairs running to a particular level ***or*** from a particular level (but not both) such that the floor-to-floor of those stairs are not the same.

You can set the levels precisely by keying in a dimension (although it might not be appropriate to do this before you have a stair - see below).

Until such time as a dimension is input, the level is tagged as "Float". This is similar to a stair's floor-to-floor floating until you "fix" it by keying in a dimension, and in fact the two (levels and floor-to-floor) are ultimately the same thing (i.e. they interact).

You can set the bulkhead by keying in that dimension (the default comes from a new setting in the Setout window called **LEVELS; Default Bulkhead**.

You can change the name of the levels (shown at the right adjacent to each level) by typing over the existing name, then pressing the ENTER key.

If you have any current stairs, a graphic facsimile or these will be shown between the appropriate levels. The **Layer** name will be shown above the stair, the default layer name showing “From *LevelName* to *LevelName*”. You can change this layer name either by changing the level names, or by directly amending the layer name as shown here. If you override the layer name, you can revert to the default name by setting the layer name to nothing (i.e. just delete the text). If more than one stair shares one layer (i.e. the start levels and finish levels are the same for both stairs), StairBiz will override the second and subsequent layer name by appending “[2]”, “[3]” etc. This is tantamount to a layer name override, and can be reverted to the default as described above (provided it no longer shares layers).

If you have any current wells, the bulkhead area of the appropriate level will be shaded to indicate such.

To delete a full-floor level, right-click and select **Delete Top Floor** or **Delete Bottom Floor**. To delete a mezzanine level, set its height dimension to zero. If any stairs/wells are associated with these levels, you will be alerted and the delete will be aborted until such time as you re-allocate levels to these stairs/wells (see later).

In the discussions below, we refer to **Layers**. A layer is from the level of the bottom of a stair to the level at the top of that stair, plus any well at the upper level.

## Well Design pane

This window is used to create well openings, platforms, floors for a 3D drawing, and walls. A “well” can also be used temporarily as guide lines for any aspect of your stair design. When we use the term “well” in this manual, it can mean any of these things unless any of the types are specifically referred to.

There is fundamentally only one default well shape – square. All other well shapes are derived from this one shape.

The panel on the left contains drawings of previously saved Well Templates.

The panel on the right is your design work-space – empty until you bring across one or more well templates (although if you have already created a stair, you will see its shadow).

#### Opening a template folder

Well templates are shown on the left. You can have as many folders as you like for well templates (see Folders window). To open a different folder, right-click the **Well design** button at the top-left of the window (i.e. the same button that opened this pane).

#### Create one or more wells

Double-click a well template.

If there is no current well, the selected template will become the well.

If there is a current well the selected well will be added to the design (i.e. you can have more than one well).

If there is more than one well, dimensions are shown only on the “active” well – the last one clicked.

When you create the first well for a design, by default it is assigned the second level. You will see this level indicated at the bottom of the window. For all subsequent wells, StairBiz will prompt you to allocate a level (you will be shown a list of existing levels, plus the option to **Add Floor Above** or **Add Floor Below**, in which case the new well will be assigned the added floor).

You can change the level of any well by clicking the **Level** popup at the bottom of the window (to get the pop-up, click on the label of the current well level).

Multiple wells may share a single level. If you have more than one well, the currently active well (the one showing dimensions) shows the **Level** label in bold type. You can change the currently active well by clicking on the **Level** label of the desired well.

#### Right-click a template

Add to Design

Same as double-clicking a template (see above).

Rename Template

Renames the template. Nothing else is affected.

Delete Template

Deletes the template completely. Nothing else is affected.

To delete all well templates in the folder, hold the Control and Shift keys down while deleting one template.

StairBiz will not allow the last remaining well template in the Main folder to be deleted – there will always be at least one.

#### Left-click a template

Double-click

Adds that template to the design.

Click-drag

Drag templates up or down to change their order (which is automatically saved).

#### Click-drag a section

You can click-drag a section (i.e. line of a well) to rough-position it.

The angle of the dragged section remains the same. The dragging of the section is locked to either the horizontal or vertical (depending on the initial direction of the drag). To override this restraint, hold the SHIFT key down during the click-drag.

Under normal circumstances, you should not move the section which represents the trimmer at the top of the stair (you can, but the balustrading might not interpret correctly - and automatically - its relationship with the top of the stair.)

The **angle mode** (see later) has no effect.

#### Click-drag a junction

You can click-drag a junction (i.e. where two sections meet) to rough-position it.

The dragging of the junction is locked to either the horizontal or vertical (depending on the initial direction of the drag). To override this restraint, hold the SHIFT key down during the click-drag.

During a drag, when the angle of the line either before or after the dragged junction gets close to any 45 degree increment (e.g. 0, 45, 90, 135, 180 etc.), it will “snap” to the exact angle. The snap is subtle but discernable.

The **angle mode** (see later) has no effect.

If you drag a junction with a line on one side and an arc on the other (not aligned), the junction will calculate to intersect with the original arc (i.e. the centre and radius of the arc will remain the same).

#### Click-drag a well

You can click-drag an entire well (to rough position it) by click-dragging any section or junction with the CONTROL key pressed.

If you click-drag a junction and drop it over a junction of another well, it will snap exactly to that junction.

#### Right-click an empty space

The first three menu-items (Show Lengths, Show Angles and Show Wall Dimensions) sets the **amend mode**.

The next three menu-items (Lock All Angles, Lock Amended Line Angle, Lock No Angles) sets the **angle mode**. They only apply to the **Show Lengths** amend mode.

Show Lengths

Shows the length of each section of the well.

To amend the length – click and edit the dimension. During the edit, you will notice that the junction at either end of the section becomes coloured – one green, the other yellow. Click on one of the colours to tell StairBiz which end of the section you want lengthened. Pressing the ENTER key after editing is the same as clicking the green junction (i.e. it is the default take-up).

The behaviour of adjoining sections is determined by the **angle mode**.

##### Show Angles

Shows the angle of each section of the well. Zero is to the right, 90 degrees is vertically down.

To amend the angle – click and edit the value. During the edit, you will notice that the junction at either end of the section becomes coloured – one green, the other yellow. Click on one of the colours to tell StairBiz which end of the section you want moved. Pressing the ENTER key after editing is the same as clicking the green junction (i.e. it is the default take-up).

The angle of the adjoining section does not change, but it’s length will adjust. **Angle mode** has no effect.

##### Show Radii

Shows the radii for arcs in the well window. These radii can be edited directly.

##### Show Junction Coords

Shows the X/Y coords of a selected junction of the well (measured from zero/zero of the design, which is the top/left corner of the initial design – the end of the dimension line without the arrow). To select the junction, click on it.

To amend the coords – click and edit the values.

Only the selected junction moves - the length and angles of the two adjoining sections adjust accordingly. **Angle mode** has no effect.

##### Show Well Position

Identical to Show Junction Coords (above), except that if you edit the X/Y position of any selected junction, the entire well will move accordingly (i.e. the well will not change shape).

##### Show Wall Dimensions

Applies only if the well has any walls (see Draw Wall). This mode allows you to amend the width and end extensions of those walls.

##### Show Head-Height

If there is a stair, this will show the head-height situation as relative as possible to the well as shown.

##### Lock All Angles

With this angle mode selected, when a junction moves as a result of an section length amend (not a drag), the non-amended section adjoining this junction will always maintain its existing angle (the entire section may have to move to do this). If, at the end of this adjoining section, there is another section of the same angle (called an “in-line” section), it will also move to preserve its angle, and so on. The process stops when it reaches a non-inline junction.

This is the default **angle mode** (i.e. the usual one)

##### Lock Amended Line Angle

With this angle mode selected, when junction moves as a result of a section length amend, the junction both before and after the moving junction stay where they are.

The amended section changes length according to the edit, its angle stays the same, and the length and angle of the adjacent section adjust.

##### Lock No Angles

With this angle mode selected, when junction moves as a result of a section length amend, the junction both before and after the moving junction stay where they are.

The amended section changes length according to the edit, the adjacent section’s length stays the same, and the angle of both must adjust.

There are times when this is an impossible situation; StairBiz will abort the amend.

##### Create Well From Stair Exact

Creates a well for the current stair. The well follows the outline of the stair exactly (if you set out to the riser, it will follow the riser line of the bottom tread, otherwise it will follow the nose of the bottom tread)

##### Create Well From Stair

In the Building Codes window (**Clearances** tab) there is a value for **Min rail clearance**, which is the clearance for your hand as the rail passes through the well opening. The **Create Well from Stair** feature uses this value to calculate the well. It is the distance from the outside of the handrail (as selected in the Components window) to the line of the well. Note that StairBiz assumes the relevant string is a tenon string (not a wall string), and that the relevant handrail is centred over this string.

StairBiz uses the existence of newels (rather than handrail) as indicating the existence of balustrade.

Note that StairBiz does not factor in head-height, although this can be done manually in a couple of seconds (right-click "Show Head-height").

Where there is not stair balustrading StairBiz applies the **Default stair to well min** setting (see above)..

##### Create Square Well From Stair

Same as **Create Well From Stair**, with one difference. For the tenonside side of the stair, StairBiz takes the bottom-most well line on the wallside side of the stair and intersects it with the line of the top trimmer.

##### Create Lower Floor

Creates a “floor” such that StairBiz can draw the floor in 3D.

##### Import Well from DXF ...

Allows you to select a DXF file containing a polygon, and StairBiz then creates a well from this polygon. The polygon may contain straight lines, and arcs (using BULGE).

Note that StairBiz is not a CAD program, so there are limitations on this feature. In particular, the DXF files needs to contain the following:

1. A "SECTION" header with subsequent "ENDSEC"
2. An "ENTITIES " header
3. A "LWPOLYLINE" object (the polyline)

The file may contain multiple layers, but if so you will be asked to select the appropriate layer. Only a single polygon may be imported.

StairBiz recognizes the following group codes:

8 Layer

90 Number of vertices

70 Open/Closed polygon

39 Thickness

10 Vertice X

20 Vertice Y

42 Bulge magnitude for arcs

##### Paste Copied Outline

It is possible to right-click on well, landing tread or item in CNC Bed and “copy” the outline of that object. Having done so, you can paste that outline in to the Well Design window to amend it. You can then paste it back where it came from (or to the CNC Bed window in all cases).

##### Delete all wells

Delete all wells in the current design. To delete a single well, right-click any line of the well and select **Delete Well**.

##### Show Walls in 3D

Allows you to toggle between showing or hiding walls you have created in the Well Design window in the 3D window.

#### Right-click a section

In the case of arcs, right-click the associated yellow straight line – arcs themselves are not clickable).

##### Add Junction

Adds a junction at the point of the click (creating two sections from the original one).

##### Divide Into Sections …

An input box will ask how many sections. StairBiz then divides the clicked section into this number of equal smaller sections. This includes straight sections, three-point arcs and chordant arcs.

##### Hide Section \*

Hides the section. In the Design window it will show as a yellow line. In all other drawings it won’t exist. Balustrading along a hidden section is not possible.

You can also hide/un-hide ALL sections that do not have balustrade - hold down the Control key which selecting this menu-item.

##### Draw Wall

Draws a wall along the length of the section. The thickness of the wall, and where the walls terminate relative to the ends of the section, can be set in **Show Wall Dimensions** mode. To move the wall to the other side of the section line, give it a negative width.

To set a default wall thickness, see Defaults menu/ Miscellaneous/ Design/ Default Wall Thickness.

##### Is Platform

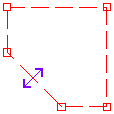
Turns a well into a landing platform. Platforms are different in that they cannot have their own balustrading (but can have stair balustrading – see **Platforms**).

##### Create Room

Creates an outer periphery for the selected well. This would generally only be used if you want to create a floor for a 3D render. The outer periphery can be manipulated in the same way as a normal well to create the correct size and shape.

##### Parallel Offset

Allows you to offset the clicked line (without changing its angle) by a certain distance. A dialog box will open asking you for the offset dimension – positive is away from the centre of the well; negative is towards the centre of the well. This is particularly useful for offset lines that have an angle other than 0, 90, 180 and 270. If the line has an “In-line” junction at the start or the end, the adjacent line or arc is also offset, and so on, so that all lines and arcs that are aligned with the offset line take on the same offset.



To parallel offset an 3-point arc directly (i.e. without clicking on adjacent in-line lines), first convert it to a chordant arc (so that you can right-click it to get the offset menu).

When you do a parallel offset, all 3-point arcs get converted to chordant arcs. If you don’t want this, convert each back to a 3-point arc.

##### Chordant Arc

There are two ways to make an arc (the other way is explained in **Right-click a junction**).

You can right-click on a well line (as opposed to a well junction) and select “Chordant Arc”.

This creates a chord situation along the length of the line. You can amend the length of the chord’s sagitta (the perpendicular bisector of the chord) to adjust the radius of the arc.

You can make it positive or negative.



To delete the arc, either set the sagitta dimension to zero, or re-select it in the menu.

When you create a chordant arc where the line before and after are not in-line, StairBiz sets the initial arc to be tangential to either the line before the start of the arc or the line after the end of the arc (depending on which is longer). Once the arc is created, you can make it tangential to either the start or the end by right-clicking either junction and selecting “Make In-Line”.

The radius of the arc can be shown/edited in **Show Radii** mode.

##### Convert to 3-Point Arc

If the line is a chordant arc, you will have the option to convert that arc to a 3-point arc (provided the arc is less than 180 degrees).

##### Add to Templates

Sends a copy of the clicked well to the templates panel on the left of the window. You will be given the opportunity to name it. If you select an existing name from the list, the current well will replace that template (this is how you update a template).

##### Delete Well

Deletes the clicked well. If it has balustrading, that will also be deleted.

To delete all wells in the current design, right-click a blank space and select **Delete All Wells**.

#### Right-click a junction

##### Delete Junction

Deletes the clicked junction. The section now spans the previous and next junctions. There must always be four or more junctions.

##### Make In-Line

Sends the junction to the closest point on a straight line spanning the previous and next junctions.

However, if the junction you click is the start or end of a chordant arc (created by right-clicking a well line [not a junction] and selecting “Chordant Arc”), StairBiz will reset the chordant arc to be tangential to the junction you click.

##### Make Mid-Way

Only applies to an **in-line** junction – sends the junction to a point exactly mid way between the previous and next junctions.

##### Make Radius / Delete Radius

Creates a 3-point arc at the junction. The start of the radius will be closest junction to the junction clicked (which is how you determine the dimensions of the radius). StairBiz will insert a junction at the same distance along the opposite section (to become the end of the radius).

The distance from the radius point to the start of the radius must always be the same as from the radius point to the end of the radius. If you amend anything to make this distance different, StairBiz will delete the radius. So it’s best to complete your well design in all other aspects before you create radii.

The junctions before and after a radius point must always be **in-line** junctions. In other words, the start and end of the radius must come in square to the adjoining sections. If you amend something that impacts this rule, StairBiz will alert you and abort the action.

The radius of the arc can be shown/edited in **Show Radii** mode.

##### Make Intersection

This moves the junction to the point of the intersection of the following two (imaginary, infinite length) lines:

1. A line drawn through the two junctions previous to the clicked junction.
2. A line drawn through the two junctions after the clicked junction.

In some situations this is simply not possible – StairBiz will abort the amend.

##### Convert to Chordant Arc

If the junction is the mid-point of a 3-point arc, you will have the option to convert that arc to a chordant arc.

#### Amending a well design that already has balustrading

If you design a well opening, then go to the Balcony Select pane and select some balcony balustrading sections, you can come back to the Well Design pane and adjust your well design, with one exception – you cannot insert or delete junctions. If you do this, StairBiz will delete your existing balustrading selections and you’ll need to re-select them (you will be alerted).

StairBiz does some tricky stuff to your well design when you select your first balcony balustrade section – it takes a close look at any stairs in the design, and integrates those stairs into your well design. In doing so it creates invisible junctions in your well where the well intersects the top of a stair or top stair newels. If any change to your well design or stair design changes the fundamental nature of these invisible junctions, StairBiz will need to delete your existing balustrading selections and you’ll need to re-select them (you will be alerted).

The fundamental nature of these invisible junctions is too complex to explain here – just remember that it’s good practice to get your well design, and the stair’s position in relation to that well design, more or less settled prior to selecting balcony balustrade.

#### Working with curved wells

Perhaps the easiest (but not only) way to create curved wells is to design the required stair, then in Well Design right-click and select “Create Well from Stair”. You can then adjust the well to suit.

If you drag a junction with a line on one side and an arc on the other (not aligned), the junction will calculate to intersect with the original arc (i.e. the centre and radius of the arc will remain the same).

## Stair Templates pane

#### Overview

This pane shows any number stair templates.

A stair template is a stair that you have previously created or modified, and saved so that you can quickly call it up in the future. It does not contain information about the job, client, well etc. – it’s just a stair.

Stair templates are saved from the Stair Design pane – see that topic below.

#### Opening an alternative template folder

You can have as many folders as you like for stair templates (see Folders window). To open a different folder, right-click the **Stair Templates** button at the top-left of the window (i.e. the same button that opened this pane).

#### Creating a new stair

Double-click a stair template.

If there is no current stair, a stair is created from the selected template.

If there is a current stair, you will be asked if you want to replace it. If you answer “No” then an additional stair for the same design is created from the selected template.

You are automatically taken to the Stair Setout pane.

#### Right-click a template

Create New Stair

Creates a new stair for the current job. If a stair already exists, the new stair is additional to the existing, and is offset from the existing by a nominal amount (which can be changed in the Stair Setout pane, Stair Position mode and Unit Angles mode.).

You are automatically taken to the Stair Setout pane.

Replace Current Stair

Replaces the current stair with your selected template. You are automatically taken to the Stair Setout pane.

Rename Template

Renames the template. Nothing else is affected.

Delete Template

Deletes the template completely. Nothing else is affected.

To delete all stair templates in the folder, hold the Control and Shift keys down while deleting one template.

Set Class

Allows you to set an identification code so that this specific stair, when used in any design, can be identified and filtered according to its class by the Parts or Labour filters. It is optional. Multiple stair templates can have the same class. Any text can be set, up to 10 characters. See Filters – Properties and Results.

Setout =

In the Setout window (Defaults) you can create multiple Setout windows. You can attach a particular Setout to a stair template, such that when you use that template in a job the attached Setout will override the job’s current Setout selection. When you select this menu-item a list of your saved Setout windows will be presented – select one (or [Normal] to revert to the usual situation). When you use this stair template you will be alerted before StairBiz overrides your existing Setout.

#### Right-click an empty space

Design Flip Horizontal, Design Flip Vertical

Flips all templates.

Design Rotate 90, Design Rotate –90, Design Rotate Other

Rotates all templates.

Design Revert Rotation

Sets rotation to zero.

Auto Layout

With this set (ticked), the position of the templates in the window is calculated by StairBiz. Otherwise see **Manual Layout**.

Manual Layout

With this set (ticked), you are able to drag templates around the window to the position of your choice. While holding down the CONTROL key, drag the template and release.

To revert back to Auto Layout, select that menu-item.

Change Scale

Changes the scale of the templates (i.e. the size at which they are displayed in the window).

Space Between

Applies only if Auto Layout – sets the distance between each template as seen in the window.

## Stair Design pane

The panel on the left contains drawings of previously saved Unit Templates. A unit is a basic building block of a stair. There are fundamentally only two units – straight and corner. All other units (and therefore all stairs) are derived from these two units.

The panel on the right is your design work-space – empty until you bring across one or more unit templates.

#### Opening an alternative template folder

You can have as many folders as you like for unit templates (see Folders window). To open a different folder, right-click the **Stair design** button at the top-left of the window (i.e. the same button that opened this pane).

#### Create or change a stair design

Double-click a unit template.

If there is no current stair, the selected unit will become the stair. When you create the first stair for a design, by default it is assigned the “layer" **First to Second**. A "layer is from the level at the bottom of a stair to the level at the top of that stair, plus any well at the upper lever. See Levels pane.

If there is a current stair (even one created from a stair template) the selected unit will be added to the bottom of it.

There is no limit to the number or order of units that can be added to a stair.

If there is more than one stair in the design, units are added to the bottom of the last stair clicked.

#### Create an additional stair within the same design

If you hold down the CONTROL key while double-clicking a template, and additional stair is started in the same design using the selected unit template. It’s position is nominal, but can be adjusted by either dragging the stair with the cursor within the up/down arrow shown on the stair, or more accurately in the Stair Setout pane, Stair Position mode and Unit Angles mode.

StairBiz will prompt you to allocate a layer (you will be shown a list of existing layers plus the option to **Add Floor Above** or **Add Floor Below**, in which case the new stair will be from the added floor below to the floor above it, or to the added floor above from the floor below it).

Multiple stairs may share a single layer, but all would by necessity share the same floor-to-floor (StairBiz will make sure of this).

See Levels pane.

Also see Copy/Paste in the Design window.

#### Join a second straight flight to a corner unit

Corner units may have THREE units attached to it. It can have a unit above, a unit below, plus it can have an addition straight unit running off (i.e. replacing) one of the units outside strings. This is called an “attachment”.

To create an attachment, create an additional straight flight (see Create an additional stair within the same design). You will notice that there is an up/down arrow at BOTH ends of the straight flight. With your cursor with one of these arrows, drag the unit and release the mouse over one of the wallside strings of the corner unit. If you drag the top arrow, the top of the new stair attaches to the corner unit. If you drag the bottom arrow, the bottom attaches.

If the top of the straight attaches (rather than the bottom), addition units can be added to the bottom of it. It is treated as a separate stair (even though it is attached). Note that units from the units templates list are added to the last stair clicked (i.e. selected, although there is no visual sign of a stair being selected).

Attachments can be made to attachments (providing the attached stair has a corner unit), making for some rather interesting stairs.

To un-attach, drag the attached unit (at the arrow) away from the stair it attaches to.

#### Right-click a unit template

Add to Stair

Same as double-clicking a template (see above).

Rename Template

Renames the template. Nothing else is affected.

Delete Template

Deletes the template completely. Nothing else is affected.

To delete all unit templates in the folder, hold the Control and Shift keys down while deleting one template.

StairBiz will not allow the template named “Straight” or “Corner” to be deleted – these must always exist.

Set Class

Allows you to set or change an identification code so that this specific unit, when used in any stair, can be identified and filtered according to its class by the Parts or Labour filters. It is optional. Multiple unit templates can have the same class. Any text can be set, up to 10 characters. See Filters – Properties and Results.

Set Stair Name

Allows you to set or change a name for this stair, which can then used in custom sheets and as properties in most filters. It is optional. If the stair was created from a stair template, by default the stair name will be the stair template name, otherwise it will be nothing.

Setout =

In the Setout window (Defaults) you can create multiple Setout windows. You can attach a particular Setout to a unit template, such that when you use that template in a job the attached Setout will override the job’s current Setout selection. When you select this menu-item a list of your saved Setout windows will be presented – select one (or [Normal] to revert to the usual situation). When you use this unit template you will be alerted before StairBiz overrides your existing Setout.

#### Left-click a template

Double-click

Adds that template to the bottom of the stair.

Click-drag

Drag templates up or down to change their order (which is automatically saved).

#### Right-click an empty space

Flip Horizontal, Flip Vertical

Flips the current stair and all templates.

Rotate 90, Rotate –90, Rotate Other

Rotates the current stair all templates.

Revert Rotation

Sets rotation to zero.

#### Right-click a unit

Flip Landing

Applies to corner units – flips the unit so that it’s facing the opposite direction.

This should only be used to create a “Z” stair, where a lower landing needs to face the opposite direction of the upper landing.

There should never be a reason to flip the highest landing in a stair, and in fact it can cause problems - rather than flip the landing to get an opposite hand of stair, use the Flip Horizontal menu-item to flip the entire stair.

There is potential for confusion here because now the tenonstring is the wallstring and vice-versa. StairBiz resolved this with the rule that a wallstring is whatever string is the continuation of the wallstring in the top unit of the stair. The same obviously applies to tenonside side. So if there is a straight flight at the top of the stair, and then a flipped landing below it, the size of the outside strings of the landing are now in fact the size shown in the Components window for tenonstrings.

Existing Platform

Applies to corner units – Instructs StairBiz to treat a corner unit as a placeholder for an existing platform (i.e. a landing built by a builder on site, rather than by you).

In such cases StairBiz will not specify treads or strings for this unit, but will specify newels and balustrading if you select those items for inclusion.

You may (if you like) create the existing platform outline in the Well Design pane.

Join To Below

Applies to corner units with a corner unit below it – instructs StairBiz to join the two units such that no string joins exist between the two. Any two or more contiguous corner units can be joined.

Join to Above

Applies to corner units with a corner unit above it – same as **Join To Below**.

Delete Stair

Deletes the right-clicked stair.

Delete Unit

Deletes the clicked unit and all units below it. If the clicked unit is the top unit, it deletes the stair.

Add to Stair Templates

Adds the clicked stair to the stair templates pane. You will be given the opportunity to supply a name and select a folder. You can replace an existing stair template by selecting that template’s name from the list. Duplicate names are not allowed (you will be alerted).

Set Stair Class

Allows you to set or change the class identification code so that this stair can be identified and filtered according to its class by the Parts or Labour filters. It is optional. Any text can be set, up to 10 characters. This class would normally be set by right-clicking on the stair template, but is included here mainly in case this default setting needs to be changed. See Stair Templates Pane and Filters – Properties and Results.

Set Stair Name

Allows you to set or change the name of the stair so that it can be identified and filtered according to its name by the Parts or Labour filters. It is optional. Any text can be set. See Stair Templates Pane and Filters – Properties and Results.

Add to Unit Templates

Adds the clicked unit to the unit templates panel on the left. You will be given the opportunity to supply a name and select a folder. You can replace an existing unit template by selecting that template’s name from the list. Duplicate names are not allowed (you will be alerted).

If the clicked unit has joined units above or below it (see above), all joined units act as a single unit and appear in the units templates as such.

This is how design-setout defaults are created – you modify a stair unit to contain the default settings you will mostly use in the future (see Stair Setout pane), then save that unit as a unit template (replacing the existing if you want).

Update Unit Template

This item is enabled only when the unit clicked has been created from a unit template during the current session (i.e. the job has not been closed since the unit was created).

This is a shortcut for Add to Unit Template (replacing the existing template from which this unit was created). It allows you to more quickly update the unit template with changes you are making to the unit.

Set Unit Class

Allows you to set or change the class identification code so that this unit can be identified and filtered according to its class by the Parts or Labour filters. It is optional. Any text can be set, up to 10 characters. This class would normally be set by right-clicking on the unit template, but is included here mainly in case this default setting needs to be changed. See Filters – Properties and Results.

Stair Flip Hoz/ Flip Vert/ Rotate

Unlike the Design Flip/Rotate menu-items you get when you right-click a white space (which flip/rotate the entire design), these menu-items will flip/rotate just the stair you click on. It is really only useful (and therefore only enabled) when there is more than one stair in the design (otherwise use the design flip/rotate), and even then it is best to only flip/rotate stairs other than the first one.

#### Right-click a string

Right-click a newel to select its options – see String Options.

## Stair Setout pane

Here we set out a stair in a more precise way.

* Be sure to have read Amending the Stair Design.
* Newel setout (positions, angles etc.) are done in the Rake Setout pane.
* Whenever a nosing is mention in the following discussions, if you have Setout to line of riser set to true in your Setout window, then we are actually referring to the face of the riser (not the nosing of the tread). For simplicity, I’ll always use the term “nosing” rather than “nosing or riser face depending …etc”.
* Most of these setouts only need to be done once (during the initial setup for your business) - then you send the unit(s) back to the unit templates in the Stair Design window; thereafter whenever you use that template to create a stair it already has all your standard setouts. See Setting design defaults.
* In the following discussions, the “zero angle” of a unit is the angle of the upper wallstring of that unit assuming that the string has not had its string angle manually changed.

#### Right-click an empty space

All these menu-items (except for the last three) set the **amend mode** for the stair. Different **amend modes** display (for viewing or editing) different categories of dimensions. This avoids clutter and confusion.

##### Main Setout

In this **setout mode** we set the major dimensions of the stair – unit widths, unit lengths, goings, risers etc.

To amend a dimension, click the dimension, edit it, then click either a yellow or green take-up dimension (pressing the ENTER key is the same as clicking a green).

**Number of risers**: This dimension is at the bottom of the window. It is always one more than the number of treads. It can be edited directly. The default **take-up** (green) is the tread count for the lowest straight flight (or bottom corner unit if none found).

If the floor to floor has not been edited directly (i.e. floats), it will change to suit. If it has been edited directly (i.e. fixed), the riser height will change to suit.

**Riser Height**: You can edit the riser height directly. The only take-up is the floor-to-floor (StairBiz will alert you).

**CornerHi/CornerLo:** Applies only to corner units. You can best understand what these dimensions do if you set them to something other than zero (e.g. 200mm - you can always set them back again).

These two dimensions position the top and bottom risers of the landing relative to the corner. Internally StairBiz holds these dimensions relative to the intersection of the outside face of the two tenonstrings. However, you can right-click these dimensions and also have them show their position relative to the string centres, string insides, and (if there is a newel) the front or back of the newel.

**CornerHi** and **CornerLo** can (optionally) hold different values for each different tread count for a landing. In other words, if you set these for a one tread landing, those values won't apply to a two tread landing (to set them for a two tread landing, give the landing two treads then set them again, and so on up to any number of treads that you like. The same applies to whether the landing is a top unit or not. See Contextual Setouts). When using contextual setouts, contextual dimensions are red to help you identify them.

**Floor-to-floor dimension**: This dimension is at the bottom of the window after the “=” sign. It “floats” with each change in the treads numbers of riser height, until such time as it is edited directly (after which it becomes “fixed” and the riser height will float).

The default (and only) take-up for a floor-to-floor edit is the riser height.

Even if the floor-to-floor is fixed, if you edit the riser height directly, the only take-up is the floor-to-floor (StairBiz will alert you).

**Tread Count**: Tread counts are shown in the middle of each unit. They can be edited directly. The default take-up is the riser number. Exceeding the maximum treads counts per unit specified in your Building Codes window will trigger an alert.

**Straight Unit Tread Count**: If you have only a single tread in a straight flight, and make the going of that tread more than 400mm (300mm if merged with the outstep), StairBiz will treat that unit as an in-line landing (i.e. a landing which starts and ends in the same direction).

**Corner Unit Tread Count**: You can have as many treads as you like in a corner unit. Depending on your setting for **Contextual Setout** (see later), various aspects of the setout of a corner unit can change depending on the number of treads. See Contextual Setouts.

**Rebate**: The rebate dimension is the one at the back of the outstep at the top of the stair (the amount the outstep intrudes over the top of the trimmer). I only mention this here because it may show a letter (e.g. “F”) rather than a dimension. Refer to Amending the Stair Design and Tags; where they get their values for more about **Tags**.

**Space Between**:

This dimension appears when you have two adjacent corner units. It shows the space between the upper tenonstring of the upper unit and the lower tenonstring of the lower unit. These strings can be vertically aligned (regardless of the width of the strings) by setting the **V: Vertical Align** tag (right-click the dimension).

##### Tread Setout

**Sawtooth treads:** Applies to straight and corner units; shows the distance that sawtooth treads extend beyond the outside of a string. This can be a tagged dimension; **E: End of Newel** sets the end of the tread to the outside face of a standard newel; **D: Standard Nosing** protrudes the tread the same distance as a standard tread nosing.

**Outstep Extension:** Applies to a corner unit as a top unit, where the top newel height has been set to **Up To Under Lnose**. In other words, the top of the top tenonside newel terminates at the underside of the outstep. The dimension sets the end of the outstep (which probably protrudes over the top of this stub newel).

**Walkline:** Shows the line of the goings for both straight and corner units. The goings in straight flights will always be calculated along this line. The goings in corner units will be indicated in red. The alerts relating to goings for both straight and corner units will always be along this line. Head-height calculations (where there is both a stair and a well) will always be along this line and will be displayed at the top of the window (in all Panes of the Design window) if there is a head-height violation.

##### Winder Setout

This mostly applies only to a corner unit where there is more than one tread (Detachednose applies to one tread or more).

To best understand what these dimensions do, set **CornerHi** and **CornerLo** (see Main Setout) to about 200mm each.

Note that you can right-click the nosing of a winder tread (other than the lowest one) and select **Show Setout This Nose** to hide dimensions relating to other nosings (this may eliminate some confusion). Select **Show Setout All Nosing** to revert.

There are four categories of dimensions in this mode:

**Nosing start points**:

These dimensions set the hypothetical start points of each winder nosing (not including the bottom or top nosings of the unit) relative to the intersection of the top and bottom nosings of the unit. The dimensions closest to this intersection relate to the second nosing of the landing, the next ones out relate the third nosing, etc.

If you want to set the start of a nosing at an exact distance along the inside of a string, first position the start of the nosing at the string, then use the opposite dimension to set the distance along the string. You can do similar to set the start of a nosing at an exact distance along the face of a newel.

**Winder angles:**

These values are shown mid-way along the nosings and set the angle of the nosing for the second, third .. etc treads in the unit. The angle is always relative to the bottom nosing.

**Menu for right-click on a tread;**

**Drag-edit this nose (pivot end)** draws a selection circle at both ends of the nose – click-drag one of these circles to manually position the nosing (pivoting at the opposite end).

**Drag-edit this nose (pivot walkline)** draws a selection circle at both ends of the nose – click-drag one of these circles to manually position the nosing (pivoting at the walkline).

**Space this nose angle** to set the angle exactly half way between the one above and the one below.

**Space all nose angle** to evenly space all nosing angles between the bottom nose and the top nose.

**Space all nosings at string** to space all nosings equidistantly along the string between the bottom nose and the top nose.

**Space all nosings at walkline** to space all nosings equidistantly along the walkline between the bottom nose and the top nose.

**Risers always to corner** is only enabled where a corner unit has two treads and you click on the second tread – it sets the riser of the second tread to always intersect exactly with the inside corner on the wall side.

**Show setout all noses** shows the setout dimensions for all winders in the unit.

**Show setout this nose** shows the setout dimensions for only the clicked winder in the unit.

**Copy Winder Setout** copies the setout and angles of the winder nosings (including the newel size, position and setout).

**Paste Winder Setout** pastes the copied setout and angles of the winder nosings (including the newel size, position and setout). It will not affect strings. If you want the paste to be a MIRROR of the copy (extremely rare), hold the SHIFT key down while doing the paste - the riser lines (if SetoutToRiser) and angles will be a mirror of the copied corner unit.

Cut-ins:

If a nosing hits the lower tenonstring or right-hand face of the newel, a dimension is dawn showing the **cut-in** – a distance prior to where the nosing intersects the string or newel at which the nosing will turn square to the newel or string.

Similar to **CornerHi** and **CornerLo**, all these winder dimensions can be set for each different tread count, and whether the unit is top of not, if you like - see Contextual Setouts. When using contextual setouts, these winder dimensions are red to help you identify them.

Detachednose:

This is a single dimension mid-way along the nosing of the bottom tread. It is not applicable (and removed) is there is a side-nose on either side of the tread.

Some stair builders fabricate the bottom tread of a landing with a detached nosing (i.e. the nosing at the top of the flight below the landing) in order to facilitate installation. If you do not do this, set this value to zero. If you do want it, set this value to the width you want the detachednose.

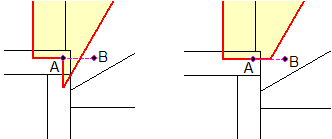
If this value is greater than zero, StairBiz will break the tread into two parts (the nosing and the main part of the tread), and it will also add a bearer to the Bill Of Materials (to support the join between the detachednose and the landing). To see this, right-click the bottom landing tread and select the “Show Tread” menu-item.

This setting is contextual – StairBiz saves three separate settings depending on the number of treads in the landing; 1, 2 and 3 or more treads. This means that the setting for a single tread landing is different to the setting for 2 treads, and so on.

Winder tip slice lines:

Slice lines (with length dimensions) are shown in this mode (two if sawtooth insides strings, one if otherwise).

The illustrations below show a three tread landing unit (kite winders), with box strings, focusing on the third winder as an example.

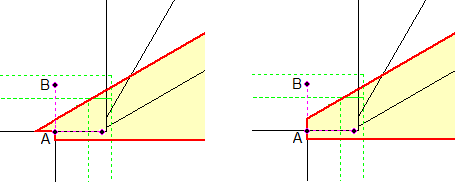


In the first illustration, the nose of the third winder comes around the corner. This may not be what you want. StairBiz has a “slice line” (in the illustration this line starts at point B and runs through point A) which is simply an extension of the line in the upper string that represents the end of the treads (i.e. the bottom of the trenching into the string). If the nosing of any winder (i.e. not just the third winder in a kite) intersects this line, that nosing will be “sliced” (see the second illustration).

The corresponding dimension (not shown here) sets the length of this line (i.e. how far does B extend out from A). It applies only where both upper and lower strings are box strings (for sawtooth see below).

Even though the line is only drawn to point A, in effect it continuous up the upper string.

Sawtooth strings are the same as above (the slice line is still along the line of the tread ends), but in the case of sawtooth this line would be outside of the string (in line with the tread ends. The following illustration shows the lower of (in this case) the two slice lines. The second illustration below shows the effect of the slice.



##### Bearer Setout

Bearers must first be selected in the Components window. Tread support bearers are also subject to the Bearers category of the Setout window.

**Tread support bearers (coloured magenta):**

These are the bearers which give support to the back of each landing tread (along the end-grain). If the first landing tread has a DetachedOutstep then a bearer will also be included behind the nosing of the first landing tread.

You can change the quantity of each bearer by amending the number shown mid bearer (the extra quantities will not be drawn, but will be included in materials). If the quantity shows zero, no bearer will be specified at that location.

You can change the lengths of the bearers using the dimensions provided.

Bearer quantities and length-adjustments are saved with the unit template.

**String replacement bearers (coloured green):**

Strings for a quarterspace landing may be replaced with skirting above and bearers below – right click on the string and select “Skirt/Bearer”. These bearers are also shown in this window, and may be amended as above.

To have bearers without skirt, first select “Skirt/Bearer”, then select “Delete String”.

##### String Setout

For a straight unit, applies only if there is a dog-leg. Shows the DogLeg-X dimension – the distance from the top trimmer to the start of the dog-leg.

For a corner unit, applies only if there is a slice corner or round corner – shows the dimensions that determine the position of the slice or round string. Note that for a round corner, if the landing is not 90 degrees the inside dimensions shown cannot be interpreted as the exact radius – they simply show the start and end points of the radius.

If you edit stair dimensions such that any existing round or slice corners not longer fit, StairBiz will adjust them and alert you.

##### Stair Position

Here you can see and edit the exact position of the top-left corner of a stair relative to zero/zero of the design. It’s the same as dragging a stair around using your mouse, except more accurate. It is suggested (for the sake of simplicity) that the first stair in a design should stay at the design zero/zero.

##### Unit Angles

Here you can see and edit the angles for each run (a run is from the top of a stair to the first corner, a corner to a corner, or a corner to the bottom.

If you change the angle of the top unit, you rotate the entire stair (but keep in mind that this only rotates the stair, not the design, which you’d notice if the design included a well or a second stair – to rotate the design use the **Rotate** menu).

All angles below the top unit are in fact corner angles – changing it changes the angle (direction) of the lower part of the landing from the normal 90 degrees.

The angle of the top unit is shown relative to the zero angle of the design. The angle of all corner units are relative to the zero angle for the unit.

However, if you right-click any angle dimension in StairBiz (except in the Well Design pane) you can also choose to see the angles displayed in other forms – see Angles; Viewing and editing.

##### Tread Angles

Here you can see and edit the angles for the theoretical line of the trimmer, the outstep, the bottom nosing of the stair, and any nosing separating one unit from another. Angles are generally relative to the zero angle for the unit plus or minus 90 degrees (the direction of the arrow will show which). In the case of straight flights, all intermediate nosings will adjust proportionately to any change in tread angle. In the case of a corner unit, if there are winders their angles may need to be adjusted separately to suit.

See Angles; Viewing and editing.

##### String Angles

Here you can see and edit the angles of each string run. Note that when you change the angle of a string, this does not change the angle of the unit (in fact strings angles are relative to the angle of the unit).

See Angles; Viewing and editing.

##### Show Inside Run Dims

Only relevant in **Main Setout mode**. Shows the overall stair dimensions for the tenonside side of the stair. They are normally not shown to avoid cluttering the design space.

##### Show Landing Heights

Only relevant in **Main Setout mode**. Allows you to see and edit the height of each individual corner unit.

In this context a landing is considered to be the upper floor, plus the lowest tread in any corner unit. For the purposes of the exercise we might also consider the lower floor to be a landing.

The landing height dimension will show something like as follows:

1800 (Float 5 @ 180)

The “1800” is the height of the landing from the lower floor, the “5” is the number of risers up from the previous landing, and “180” is the rise of those risers.

The upper floor “landing” height is floating if you have not already manually set the floor to floor (in which case it “floats” depending on the number of risers and the riser height), otherwise it is fixed at your floor to floor.

If you amend the upper floor landing height, all you’re doing is changing the floor to floor dimension.

The lower floor is also obviously fixed (at zero).

Each landing between the upper and lower floor is normally “floating” (thus the “Float” in the above dimension) – if you add or delete treads between any two landings, the landing heights recalculate.

However, you can edit a landing height directly, “fixing” it at your edited value. Riser heights between fixed landings recalculate according to the edited heights. If you add or delete a tread in the stair, only the risers between the fixed landing above and the fixed landing below the added or deleted tread can recalculate.

If you fix any landing height by amending its height dimension, the riser height at the bottom of the window now says “variable” – riser heights now apply on a “between-fixed-landings” basis and can only be edited with the Show Landing Heights option ticked.

If you have not previously set the floor to floor (i.e. it is floating) and you fix any landing height, the floor to floor becomes fixed at its current height.

To revert a fixed landing back to its floating state, set the landing height to zero (this also applies to the floor to floor).

The landing heights feature is particularly useful in conjunction with the “platform” feature in StairBiz (i.e. a pre-existing landing), or if a landing height needs to match up with something in the stair environment (assuming that you are not unduly limited by statutory requirements for consistent riser heights).

##### Show Sawtooth Width

Normally stair width dimensions show the width between the outside faces of opposing strings. However, if one or both sides have sawtooth strings, it may be more convenient to view or edit dimensions which show to the ends of the sawtooth treads.

You can also set this as the default mode. Open the Miscellaneous Defaults window (Design category) and set “Show Sawtooth Width” = “Y”

##### Show Inside Width

Shows the stair widths from the outside of the wall string to the inside of the tenon string. This could be useful where the tenon string needs to straddle an existing wall, etc.

##### Show Walls

With this selected any wall previously created in the wells window will show in this pane (otherwise they only show in the Well Design pane or on Custom Sheet drawings where specified)

##### Show Layer Names

Show the layer name on each stair and shows the level name on each well.

##### Show Stair ID

Show the Stair ID on each stair (each stair has its own unique ID, e.g. 1, 2, 3 etc)

##### Show Comp Window Names

On each stair show the name of the Components window associated with that stair (only useful if using multiple component windows).

##### Show Custom Tags

Shows all set Custom Tags in the relevant place on the drawing. Also see Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

##### Show Parts

Shows all parts generated in your Part Filters in their relevant position on the stair.

To not include certain parts set the Hidden field for that part in the Parts window.

Also see Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

##### Hide Unselected Newels

In the design window newels which are un-selected are normally shown as a dotted outline, and are selectable (you can click or right-click them). Sometimes this clicking may interfere with you clicking something under, or you may simply want to not show them. Select this to hide all unselected newels. Select it again to show them.

#### Right-click a unit

The last four items below relate to the clicked tread or riser. All others relate to the clicked unit.

##### Hide Unit Dimensions

There may be times (rarely) when the dimensions of one unit are clashing with the dimensions of another unit. Select this menu-item to hide them. Select it again to show them.

##### Carriage String

Tags the (straight only) unit that it needs a carriage string. A carriage string style needs to be selected in the Miscellaneous category of the Components window first (otherwise this option will be disabled).

Note that for now, carriage strings are “dummied” from the tenonside string of the flight. This means that StairBiz does not yet calculate the carriage string accurately, but rather simply specs another string with the same length as the tenon string (but with the Style/Size selected for carriage strings) in the Cutting List and BOM.

See Chapter 21 : Stair Components quick reference /Strings /Carriage Strings

##### Allow Different Goings

Applies only to straight units.

Normally when you edit the going in a unit, the goings of all treads are changed. If you don’t want the goings in a particular unit to be affected by such a global change, select this menu-item – these goings will now act independently of any other straight unit.

To revert, select the menu-item again.

Consider any statutory requirements you might have to maintain consistent goings.

##### Extend tread-ends wallside

You can extend the wall-side ends of landing treads (presumably for on-site final cutting and fitting). You will be prompted for the amount.

When set, cut-arounds for newels and cut-ins for nosings are suppressed. The extended polygon feeds into landing specs, pricing and CNC. The settings saves with the job, and with unit and stair templates.

##### Extend tread-ends tenonside

When ticked, landing/winder treads extend to the outside of the tenon string. Nothing else is affected. It is assumed (but not mandatory) that there is no centre newel. It does not apply to sawtooth strings.

##### Join To Tread Below

Applies to the lowest tread in a corner unit where there is a corner unit below it and both corner units are joined (see Join to Above/Below) – this creates a single tread out of two treads.

Amongst other things, use this feature to create a single half-space (single tread) landing from two joined corner units.

##### Contextual Setout

A single corner unit can be used as a top unit, mid unit or bottom unit. It can also be used as a one tread unit, two tread unit etc.

This feature allows you to use a single unit from your unit templates list as a top unit, bottom unit or mid unit, single tread landing, two tread landing, three tread landing etc., and have StairBiz automatically apply a different setout for each of these different situations. It applies to corner setout dimensions, winder setout dimensions, and the position of some newels.

See Contextual setouts for a full discussion.

##### Tread Height Offset

Use this where (for example) some treads have carpet and some don’t, and you want to adjust the treads heights to compensate. The starting tread is the one clicked, and offset (a positive or negative amount) applies to tread heights from that tread on down to the bottom tread. The offset is reversed in the bottom riser such that the stair maintains the same overall floor-to-floor.

You will be prompted to enter the amount of the offset (a positive dimension makes the tread HIGHER). Subsequently this menu-item will be ticked (and show you the amount of the offset) for each affected tread. You will also be alerted in the Alerts window. There is also a field for this in the Custom Editor (Stair Design/ Tread Height Offset; ~231).

Tread Height Offset will save to a stair template, but not to a unit template.

Tread Height Offset is allowed for splayed risers, but is not supported (and we would anticipate problems).

##### Extra Below Floor

Allows you to set the Extra Below Floor dimension. This distance is added to the bottom of every component of the stair which makes contact with the floor (i.e. newels which meet the floor, strings that meet the floor, and the bottom riser of the stair). It is useful for when tiles are to be laid after stair installation, and those tiles are to be cut around the stair.

##### Openrise Override

If you select “None” for the Risers in the Components window, the entire stair becomes openrise. If you want only certain units to be openrise, select the relevant riser size in the Components window, and then select this menu item for the unit(s) which are openrise.

If a straight unit is openrise, every riser in that unit (including the top and bottom risers) will the open. The same applies for closed. For corner units, the very bottom or very top riser will depend on the openrise status of the unit below or above it (if there is one).

##### Use Carpet Wedges

Set this to tag that carpet wedges are included. StairBiz doesn’t use this value directly, but it can be shown in Custom sheets and used in the Risers category of Parts and Labour filters.

##### Set Minimum Going

In the Building Codes window there is a setting for **Steepest Rake Angle** (Rake tab). StairBiz will (based on the rise of the clicked unit) calculate and set the going to be the minimum possible within the specified steepest rake. If you allow different goings then the changed going will only apply to the clicked unit.

##### Set Maximum Going

If you hold the Shift key down when right-clicking the unit **Set Minimum Going** (see above) changes to **Set Maximum Going**, and the going will be based on the shallowest angle rather than the steepest.

##### Offset Tread Numbers

You can enter a number, and StairBiz will add this number to all tread number labels used throughout StairBiz for this particular stair. This may be useful where you have multiple stairs and would rather contiguous numbers for all treads in the design.

##### Show Tread

Shows the exact outline of the finished tread. Select again to hide it.

##### Show Riser

Shows the exact outline of the finished riser. Select again to hide it.

##### Send Tread To CNC

Sends the tread to the StairBiz CNC bed.

##### Send Rise To CNC

Sends the riser to the StairBiz CNC bed.

##### Don’t Process

This causes StairBiz to skip this unit for the purposes of calculating and spec’ing timbers, parts and labour. It may be useful if you want to create Cutting Lists, Bills of Material, Labour Costs etc. for some unit(s) and not others.

It is independent of (but often used in conjunction with) **Set Draw Range** (see above).

##### Stair Tags

Show and/or set tags created in Custom Tags window (Stair category)

##### Unit Tags

Show and/or set tags created in Custom Tags window (Unit category)

#### Click a newel

Left-click a newel to select it or un-select it.

Right-click a newel to select its options – see Chapter 11: Newel Options.

#### Right-click a string

Right-click a string to select its options – see Chapter 11: String Options.

#### Layers

At the bottom of this window you are shown the current **Layer** of the stair. You can change the layer by clicking on the layer label and selecting from the pop-up.

If you manually set the floor-to-floor of a stair (so that it is "fixed" as opposed to "float"), the corresponding level in the Levels pane is also set to "Fixed". If you manually set the height of a layer in the Levels pane (i.e. it becomes "Fixed"), any stair you assign to that layer automatically has a corresponding floor-to-floor that is "fixed". In other words, layers in the Levels pane and floor-to-floors in the Stair Setout pane are interactive (i.e. the same thing). Once a layer or floor-to-floor becomes fixed, it will not change with changes in total risers. To set a fixed floor-to-floor to "float" (i.e. to revert it), set the floor-to-floor to zero.

It is best not to "fix" the levels in the Levels pane until after you have more-or-less finalized the configuration of your stair. The reason is that if you "fix" a layer in the Levels pane of, say, 120 inches, and then you bring in a 1 tread corner unit template, before you have a chance to add more units you have 2 risers at 55 inches. Under such circumstances StairBiz has no choice but to revert your "fixed" layer to "float" because the rise is outside what StairBiz sees as workable (it will alert you first), so you wasted on input. Generally speaking the easiest way to set the height of a layer is to simply set the floor-to-floor of the associated stair (like we said at the beginning - there really is no reason, other than curiosity or double-check, to open the Levels pane of the Design window).

If there is more than one stair, when you click on any stair the "Layer" label for that stair (at the bottom of the window) becomes bold type. However, there is a better way to track which stair is which – right-click in this pane and select **Show Layer Names**.

## Curves pane

The following terminology is used in these discussions:

**Standard going** - means the going you have set for the unit, as shown by the going dimension.

**The line of the going** – means the line down the centre (or offset from the centre) of the curved flight along which tread goings are measured.

**Tread going** – means the going of a single tread along the line of the going.

**String going** - means the going at the inside of the string (in the case of a closedstring) or the going at the ends of the treads (in the case of a sawtooth string).

**Consistent going** - means that whichever going we’re referring to does not change from tread to tread

### Types of curves

In all curve types, tread goings are always be consistent and equal to the standard going.

String goings may or may not be consistent, depending on the curve type.

In all cases the distance from the trimmer/header to the start of the curve (spring line) can be set with the relevant dimension.

Right-click a straight unit to set the type of curve, as follows:

##### No Curve

Revert an existing curve to a normal straight flight.

##### Circular

Has a single radius centre for both strings (producing a perfectly circular stair).

Tread nosings are straight.

Goings are measured along a radius with its centre at the centre of the radius for the strings.

Goings are consistent along both strings.

Set either the tenonside or wallside radius using the dimensions shown.

Can only be used on any straight unit (not just the bottom one).

There are limitations to the total arc of the curve – when you approach or pass a full circle there are string issues that are yet to be resolved.

##### Flare/Straight nosings

Flares one or both strings. The nosings are always straight. The string goings are not consistent. Can only be used on a bottom unit.

##### Flare/Curved nosings

Flares one or both strings. The nosings arc into the string such that the string goings are always consistent with the standard going. Can only be used on a bottom unit.

##### Curved walkline

Only relevant to flared (circular is automatically curved walkline).

For flared, this is not yet hooked up (and not entirely sure what this would look like anyway). On a large flare, Curved nosings would have a similar effect (i.e. would attempt to keep the going consistent down the line of the curved string).

### Doglegs in curved stairs

Most curved strings will take a dog-leg. The exception is as follows:

Any straight unit can have a maximum of two strings per side (plus the short dog-leg strings). Therefore, if there is a non-curved section at the top of the flight such that the side is broken into a straight string plus a curved string, we’ve used up our two strings and a dog-leg in the curved section is not possible.

The solution is to use a separate unit for the straight section at the top - thus the curved section can be fully curved (i.e. a single string) and would then take a dog-leg.

## Bullnose pane

Here you can create a stair bullnose from a bullnose template, modify that stair bullnose, and create a bullnose template from the stair bullnose.

From one single template you can create any bullnose situation.

You can only add a bullnose to a straight unit.

If you add a unit template to a stair with a bullnose, the bullnose is deleted.

If you create a unit template from a unit with a bullnose, the bullnose is excluded.

This window makes extensive use of tags – see Amending a stair.

This window displays both nosing and riser lines. The dimensions always apply to the nosings (even if you work to the riser). This is because in many bullnose designs the nosing is more fundamental than the riser..

#### Opening an alternative template folder

You can have as many folders as you like for bullnose templates (see Folders window). To open a different folder, right-click the **Bullnose** button at the top-left of the window (i.e. the same button that opened this pane).

#### Double-click a template

Create a bullnose.

If there is no current bullnose, the selected template will become the bullnose on the tenonside side of the stair.

If there is a current tenonside bullnose, you’ll be asked if you want to replace it. If you say no the selected bullnose will be added to the wallside side of the stair.

#### Right-click a template

##### Add to Stair Tenonside

Copies the template to the tenonside side of the stair.

##### Add to Stair Wallside

Copies the template to the wallside side of the stair.

##### Rename Template

Allows you to rename the template.

##### Delete Template

Deletes the template completely. Nothing else is affected.

To delete all bull templates in the folder, hold the Control and Shift keys down while deleting one template.

StairBiz will not allow the last remaining bull template in the Main folder to be deleted – there will always be at least one.

##### Set Bullnose Class

Allows you to set or change an identification code so that this specific bullnose, when used in any stair, can be identified and filtered according to its class by the Parts or Labour filters. It is optional. Multiple bullnose templates can have the same class. Any text can be set, up to 10 characters.

##### Set Bullnose Name

Allows you to set or change a name for this bullnose, which can then be used in custom sheets and filters. It is optional.

See also; Chapter 15 : Parts and Labour Filters/ Auto-filters – Suggestions for each category/ Bullnose Treads (it may be in your interests to use name abbreviations).

#### Left-click a template

##### Double-click

Copies the template to the tenonside side of the stair.

##### Click-drag

Drag templates up or down to change their order (which is automatically saved).

#### Right-click a bullnose tread

##### Add Bullnose

Adds an extra bullnose tread to the bottom of the flight on the clicked side, moving existing bullnose treads on that side up one tread. StairBiz will try to give the new bullnose initial settings to keep it consistent with the style of the existing bullnoses.

##### Delete Bullnose

Deletes the clicked bullnose and all below it.

##### Apply to Other Side

Copies the bullnose treads on the clicked side and pastes them on the other.

##### Show Lengths

Shows the lengths which determine the bullnose, for editing.

##### Show Radii

Shows the radii which determine the bullnose, for editing. Strictly speaking, these dimensions are only radii when the two edges which define the radius are at right angles. Otherwise they define the start and end points of the radii.

##### Show Angles

Shows the angles which determine the bullnose, for editing.

The angle of the front section of the bullnose is always the same as the nosing from which it extends. The angles of the end and back edges of the bullnose are shown relative to their normal (non-angled) positions.

##### Show Slice

Shows a dimension from the top of the unit which determines a “slice” line; a line that deletes all parts of any bullnose that protrudes past it. You will not see the slice in action until you exit the Bullnose pane.

##### Show Block

Shows the outline of the finished riser block.

##### Show Tread

Shows the outline of the finished tread

##### Hide Dimensions

Hides the dimensions of the clicked tread. Useful to prevent confusion.

##### Diagonal Corners

Creates diagonal corners, the dimensions of which are determined by the radius settings.

##### Mitre Front

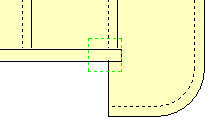
Runs a join through the bullnose such that the ends of the bullnose do not display end-grain. It makes no difference to the appearance of the tread in the Design window, but affects the cutting list and CNC.

##### Mitre Back

Only applies if **Mitre Front** is set – again switches grain direction such that the back of the bullnose does not show end grain.

##### No Nose Back Edge

Where a bullnose has no second radius, and extends out past the stair (i.e. not a blunt bullnose), you can select this to delete the riser (and nosing for CNC purposes) from the back edge of the bullnose. This is useful where the back edge of the bullnose is against a wall or similar.



##### Use Block

Select this when you want StairBiz to calculate/spec/CNC a block behind the bullnose riser. Select “Show Block” to see and amend it.

##### Solid Block

Select this to get a half-moon shaped block rather than a horse-shoe shape.

##### Riser Full Length

Select this if you want the risers associated with a bullnose tread to continue all the way around the arc of the bullnose (otherwise the riser will stop of the first corner or radius). This is particularly relevant to the length StairBiz specifies for the riser.

##### Add to Templates

Sends the entire bullnose package on the clicked side of the stair to the templates panel. You can create new or replace an existing. All templates (whatever side of the stair they came from) are stored as tenonside side, and can be re-applied to either side of a stair.

See also; Chapter 15 : Parts and Labour Filters/ Auto-filters – Suggestions for each category/ Bullnose Treads (it may be in your interests to use name abbreviations).

##### Set Bullnose Class

By default, the class of a bullnose comes from that set for the template from which it came. See same topic in **Right-click a template** (above).

##### Set Bullnose Name

By default, the name of a bullnose comes from that set for the template which it came. See same topic in **Right-click a template** (above).

##### Send Block to CNC

Sends the clicked bullnose block to the CNC Bed window.

##### Bullnose Tags

Displays a menu for showing/setting your Custom Tags for the bullnose category.

#### Changing a bullnose

To change the setout of a bullnose, it may be easier to start with only a single bullnose tread. Once that’s set the way you want it, you can add another bullnose, which will (as best as possible) mimic the setout of the existing one (except as applied to a double bullnose, etc). For the purposes of the following discussions we assume a single un-rotated straight unit, with a single bullnose tread.

If there is more than a single bullnose, it may be easier to hide the dimensions of the others with the **Hide Dimensions** menu-item (so that you can see specifically which dimensions are relevant to the tread at hand).

The bullnose is a good example of tags at work. Many dimensions in a bullnose are determined by the going and the nose - you would not want to have to manually recalculate a bullnose every time one of these values changed.

Reminder: To see the actual calculated values of tags, left-click the tag. To see the values of all tags, right-click any dimension and select **Show Values**. When you select **Show Values**, the tags are not deleted, they’re just not shown (select **Show Tags** to revert to the tags). To edit you can right-click to select a tag, or you can input an actual dimension.

Whatever you end up with on one side of the stair can be applied to the other side using the **Apply to Other Side** menu item.

Regardless of the ultimate look and shape of your bullnose, they all follow the same principles discussed below.

There are three amend modes (select them by right-clicking):

##### Show Lengths

* The vertical dimension on the far right determines where the bullnose starts (specifically it determines the start point of the next dimension). It can be positive, negative or zero.
* The vertical dimension on the far left indicates the distance past the face of the string (i.e. under the stair) that the bullnose will extend. An “N” tag sets it to the outside face of the string. A “P” tag sets it to the inside face of the string.
* The remaining dimensions show the lengths of the bullnose.
* The tags “T1”, “T2” and “T3” are available. These tags create a balanced bullnose whose dimensions are determined by the going (run) and the angles of the strings and treads of the straight flight. The tags may also operate in different ways depending on how many bullnoses there are.
* A “T1” tag will always bring the back of each bullnose into the riser of the lowest non-bullnose tread.
* A “T2” tag will bring the riser of the top bullnose tread into the riser of the lowest non-bullnose tread. For each bullnose below that, the riser comes in at the corresponding number of treads above that.
* A “T3” tag will bring the riser of the top bullnose tread into the riser of the second lowest non-bullnose tread. For each bullnose below that, the riser comes in at the corresponding number of treads above that.
* Setting a tag for one dimension sets the same tag for all dimensions that can accept that tag.
* These tags can be overridden with actual dimensions (simply edit the dimension)

##### Show Radii

Even though there are four dimensions here, they are really only two - the radius on one side of a radius point is always the same that on the other side of it.

The tag values are as discussed in **Show Lengths** (above). You can use tags, or input an actual value.

StairBiz may override your input if the value is not possible.

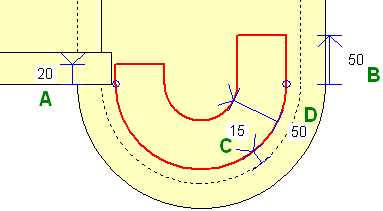
##### Show Angles

See the discussion above.

##### Show Block

Select this to show the block and enable editing

In the following illustration …



Dimension A sets an extension to the end of the block.

Dimension B sets an extension to the start of the block.

Dimension C sets the distance from the face of the riser to the front edge of the riser block.

Dimension D sets the width of the riser block.

## Rake Balustrade pane

Each length of balustrading is called a “section”. In this pane you can select sections and newels on the strings of a stair. You can also specify the properties and characteristics of each selected section of balustrading, and the components within each section (handrail, wallrail, shoerail, balusters and newels).

There are two context menus associated with this window:

1. Show Mode
2. Amend Mode

You can see these menus in the left panel when you click a white space, or as a pop-up when you right-click a white space.

The upper bracket of menu-items selects the Show Mode, which determines what we’re looking at. The lower selects the Amend Mode, which is what we’re doing with what we’re looking at.

The following headings correspond to each Show Mode. The sub-headings correspond to the Amend Modes relevant to that Show Mode.

#### Show All

Anything you do in this mode affects most components of the section (balusters, shoerail and handrail/wallrail). Newels are not affected (other than if you select or unselect them).

Shows handrail, or, if none, shows shoerail. Also shows balusters.

##### Selections

In this mode you can select or unselect (by clicking) complete sections of balustrade.

By default, sections will be automatically selected where there is a newel selected at both ends of the section, and the section butts those newels. In this window you can unselect sections that have been auto selected, or you can select sections that did not auto select.

Once you make a manual selection in this mode, all section selections in this window need to be done manually (i.e. the auto-selection feature is switched off).

To select wallrail, first select the section (handrail will be shown), then right-click on the handrail and choose **Make Wallrail**. To revert it back to handrail, do the same thing and choose **Make Handrail**. Select **Make Wallrail for Side** to convert to wallrail for that entire side of the stair in one action.

You can also select or unselect stair newels in this mode, but section selection has a higher priority (i.e. a click on a newel AND a section at the same time will detect the section before it detects the newel – either select newels by clicking them outside of any underlying sections, or select them in the Stair Design pane or Stair Setout pane.

##### Amend Spacing

This actually relates to the Balusters show mode, but for the sake of convenience (i.e. to save you having to specifically select that mode), it is duplicated here. See Balusters (below).

##### Amend Offsets and Extensions

The two dimensions at either end are extension dimensions. They allow you to override the default start and end points of the entire balustrading (shoerail, handrail and balusters). If the balustrading terminates at a newel, adding extra length at this end won’t have any affect (a newel is a physical barrier), whereas subtracting length will have an effect.

The third dimension (shown mid way along the section) sets the offset for the entire balustrading (shoerail, handrail and balusters) relative to the outside face of the string. Depending on the offset mode (right click the dimension to select **Show To Inside**, **Show To Centre** or **Show to Outside**) the dimension will show to the inside, centre or outside edge of the shoerail (or handrail if there is no shoerail). A “D” tag centres the balustrading over the string.

#### Show Balusters

Anything you do in this mode affects balusters only.

##### Selections

Here you can specifically un-select (and re-select) all balusters in a section. All other components remain as they are.

##### Amend Spacing

Here you can amend the baluster spacings, as follows:

For Closedstring balusters:

StairBiz calculates the default number of balusters based on the size of the baluster and your setting for **Max Between Balusters** (in the Setout window).

There are two dimensions mid-way along the section. The first is a number (default value zero) which allows you to increase or decrease the baluster spacing by inserting or deleting balusters. Entering a “1” adds one baluster to the default number of balusters. Entering a “-2” deletes 2 balusters from the default number of balusters. The second dimension shows the distance between the balusters and is not editable.

There is a dimension at either end of the section. These allow you to change the default start and end points for calculating the balusters. Zero is the default, which is at the face of the newel, or at the change in the rake if there is no newel. Any other value (positive or negative) will move that point. Note that this does not affect the length of handrail or shoerail (this can be done elsewhere). It is most useful if you want to have the baluster spacing adjacent to a newel a little tighter than the other spacings.

For Sawtooth String balusters:

There a three dimensions.

The first shows the distance from a nosing to the face of the first baluster on the tread. The default value comes from the **Sawtooth Nose To Baluster** setting in the Setout window (where a value of “-1” instructs StairBiz to balance the balusters on the tread). You can right-click the dimension and choose a tag, or input a dimension directly.

The second dimension is a single number (default = zero) which sets the number of balusters per tread. A value of zero instructs StairBiz to auto calculate with regard to the **Max Between Balusters** setting. Any other number will override the calculation (e.g. “3” will set three balusters per tread, regardless of the space between).

The third dimension shows three values; the middle one shows the space between the balusters (it is not editable); the numbers before and after this dimension (which are editable) show the number of extra balusters inserted at the hi end and low end of the section. For example, “2” will insert an extra two balusters at the relevant end, whereas “-1” will deduct a baluster (useful for manually overriding what StairBiz thinks is about right).

##### Amend Offsets

The dimension shown mid way along the section sets the offset for just the balusters, relative to the outside face of the string. It overrides (just for balusters) any offset default set in Show All mode. Depending on the offset mode (right click the dimension to select **Show To Inside**, **Show To Centre** or **Show to Outside**) the dimension will show to the inside, centre or outside edge of the balusters. A “D” tag centres the balustrading over the string. Other components of the section are not affected.

Note that if the **Offset all in section** menu-item is ticked, the offset will apply to all components of this section (i.e. also to handrail and shoerail, rather than just the balusters).

#### Show Shoerail

##### Selections

Exactly the same as for Balusters (above), except that it applies only to shoerail.

##### Amend Offsets

Exactly the same as for Balusters (above), except that it applies only to shoerail.

#### Show Handrail

Exactly the same as for Balusters (above), except that it applies only to handrail.

#### Show Wallrail

Exactly the same as for Balusters (above), except that it applies only to wallrail.

#### Show Newels

##### Selections

To select or unselect a newel, click it (although this can also be done in the Stair Design and Stair Setout panes of the Design window, and in other modes of this window if you click the newel outside of any underlying section).

To add a mid newel (i.e. a floating newel at some point along the string) right-click the string at the appropriate point and select **Insert Mid Newel** from the pop-up menu.

To space one or more mid newels evenly along the string, right-click the string at the appropriate point and select **Space Mid Newels** from the pop-up menu.

##### Amend Newel Size

This mode allows you to override the default width and depth for the newels (as selected in the Components window). An “N” tag sets the width or depth at this default size (assuming you have previously manually overridden this size).

##### Amend Newel Angles

This mode allows you to rotate a newel. The little circle shows the centre of the rotation (i.e. the intersection of the centre of the string with the relevant nosing). You can set the **angle mode** by right-clicking the angle dimension.

##### Amend Newel Position

This mode allows you to move the newel. These dimensions are often tagged. Dimensions can be relative to the intersection of the centre of the string with the relevant nosing (right-click the dimension and select **Show To Centres**), or they can be relative to the outside of the string (unselect **Show To Centres**). You can set the **angle mode** by right-clicking the angle dimension.

Some newel positions are contextual (whether or you have the Contextual Setout option applied to the unit). The Y-position dimensions are contextual for newels at the top of a stair. The X-position dimensions are contextual for newels at the top and bottom of a stair. See Contextual Setouts. When using contextual setouts, contextual dimensions are red to help you identify them.

##### Other newel properties

Right-click a newel (in any show or amend mode) to see a newel properties menu. See Newel Options.

#### Offset all in section

When the Show mode is something other than ‘All’, and you amend the offset of a component (e.g. handrail, or balusters, or shoerail, and you want the same CHANGE in offset to apply to all components in the section, tick this.

This is useful when you want to offset all components (which is the default behaviour in ‘Show All” mode), but it’s more convenient to actually make the change to a particular component.

#### Highlight Fittings

Indicates the fittings (with a different colour) in plan view.

#### Show Min Diameters

Indicates the minimum diameters for balusters and newels, as set in the Style window for those components. Baluster spacings work off these minimum diameters (not the outside dimensions of the baluster).

#### Show Custom Tags

Shows all set Custom Tags in the relevant place on the drawing. Also see Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

#### Show Parts

Shows all parts generated in your Part Filters in their relevant position on the stair.

To not include certain parts set the Hidden field for that part in the Parts window.

Also see Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

#### Hide Unselected Newels

Does not show the dotted outline of unselected newels. This can be useful when such newels are getting the way of a click on something else.

## Elevations pane

This shows the string and balustrade elevations for all stairs in the design. You also select handrail fittings in this window.

See also Chapter 21 : Stair Components quick reference/ Strings/ String Faces

See also String Setout window.

See also Handrail Fittings.

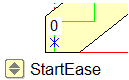
Both the inside and outside edges of each string are shown (if the string ends are square in plan view then these will be identical).

#### Layers

You can hide/show stairs using the Layers window (which changes slightly for use in this pane).

In this pane, by default there is a gap between the vertical layers of multiple stairs. If you are showing balustrade, this gap is increased (to avoid overlap between the layers). If you want no gap (e.g. to check head-height between stacked stairs, etc.), right click any string and select **No Vertical Gap**.

There is also a “slide” dimension in the Elevations pane.



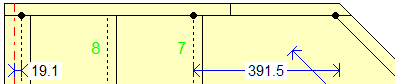
This dimension allows you to align stair over stair any way you like. Setting the dimension will slide the stair elevation left or right relative to the other stair elevations. Note that it has no impact on the actual position of the stairs – the effect is limited to the Elevations window (good for checking head-height between stacked stairs, etc). Use the dimension tool to determine how much slide you need.

#### Boundary lines

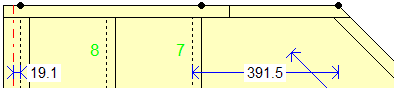
The horizontal solid red line at the top is the upper floor level. If you have a well with a bulkhead depth, the ceiling level will be shown also.

The horizontal solid red line at the bottom is the lower floor level.

The vertical dotted red lines represent the unit’s “base” points at the inside of the string (the inside is the side of the treads). For straight flights this point will be at the top and bottom riser (or nosing if you work to the nosings) at the inside of the string. At corners this will be where the two string inside edges intersect.



The vertical dotted green lines represent the unit’s “base” points at the outside of the string



#### Right-click a string

This includes clicking anywhere within the bounding rectangle shown for the string.

Show Tenonside Side

Shows the tenonside run of strings only.

Show Wallside Side

Shows the wallside run of strings only.

Show Both Side

Shows the tenonside and wallside runs of strings.

Show This String

Shows the clicked string only.

Show This Run

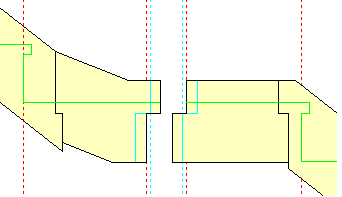
Shows only the run of the side clicked.

Show Inside

The inside face of the string is the side that the treads are on.

If the vertical cuts of a string are exactly square (in plan view) then the inside face and outside face will be the same. Otherwise they will be different (e.g. a corner join where the strings intersect at 45 degrees, as shown in the illustration below).

This mode shows the inside face at the front (in black), and the outside face behind it (in green). The inside face will have the fill colour.



Show Outside

This mode shows the outside face at the front (in black), and the inside face behind it (in green). The outside face will have the fill colour.

Show Balustrade

Shows the balustrade with the string. This Show Balustrade also applies to the String Setout window.

Show Newel Setout

Enabled only if Show Balustrade (see above) is selected. Shows the newel turning lengths for viewing or editing.

See Chapter 11: The Design window in Depth/ Newel Setout.

Show Head-height

If there are one or more stairs going up to a well, this will show the head-height situation.

See Chapter 11; Head-height

Show Join Type

Shows the StairBiz labelling for the type of join. See String Setout window.

Show Setout

Opens the string setout window for the clicked string (when you can modify the setout for the string).

Send to CNC

Sends the clicked string to the CNC Bed window (even if this window is closed).

Copy Setout

Copies the string setout (as shown in the String Setout window) for this string. See “Paste Setout”

Paste Setout

Pastes the string setout previously copied with Copy Setout. This menu-item is only enabled if there has previously been a Copy Setout, and the string being pasted into is compatible with the string copied (it will be if it’s the same string but in a different unit, or, in the case of straight flights, is the same or the opposite string).

This is convenient if you can spent time setting up one string (e.g. the wall string of a straight flight) and want to set the opposite string (the tenon sting of the straight flight) to be identical.

Note that even setouts that are not currently applicable are copied/pasted (e.g. even if there are newels, the setout for the string without the newels will also be copied/pasted). I.e. the copy/paste applies to all contexts of the string.

Menu for Plan View

Pops the same menu that you get when you right-click on a string in plan view (i.e. when in any of the other Design modes). Insert Mid-Newel and Dog-Leg will only be enabled in actual plan view (because they rely on the location of the click).

Turn Off Error Checking

For StairBiz to be as automated as it is, it needs to know what every point in a string polygon is. For unusual (unexpected) strings, sometimes StairBiz loses track of these points and you get the “Can’t find string top/bottom) error messages.

If you are sure that the error is not causing any major problems, especially in relation to CNC, you can turn off this error message here (on a job-by-job, string by string basis).

This is quite often acceptable if you are not using CNC, or you are using CNC and are cutting the entire outline (and not using cut templates).

#### Right-click an empty space

This means clicking anywhere outside the bounding rectangles shown for all strings.

It brings up an identical menu as discussed above, with the exception of “Show This String” and “Show This Run”.

#### Guide-lines

You can create any number of horizontal or vertical guide-lines in this window. These are useful for checking measurements for things like cupboards, doors etc.

Guide-lines are saved with the job.

Horizontal guide-lines

Click-drag either the line of the upper floor level or the line of the lower floor level (both are solid red lines). Release the drag at the approximate position. Refine the position by editing the dimension. Delete the guideline by setting a dimension of zero.

Vertical guide-lines

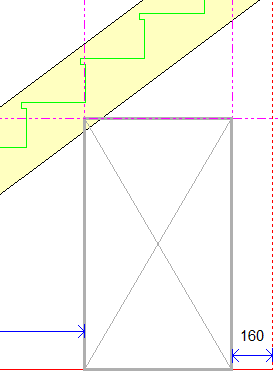
Click-drag any vertical boundary line (shown as dotted red or green lines). The boundary line will always be the base line of the *outside* face of the string – if there is only a red line (inside), the green line (outside) is behind it; if there is both a red and a green line, only the green (outside) line can be dragged. Release the drag at the approximate position. Refine the position by editing the dimension. Delete the guide-line by setting the dimension to zero, or drag it back to the boundary from where it came.

Note that the dimension will always be relative to the vertical boundary line from which you created the guide-line. Dimensions can be positive or negative.

Note also that vertical guide-lines will extend up to the highest horizontal guide-line and will extend down to the lowest horizontal guide-line.

#### Windows and Doors

After creating guidelines representing windows and doors (see above), you can right-click within the rectangle and select "Create Window/Door" and StairBiz will draw the representation. You can then delete the guide-lines (if you wish) and the window/door will persist.



Select "Delete Window/Door" to revert back to just the guide-lines.

#### Handrail Fittings

The pop-up lists at the bottom of this window allow you to select handrail fittings for the stair. For a full discussion, see Handrail Fittings.

#### Bezier curves – transitions in string rake

See Chapter 11 : Bezier curves – transitions in string rake

## Balcony Balustrade pane

Click the **Bal Space** button at the top-left of the Design window to switch to the Return Balusters window.

1. Click one of the toggles then press the **Enter** key.
2. Close the Design window.
3. In the Process window, click the **Save Job** button.

This pane works in the same way as the Rake Setout pane, except that obviously it relates to balcony balustrade, and has the following differences:

* Shoerail becomes Bottom Plate.
* Offsets can also operate on newels.
* You can toggle between newel and mitre by clicking a newel at the junction of two sections. You can toggle between newel, half-newel or nothing by clicking a newel at section termination (providing it is not a top stair newel).
* There is also balconytrim.

### Special Note

* Do saves as you progress through a job (**Control+S**)
* Always select the **Lock** button in the Quote Calculation window when the job is complete (if a bug-fix in a StairBiz update changes a calculation slightly, and your quote is not in lock mode, the quote total may change).

# Chapter 11 : The Design window in depth

## Amending the stair design

**Amending the basic stair dimensions**

Edit the dimension, then press the ENTER key. Sometimes when you edit a dimension, other dimensions turn yellow or green. These are the “take-up” dimensions. After you edit a dimension, you can left-click a take-up dimension to tell StairBiz how you want what you have edited to affect the rest of the stair. This saves having to do double or triple edits. For example, you have five treads in the upper flight and you want to reduce it to four; click on the “5” and change it to “4”. The yellow and green dimensions are asking where you want to “put” this tread. You have a choice of the landing, lower flight, or risers. The risers dimension is green, meaning it’s the default take-up dimension (pressing the ENTER key is the same as clicking on this green dimension). Or, click either of the yellows.

Clicking a green take-up dimension is like saying “do not take-up” (e.g. don’t put the extra tread anywhere).

If you don’t like what you’ve done, click the **Undo** button.

**Dimension Tags**

In some cases, instead of setting a dimension, you set a tag (by right-clicking the dimension and selecting the appropriate tag).

A tag is a calculated dimension. For example, when setting the position of a newel to be centred on the associated string, if you set the actual dimension, then changed either the string width or the newel width, the string would no longer be centred. However, if you right-click the dimension and select the “C: Centre String” tag, StairBiz would automatically calculate the correct dimension to keep the newel always centred (the dimension would show as “C”). To see the actual dimension of a tagged dimension, left-click it. To see the actual dimension of all tagged dimensions, right-click a tagged dimension and select **Show Values**. To override a tag with an actual dimension, simply edit the dimension.

When you select **Show Values**, the tags are not deleted, they’re just not shown (select **Show Tags** to revert to the tags).

Also see Tags; where they get their values

**Dimension Calculations**

Anywhere in StairBiz where you enter a dimension, you can enter a calculation (plus or minus only). For example, if you have a dimension as 36.7 and you want to add 4.4 to it, you can set the dimension as *37.7 + 4.4*. On committing the dimension, StairBiz will do the calculation and post the result. This can be done in any measurement system.

Tips for amending the stair

The trick to amending the stair is to approach the task in the same way you always did. The only difference is that, whereas the brain can juggle many things at the same time, the computer has to go one step at a time. The following are not rules, simply suggestions which may, at times, keep the situation clearer in your mind.

* **Decide on what you are trying to do**  
  Prioritize the design issues. Come up with a game plan before you start amending.
* **Deal with issues directly**  
  In most cases an **amend** will ultimately have a corresponding **take-up**. Both dimensions will change - the **amend** because you typed in a new dimension and the **take-up** as a direct result of the new dimension. Make the most important change the **amend**, and the less important change the **take-up**. For example, if you want to reduce the number of treads in the upper flight (and feel that the best way to deal with the spare tread is to put it into the lower flight), make upper treads the **amend** and lower treads the **take-up**, rather than the other way round. Ask yourself WHY you want to amend something, and if the answer is to change SOMETHING ELSE, then amend the SOMETHING ELSE directly.
* **Upper flight first**  
  Upper and mid flights are less flexible than lower flights. So, generally speaking, deal with upper and mid flights first. Also, if you want to amend something that is likely to affect the upper flight, amend that aspect of the upper flight directly. For example, if you want to increase the riser number and add the extra tread to the upper flight, instead of trying to amend the riser number, **amend** the upper tread number and select the riser number as the **take-up**.
* **Riser numbers and tread numbers a priority**  
  If the riser number or tread number is to change, it is often better to make it the **amend**, rather than the **take-up**. For example, amending the riser number or tread number can use the going as a take-up, but amending the going CAN’T use the riser number or tread number as a take-up (because you would have to amend the value by exactly the distance of one going).

## Angles; Viewing and editing

### Angle Mode

In the Design window (except for the Well Design pane) if you right-click any dimension which shows an angle you can choose to see all angles displayed in different forms (called **angle modes**), as follows:

#### Relative Angles

This is the default; the angles are relative to some nominal direction (usually the zero angle of the unit – if it’s other than this the discussion on the relevant angle will advise you).

The angles are not influenced by rotating or flipping the design, and are usually more convenient to work with than absolute angles.

#### Absolute Angles

Here all angles are shown relative to the zero angle for the entire design. With no rotate or flip of the design, zero degrees is directly to the right, however, angles in this mode also account for design rotate or flip.

#### Offset Per Metre/Foot

The angle becomes the hypotenuse of a right-angled triangle, where the adjacent side is one metre (or foot if you use imperial) long, and the dimension shows the length of the adjacent side. On-site measurers may find it more convenient to record angles in this form,

#### Offset Per Run

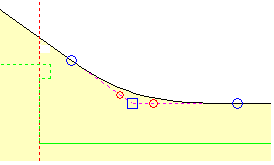
The angle becomes the hypotenuse of a right-angled triangle, where the adjacent side is the length of the run, and the dimension shows the length of the adjacent side. On-site measurers may find it more convenient to record angles in this form.

### Angle Limits

In many cases (string angles, tread angles, etc.) there are limits on the extent of the angle you may enter. In many cases the limits are from -46 to 46 degrees. In some cases you can override this by holding the SHIFT key down while you press the ENTER key down to effect the amend.

## Bezier curves – transitions in string rake

The top and bottom edges of string can be curved through transitions in rakes (e.g. at a hockey join, or where strings level). The curves can be radii or Bezier curves.



Open the String Setout window and click the ‘Edit Curves’ checkbox in the left panel – transitions which can take a curve will show a small selection box.

Click on the box to select the options:

**Bezier Curve**: Creates a Bezier curve, ready for click-drag editing

**Radius**: Creates a Bezier curve, ready for click-drag editing

**Same as top edge**: Makes a curve on the bottom edge of a string with the same centre as that of the top edge.

**Delete**: Deletes the curve

When editing beziers, there will be a large and small circle either side of the transition point. Drag the larger to move the start and/or finish points of the curve. Drag the smaller ‘shape’ controls (Beziers only) to change the shape of the curve.

These shape controls are always ‘percentage’ based rather than a set distance (i.e. they maintain their ratio with the start/end when you drag the starts/ends). The start/end controls are distance based unless you right-click them and change them to **Percentage Basis** (in which case they are saved as a percentage of the length of the line – the start/end changes with changes in the length of the line).

You can right-click the shape controls to select **Set 50%** (a Bezier curve with equal distances to the start and finish, and shape controls set at 50%, is a radius arc).

For a radius you can right-click the shape controls to select **Set radius dimension**, which allows you to set a specific radius (rather than dragging to what looks about right).

You cannot start/end a curve within 10mm (3/8 inch) of the end of a line.

These curve settings are contextual for the join type, they save with the unit and stair templates, and they save with the job. They translate to the CNC bed.

The resolution of Bezier curves for CNC export can be controlled by properties in the CNC Preferences window (Optimize tab).

## Combo Balusters

### Overview

Combo balusters are when you have more than one baluster style in a balustrade.

A “basket” baluster is one that is somehow special. It is usually bigger, wider, or more elaborate than the “regular” balusters. They are most commonly used in the context of wrought iron balustrading (but not necessarily). A “panel” is a (kind of) basket baluster where the width is such as to be more like a panel than a baluster.

In the following discussion, a normal baluster is indicated with an “A” and a basket or panel is indicated with a “B”. The sequence of “A” and “B” balusters is referred to as a “scheme”.

### Automatic Mode

Most combo baluster schemes can be accomplished in automatic mode, as follows:

**For box strings** (or sawtooth strings with a raised shoerail): StairBiz allows one basket baluster to be combined with a specified number of regular balusters in a repeating pattern. For example, two regulars for every basket would give a pattern of “AABAABAA“ etc.”. Alternatively, in the case of a panel, StairBiz allows a specified number of panels for any given balustrade section, and the gaps between the panels are filled with the appropriate number of regular balusters (e.g. for two panels; “AAABAAABAAA”.). Unless overridden, StairBiz attempts to calculate spacing to be consistent with your building codes and each baluster’s Minimum Diameter value.

**For sawtooth strings**, StairBiz allocates one basket baluster per tread (plus the required number of regular balusters to keep within code). You can specify which position the basket baluster is on the tread, or delete the basket entirely, for any given balustrade section. Panel type baskets are not allowed on sawtooth strings.

#### To set up:

Create one or more basket balusters in the Styles window (Balusters category) by creating a baluster in the usual way and then setting the new “Combo Bals” field. For regular basket balusters this setting is the number of regular balusters that would normally combine with this one basket baluster to form the “combo” (e.g. “2”). Note that this setting can be changed on a job-by-job basis (in the job’s Style window). To specify a “panel”, this setting must be “P”.

In the Components window (**Styles** tab) there is a category called “Baskets”. Your baskets and panels will be listed, plus the **[None]** item. To specify baskets or panels in a job, select the basket or panel from the list.

#### User control:

In the **Balustrade** pane of the Design window, select the **Amend Spacing** menu item. Various dimensions/values appear, depending on the situation. The easiest way to work out what these mean is to right-click the dimensions – in most cases you’ll get a pop-up explaining the nature of the dimension.

**For box strings**; either side of the (non-editable) spacing dimension are two (editable) text fields. For baskets, these are Extra Bal dimensions (on for the top of the section and one for the bottom). Editing these adds or removes balusters from the top/bottom of the section (e.g. “-2” removed two balusters, “1” adds one baluster). For panels, the one on the left adds or removes regular balusters, and the one of the right sets the number of panels you require for this section.

**For sawtooth strings**, there is a double dimension above (or below) the (non-editable) spacing dimension (e.g. “0 ; 2”). The first dimension is used to override the number of balusters on each tread (“0” means auto-calculate to stay within code). The second dimension is the position on the tread of the basket (by default it is “2”, i.e. the second baluster on the tread).

### Manual Mode

There may be times when you need more control over the baluster schemes and/or you need to apply different schemes on a section-by-section basis. For this StairBiz has semi-manual and a fully manual modes.

In the **Balustrade** pane of the Design window, select the **Amend Spacing** menu item. Right-click the relevant balustrade section and select “Manual Baluster Scheme” – you’ll get a text box showing the conversion of the current (automatic) scheme to the manual scheme; you can edit or change this scheme as follows:

#### Characters representing a scheme:

A baluster scheme is a piece of text made up of combinations of "A" and "B" (and optionally a few other characters) indicating the pattern of combo balusters.

"A" = Normal baluster

"B" = Basket baluster

For example:

"AAB" means two normal balusters following by one basket.

You can optionally indicate the number of balusters using numbers.

For example:

"2A1B" or "2AB" is the same as "AAB"

#### Non-sawtooth and landing schemes:

##### Semi-manual (repeating):

For example:

"AAB" means a repeating pattern of two normal balusters and one basket (StairBiz automatically ends the repeating pattern with whatever comes before the “B” – in this case “AA”).

"2A2B" means a repeating pattern of two normal balusters and two baskets.

##### Semi-manual (floating):

A question mark ("?") means a floating number of "A" (i.e. fill the space with as many “A” balusters as appropriate).

Any scheme which includes a "?" is a non-repeating scheme.

For example:

"?B?" means one "B" with as many "A" either side to make legal spacing

"?B?B?" means two "B" with as many "A" before, between and after to make legal spacing

"?BAAB?" means a "BAAB" with as many "A" either side to make legal spacing

##### Fully-manual:

A "#" prefix to a scheme means a fully manual scheme (i.e. we are spec'ing the position of every baluster in the section).

For example:

"#ABAABAA" means that "ABAABAA" is exactly what there is in this section.

"?" (floaters) are not allowed in an fully manual scheme.

All non-sawtooth manual schemes should start with a "A"; results are unpredictable if you start with “B” (especially where there is a mitred corner).

#### Sawtooth schemes:

Note that sawtooth only includes straight flight main sawtooth strings (landing strings, even if sawtooth, use non-sawtooth schemes).

##### Semi-manual (repeating):

You can specify a scheme for one tread and have it repeat for each tread.

For example:

"ABA" means ABA for each full tread

"B?" means start with a "B" then fill the rest of the tread with "A"

You can specify a scheme for two adjacent treads and have that repeat for each two treads. For this you use a single "/" (indicating a tread nosing)

For example:

"AA/B" means one tread with "AA" then one tread with "B", repeating for each two treads (the forward-slash "/" indicates separate treads).

"?/B" means one tread with as many "A" as appropriate then one tread with "B", repeating for each two treads

##### Semi-manual (with fixed mid-section):

You can use brackets to specify a fixed middle section.

For example:

"AA(B)" means put a "B" on the middle tread, with "AA" on each tread before and after.

Other examples:

"AA(B/AA/B)" means put "AA" on the middle tread, a "B" on the tread either side, with "AA" on each tread before and after that.

"?(B/?/B)" means put A's on the middle tread, a "B" on the tread either side, then A's on each tread before and after that.

“AA(/B/)” means put a single “B” mid section but it will span three treads (the two slashes assume we are using up three treads, but there is nothing before or after the “B” so those treads remain blank).

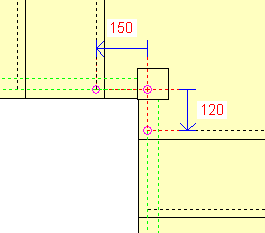
##### Fully-manual:

A "#" prefix means a fully manual scheme (i.e. we are spec'ing the position of every baluster on every tread).

For example:

"#AA/AA/B/AA/B/AA" means 6 treads with these balusters (not accounting for dummy treads).

Note: The above is not technically accurate. Note the following situation (i.e. the “partial” treads above and below the mid newel”



To handle this (and similar situations, like at dog-legs) StairBiz creates a dummy (invisible) tread below the first full tread and above the last full tread. It fills these dummy treads with balusters as if the tread were real, then “crops” the balusters that run past the “limits” (in this case the newel face).

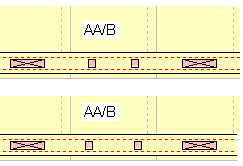
When creating fully manual schemes for sawtooth you also need to include the balusters for the first dummy tread (and perhaps the last, if necessary), whether or not a partial tread exists.

##### Nose to Baluster dimension:

For manual schemes the “Nose to Baluster” dimension only applies for repetitive schemes (i.e. semi-manual and same scheme on each tread), otherwise the “Balanced” position is applied automatically.

##### Feathered Spacings:

For non-repeating sawtooth schemes (i.e. where you can have different schemes on different treads), the baluster spacings can be calculated two different ways. In the first example below, each tread is considered in isolation (which means that the spacings will not be the same between every baluster, unless the baluster widths were coincidently appropriate).



The second example (above), the spacings have been “feathered”, meaning that in calculated the spacings for one tread the balusters on the next tread are taken into account. Here the spacings between all balusters are consistent.

The setting for feathers spacings is in the Setout window (Balusters category).

### Parts and Filters:

Baskets and panels do not have their own category in Parts, Part Filters or Labour Filters windows – they use the regular baluster’s category.

## Contextual setouts

##### Overview

**Contextual setouts** allows you to use a unit from your unit templates list in a number of different contexts, and StairBiz will automatically apply different setout values depending on the context.

The **Contextual setout** option can be set by right-clicking a corner unit in the Stair Setout pane of the Design window.

##### What are “contexts”

There are three contexts.

* 1. **Unit Position context**

Applies only to corner units. There are two position contexts …

a) The unit is a top unit.  
b) The unit is not a top unit.

* 1. **Winder Count context**

Applies only to corner units. There is a winder count context for each number of winders, e.g. …

a) The unit has one tread.  
b) The unit has two treads.  
c) The unit has three treads.  
 …. etc., up to the highest number of winders you have ever created in that unit

* 1. **Newel Position context**

Applies to any unit. There are three newel position contexts …

a) The newel is the top newel in the stair.  
b) The newel is the bottom newel in the stair.  
c) The newel is neither top nor bottom.

**Unit position** and **winder count** contexts apply only to corner units and only if its **Contextual setout** menu-item is selected.

**Newel position** contexts apply to both corner and straight units. They are contextual at all times – you cannot switch it off.

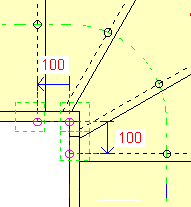
##### Which dimensions are contextual

There are three groups of dimensions which are contextual

1. **Corner Setout dimensions** (corner unit only)

In the Stair Setout pane of the Design window, Main Setout mode;

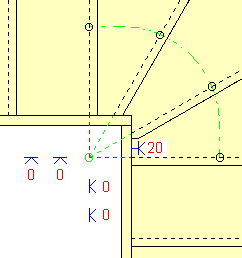
In the corner unit, there are two corner setout dimensions, which we call CornerHi and CornerLo (these have an id of 514 and 515, which you’ll see if you hold the Control Key and click the “?” button to the right of the dimension buttons – click any empty space to return to normal mode). You’ll also note that these two dimensions are red (indicating that they are contextual dimensions).



1. **Winder Setout dimensions** (corner unit only, and only if more than one winder)

In the Stair Setout pane of the Design window, right-click an empty space and select the Winder Setout mode.

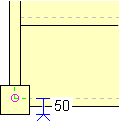
In the corner unit, there are winder setout dimensions (these have an id of 501, 502, 503 and 505).



1. **Newel Position dimensions** (top and bottom newels only)

In the Rake Balustrade pane of the Design window, right-click an empty space and select Show Newels and Amend Newel Position.

Top and bottom newel dimensions with an id of 1174 (i.e. the dimensions that position the newel in the direction of the line of the going) are contextual.



##### How do contextual setouts work

The above dimensions (i.e. setouts) are saved with the unit. This applies when saving to either unit templates, or in a job.

StairBiz saves a copy of the dimension for each different context.

Unit Position Tread Count

Dimension Context Context

| 1 tread

| Top Unit ---------- | 2 treads

Setout | | 3 treads

Dimension ----------- | | etc.

|

| | 1 tread

| Not top unit ------ | 2 treads

| 3 treads

| etc.

Newel Position | Top Newel

Dimension ----------- | Mid Newel

| Bottom Newel

The best way to explain these is with examples …

##### An example

Create an L-shape stair (straight – corner – straight).

Right-click the corner unit and tick the “Contextual Setout” menu-item.

In the Stair Setout pane of the Design window, right-click an empty space and select the Tread Setout mode.

In the corner unit, there are two corner setout dimensions (the red ones).

Amend the corner unit to give a single landing tread, then set these two dimensions.

Amend the corner unit to give a two landing treads, then set these two dimensions to something other than for the ones you set for the single landing tread.

Amend the corner unit to give a three landing treads, then set these two dimensions to something else again.

Save the corner unit back to the unit templates list, either replacing the existing or creating a new one (i.e. go back to the Stair Design pane of the Design window, right-click the corner unit and select Add To Unit Templates).

**Result …**

Delete the current stair.

Create a new L-Shape stair, using the corner unit template you just saved.

Firstly you’ll notice that the “Contextual Setout” menu-item is still ticked (i.e. it saves with the unit template).

In the stair you just created, if you set the winder count to one, the setout dimensions you set for one winder will automatically apply. If you set it to two, the setout dimensions you set for two winders will automatically apply. Etc.

Bear in mind that in this example, we did not consider the unit position context.

The trick in setting contextual setouts is to first sit down and think about which of your contextual dimensions vary according to the context. Based on that information, work out a strategy for setting each of them. For example, to set a “Top Unit” position context, the unit must be a top unit. If you’ve been working on the unit in a mid position context, you will need to save the unit back to the unit templates, delete the current stair, then create a new stair with that unit at the top.

Don’t forget to save your changes back to the unit template, otherwise all your good work goes to waste.

##### An alternative to Contextual Setout

If you use different winder setouts or newel positions for units when they are top units, bottom units or various tread counts, you could save each situation as a different unit template, then simply use the unit template appropriate to the situation. The disadvantage of this approach is its inflexibility – for example, switching from a one-tread landing to a two-tread landing would not be as simple as editing the tread count. It also means you may have to deal with numerous unit templates.

##### Unit-By-Unit

The contextual setout option applies on a unit-by-unit basis. Setting it for one unit does not set it for any other unit.

##### Newel setout

Consider the position of some newels in a stair - for example, the newel at the tenonside corner of a corner unit.

If this corner unit is the very top unit in the stair, you might want to position the newel a little differently to how you would if it had a straight flight above it. The same might apply if it had no unit below it.

StairBiz will save a separate set of position dimensions for any newel that could possibly end up as a top newel, or could possible end up as a bottom newel, and then automatically apply those dimensions to the appropriate context. In the case of newel positions, contextual setouts apply whether you have the **Contextual Setout** option set or not.

The way to set the these alternative positions is to create a stair where the unit in question is the top unit, and set the position of the top newels (in which case StairBiz knows they are in a “top newel” context and is setting the “top newel” set of values. Then send the unit back to the unit templates (thus saving those positions to the template). Then create a stair where the unit in question is the bottom unit, and set the position of the bottom newels (in which case StairBiz knows they are in a “bottom newel” context and is setting the “bottom newel” set of values. Then send the unit back to the unit templates.

##### What is a top/bottom newel?

For the tenonside side of corner unit, this can be confusing. Imagine a stair comprised of a single corner unit. The tenonside side of a corner unit can have three newels (depending on amount of room provided by the Corner Setout). Let’s call them N1 (the bottom newel), N2 (the newel right at the corner) and N3 (the top newel). If N1 is selected, it is the bottom newel. If it is not, then N2 becomes the bottom newel. If N3 is selected then it’s the top newel. If not then N2 is the top newel.

The rule is simple - the top newel is whichever selected newel is the top newel, and the same with the bottom. So StairBiz is saving the position of N1 and N2 for both bottom newel and mid newel contexts. And it’s saving the position of N2 and N3 for both top newel and mid newel contexts.

##### Identifying contextual dimensions

When you use the Contextual Dimensions option, all dimensions which are contextual are shown in red in the Design window. Thus, when you amend a red dimension, be aware that you are only amending it for that particular context. If you want to amend it for other contexts (i.e. you might intend to create a unit template from it and use that unit template in a variety of contexts), you will need to put that unit into each different context and (in the case of position contexts) save the unit back to the template between each context.

##### Contextual Strings

String Setout dimensions are also contextual. For example, the bottom of a straight string can come down to a landing, or a winder, or a floor, or a bullnose, etc. etc., and the values for each context are saved independently and applied for the relevant context.

Actually, it's not the *string* that is contextual – it’s the setout of the JOIN between strings or (where there is no join) the TEMNINATION.

For example, the high end of an upper wall-side landing string has four contexts;

1) Join between a 1-tread landing and a straight flight

2) Join between a 2-tread landing and a straight flight

3) Join between a 3(or more)-tread landing and a straight flight

4) Termination at the upper floor

Any change you make (in the String Setout window) to a dimension at that join or termination will apply only for the current context of that join or termination. That same dimension for any of the other three contexts will not be affected (in case that join or termination finds itself in a different context in the future, especially likely in the case of unit templates).

See String Setout window > Contextual Setouts.

##### For example; a landing unit as a top unit:

**Strings**; The setout at the high end of the upper landing string is contextual, and "at upper floor" is one such context.

**Newels**; The position of the inside newel is contextual, and "at upper floor" is one such context.

**Corner Setout**; This comprises the two dimensions that dictate the horizontal distance from 1) the corner to the top-most riser in the landing, and 2) the corner to the bottom-most riser in the landing. These are contextual, and "top unit" is a different context to "not top unit".

**Winder Setout**; This comprises the dimensions and angles which determine the setout of the winder treads. Each winder count (1, 2, 3, 4, etc.) is a different context, and top unit vs not top unit are different contexts.

## Copy/Paste in the Design window

Also see Changing a StairBiz drawing, Copying a drawing to the clipboard, Processing non-standard stairs

You can copy a design (which includes all stairs and wells), a stair, a particular unit of a stair, a well or a bullnose from one job to another (even between projects). You can even copy/paste within the same design (e.g. copy a unit in the stair, then paste that unit to the bottom of the same stair, or copy a bullnose from one side of the stair and paste it to the other side.)

Open the Design window (Stair Design pane) of the job you want to copy from. Right-click the relevant stair, unit, bullnose etc. while holding down the SHIFT key.

Then open the Design window (Stair Design pane) of the job you want to paste to (if you need to close the current project and open a different or new one, that’s OK). Right-click the relevant item in the drawing (or on an empty space in the window) while holding down the SHIFT key.

## Dimension Tools

Dimension tools can be found in the Design window, the CNC Bed window and the Custom Drawing window.

Allows you to click-drag between two points on the drawing, and draws a temporary dimension between the elements on the drawing closest to those two points, depending on the dimension mode.

The dimension mode is determined by which of the four buttons is clicked.

##### (Line to line)

The start point of the dimension is the closest imaginary point on closest line to the clicked start point. The end point of the dimension is the intersection of the line closest to the clicked end point with an imaginary line starting at the start point and at right angles to the start line.

The dimension will be perpendicular to the line at the start point (if you don’t want this, hold the SHIFT key down while dragging).

If you want the dimension exactly horizontal or vertical (depending on whether your drag is more horizontal or more vertical) from the start point then hold the CONTROL key down while dragging.

##### (Point to point)

The start point of the dimension is the line-end closest to the clicked start point. The end point of the dimension is the line-end closest to the clicked end point.

##### (Point to line)

The start point of the dimension is the line-end closest to the clicked start point. The end point of the dimension is the intersection of the line closest to the clicked end point with an imaginary line starting at the start point and at right angles to the end line.

##### (Co-ord)

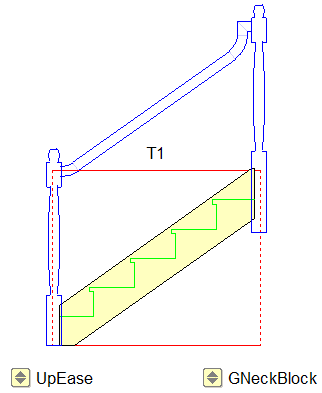
Shows the co-ordinate of the intersection closest to a single click.

##### (Anywhere to anywhere)

The start point of the dimension is a point on a line closest to the start of the drag. The end point of the dimension is a point on a line closest to the end of the drag.

## Handrail Fittings

Handrail fittings are selected in the Elevations pane of the Design window. Click the arrows and select as required.



In the following discussion we refer to “nominal” newels. A nominal newel is a position on the stair where a newel “could” be (whether or not it’s selected). This is because fittings can occur even if there is no newel (so long as there is handrail above, below, or above and below the nominal newel.

Selections are contextual, meaning that the options you are presented with depend entirely on the circumstances.

For example, in the above illustration, the bottom nominal newel has up to 16 contexts, being various permutations of …

* + 1. Is the rail raked or level
    2. Is there a newel or no newel
    3. If a newel, is it OTP or PTP
    4. Bullnose or no bullnose

What options are available to you will depend on the context.

#### Default Selections

StairBiz can remember what fitting selections should be the default selection in any given nominal newel context. When you save a stair template or unit template, your selections for EVERY context for EVERY nominal newel are saved. For example, if you make a selection when there is a bottom OTP newel with a bullnose, then delete the bullnose and change the newel to PTP and make another selection, BOTH selections are saved. The next time this newel is OTP with a bullnose, by default your fitting will be the one selected in this context, however if this newel becomes a PTP with no bullnose, the default fitting will be the selection you made in that context.

So to create default fitting selections, you place the bottom newel in the various contexts and make your selection, then save the unit back to the unit templates or save the stair to a stair template. The next time you use that template, you can put the nominal newel into any context and your default fitting selection will be appropriate.

#### Override of rail fittings

If for any reason the rail fitting selections offered do not quite satisfy the situation, you can manually delete or override the selection. When you make a fittings selection there is an extra “Override” menu-item. Select this item for a list of alternative fittings (or choose [None]). The override does not impact the drawing (which remains as per your last valid selection).

An override will be processed in the materials and parts/labour filters as normal, however the Joins, RailCuts and FittingCuts properties of the fitting (if filtered) will show zero (StairBiz cannot anticipate what your application is). Overrides are saved with the job. If you have fitting requirements in addition to your override selection, you can spec them in the Materials window as a Loose Item (the main advantage being that you do not need to put the Materials window into Manual Mode to delete the previous unsuitable fitting).

#### Fitting Types

Fittings are grouped (i.e. there can only be one of the following fitting types at each nominal newel). The fitting type includes all fittings at or directly above and/or below the nominal newel.

You don’t need to remember the following – they are a reference (but are largely self explanatory). They essentially indicate what is below, at, and then above the nominal newel. For example, you can assume that GNeckTandemCap has either nothing above it or a straight handrail above it (if there was an upease above it would be GNeckTandemCapUpEase).

In the following, where is says “sent to the filter”, it means that either the fitting, or several fittings being a breakdown of the original fitting into its constituent parts, is sent to the Handrail Fittings category of the Parts Filter and Labour Filter for conversion into parts and labour items.

In the following, where it refers to “breakdown”, “assembled” or “disassembled”, see the next sub-heading for a fuller explanation.

Note that the following fittings are organized or described the way they are so that the filters are able to get a total and accurate picture of exactly what is happening. This way labour can be accurately allocated, and regardless of how you purchased or manufacture your fittings (e.g. assembled or disassembled, with hardware or without, etc.) the filters can accurately deal with the situation.

BullTurn At bullnose PTP newel – the rail comes out of the block and does a 90 degree turn up to the straight section of rail (no upease). This is sent to the filter as a Turn.

BullTurnUpEase At bullnose PTP newel – the rail comes out of the block and does a 90 degree level turn up to an upease up to the straight section of rail. This is sent to the filter as a Turn and an UpEase.

ButtJoin Two in-line handrails butt join (assumes no newel). This is sent to the filter as one ButtJoin.

Curve3D A raked handrail runs into a curved raked handrail (assumes no newel). This is sent to the filter as one Curve3D.

GapReturnEnd Adjacent handrails (either in-line or at a corner) are separated by a gap and both have return ends (assumes no newel). This is sent to the filter as two ReturnEnd.

GapTerminate Adjacent handrails (either in-line or at a corner) are separated by a gap and neither have return ends (assumes no newel). This is sent to the filter as two Terminate.

GNeckBlock Gooseneck up to PTP newel block termination. It can be sent to the filters assembled as a GNeckBlock or disassembled as an UpEase (or UpEase90) and a Vertical.

GNeckBlockRail Gooseneck up to PTP newel block up to straight rail. It can be sent to the filters assembled as a GNeckBlockRail or disassembled as an UpEase (or UpEase90) and a Vertical.

GNeckBlockUEase Gooseneck up to PTP newel block up to UpEase. It can be sent to the filters assembled as a GNeckBlockUEase or disassembled as two UpEase (or UpEase90) and a Vertical.

GNeckReturnEnd Gooseneck where the horizontal section terminates in a return end (assumes an OPT newel or no newel). It can be sent to the filters assembled as a GNeckReturnEnd or disassembled as an UpEase (or UpEase90), a Vertical and a ReturnEnd.

GNeckReturnEndCap Gooseneck where the horizontal section terminates in a return end with cap (assumes an OTP newel). It can be sent to the filters assembled as a GNeckReturnEndCap or disassembled as an UpEase (or UpEase90), a Vertical and an OpeningCap.

GNeckRosette1 Gooseneck up to a type 1 rosette (assumes no newel) Note; “type 1” and “type 2” are nominal designations – what you do with them in the filter is completely up to you. It can be sent to the filters assembled as a GNeckTerminate and a Rosette1 or disassembled as an UpEase (or UpEase90), a Vertical and a Rosette1.

GNeckRosette2 Gooseneck up to a type 2 rosette (assumes no newel). It can be sent to the filter assembled as a GNeckTerminate and a Rosette2 or disassembled as an UpEase (or UpEase90), a Vertical and a Rosette2.

GNeckTandem Gooseneck up to a tandem (short horizontal section) termination (assumes OTP newel or no newel). It can be sent to the filter assembled as a GNeckTandem or disassembled as an UpEase (or UpEase90), and a Vertical.

GNeckTandemCap Gooseneck up to a tandem (short horizontal section) termination with cap (assumes OTP newel). It can be sent to the filter assembled as a GNeckTandemCap or disassembled as an UpEase (or UpEase90), a Vertical and a TandemCap.

GNeckTandemCapUpEase Gooseneck up to Tandem Cap up to UpEase (assumes OTP newel). It can be sent to the filter assembled as a GNeckTandemCapUpEase or disassembled as an UpEase (or UpEase90), a Vertical, a TandemCap and a UpEase.

GNeckTandemUpEase Gooseneck up to Tandem (no Cap) up to UpEase (assumes OTP newel or no newel) . It can be sent to the filter assembled as a GNeckTandemUpEase or disassembled as an UpEase (or UpEase90), a Vertical, and a UpEase.

GNeckTerminate Gooseneck up to a termination (i.e. runs into wall, no rosette). It is sent to the filter always as a GNeckTerminate.

GNeckTurn Gooseneck into a turn (no cap) into straight level rail (assumes no newel). It can be sent to the filter assembled as a GNeckTurnL/R or disassembled as an UpEase (or UpEase90), a Vertical, and a Turn.

GNeckTurnCap Gooseneck into a turn (with cap) into straight level rail (assumes OTP newel). It can be sent to the filter assembled as a GNeckTurnCapL/R or disassembled as an UpEase (or UpEase90), a Vertical, and a TurnCap.

GNeckTurnCapUpEase Gooseneck up to turn (with cap) up to upease up to straight rail (assumes OTP newel). It can be sent to the filter assembled as a GNeckTurnCapUpEaseL/R or disassembled as an UpEase (or UpEase90), a Vertical, a TurnCap, and an UpEase.

GNeckTurnUpEase Gooseneck up to turn (no cap) up to upease up to straight rail (assumes no newel). It can be sent to the filter assembled as a GNeckTurnUpEaseL/R or disassembled as an UpEase (or UpEase90), a Vertical, a Turn, and an UpEase.

MachinedEnd This is a rail termination with some special machining required. StairBiz is not concerned with what kind of machining, or what it looks like – it’s just something that you can trap in your filters and do with it what you like.

Mitre Adjacent straight rail sections join with a mitre (either in plan view or elevation view). This is sent to the filter as one Mitre.

NewelBlock No fittings – straight handrail section(s) terminate at PTP newel block. If there is rail on only one side of the newel, this is sent to the filter as one NewelBlock, otherwise it is sent as two.

OpeningCap Opening Cap at OTP newel (level rail). This is sent to the filter as one OpeningCap.

OverEase Straight handrail up to overease. They may or may not be straight handrail above the overease. This is sent to the filter as one OverEase.

OverEaseReturnEnd Straight handrail up to overease with return end termination. It can be sent to the filter assembled as a OverEaseReturnEnd or disassembled as an OverEase and a ReturnEnd.

OverEaseRosette1 Straight handrail up to overease up to rosette (type 1) termination. This is sent to the filter as one OverEase and one Rosette1.

OverEaseRosette2 Straight handrail up to overease up to rosette (type 2) termination. This is sent to the filter as one OverEase and one Rosette2.

Reducing This fitting is an option for the lower tenon-side rail in a U-Tight stair (where it will cause the handrail to return down the underside of the string above) and at a top newel (where it will cause the rail to return along the underside of the level of the ceiling). See also Chapter 11/ Reducing Balustrade.

ReturnEnd Straight handrail terminating with return end (assumes OTP newel or no newel). This is sent to the filter as one ReturnEnd.

Rosette1 Straight handrail up to rosette (type 1) termination. This is sent to the filter as one Rosette1.

Rosette2 Straight handrail up to rosette (type 2) termination. This is sent to the filter as one Rosette2.

StartEase Start ease up to straight rail (assumes no newel). It can be sent to the filter assembled as a StartEase or disassembled as an UpEase (or UpEase90) and an ReturnEnd.

StartEaseCap Start ease up to straight rail (assumes OTP newel). It can be sent to the filter assembled as a StartEaseCap or disassembled as an UpEase (or UpEase90) and an OpeningCap.

TandemCap A tandem with cap. This is sent to the filter as one TandemCap.

Terminate Straight rail simply ends (no fittings, assumes no newel). This is sent to the filter as one Terminate.

Turn Level rail up to turn (no cap) up to level rail (assumes no newel), or as a component of a gooseneck disassembly. Either way, the hand (L/R) is not relevant. This is sent to the filter as one Turn.

TurnCap Level rail up to turn (with cap) up to level rail (assumes OTP newel), or as a component of a gooseneck disassembly. Either way, the hand (L/R) is not relevant. This is sent to the filter as one TurnCap.

Turnout Turnout up to raked rail (assumes bullnose and OTP bottom newel). It can be sent to the filter assembled as a TurnoutL/R or disassembled as an UpEase (or UpEase90) and n TurnoutL/R.

TurnoutSmall Small turnout up to raked rail (assumes bullnose and OTP bottom newel). It can be sent to the filter assembled as a TurnoutSmallL/R or disassembled as an UpEase (or UpEase90) and a TurnoutSmallL/R.

UpEase Two rail sections joined by an upease (assumes no newel), or as a component of a disassembly. This is sent to the filter as one UpEase.

UpEase90 A 90 degree UpEase. This fitting is not a user option in the Elevations window, however StairBiz will recognize where a standard UpEase will not suffice and an UpEase90 is required. This is sent to the filter (instead of the UpEase) as one UpEase90. See Forced Disassembly (below).

Vertical The vertical (handrail) section of a disassembled gooseneck. This is sent to the filter as one Vertical.

VerticalTurnout Ramshead up to raked rail (assumes OTP bottom newel). It can be sent to the filter assembled as a VerticalTurnoutL/R or disassembled as an UpEase (or UpEase90) and a VerticalTurnoutL/R.

Volute Volute up to raked rail (assumes bullnose and OTP bottom newel). It can be sent to the filter assembled as a VoluteL/R or disassembled as an UpEase (or UpEase90) and a VoluteL/R.

VoluteClimb A climbing (ascending) volute up to raked rail (assumes bullnose and OTP bottom newel). It can be sent to the filter assembled as a VoluteClimbL/R or disassembled as an UpEase (or UpEase90) and a VoluteClimbL/R.

#### Assemblies and disassemblies

In the Elevations mode of the Design window, the appropriate fitting can be selected for each nominal newel. You will find all the available choices listed above.

##### Automatic disassembly

In some cases, StairBiz will automatically disassemble this fitting and send the components of the disassembly to the filter one piece at a time, as follows:

BullTurn > Turn (not really a disassembly – just a conversion)

BullTurnUpEase > Turn + UpEase

GapReturnEnd > 2 x ReturnEnd

GapTerminate > 2 x Terminate

GNeckBlockRail > GNeckBlock + NewelBlock

GNeckBlockUEase > GNeckBlock + UpEase

GNeckRosette1 > GNeckTerminate + Rosette1

GNeckRosette2 > GNeckTerminate + Rosette2

OverEaseRosette1 > OverEase + Rosette1

OverEaseRosette2 > OverEase + Rosette2

##### User disassembly

In the Fittings window (Defaults menu), under the Disassemble heading, you will find the following settings:

**Goosenecks**

With this set to true (T), StairBiz will disassemble goosenecks into their individual components (upeases, vertical, turn, tandem etc) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send the goosenecks to the Part Filters window as a single assembled unit.

**Start/End Easings**

With this set to true (T), StairBiz will disassemble start and end easings into their individual components (upease/overease and return end/start cap) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send them to the Part Filters window as a single assembled unit.

**Volutes**

With this set to true (T), StairBiz will disassemble volutes and turnouts into their individual components (volute/turnout and upease) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send them to the Part Filters window as a single assembled unit.

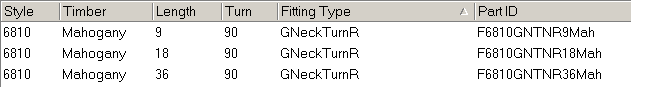
##### Forced disassembly

In all fittings that include an UpEase, and the angle of the UpEase is more than the maximum angle shown in the Fittings window for the particular fitting, StairBiz will understand that an UpEase90 is required and will send an UpEase90 to the filter (instead of the UpEase). If the UpEase is part of an assembly (goosenecks, start and end easings and volutes), then StairBiz understands that the UpEase90 is not included in the assembly and will force a disassembly. In other words, StairBiz forcing a **User disassembly** (see above) for that particular fitting.

#### Fittings and Filters

Much has already been said about filters, and pretty much all of it applies to fittings in the same way it does to other categories. Here is a revision and a few extra tips.

**Parts Window (Fittings category):**



In the above parts window, the Width, Depth and Description columns have been hidden (for clarity). If we imagine that a 6810 rail comes in only one size, the Width and Depth columns would not be relevant and any sizes you enter in them would be redundant (providing you didn’t filter for them). The Description field is simply not relevant to filtering.

**Parts Filters Window (Fittings category):**



The above part filter is an auto-filter (although it doesn’t have to be) - note the {AUTO} in the Part column.

In this case, if a GNeckTurn is selected in the Design window (Elevations pane), then this would be sent to the filter (as a GNeckTurnL or GNeckTurnR – let’s imagine it’s a right hand).

The filter is set up to filter only for Style, Timber, Fitting Type, Length and TurnAngle, so when the GNeckTurnR is sent to the filter it will take with it this information about itself.

Being an auto-filter, StairBiz will let the Parts window do the filtering. If the Style of the handrail in the Components window is “6810”, and the timber of the handrail is set to “Mahogany”, and the length of the gooseneck vertical is 10 inches (as calculated by StairBiz under the circumstances), and the angle of the turn is 90 degrees (as calculated by StairBiz under the circumstances), then StairBiz will return the part in the second row (F6810GNTNR18Mah). It would skip the first row because the vertical length needs to be more than 9. It would not return the third row because it can find a part that matches all criteria with a vertical length less than 36.

Note that for all parts in the Parts window that do not include a turn, the value in the Turn column should be zero or nothing (if the filter is filtering for Turn, otherwise it doesn’t matter). Also, for all parts in the Parts window that do not include a vertical, the value in the Length column should be zero or nothing (if the filter is filtering for Length, otherwise it doesn’t matter).

## Head-height

### Show Head-height

Where you have one or more stairs going up to a well, StairBiz can show the head-height situation.

##### Well Design and Stair Setout panes:

Right-click a blank space in the Well Design or Stair Setout panes of the Design window and select **Show Head-height** - the head-height situation will be drawn adjacent to the stair so that you can see the effects of your changes to the stair or well in real time. Note that here the head-height is only shown for the first such stair/well (otherwise see next paragraph).

The walkline is drawn on the plan of the stair, and a circle indicates where this walkline intersects the well.

##### Elevation pane:

Right-click a blank space in the Elevations pane of the Design window and select **Show Head-height** - the head-height situation for all relevant stairs will be drawn (one over the other at the correct height for stair-over-stair).

##### Understanding the head-height drawing:

In elevation, the tread outlines shown depict the situation along the walkline of the stair (imagine the walkline unwrapped to form a continuous line from left to right). The bulkhead shown is at the same position along the walkline as where the walkline intersects the well in plan view. The bulkhead depth is as set in the Levels pane of the Design window (or the default setting if not changed there).

### Head-height alerts

StairBiz automatically alerts you to any head-height issues regarding a stair’s relationship with the associated well. There is an alert in the Alerts window, and (if there is a head-height issue) in the Stair Setout pane of the Design window at the top/right of the window the actual head-height is shown (with the horizontal distance required to set the situation right shown in brackets).

StairBiz does not alert to head-height issues involving stair-over-stair (i.e. heathenish issues between the two stairs).

### Stair-over-stair head-height issues

StairBiz does not alert to head-height issues involving stair-over-stair (i.e. heathenish issues between the two stairs). This is because the issues are too complex for StairBiz to resolve automatically (are the walklines aligned, are there string depth issues, etc.).

However, using the Show Head-height feature in the Elevations pane is ideal for manually checking the situation.

Note that to accurately assess stair-over-stair head-height issues obviously the walk-lines of both stairs must follow the same path in plan view (but not necessarily have same start and end points). StairBiz automatically offsets the head-height drawings relative to each other by the amount of any X-offset to the stairs.

Note that there is a dimensions tool feature that will help in this regard: Select the line-to-line dimensions tool; If you want the dimension exactly horizontal or vertical (depending on whether your drag is more horizontal or more vertical) from the start point then hold the CONTROL key down while dragging. This can be useful (for example) for dimensioning vertically between strings etc. in elevation.

## Newel options

#### Stair Newels

For stair newels, right-click a newel in most panes of the Design window to select its options.

Hide Newel Dimensions

Sometimes newel can be so close that their dimensions collide. This hides the dimensions. Select again to show.

Floating

Sets a newel to “float”, meaning that it is no longer part of the stair structure but is (most likely) attached to the stair subsequent to its installation. String setout ignores a floating newel (i.e. pretends the newel doesn’t exist).

If any string coming into a newel does not have BOTH inside and outside edges intersecting the newel, StairBiz will force a float on that newel (called a forced float). The menu-item will be ticked but disabled.

Also see **No Force Float** (below).

Delete Mid Newel

Deletes a mid-string newel (which would have been set using the **Insert Mid newel** menu-item in the Rake-Select pane of the Design window).

Full

Sets the width and depth of the newel to the dimensions shown for this newel in the Components window (assuming the user has previously overridden these default widths). It’s a shortcut to manually setting the dimensions in the Rake Setout pane.

3/4

Sets the width or depth of the newel (depending on its location) to the 75% of the relevant dimension shown for this newel in the Components window. It’s a shortcut to manually setting the dimension in the Rake Setout pane.

1/2

Sets the width or depth of the newel (depending on its location) to half of the relevant dimension shown for this newel in the Components window, less half of the **Half Newel Cut Width** setting shown in the Setout window (i.e. so that you can get two half newels out of a full newel). It’s a shortcut to manually setting the dimension in the Rake Setout pane.

Normal Height

Sets the height of the newel to normal (assuming you have previously manually overridden this default).

Up to Ceiling

Sets the top of the newel to the level set in your floor to ceiling dimension. Not an option for some newels. Any acorns are deleted.

Up to Floor

Sets the top of the newel to the level set in your floor to ceiling dimension. Any acorns are deleted.

Up to Top of String

Sets the top of the newel to the level of the top of the highest string making contact with it. Turning setouts become irrelevant.

Up to Under Outstep

Sets the top of the newel to the level of the underside of the outstep at the top of the stair. Turning setouts become irrelevant.

Up to ...

Sets the top of the newel to the level you enter into the dialog window that opens when you select this option. The dimension is the height above the floor. Any acorns are deleted.

Down to Floor

Sets the bottom of the newel to the level of the lower floor. Not an option for a top newel.

Down to Stg Bottom

Sets the bottom of the newel to the level of the bottom of the lowest string making contact with it.

Down to Landing Top

Sets the bottom of the newel to the level of the associated landing.

Down to Top Tread

Sets the bottom of the newel to the level of the highest tread in contact.

Down to Top Tread + 1

Sets the bottom of the newel to the level of the highest tread in contact plus one rise.

Down to Top Tread + 2

Sets the bottom of the newel to the level of the highest tread in contact plus two rises.

Down to Bot Tread

Sets the bottom of the newel to the level of the lowest tread in contact.

Down to ...

Sets the bottom of the newel to the level you enter into the dialog window that opens when you select this option. The dimension is the distance from the bottom of the lowest string making contact with it.

Wrap Start

Applicable only where balustrade sections terminate at a newel, and both edges of the balustrade section do not butt the newel.

These menu-items overwrite the default Wrap Type setting in the Balconyplate section of the Setout window. By default, the selected setting (Start/Mid/End) comes from the Setout window. You can change this default setting here on a section-by-section basis.

Wrap Mid

See Wrap Start (above).

Wrap End

See Wrap Start (above).

Wrap Manual

See Wrap Start (above). However, Manual means that rather than StairBiz calculating a wrap, you can set both the extension and the end angle in the Show All show mode and Amend Offsets/Ext/Ang amend mode.

Notch

Not yet enabled.

No Force Float

Where you have an inside corner landing newel, if both upper and lower tenon strings do not enter entirely within the newel faces StairBiz will force the fixed newel to become a floating newel. This is because in this situation things can become too complicated and confusing for StairBiz to resolve. If you don’t want StairBiz to set this newel to floating under these circumstances, select this menu-item. You’ll get a message saying that StairBiz doesn’t support this feature – this is because of the potential can-of-worms, but you probably find in most cases it works just fine.

Outside Drilling

When drilling the newel on the CNC bed for tenon dowels, the default is that we drill from the inside of the newel. This switches it to the outside.

Send to CNC

Sends the newel to the CNC bed.

Newel Tags

Shows the stair newel tags (as created in Custom Tags) with their current settings, and allows you to change those settings.

#### Balcony Newels

For balcony newels, right-click a newel in the Balcony Balustrade pane of the Design window (not all the following options apply to balcony newels).

Align Prev

Aligns the newel with the previous section (useful for corners not 90 degrees)

Align Next

Aligns the newel with the next section (useful for corners not 90 degrees)

Align Split 1

Sets the angle and position of a corner newel to be centred on the section before and after.

Align Split 2

Same as above but slightly different method.

Align Towards Prev

No idea what this does – will get back to it.

Normal Height

Sets the newel top to normal height

Up to ...

Sets the newel top to something other than normal height

Default Bottom

Sets the newel bottom to normal height (depending on a variety of factors)

Down to Floor

Sets the newel bottom to the floor

Down to Plate

Sets the newel bottom to the top of the balconyplate

Down to ...

Sets the newel bottom to a specified dimension below the floor.

Wrap Start

If the newel is at a section termination and has balconyplate that wraps around it (rather than butts directly into it), this sets the balconyplate to terminate in line with the front face of the newel.

Wrap Mid

Same as above but sets the balconyplate to terminate mid-way along the newel.

Wrap End

Same as above but sets the balconyplate to terminate in line with the rear face of the newel.

Wrap Manual

Not enabled yet

Notch

Not enabled yet

Set as Default Fitting

Allows you to set a default through rail fitting (if pin-top newel).

Make Half/Full Newel

Allows you to toggle between full and half newel (at a section termination) without needing to set the newel size in the usual way.

Newel Tags ...

Shows the balcony newel tags (as created in Custom Tags) with their current settings, and allows you to change those settings.

## Newel Setout

Select the Show Newel Setout menu-item in the Elevations pane of the Design window (enabled only if Show Balustrade is selected). Here you can view and edit newel turnings.

Default turning lengths come from the relevant Style window for the newel.

#### Tags

The dimensions for turning and flat lengths can hold dimensions, or tags as follows:

D: Default

Means use exactly the values shown in the Style window for this newel

A: Auto Adjust

Means if the default values don’t work (according to the *Min flat below rail* and *Min flat above string* settings under the *Newel* heading in your Setout window), allow StairBiz to adjust the newel setout so that it works. This tag is useful where you turn your own newels, or if the newel is a part and has many different turning variations in your Parts window (so that whatever StairBiz comes up with is likely to be satisfied by something in your Parts window).

If a newel has (in its Style window) the **Force Default Turnings** checkbox ticked, even if ‘Auto Adjust’ tags are used StairBiz will ignore them and pretend they are ‘Default’ tags. See Style window.

We suggest that you use the Auto Adjust setting unless you have a specific reason to do otherwise (this allows StairBiz to calculate the most appropriate turning setout, which it can feed into your parts filter to select the most appropriate newel part – all without the need for a multitude of different newel styles to cover all turning setout possibilities).

Alternatively you can simply enter a dimension (to override the tags).

Tags (if used) are saved with unit and stair templates.

#### Setout dimensions are contextual

Note that turn length overrides (tags or user dimensions set in this window) are contextual, as follows: If you override lengths for a top newel, the override will only apply where the newel is a top newel; if you override lengths for a inside-corner newel, the override will only apply for the current number of treads in that landing. Each newel saves the override values for each different context and applies them automatically depending on the context.

Two other dimensions in Newel Setout specify the top and bottom heights of the newel. Note that when a newel is set to “floating” the tags for the bottom height of the newel include:

**To Tread High**; The newel goes down to the top of the highest tread it is in contact with.

**To Tread High + 1**; Same as Tread High, but adds one riser.

**To Tread Low**; The newel goes down to the top of the lowest tread it is in contact with.

Note that to send the newel a specified distance below the top of the tread, see Setout Defaults window / Floating newel into tread (~60).

## Newel position flush with string (string newel)

Where you have a newel where one or more faces are flush with the inside of a string (like a string newel), and your setting for TreadsIntoNewel is more than your setting for TreadsIntoString, be mindful of the following: The shape of treads (including landing treads) are calculated before considering any newels (i.e. they are first cut according to the strings). When you add a newel StairBiz cannot make the tread BIGGER (i.e. on the basis that the trench into the newel is deeper). So in those cases it’s safer to make your settings for TreadsIntoString and TreadsIntoNewel the same, or otherwise take care that all is good.

## Processing non-standard stairs

Also see: Changing a StairBiz drawing, Copy/Paste in the Design window, Copying a drawing to the clipboard.

When you need something extra or different than what StairBiz allows you, you can (in most cases) do as follows:

1. Select and process the stair **most** like the stair you are needing.
2. Manually modify the drawing(s) for that stair in a Draw window, and then
3. In your Job sheets, use annotation to override the existing drawings.
4. In your Custom sheets, use draw override to override the existing drawings.

See Manually modifying a StairBiz drawing.

1. Make any necessary adjustments to the Materials window. These adjustments will impact the cost of blank items and the specifications shown in all cutting lists.
2. To simply add some materials to the existing list, use the **Loose Items** tab of the Materials window.
3. To change existing materials, first tick the **Manual Mode** button (which makes all materials loose items), then amend these loose items any way you like.
4. Make any necessary adjustments to the Labour window (first tick the **Manual Mode** button). These adjustments will impact the cost of labour.
5. If necessary, or as an alternative to steps 3) and/or 4) above, make any necessary adjustments to the Quote Calculation window.

## Reducing Balustrade

#### Reducing is a Fitting

**Reducing** is a fittings option (Design window/ Elevations pane). It is an option for:

1) The lower tenon-side rail in a U-Tight stair (where it will cause the handrail to return down the underside of the string above), and

2) The rail along any unit where that rail either hits or is above the level of the ceiling (where it will cause the rail to return along the underside of the level of the ceiling).

#### U-Tight Stair

For this option you need a U-Shape stair where the lower tenonstring is vertically aligned with the upper tenonstring.

#### Rail Under Ceiling

By default, this option includes the level rail (along the ceiling) in drawings and specifications, however, if you have your own special component to replace this level rail, set the Setout Window/ Handrail/ Ceiling Rail Override (~34) with the depth dimension of this component (or set “-1” to have raked rail and balusters simply run into the ceiling). StairBiz will not spec or draw your special component (invariably it will be an irregular length, so you can create this in Loose Items in the Materials window), but it will make the allowance.

Also, there is a property called “CeilingRail” in the filters for handrail. It returns True if a piece of handrail running along the underside of the ceiling comes through the filter. Note that this won’t be useful if you use the “Ceiling Rail Override” setting because the rail won’t go through the filter (StairBiz is expecting that in most cases this ceiling plate would be the full length of the well, and as such is better spec’d as a loose item).

Following are the conditions required for a **Rail Under Ceiling** option:

These relate to the section below the newel position holding the "Reducing" option.

* There must be handrail (not wallrail).
* It may not be the lower flight of U-Tight stair.
* There must be a well associated with the top of this stair.
* The highest part of the rail must be above the ceiling.
* The lowest part of the string must be below the ceiling.
* The rail must normally be raked.

#### Fixed Turning Balusters

Where a fixed turning baluster is not possible in a reducing situation because it leaves the bottom flat less than zero StairBiz deletes the turning for this baluster. Note that it is preferable to use a fixed lower flat baluster for reducing balustrade.

## String options

Right-click a string in most panes of the Design window to select its options.

Sawtooth

Tells StairBiz to treat this string as a sawtooth (cut) string.

Also see: Chapter 21/ Strings: Sawtooth/ In-line adjacent strings

Use Frets

If the Frets category of the Components window is not showing “None”, then by default StairBiz will include frets for all sawtooth strings in the stair. This menu-item can exclude frets (i.e. override the default setting) on a string by string basis.

Riser Mitres String

If the string is sawtooth, and frets are not used (see the Frets category of the Components window, and the Use Frets menu-item in the previous paragraph), then the two alternatives are that the riser runs to the end of the tread, or the riser mitres the string. Use this menu-item to specify which.

Note that for the riser to mitre a fret, the **Non-mitred** checkbox in the Style window for the Fret must not be ticked (otherwise the riser will finish at the outside face of the string).

Use SideNosings

If **Use Sidenoses** is ticked in the Components window, then by default sidenoses (tread returns) will be used for the tread-ends of sawtooth strings. Use this menu-item to switch this off on a string-by-string basis.

Dog-Leg

Applies to straight units – inserts a dog-leg into the string. Only one dog-leg is allowed on each string side of the unit. The position of this dogleg can be amended in the Stair Setout pane, **Main Setout** mode and **String Setout** mode.

Skirt or Skirt/Bearer

Where a corner unit is flagged as an existing platform, this setting indicates whether you want StairBiz to include skirting. If the corner unit is not an existing platform, but is comprised of a single tread, this setting indicates whether you want StairBiz to replace the string with skirting and bearer.

Sand

Tags that the outside face of this string is exposed and needs to be sanded. By default, StairBiz sets the Sand tag for all strings where there is a newel at the top and bottom of the string. You can override this behaviour using this menu. Once you override it, you can only reset the “default” behaviour by holding down the Shift key while selecting this menu.

StairBiz doesn’t use this setting in any calculations, but it can be shown in your Custom sheets and in the Strings category of Parts and Labour Filters.

Ignore Top Nosing

Applies only where there is a curved string with a straight section at the top which is not curved.

Under this circumstance, the run (going) of the treads along the straight section is not the same as the run (going) of the treads along the curved section. To get the string margin (i.e. distance from nose to top edge of string), StairBiz draws a line from the top nosing in the string to the bottom nosing in the string, leaving string margins that are inconsistent from nose to nose (except for the top and bottom nosings). This may not suit you – you may want the string margin to be calculated only from nosings along the curved part of the string. To achieve this, right-click the string and select “Ignore Top Nosing”.

Delete String

Sometimes there may be a very short string running from the inside corner of a corner unit to an adjacent in-line string above or below it (it depends on the distance involved). If you want to force StairBiz to ignore this string and run the adjacent string all the way through, select this option. It can also be used to delete a dog-leg string.

Revert Delete

Reverts the **Delete String** setting mentioned above.

Self Supporting

Tags that this string is self supporting. StairBiz doesn’t use this setting in any calculations, but it can be shown in your Custom sheets and in the Strings category of Parts and Labour Filters.

Slice Corner

Applies to corner units – Cuts the outside corner of a corner unit, inserting an extra string. The position of this string is set in the Stair Setout pane, **String Setout** mode.

Round Corner

Applies to corner units – rounds the inside or outside corner of a corner unit. The setout of the curve is set in the Stair Setout pane, **String Setout** mode.

Especially for the inside corner, obviously there must be sufficient room for this curve – room can be created in the Stair Setout pane (Corner Setout dimensions). If subsequent modifications reduce the space available to less than required by the current radius, the radius of the curve will be auto-adjusted and you will be alerted.

String Newel

When you have a U-Shape stair with a short tenon string between the upper and lower flights (less than 12”/300mm long), this menu-item gives you the option to make the string a “string newel”. A string newel is a string which is vertical and behaves half like a string and half like a newel. This is especially useful for a U-Shape stair (with winders) which is wrapping around a wall. You can adjust the length of the string newel (plus other options) in the String Setout window. You can have balustrading with a string newel (an unlikely scenario), but the elevation of it is not likely to be accurate because rail rake generally follows the top of the string.

Insert Mid Newel

Inserts a mid newel (floating) at the location of your click.

Add Stair Up/Down

Use to create tee-stairs

See Chapter 11; Design window is depth/ Tee-stairs

Show String Setout

Opens a window in which you can amend the string setout.

Send String to CNC

Sends the string directly to the CNC bed window.

String Tags

Displays a menu for showing/setting your Custom Tags for the string’s category.

Override String Style

Allows you to override the style of clicked string with that from the Style Override pane of the Components window..

See Style Override in the Components window.

Hijack Carriage String

This tells the string to use your style selection under the Carriage String category of the Components window. It may save you having to use a separate Components Override window and normal component override. Obviously it will only be useful if your design does not use a Carriage String, in which case it may be useful if (for example) you want just one of several landing strings to be different to the existing selections in the Components window.

Also see Style Override in the Components window.

## Setting design defaults

Stairs are created from unit templates, bullnoses from bullnose templates, and wells from well templates. Stairs created from unit templates can also be saved as stair templates. Therefore, all templates need to hold your factory’s own settings.

#### Unit templates

For the purposes of this discussion, we will select a single template (the Corner unit template); all other templates will follow the same process.

1. Delete all templates except the Corner and Straight (these two are the basic building blocks of all stairs – any other unit templates you currently have been created from these two).
2. Create a dummy stair using the Corner unit.
3. Within the stair, adjust all settings for this corner unit to suit your requirements (use tags as often as you can – tags are far more flexible than hard values).
4. Right-click the corner unit within the stair and select **Add To Unit Templates**, and replace the existing Corner with this modified Corner (by saving it using the existing name). If you have not closed the job since you created the stair from the unit template, you can select **Update Unit Template** as a shortcut to the above.
5. If you are using the **Contextual Setout** option – different settings are saved depending on the context of the unit, be sure to adjust the settings for each context. See Modifying unit templates using Contextual Setouts below.
6. Now create other corner templates from this modified template. For example, if you want to create a 45 degree corner unit, create that stair using the standard Corner unit, then change the settings to suit and 45 degree unit angle, then create a new template from this unit. Because you had previously set the Corner unit’s setout to your liking, only a couple of changes were needed to create a 45 degree unit. And so on …

#### Modifying unit templates using Contextual Setouts

See Contextual Setouts.

A single corner unit using the **Contextual Setout** option can save multiple sets of setouts, one for each context. Subsequently you can use this single template in a variety of contexts, and StairBiz will apply the setout appropriate to the context.

Use the template to create a stair with the unit in the context you wish to save (top unit, mid unit, bottom unit, one tread, two treads etc.) Adjust the setout for the unit. Save the setout back to the template.

In the case of a position context (top unit, bottom unit etc.), you will need to save the unit back to the template for each different position (i.e. create a stair with the unit as a top unit, adjust the setout, then save the unit back to the templates; then do the same with this unit as a mid unit, then a bottom unit).

In the case of a tread count context, you do not need to resave the template between each different tread count; set the tread count to one, and adjust the setout; set the tread count to 2, and adjust the setout, etc. When you are done with all tread counts, save the unit back to the templates.

#### Well templates

There is not much in the way of setouts that apply to well templates – they basically just hold shapes. Delete any existing templates that you don’t want. Create any number of new templates with shapes approximate to ones that you are likely to use on a regular basis.

When you use that template for a job, in most cases only the dimensions will need to be adjusted to suit the particular job.

Well templates do not hold any balcony balustrading.

#### Bullnose templates

Delete any existing templates that you don’t want. Create any number of new templates as required. Be sure to make extensive use of tags – if you set hard values in many cases you will need to adjust the bullnose in each stair with a different going.

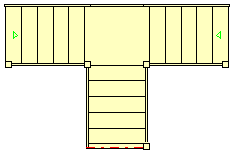
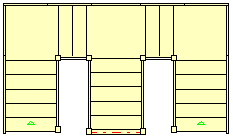
#### Stair templates

Delete any existing templates that you don’t want. Create any number of new templates as required. The templates are created from stairs that you create, so be sure that those stairs are created using unit templates that have the correct setouts (i.e. set up your units templates before creating stair templates.

## Tags; where they get their values

Coming soon

## Tee-stairs

  etc.

To create a Tee stair you need to start with a ‘parent’ stair that includes (at least) a single corner unit with a straight flight both above and below it (the ‘parent landing’). A Tee ‘child’ stair can start at the lower string of the parent landing and run up, or start at the upper string of the parent landing and run down.

There are two ways to create a Tee stair;

1) Right click on either string of the parent landing and select ‘Add stair up’ (for the lower landing string) or ‘Add stair down’ (for the upper landing string).

2) Create a separate second (child) stair in the design and drag either the bottom arrow of the bottom unit (which must be a straight) or the top arrow of the top unit (which must be a straight) until your cursor is directly over a string of the parent landing, at which time you release the drag.

The parent and child stairs have independent going settings – if you change the going of the parent stair it does not automatically change the going of the child stair, and vice versa.

The child part of a tee stair does not have to end at the same floor level as the parent. To have them different, create a new level (not mezzanine) in the Levels pane of the Design window. You will notice a small circle at the top and bottom of each stair – drag the circle to the required level. StairBiz will automatically set as “Fixed” the floor-to-floor levels of Tee-stairs (or others) that span multiple floor levels.

Any parent stair can have a child, which can itself have a child (making it the parent of that child), and so on, but any one parent stair can have only one child.

## Temporary Separations



The above button in the Design window (just above the Zoom button) allows you to create temporary separations (spacings) of stairs and wells.

Where you have stair over stair, you could use the layers window to hide some stairs/wells while working on the visible ones. The downside to this is that you cannot view or work on the hidden layers. The solution is to use this **Temporary Separation** tool. This allows you to temporarily separate (move) the stairs/wells apart in the design so all can be viewed and worked on at the same time, then with a single click they return to their original positions (stair over stair).

The **Temporary Separation** button is a graphical check box. With this checked, you can move stairs and wells around in the Design window using the following methods:

1. Click on the stair or well (to select it), then use your arrow keys to move the stair/well in the direction of the arrow. The movement will be 500mm/24” (or 100mm/6” if Control key is held down).
2. Drag either of the up/down arrows of a secondary stair to place the stair where you want.
3. Drag a well *line* (with the Control key down so that StairBiz knows you’re wanting to drag the whole well) to place the well where you want. Note that dragging a well *junction* (with Control key down) moves the well permanently (i.e. it does not relate to Temporary Separations).

When moving stairs/wells in this way, when you untick the **Temporary Separation** button the stairs/wells snap back to their original (actual) positions.

In terms of any relationship between a separated stair/well and other stairs/wells in the design, the original relationship is never broken – the separation is only done in the output to the screen, not to the actual positions (so this is quite a different thing to offsetting a stair or well in the normal way).

Note that whether you move a stair or a well, it’s the LEVEL that moves. In other words, if you move a stair you also move any well at the top of that stair (and vice versa).

To permanently revert all current temporary separations to zero, hold the CONTROL key down while clicking the Temporary Separation button in the Design window (note that this is not the same thing as hiding temporary separations, which you can do simply by un-checking the Temporary Separation button).

You can show temporary separations in drawings in Custom sheets: In the Custom Editor window, click on the drawing boundary rectangle with the Set Field tool to open the Drawing Definitions window – there is a check-box to set the drawing to show separations.

You can show temporary separations in the Custom Drawing window: Tick the **Separations** checkbox.

Temporary separations save with the job.

# Chapter 12 : CNC

## Overview

StairBiz can drive just about any CNC machine. At this stage it can process in up to 4-axis (5th axis is anticipated some time down the track). It can process all stair components except for rail fittings and 3-D balustrade components.

See the separate Users Manual CNC (in the StairBiz Program folder).

For more information see the separate **Users Manual CNC** (in the StairBiz Program folder).

# Chapter 13 : All windows in alphabetical order

## 3D Window

### Overview

From: Process menu; **Show 3D Drawing**

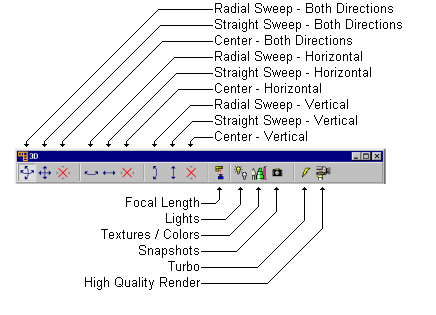
The **3D Window** allows you to view your design from a 3D perspective. There must be a design containing a stair and/or balcony to open this window. Note that for now strings and stair balustrading are not been drawn (coming soon).

Using controls that are analogous to lights and cameras, you can control the angle you view your design from, and the way the surfaces appear.

Due to the fact that rendering a drawing in 3D can be very processor intensive, the 3D Window uses a low quality for presenting the initial drawing while you adjust the lights and camera. This low quality setting allows the best combination of speed and quality for quick screen updates. After you have positioned your cameras and adjusted your lights to your liking, you can then render a high quality drawing of your design in realistic 3D.

### 3D Toolbar

From the 3D Toolbar, you can control all aspects of the 3D Window. The following diagram illustrates the action of each tool on the toolbar. See below for a detailed explanation of each.



### Camera Sweeping

Sweeping the camera allows you to change the location from which you view your virtual stair. There are two types of sweeps that can be performed:

A **Radial Sweep** causes your camera to orbit the object you are viewing. If you radial sweep from side to side, it will appear as if you are walking around your stair.

A **Straight Sweep** causes your camera to move in a straight line from side to side, or up and down.

Depending on the mode you choose, you can also choose to constrain your movement in the **horizontal** or **vertical** directions. Or if you choose **both directions** you have the ability to sweep without constraint.

For example, if you click on **Radial Sweep – Vertical** and then click anywhere on the 3D drawing, while holding the mouse down your vertical movements will cause the camera to rotate up and down around the object you are viewing.

### Camera Centring

If at any time your view becomes difficult to adjust and you wish to return to a home position, you have the option of clicking on a **Centre** button. For example, clicking on **Centre – Vertical** will return your camera to the level position as it was when the window was first opened.

### Focal Length

Adjusting your focal length allows you to move closer or further away from the stair. Click on **Focal Length** tool to set that mode. Then click-drag either up or down anywhere on the 3D drawing - your vertical mouse movements will cause the camera to move closer to or further from the stair.

### Lights

The **Lights** tool will open a panel where you can adjust the lights in your scene. You can determine which lights are enabled, how high they are positioned, and how intense they shine on your scene. An explanation of the lights panel will follow below.

### Textures / Colours

The **Textures / Colours** tool allows you to determine the colours that are used for various components of your 3D design. The textures for high quality renderings can also be selected from the Textures Window. An explanation of this window can be found below.

### Snapshots

The **Snapshots** tool opens another row of toolbar that allows you to memorize various lights, textures, and camera settings. An explanation of this tool will follow below.

### Turbo

If you find that your 3D Drawing is too slow when moving the camera or adjusting the lights, click on the **Turbo** tool to speed this process up. When **Turbo** mode is enabled, the detail and accuracy of the drawing are diminished, however the speed is greatly enhanced.

### High Quality Render

When you have positioned your camera and adjusted your lights to your liking, you can click on the **High Quality Render** tool to cause StairBiz to begin creating a much more accurate 3D drawing. The final 3D drawing will contain accurate shadows, reflections and textures according to the settings that you’ve established.

High quality rendering is slow. How quickly it renders will depend on the speed of your computer and the complexity of the stair. If you like you may return to your other work (including in StairBiz) while this window renders in the background.

### Lights Panel

In the **Lights Panel** you will see a mock stair surrounded by nine lights. From here you can control the intensity of those light sources. By clicking on a **Light** Icon, you can turn it on or off.

When a light source is illuminated, two corresponding sliders will appear below the light map. The yellow slider allows you to vary the intensity of the specified light source. The green slider allows you to control the elevation of each light source. With the slider set to maximum (100%), the elevation is roughly equivalent to the height of the upper ceiling. With the slider set to minimum (0%), the elevation is the same as the lowest floor level in the design.

You also have control over three additional light sources. The S (**Skylight**) light source is directly overhead and cannot be moved. The **Ambient** light source controls how much light falls on surfaces that are in the shadows. The **Camera** light source controls how much light shines from the location of the camera.

As you add more light sources to the scene, the scene becomes brighter. The true results of the light settings can be seen on a *High Quality Render* where shadows are cast and lighting effects are rendered.

### Send the 3D drawing to a Custom sheet

You can include a 3D stair drawing in a Custom sheet, as follows:

To set up the relevant Custom sheet(s), open the sheet (probably your Quote sheet) in the Custom Editor. Select the Set Field tool and click on the boundary rectangle of the relevant stair drawing. In the drawing properties window that opens, set the DrawId = 99. Close and save.

In a job, design the stair, open the 3D window, and position and light the stair to your liking. Click the “Capture to Custom sheet” toolbar button (far right) – the cursor will change to a cross-hair (just like when you press the F3 key). Click-Drag a rectangle around the 3D image. This captured image will now automatically override the standard (plan) drawing in all custom sheet drawings with a DrawId = 99.

To revert the image to the standard (plan) drawing you can right-click the drawing in the Custom sheet and select “Revert”.

If your Custom Sheet drawing does not have a Drawing ID of “99” (such that the above process does not automatically insert the 3D drawing), you can still override an existing stair drawing in any Custom sheet – right-click the drawing and select **Override with Clipboard**. You may also need to select **Centre** and **Scale**.

### Snapshot Tools

When the snapshot toolbar is displayed, you have the ability to memorize various settings of the 3D Window. These saved settings are referred to as a snapshot.



Saving a snapshot captures the following attributes of your current 3D View:

* Camera Angle
* Light Settings
* Textures Settings (Override settings only)

To use the snapshot tools, first position your camera using the **Camera Sweeping** tools described above. If desired, adjust your lights and your textures. Then click on the snapshot button to display the **Snapshot Toolbar** (pictured above). Next click on the **Save** or **Save As** buttons. Clicking **Save** will overwrite the current snapshot if one is selected. Clicking **Save As** will allow you to create a new snapshot with a new name.

When you have multiple snapshots with different names, you can use the **Snapshots** pull-down on the left side of the toolbar to select the snapshot you wish to view. You also have the option of clicking **Delete** to remove any unwanted snapshots.

Snapshots are specific to a job and are saved with that job (i.e. with snapshots you can open a job an go straight to a saved snapshot).

### 3D Textures window

The **Textures/Colours** tool in the 3D window opens the **3D Textures window**.

A colour (in this context) is a simple painted surface. A texture is a finish to a surface other than just a colour (for example, a wood texture shown grain, or a colour but with certain reflective qualities such as gloss).

Here you can define default colours and textures for all timbers and parts for all jobs, and you can override those defaults just for this job. There are two main sections to this window.

##### Defaults

The list on the top half of the window shows all timbers existing in the Timbers window.

This list (at the top) is divided into 2 sections:

**Room**: Lists the 3 components that create rooms.

**Timbers**: Lists of all timbers current in your Timbers window.

Any changes made in this section apply to the default settings for all future jobs, and all non-overridden default settings for all past jobs.

##### This Job

Lists all components in the current job.

By default, the colour/texture for each component will be “Default”, meaning that the colour/texture for this timber is whatever is defined for this timber in the list at the top.

Any changes made in this section will override the default settings just for this job..

##### Defining colours and textures

To defining a colour or texture in either list:

1. Click on the appropriate cell in the column labelled **Texture**. A pull-down icon will appear in this cell allowing you to change the setting.
2. Click the down icon to pull down a list of options. Inside this list, you will find a list of predefined textures, as well as a **<Colour>** option. There will also be a **Default** option if you are editing the **This Job** list.
3. Selecting **Default** causes this component to obtain its colour setting from the **Defaults** list above.
4. Selecting **<Colour>** allows you to specify a solid non-textured colour.
5. Selecting a **texture** causes this item to be rendered in an approximate representation of the chosen texture (e.g. DkWalnut). **Note**: These textures will only show up in the *High Quality Renderings*.

## Building Codes window

### Overview

Here you set maximums and minimums which, if exceeded in the stair design, will trigger an alert in the Alerts sheet. Note that StairBiz does not stop you exceeding these limits – it simply advises you if you do.

NOTE that there are other ways of generating alerts in the Alerts sheet beside violating the following settings – see Parts and Labour Filters. Note also that if alerts are current for a job the **Alerts Current** field of the Job Directory window will indicate such.

You can create as many different sets of Building Codes as you require (using the Save As button). You can then select the applicable code for a particular location in the job’s Site window.

Note that the values of the Building Codes selected in the Site window are not saved with each job (but the selected name is). This means that if you subsequently change the selected building codes, previously saved jobs will be affected by those changes. This probably wouldn’t matter much, except for the Walkline settings if you use the “B: Building Code” dimension tag in the Design window (curved stairs in particular may be affected by this).

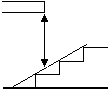
#### Export/Import

Exports the current window to a file or imports a previously exported file to the current window (overwriting the current settings). This is useful only for moving settings from one computer to another where you don’t wish to move the entire defaults database.

### Clearance

##### Legal head clearance

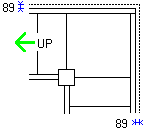
Usually the statutory minimum head clearance between a line drawn down the nosings of the treads and the face of any bulkhead above.



You can see head-height clearance for the current design in the Well Design pane of the Design window (if there is a problem), or at any time in the Elevations Pane (right-click a blank space and select "Show Head-height")..

##### Default stair to well min

The default gap between the outside face of a wallstring and an adjacent wall. This allows for any irregularities in the wall. StairBiz accounts for this gap when proposing a new stair where a well is involved. This gap can be changed for a particular job (if necessary) in the job’s Design; Stair Design window.



If you violate this clearance StairBiz does not alert you..

##### Min rail clearance

The minimum gap between a stair handrail and the face of the well as the rail passes through the well. StairBiz uses this when calculating the proposed stair design.

If you violate this clearance StairBiz does not alert you..

### Going Straight

##### Minimum going

The minimum going (nose to nose) along the walk-line of a straight flight.

##### Maximum going

The maximum going (nose to nose) along the walk-line of a straight flight.

##### Maximum going variation

The maximum difference between goings (nose to nose) of all straight flights in the design.

##### Minimum going at string

The minimum going measured at the inside string of the straight flight

### Going Winder at String

##### Minimum going at string

The minimum going measured at the inside string of the corner unit.

##### String Position Box

Sets where the going is measured along (box strings). Options are 0=outside string, 1=inside string;

##### String Position Sawtooth

Sets where the going is measured along (sawtooth strings). Options are 0=outside string, 1=inside string, 2=TreadEnd;

##### Calc Method

Sets the line (as per “String Position” settings) along which the going is measured, as follows: 0=Follow the string; 1=Follow the string, but use shortest straight line distance (i.e. cut corners and arcs); 2=Follow fullest radius.

### Going Winder at Walkline

##### Calc right angles to nose

Will calc the goings at right-angles with the nosing consistent with many building codes. To see the effect select “Winder Setout” mode in the Stair Setout pane of the Design window.



Note: **Calc right-angles to nose** should be used in conjunction with **At landings use fullest arc** (see **Walkline** category), and even then if the distances from the corner up to the top nosing/riser and down to the bottom nosing/riser are not the same then the method is inherently flawed. We include these options not because they produce a well designed stair, but because that’s what a lot of building codes require.

##### Minimum going

The minimum going (nose to nose) along the walk-line of a corner unit.

##### Maximum going

The maximum going (nose to nose) along the walk-line of a corner unit.

##### Maximum going variation

The maximum difference between goings (nose to nose) of all corner units in the design.

### Rake

##### Steepest rake angle / Shallowest rake angle

This relates to the rake (angle in degrees), measured at the walkline. Applies to straight flights only. Set both to zero if you don’t use this.

StairBiz can set the going of a stair based on the steepest or shallowest rake specified here: right-click a straight unit in the Design window (Stair Setout pane) and select “Set Minimum Going” (maximum if you hold down the Shift key).

##### Min/Max 2xRise+Run

Some codes have a ‘twice the rise plus one run’ rule. StairBiz calculates the value at the walkline and alerts if it is outside your minimum and maximum values. Applies to straight flights only. Set both to zero if you don’t use this.

### Risers

##### Minimum rise

Minimum rise, tread to tread, for all units.

##### Maximum rise

Maximum rise, tread to tread, for all units.

##### Maximum rise variation

The maximum difference between risers of all units in the design.

### Treads

##### Max straight treads in a line

The maximum number of treads in any straight unit.

##### Max treads without landing

The maximum number of contiguous treads or winders (not including a quarter or half-spaced landing).

##### Max landing treads

The maximum number of treads in any corner unit.

### Walkline

##### Walkline override (box)

Applies only when the walkline dimension (Design window, Tread Setout pane) has the “B: Building Codes” tag set, and the top tenon string of the unit is not sawtooth. This sets the value of the walkline dimension tag. Note that you can enter a value of “-1” to tag that the walkline is down the middle of the unit. If a different setting applies to units over a certain width, see below.

##### Walkline override (sawtooth)

Applies only when the walkline dimension (Design window, Tread Setout pane) has the “B: Building Codes” tag set, and the top tenon string of unit is sawtooth. This sets the value of the walkline dimension tag. Note that you can enter a value of “-1” to tag that the walkline is down the middle of the unit. If a different setting applies to units over a certain width, see below.

##### Walkline override (wide stair)

Same as above, but applies when the stair is over a certain width (see next setting). Ignored if setting is zero. Applies to both box and sawtooth.

##### Wide stair width

Holds the width of the unit above which the previous setting applies (e.g. if the previous setting applies to flights over 1000mm, set this to “1000”).

##### Walkline starts at (box)

Determines where the walkline dimension is measured from. Applies only when the top tenon string of unit is not sawtooth.

0 = outside of string  
1 = inside of string

NOTE: If the walkline is tagged to be the centre of the flight, the centre is always deemed to be the mid-point between the outside faces of the strings

##### Walkline starts at (sawtooth)

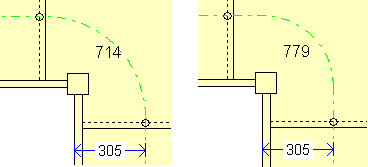
Determines where the walkline dimension is measured from. Applies only when the top tenon string of unit is sawtooth.

0 = outside of string  
1 = inside of string  
2 = end of sawtooth treads

NOTE: If the walkline is tagged to be the centre of the flight, the centre is always deemed to be the mid-point between the outside faces of the strings

##### At Landings Use Fullest Arc

Deletes (as much as possible) any straight parts of the walkline within the landing (as per the first illustration below).



## Client Contacts window

### Overview

From : Client List window ; **Contacts** button

Also see Client window (Contacts tab)

Contacts are people in the clients organization that may relate to a particular job (e.g. supervisors). Here you can create a list of contacts for each client, and set the details for each (phone, fax, email etc.).

In a job’s Client window, you can assign a job contact from this list.

In the Client List window, you can assign a default Contact for each new job using that client.

### Buttons

##### New

Creates a new contact. The Contact Name can’t remain as “New”.

##### Delete

Delete’s the current contact. If one or more jobs are using this contact, StairBiz will advise you and abort the delete.

##### Paste to Job

If the client for the currently open job is the client relating to the Contact currently displayed in this window, you can paste this contact to the job’s Client window (Contact tab).

##### Close

Closes the Client Contacts window.

##### Export

Exports all contacts for all clients (not just the current client) to Excel. The client name for each contact will be shown in the first column.

To export all contacts just for the single currently selected client (as opposed to all clients), hold the CONTROL key while clicking the Export button.

When you export contacts, the last column contains a large number (the Contact Key). Never enter a new number for new contacts you create in the spreadsheet. A contact key is used by StairBiz to try and recreate (if possible) the exact same table when importing as that which was exported. This may be useful for some things too technical to mention here, but it is not absolutely critical.

##### Import

Imports all contacts in your spreadsheet. You will be given the option to delete all existing contacts prior to import (if any contact is being used by a job, StairBiz will advise you and will not delete that contact).

If an imported contact already exists in your contacts list, it’s data will be overwritten with the imported data. If not, a new contact will be created.

To see the correct column format for importing, do an export and check the spreadsheet.

### Fields

##### Field Lengths

Field lengths (i.e. maximum characters) for each field are much the same as the similar fields in the Client List window.

##### Contact Name

Contact names for any one client have to be unique (i.e. no duplicates).

##### Tag

Any text up to 8 characters. For your use only. It can be used to do finds and sorts on the client database table for mail merges etc. (this can be done by an external application).

##### Spare

Use this any way you like (you can change the name in the Language window).

##### Notes

There is no limit to the length text in this field.

##### All others

Use these fields any way you like.

## Client List window

### Overview

From : Process menu ; **Client List** menu-item

The **Client List window** holds details about your regular clients. The details for any client can be pasted from here into the Client window of a job.

To delete all existing clients (something you would probably only do at the start of setting up for your business) click the **Delete** button which holding down both the CONTROL and SHIFT keys.

There are three ways to enter client information into this window:

1. After you input client information in the Client window as part of new project, if that client is a regular, or you suspect that he might become a regular, you can save those details in the **Client List window** (where they will available to you next time). In the Client window, after entering all the details, click the **Paste to Client List** button.
2. Type them in directly. To create a new client, click the **New** button.
3. Use the **Import** button – see Client Import window.

### Fields

Fields in this window are the same as the Client window, so refer to that window. Exceptions are as follows:

#### Discount

This is the amount to discount from the before-tax sub-total shown in the Quote Calculation window for a job for this regular client. There is no corresponding field in the Client window for the job – it is shown only in the Quote Calculation window.

#### Contacts button

Click this to open the Client Contacts window for this client.

#### Default Contact

If you have created any contacts in the Client Contacts window for this client, you can select a default contact to be used for each new job that uses this client. This contact goes in the **Contacts** tab of the job’s Client window.

### The List

The list of clients is automatically sorted.

To put the clients details into the left of the window, click the client’s name in the list.

If you resize or maximize the window, the list is resized – you could see hundreds of clients at one time if the screen was large.

This list can be speed searched – see Speed Search Lists

If this list seems to misbehave while scrolling through the clients, see Miscellaneous Defaults window, Miscellaneous category, Client List Delay.

### Buttons

#### Show in List

This is the button adjacent to Customer ID field. Converts the client list (on the right) to Customer IDs rather than Business Names.

If a client does not have a Customer ID (they are not required) then “[NoID\_##]” will be shown (where ## is an incrementing number set by StairBiz) – in which case that client cannot be selected from the list; un-tick the checkbox and select by Business Name.

#### New

Creates a new (empty) record at the end of the existing list. Type in the details for your new client.

#### Delete

Permanently removes the client currently displayed.

If you hold down both the Control and Shift keys while clicking the Delete button, StairBiz will delete all clients in the list. If a client in the list is currently being used by any job, it will not be deleted.

#### Export

Allows you to export the current StairBiz client list to a Microsoft Excel spreadsheet. See Export Clients below.

#### Import

Allows you to import an existing client list from a Microsoft Excel spreadsheet into the StairBiz client list. See Import Clients below.

#### Paste to Project

Pastes the details of the currently selected client into the Client window of the current project. This creates a “live connection” between the project and the client in the client list – see Client window.)

#### Update Local

Only applies when connected to StairBiz server. It downloads from the server to your local database all clients not already in your local database (so that you have access to these clients when not connected).

Your Contacts are also synchronized. Note that Contacts are not synchronized in reverse (Update Server) - best always to create Contacts when connected to the server.

For the technically minded, following is a summary of what happens:

Note that a "key" is a number which uniquely identifies a record (in this case a client record in the database). No two client records can have the same key in the same database. Jobs in StairBiz use keys (rather than names) to point to a particular client.

If the client KEY on the server exists in the local database, the existing local record will be updated, otherwise ...

If the client NAME on the server exists in the local database ...  
 If the contents are different, and the keys are different, but the name is same ...  
 You will be asked if you want to update the local  
 If Yes, the local key will change to the server key, and the local record will be updated  
 If No, the record will be skipped (no action)

If the client KEY on the server does NOT exists on the local database ...  
 If the server key does not exist on the local, the client will be added with that key,  
 otherwise the client will be added with a new key

#### Update Server

Only applies when connected to StairBiz server. It uploads from your local database to the server database all clients not already in your server database (i.e. clients you have created while not connected). Contacts are not synchronized in this case - best always to create Contacts when connected to the server.

For the technically minded, following is a summary of what happens:

See the previous heading for the definition of a "key".

If client name in the local database exists on the server, it will be skipped (no action).  
Otherwise it will be added to the server ...  
If the local client key does not exist on the server the client will be added with that key, otherwise the client will be added with a new key.

#### Inactive Clients

You can set a client as “Inactive” (tick the “Inactive” checkbox just below the Related Files button). After you close the Client List window such clients won’t show in any client list, including in the Client List window. To see them in the Client List window tick the “Show Inactive” checkbox (to the right of the Update Server button). Making a client inactive won’t affect any jobs using that client.

### Export Clients

Click the **Export button** to export all clients in the current StairBiz client list to a Microsoft Excel spreadsheet.

1. First you are presented with the **Save As** dialog box. Enter a name for the Excel file, or choose an existing file to overwrite. Click the **Save** button.
2. If you select an existing file name, you will be asked if the file is currently closed. If it not, click **No**, close the file, and try again.
3. Wait until you get the message “Export Completed”.

When you open the Excel spreadsheet, if you get a message that starts "The file you are trying to open", simply click "Yes" to continue opening it.

The first row in the spreadsheet is a “header” row, showing labels for the columns. For an explanation of non-obvious labels (columns/fields), see **Import Clients** below.

NOTE: If you are exporting while connected to the StairBiz server, and you have a lot of clients, and the export is not successful (i.e. some kind of error), try temporarily bringing your server jobs database across to your local computer and try it from there.

**Single Client Export:**

To export just a single client, select that client in the list and, while holding the CONTROL key down click the **Export** button.

### Import Clients

If you are importing to a local computer the clients on the server computer, we suggest you use the Synchronize feature instead (see elsewhere in this chapter). The main difference is that a synchronize will apply to both clients and client contacts (whereas for import/export you have to do contacts in a separate process - see Client Contacts window).

Click the **Import button** to import a list of clients from a Microsoft Excel spreadsheet into the current StairBiz client list (study the following before doing anything).

#### Creating the Spreadsheet

To set up such a spreadsheet (PRIOR to attempting an import), do as follows:

1. Most databases allow you to export to an Excel spreadsheet, so if your clients are in a database you will need to do this first.
2. It is CRITICAL that the spreadsheet contains at least 30 columns in a very specific order. To see what columns are required and in what order they are required, do an Export as discussed above. Open the exported file and study the column headings. There is a discussion below about each of the fields/columns.
3. If the spreadsheet contains more than 30 columns, that’s OK (the extra columns will be ignored, even if they contain data).
4. Even if a required column contains no data (i.e. you do not have that field/column in your existing client database/spreadsheet), you must still include it in the spreadsheet to be imported.
5. The spread-sheet may contain a header row (i.e. the very first row being a row of labels describing the contents of the column). When importing, you will be asked if it does or does not. If there is a header row, your list of clients must start from row 2, otherwise they must start from row 1.
6. Numerical fields can be formatted as text or left as any type of numerical – it doesn’t matter.
7. There must be no empty rows. When StairBiz finds a row without any text in the first column, it assumes there are no more clients.
8. When you export clients from StairBiz into a spreadsheet, columns 29 and 30 contain long numbers (called "keys"). Do not delete or change these keys. However, if you add extra clients to a spreadsheet (or create a spreadsheet from scratch) do NOT enter anything is these columns for the clients that you add.

#### Column Explanations

Note that the following columns/fields correspond to those in the Client List window. For a description of the field, see Client window.

Text Fields

In the following list, text fields are indicated by a number following the field name. This number is the maximum characters allowed for the text in this field. If you exceed the maximum, StairBiz will advise you. Text fields can be formatted in the spreadsheet as General or Text (or simply left unformatted).

Numeric Fields

In the following list, numeric fields are indicated by NOT having a number following the field name. However, even if a field is numeric, it may still contain text (see explanations). Numeric fields can be formatted in the spreadsheet as General or Integer (or simply left unformatted). Do not format columns which contain anything other than numbers as Integer.

Field Name Chars

1) Client ID 8 Any or no text

2) Business Name 30 It should be unique (no two clients can have the same client name). Note that on import you will be given the opportunity to first delete all existing clients in the StairBiz database (although it is NOT required that you do so). When you import, if an imported client name if the same as a client name existing in your database, StairBiz will alert you and give you the option to abort the import, or skip over the duplicate client, or allow updating of existing records using the imported values.

3) Contact Name 30 Any or no text

4) Salutation 30 Any or no text

5) Street 25 Any or no text

6) Suburb 20 Any or no text

7) City 20 Any or no text

8) State 10 Any or no text

9) Zip 12 Any or no text

10) Tax Number 20 Any or no text

11) Referred By 20 Any or no text

12) Is Owner - If the client is a builder, allowable is “False”, “F”, “0” (zero) or empty. If the client is an owner, allowable is “True”, “T” or “-1” (minus one).

13) Phone 21 Any or no text

14) Mobile 21 Any or no text

15) Fax 21 Any or no text

16) Email 40 Any or no text

17) Client Notes 00 Unlimited characters. Any or no text

18) Discount - An integer from -50 to 80.

19) Pay1 Percent - An integer from 0 to 100

20) Pay2 Percent - An integer from 0 to 100, providing that Pay1Percent + Pay2Percent does not exceed 100

21) Pay2 Days - An integer from 0 to 150

22) Terms 2 - Allowable is “BeforeStart” or “1”; “BeforeEnd” or “2”; “AfterStart” or “3”, “AfterEnd” or “4”

23) Pay3 Days - An integer from 0 to 150

24) Terms 3 - Allowable is “Account” or “0” (zero); “Net” or “1”

25) Tag 8 Any or no text

26) Show Critical - “True”, “T”, or nothing

27) Critical Note 50 Any or no text

28) Default Contact 30 If (and only if) you allow updating of existing database clients using data from your import, and some or all of those existing clients have Contacts, this is the name of the default contact. Leave blank for no default contact.

29) Client Key - Never change any existing number in this column. Never enter a new number for new clients you create in the spreadsheet. A client key (and a contact key - see next column) is used to try and recreate (if possible) the exact same table when importing as that which was exported. This may be useful for some things too technical to mention here, but it is not absolutely critical.

30) Contact Key - See for 29) above.

Don’t be overly worried about your fields. StairBiz does a test run on the entire imported list before it commits anything to the StairBiz database. If something is wrong in such a way as to cause a major problem, StairBiz will advise you and give you the opportunity to abort the import before anything is committed.

#### Importing

After your spreadsheet is set up correctly and populated with clients, do as follows:

1. If any existing clients have contacts in the Contacts window, and you intend to import those clients, we suggest that first you export the Contacts. This is not really necessary if during the import you allow updating of existing clients, but better safe than sorry.
2. Click the **Import** button
3. In the Open File dialog window, navigate to the spreadsheet, select it and click **Open**.
4. If there are clients existing in your StairBiz Client List, you will be asked if you want to delete them first. You do not have to. If you say yes, and a client in the list is currently being used by any job, that client will not be deleted. We suggest you do NOT delete existing clients in your database if any of those clients have contacts in the Contacts window, otherwise you will lose your contacts (contacts are not imported with clients, although they can be exported and imported separately).
5. You will be asked if there is a header row in your spreadsheet (i.e. containing column headings). If there is, your first client in the spreadsheet should start at row 2 (otherwise it should start at row 1).
6. StairBiz will do a primary test run on the Business Name, vetting its length and whether or not there are any duplicates in the spreadsheet. If there is a problem, you will be alerted and the import may be aborted. StairBiz will place a list of the problem names on the Windows clipboard, which you can paste into Notepad or any similar program. Each problem name will be prefixed with the row number, for example "[127]". Over-length names will be suffixed, in brackets, with the number of characters you will need to remove.
7. StairBiz will do a secondary test run on the entire import. If there is a problem, you will be alerted and the import may be aborted (so that you can fix the problem and try again). StairBiz will give you some information about the problem, including the row and column of the problem cell. Note that StairBiz uses numeric columns references (i.e. 1, 2, 3 rather than A, B, C). To show numeric column references in your spreadsheet, go to Tools/ Options/General, and select “R1C1 Reference Style”.
8. When the import is done, you will get the message “Import completed”.

NOTE: If you are importing while connected to the StairBiz server, and you have a lot of clients, and the export is not successful (i.e. some kind of error), try temporarily bringing your server jobs database across to your local computer and try it from there.

### Backing up your clients

It's imperative to have a back-up of your jobs database (where the clients are saved). However, it might also be good to have a backup of just your clients and contacts, so that you could restore one or all in case of a database corruption.

The easiest way is to periodically export both clients and contacts.

If you lose a client due to accidental deletion or a database corruption, make of copy of the exported spreadsheet, and in that copy delete all clients except the relevant client. Then import that spreadsheet (being sure, when prompted, NOT to delete all existing clients during the import).

Do the same with contacts (if necessary).

## Client window

#### Overview

From : Process menu ; **Client** menu-item

The **Client window** holds information about the client (the person who orders the job) for the current Project.

You can manually enter the client's details, or you can select an existing client from the Client List window by either:

1. Clicking the **Client Names** or **Client IDs** button and selecting from the list.
2. Opening the Client List window and clicking the **Send to Project** button.

#### Live Connections

When you start a new project and type information into the **Client window** for that job, it does not affect your Client List in any way (i.e. there is no relationship between the client in your job and any client in your Client List). If you delete the project, you delete the client with it.

However, there are three ways to create a “live” connection between a client in your Client List and the client for a particular job (meaning that the two are linked).

1. If you start a new project, type the client details into its **Client window**, then click the **Send To Client List** button in that window, this client becomes part of your permanent Client List (if you open the Client List window, you will see this client now listed there). A live connection has been created.
2. If you start a new project, open the **Client window** for that job, and select a client using the **Show Client List** button in that window, details for the selected client are sent to the **Client window** for the job. A live connection has been created.
3. If you start a new project, open the Client List window, select a client, and click the **Paste To Job** button, details for the selected client are sent to the **Client window** for the job. A live connection has been created.

#### Characteristics of a “live” connection:

* Any changes you make to the client’s name or details in the Client List will be reflected in the **Client window** of all jobs using that client.
* Any changes you make to the client’s name or details in a project’s **Client window** will be reflected in the Client List window, and in the **Client window** of all projects using that client.
* If you delete the project, the client is not deleted (the only way to delete the client is in the Client List window, and you won’t be able to do this if the client is used by any other project).

#### Breaking a “live” connection:

If a client is "live", and you do not want changes you make in the Client window to affect a corresponding client record in the Client List window, click the **Disconnect from Client List** button.

#### Tab: Client Details

##### Customer Id

The customer identification number (if used – it is not required).

##### Business Name

The company name or business name of the client, or, where this is not relevant, the name of the client.

##### Contact Name

The name of your contact within the above business, or, where the business name is also your contact name, you can leave it empty.

##### Salutation

How you want the contact person to be addressed in quotes etc. In other words, what will come after the “Dear ... “. (For John Smith, the salutation would be either “John” or “Mr. Smith”.)

##### No. and Street, Suburb, Zip, City, State

The address of the client

##### Tax Number

Tax number or company number

##### Tag

Any text up to 8 characters. For your use only. It can be used to do finds and sorts on the client database table for mail merges etc. (this can be done by an external application).

##### Referred By

How was the client referred to your organization

##### Owner/Builder

Whether the client is the owner or the builder

##### Phone, Mobile (Cell), Fax, Email

Contact information

##### Clients Notes

Any information you wish to keep on this client. The text field can expand to become a separate window (click the **Expand** button).

##### Critical Note

Intended for a critical note relating to a particular client (e.g. “Legal Action Pending – see Geoff”, or “Add 20% to all quotes”.). Max 50 characters.

If you want this note to be “in the face” of any user who selects this client for a new job, or opens and existing job using this client, tick the check-box adjacent to this field. With this check-box ticked the Critical Note will pop-up as an alert whenever anybody selects this client for a new job or opens any of this client’s existing jobs. Remember that when the client in the job’s Client window is “live”, any changes you make in that window affects that client in the Client List window (and vice versa).

#### Tab: Terms of Trade

##### Pay 1

The percentage of the quote total which is required as a deposit upon acceptance of the quote. The default comes from item ~1 (Client Terms) in the Miscellaneous Defaults window. You can change it here for the current job if you like.

##### Pay 2

The percentage of the quote total which is required as an interim payment (if required), and the number of days before/after the start/finish of the job when this payment is due. The defaults comes from items ~2, ~3 and ~4 (Client Terms) in the Miscellaneous Defaults window. You can change them here for the current job if you like.

##### Pay 3

The number of days after completion of the job when the final payment is due, and whether this is Net or Account.

The best way to explain this is with 3 examples ...

**0 days Net**: The client is required to settle the account in full on the date of the invoice (i.e. completion). This is the default setting.

**14 days Net**: The client is required to settle the account in full within 14 days of the date of the invoice.

**30 days Account**: The client is required to settle the account in full by the end of the month following the date of the invoice.

The defaults comes from items ~36, and ~37 (Client Terms) in the Miscellaneous Defaults window. You can change them here for the current job if you like.

#### Tab: Contact

Holds the client’s contact details for this job.

If the current client is from (and still connected to) the Client List window, click the **Contact Names** button to get a list of contacts for this client, from which you can choose. If you select a contact this way, it is ‘live’ (if you change information here it will also be changed back in the Client List window). If you don’t want this, click **Disconnect from Contact List**.

If you don’t or can’t select a contact from the Client List window, you can simply type any details for the job’s contact. If the current client is from the Client List window, you can click **Send to Contact List** to add the new contact to the Client List window.

Whereas clients are saved with the project, Contacts are saved with the job, so you can have different contacts for different jobs in a project (un-tick the ‘Shared’ button in the Contacts tab).

#### Paste to Client

This button will take a copy of the contents of the **Client window** and place it in a new record in the Client List window, creating a live connection.

#### Client Names

This button will open a summary list of the clients (by **Business Name**) in the Client List window, from which you can select a client for this job.

#### Client IDs

This button will open a summary list of the clients (by **Customer ID**) in the Client List window, from which you can select a client for this job.

## Colours window

From : Defaults menu ; **Colours** menu-item

The **Colours window** sets colours of the Design window.

For each category of colour there is a setting for the colour shown in the Design window and another for the colour when you print the relevant sheet.

Left-click a colour to change it, or right-click a colour to change it, copy it, or paste a copied colour. The most recently copied colour is shown at the bottom-left of the window.

You can have different saved colour scheme - set colours then click "Save As". You can then select a scheme (to be shown or printed) by selecting from the pull-down list of saved schemes.

Click "Revert to Defaults" to revert to the StairBiz recommended colours.

The colour of your stair in the Design window is set in the Colours window (Defaults menu). Stair, handrail and wallrail use a "timber" colour which at times can look very yellow. To try our new suggestion for timber colour, right-click on the colour for these categories (for both DESIGN and PRINT) and select "Set Colour" while holding down the SHIFT key. Our suggested new colour will be set. If you don't like it, close the window without saving it or set a different colour.

In this window you can also set the background colour of the main StairBiz window (the full screen window that is always open).

## Components window

### Overview

From : Process menu ; **Components** menu-item

The **Components window** is one of the Process windows and relates to a specific project.

This window lists the components of the stair/balustrade and allows you to change the styles, sizes and timber for each.

The defaults selections for each new project come from the current Components Selection Template.

The settings shown are used by StairBiz in the Design window, and all windows relating to costing and quoting.

The window is divided into:

1. **Components**; which included newels, balusters, treads etc.
2. **Part Filters**; each category mentioned above has a corresponding Parts tab.

Selecting “None” from any of the pull-down lists instructs StairBiz ignores that item completely.

Selecting “As Above” from any of the pull-down lists instructs StairBiz to assume that the item is identical to the first item above it which is not “As Above”.

You can speed search in the pull-down lists – see Speed Search Lists.

### Components

The items in the pull-down lists come from the Style Defaults window.

To change the default selection, click and select from the pull-down list.

This list can be speed searched – see Speed Search Lists.

Each style has further information in its associated Style window which can be opened by clicking the button to the left of the relevant title (see Style Windows).

If you want to create a style, size or specification which is not shown in the list (i.e. not in the Style Defaults window), select “Other” – the relevant Style window will open. Change the details in the Style window to reflect what you want (your default Style settings will not be affected by this change).

###### Newels and Fillets

For most components, a “style” is the combination of style-name and size. In other words, you can have multiple styles with the same style-name so long as the sizes are different. However, for newels and fillets a style also includes the position in the stair of that newel or fillet (see the Style Defaults window).

In the Components window there are five categories for newels depending on the position of the newel in the stair. For each category, only newels that are allowed in that position are included in that list. For example, a “Colonial 90x90” newel in the Style Defaults window with only the “Top” button ticked will not show up in the list for bottom newels in the Components window. Note also that because there can be more than one “Colonial 90x90” newel listed in the Style Defaults window (so long as their positions don’t overlap), it may appear that the same newel is appearing in different newel categories (whereas in reality they are different newels).

The same thing applies to Fillets.

###### Baskets

The items in this list are balusters (from the Styles window, Balusters category) that have the **Combo Bals** field set (see Chapter 11/ Combo Balusters).

To specify baskets or panels in a job, select something from the list, otherwise select [None].

Baskets and panels do not have their own category in Parts, Part Filters or Labour Filters windows – they use the regular baluster’s category.

###### WallBrackets

Obviously you can select “None” to turn off wallbrackets for all selected wallrail. To turn them off on a piece-by- piece basis, right-click the wallrail (in the Stair Balustrade pane or the Balc Balustrade pane) and select **No Wallbrackets**. This can be useful if you are using one or more (but not all) sections of wallrail as capping.

###### Lining

To specify lining you need a style in the Components window (Miscellaneous tab), and you also need to right-click the relevant unit(s) in the Stair Setout pane of the Design window and select "Lining Under".

###### Outstep – replacing it with balconyplate

In the Components window **Use Balconyplate** is an option in the list of Outsteps. It is not a style in itself – it is not listed in the Styles window. If selected, it works as follows:

The currently selected balconyplate is used for the outstep (if there is no balconyplate an alert will be generated). The Blank/Part settings in the Balconyplate’s style window will apply.

The Balconyplate Style window now has fields which correspond to those in the Outstep Style window; **Floor Thickness** and **Overhang Outstep**. These are applied to the outstep in the same way as the **Floor Thickness** and **Overhang** fields in the Outstep Style window.

If selected, the Balconyplate part filter is used to process the Outstep (which looks up balconyplate parts if an auto-filter). The Labour filter continues to use the Outstep filter.

See also Chapter 21 : Stair Components quick reference/ Balconyplate/ Marrying Balconyplate with Outstep

###### As Above

Some components (e.g. newels, fillets, landing treads, bullnose treads etc.) also have an “As Above” item in the list. Select this if you want this component to be the same style/size as that shown in the list box above (this can save you time in making selections – you make one selection and any relevant ‘As Above’ below it will follow).

###### When “As Above” is not really “As Above”

This discussion also applies to fillets, but here we’ll just refer to newels.

The following applies where your Styles window has more than one newel of the same name and size.

Each style within a particular category in the Styles window has to be unique (i.e. you can’t have two styles the same). For all components except newels, the uniqueness of a style is determined by its style name and size. For newels, uniqueness is also determined by its position (Top, Mid, Bottom etc. as ticked in the Style window). This is why in the Style window you can have two newels of the same name and size provided that their positions are different.

If, in the Styles window, you have multiple versions of the same newel (i.e. same name and size but different positions), in the Components window you will only see what appears to be one newel (i.e. just the name and size).

In the Components window, you can select this newel (name and size) in any newel category, and StairBiz will look in your Styles window and find the newel with this name and size AND appropriate position ticked. So if you select ‘Colonial 90x90’ for the bottom newel StairBiz goes to your Style window and finds a Colonial 90x90 with “Bottom” ticked. There may be many Colonial 90x90 newels in your Styles window, but only ONE can have “Bottom” ticked.

The same applies to “As Above”. “As Above” simply points to a name and size. For each “As Above” shown, StairBiz will still find and use the appropriate newel for that position. So even if (let’s take the extreme example) you have five Colonial 90x90 newels in your Styles window, each with a different position ticked, back in your Components window you could select ‘Colonial 90x90’ as your Balcony newel and select “As Above” for all the others, and StairBiz will resolve this situation correctly so that the appropriate newel is used for each category.

This is all meant to make life easy for you.

**The only complication can be as follows:**

For example, you select ‘Bevel 88x88’ for Balcony. You select “As Above” for Inside Landing, but the ‘Bevel 88x88’ for Balcony does not have the ‘Inside Landing’ position ticked. In this case StairBiz goes to your Styles window to find a ‘Bevel 88x88’ newel with the ‘Inside Landing’ position ticked, and uses that.

This is fine until you come along and change the name or size (i.e. the Style) of the Balcony newel in the job’s Components window (by clicking the little Edit button to the left of the style name), let’s say to ‘Bevel 92x92’. The Inside Landing newel still says “As Above”, so StairBiz goes to your Styles window to find a ‘Bevel 92x92’ newel with the ‘Inside Landing’ position ticked, and can’t find it.

It’s not possible for StairBiz to resolve this situation. You will be alerted, and for the affected newel(s) you will need to select something other than “As Above”.

### Parts Filters

Parts are items shown in your Parts window. Part filters (created in the Part Filters window) can replace a blank item with a part (see Blank items and Parts), or add extra parts to your Bill Of Materials. With part filters you can specify and cost materials for a job down to the exact number and type of nails, wedges and glue blocks needed (if you want to).

Here you can select Part filters for each category.

This list can be speed searched – see Speed Search Lists.

The items in the pull-down lists come from the Part Filters window.

To change the default selection, click and select from the pull-down list.

The filters selected will be run during the calculation of the Bill Of Materials and materials cost for the job. Any “hits” will be added to your Bill Of Materials. See Part and Labour Filters.

Also see the relevant section in Labour window – there is a more comprehensive discussion, and Labour filters work in exactly the same way as Part filters.

Part filters selected for a job are not saved with the job – it is assumed that individual filters are not something that would need to change on a job-by-job basis.

You can modify any part filter in the job by clicking the button to the left of the relevant part filter selection. Any changes you make will change the defaults – they do not just affect this job.

### Buttons

#### Side Nose

Determines if there are side nosings on the ends of sawtooth string treads.

This setting can be overridden by right-clicking on specific strings.

#### Open Rise

Tick if your normal treads are open rise (have no riser board).

This does not apply to the riser under your outstep or the riser under your landings (see Setout window), and it does not apply to risers under bullnose treads (in which case set the Bullnose Riser category of this window "None").

If this check-box is not ticked, you can still have open rise on a unit-by-unit basis - see Open Rise Override.

#### Install

Applies to WallTrim and BalconyTrim. It determines whether the component is too be installed (for the purposes of costing labour in the Labour Filters).

If the item is “None”, or is not part of the design, the button becomes irrelevant.

#### Extra Lengths

Opens a window showing the extra lengths to be added to each component for the purposes of the cutting list and costing for this job. Default extra lengths for each new job come from your Extra Length Defaults window. They can be changed here just for this job if required.

#### Shared

This window can be shared amongst multiple jobs in a project. If this job is the only job in the current project, this button will be disabled. If there are multiple jobs in this project, this button will be enabled and ticked by default. If you do not want this window shared with other jobs in the project, un-tick this button – the window will be disconnected from the project and any changes you make to it will only affect this one job. See Shared Windows.

#### Done

Simply places a tick against the Components window menu-item under the Process menu.

#### All Filters ‘None’

Sets all Part Filters to ‘None’. You can reselect them by re-selecting the appropriate Selection Templates.

#### Refresh

Each time you select a style, or assign a new timber to a style, StairBiz pulls the relevant settings and pricing from your defaults (for that one style or timber). Otherwise, all setting and pricing for components are as they were the last time you made the style/timber selection.

One way to update *every* item (especially if the original selections were done using a selection template) is to re-select the selection template.

Alternatively you can click the **Refresh** button in the Components window – See Chapter 14: Pricing Refresh

Note that if you have the Quote Calculation window in **Lock** mode, you may need to (even just temporarily) un-tick this mode to regenerate the quotation.

### Timber

To select a timber for any component, click on the timber label to the right of the component. A pop-menu will appear listing all timbers currently in the Timbers window. Make your selection.

To change a timber and have that change apply to all components of the same timber, hold the Shift key down while you make your selection.

After you make a selection, if you want to apply that selection to another component, click that component’s timber field while holding the Control key down.

Note that if a style type is set to “Part”, its timber field will be disabled. This is because the timber for all Parts can only be specified in that part’s description.

Timber fields are also disabled for “As Above” items (the timber is the same as above).

### Layers: Multiple Component windows

There is the capacity to create different Component windows for different stairs and/or balconies. By default, a single Components window applies to all stairs/balconies. To create a different Component window for a particular stair and/or balcony, click the **Manage Layers** button in the Components window.

In the **Manage Layers** window that opens, if there is more than one stair or balcony, each will be listed on the left, with the name of the current Components window (“Main” is the default window) on the right. You can rename this “Main” window, but you can’t delete it – at least one stair/well must use it.

You can create a new Components window for a stair/balcony by selecting the relevant layer/level and clicking the “Create New” button – it will allow you to name the new window and will then duplicate the original window.

When there is more than one Components window, you can double click the name of the Components window at the right and select a different Components window for this layer/level.

Back in the Components window, if there are multiple Component windows they will be listed in the **Layer** drop-down list. Select the relevant components window and make your selections as usual.

Currently the Part Filter selections are shared between component windows, but everything else is unique to its window. Currently each stair and balcony is listed separately – soon there will be the option to group them automatically which will save a few seconds of work.

Note that currently non-list fields in Custom sheets are not handling multiple Component windows. For example, the non-list field for BalusterStyle can only show one baluster style, and this will be the one selected in the default (Main) components window. Shortly we will be upgrading all these fields to be list-fields. If you do not use multiple component windows then your existing Custom sheets will not be affected by this upgrade. If you do use multiple Component windows, you may decide to take advantage of the new feature.

### Style Override (Create Override button)

The following applies where you want to override the style/size of individual newels, treads, landing treads and strings within a single stair.

There is a button called **Create Override**. It creates a new component window (similar to creating a new layer) called **Style Override**. You can toggle between this component window and others using the Layers drop-down list.

By default, all component styles in this freshly created window are set to ‘None’, which (in this case) means ‘not overridden’. You can make selections in the **Style Override** components window as normal, however these selections won’t apply to anything until you take the next step.

In the Design window you can right-click individual treads, landings and strings and select ‘Style Override’ from the bottom of the menu. Such overridden components will now get their Style/Size from the **Style Override** components window (rather than the normal one).

At the moment this only functions for newels, treads, landings and strings. If there is a need for other categories let us know and we can add them.

Style Overrides are saved with the job (both the Style Override components window and the individual components tagged as ‘Style Override’). Components tagged as ‘Style Override’ (but not the components window) are also saved in stair and unit templates. Thus a unit template could include a permanently overridden component style. The trick is that this override will only apply where there is a **Style Override** components window, and there is a valid (not ‘None’) style selected in that window. Where no such window is available, StairBiz reverts to the normal Components window.

Note that if you have balustrade which continuously spans two or more in-line strings with different depths, there will be issues (there are now multiple centre-of-string).

Also, if you override the string, it’s then possible to adjust the design such that the string no longer exists. Even as an invisible string if it retains its override property it has the potential to cause problems, so StairBiz automatically turns it off.

### Selection Templates



To see the button at the right of the above illustration, click the **Manage Templates** button.

Your current selections can be named and saved, so that next time you want to select all those same selections it requires only a single click. The selections are divided into stair items and balustrade items, and include all timber, components and part filter selections.

This list can be speed searched – see Speed Search Lists

**To modify an existing selection template:**

1. Select the template to be modified from the drop-down list to the right of “Selection Templates” (you can also modify the “Default” template).
2. Select appropriately for each category, including Parts.
3. Click the **Save** button.

**To create one or more alternative templates:**

1. Select the template which most closely resembles the template you wish to create.
2. Select components appropriately for each category.
3. Click the **New** button (if the current template has been changed, you will be asked if you want to save the current one BEFORE creating the new one).
4. Type the name of the new template at the top
5. Click **OK**.

**To delete a template:**

1. Select the template.
2. Click the **Delete** button. To delete all selection templates except for the one named “Default”, hold the Shift and Control keys down while you delete one template.

**To make a template the default template for each new job:**

1. Select the template.
2. Tick the little check-box to the right of the pull-down list.

##### Show Colours checkbox

When using selection templates there may be some confusion as to what is “stair” and what is “balustrade” (the Stair template only affects stair items and the Balustrade template only affects balustrade items. The **Show Colours** checkbox shows you by way of colours which is which.

## Custom Tags window

### Overview

From : Defaults menu ; **Custom Tags** menu-item

StairBiz uses “tags” in various ways. For example, if you right-click a string, there is a “Sand” tag. You can select (or de-select) this tag to indicate whether or not the string should be sanded. StairBiz doesn’t use this tag in any direct way, however the value of the tag can be displayed in a Custom sheet, and can be intercepted in a filter to spec parts and labour.

### Creating Custom Tags

You can create your own “tags” for various components of a job using the **Custom Tags window**. These tags can be used for all jobs (even jobs that existed before you created the tags), and the values of the tags are saved with the job.

See also Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

#### Category

The tag in the above example was a “String” category tag (because the tag was selectable by right-clicking a string, and could be intercepted in a strings filter). Select the required category for the new tag by clicking it in the list at the left of the window.

#### Add

Creates a new tag for that category.

#### Name

Enter the name for the tag. StairBiz will not allow duplicates within the same category. If you have duplicates across categories (e.g. the same tag name in both "Newels Rake" and "Newels Balcony", StairBiz will vet that the case is the same in both (i.e. if they are duplicate in name, they must also be duplicate in upper/lower case).

#### Type

There are two types of tags:  
 **Yes/No**: Holds a True or False value.  
 **Number**: Holds an integer number.

Double click the cell to select the type.

#### Move Up/Down

Allows you to order the tags to your liking.

#### End Group

Adds a separator line after the current selection (which also appears in the menu when you right-click the relevant component.

### Setting custom tags in a job

When you right-click a component of a stair or balustrade, the menu shows a “Tags” item at the bottom of the list of usual menu-items. Click this to display the list of custom tags for the category of the component clicked, as follows:

**Balustrade Balcony**: Right-click a section of selected balustrade in the Balc Balustrade pane of the Design window. Tags are saved on a section-by-section basis.

**Balustrade Rake**: Right-click a section of selected balustrade in the Rake Balustrade pane of the Design window. Tags are saved on a section-by-section basis.

**Bullnose**: Right-click the unit of the bullnose tread. Tags are saved on a unit basis (and thus apply to all bullnoses in the unit.

**Newels Balcony**: Right-click a selected newel in the Balc Balustrade pane of the Design window. Tags are saved on a newel-by-newel basis.

**Newels Rake**: Right-click a selected newel in the Rake Balustrade pane of the Design window. Tags are saved on a newel-by-newel basis.

**Stair**: Right-click any unit of the stair in the Stair Setout pane of the Design window. Tags are saved on a stair-by-stair basis.

**Strings**: Right-click any string in the Stair Setout pane of the Design window. Tags are saved on a string-by-string basis.

**Unit**: Right-click any unit in the Stair Setout pane of the Design window. Tags are saved on a unit-by-unit basis.

**Yes/No Tags**: Selecting this tag sets the tag to “Yes” (and gives the menu-item a tick). Selecting it again sets the tag to “No”, and deletes the tick.

**Number Tags**: Selecting this tag opens a small window where you can enter a number. If the number is non-zero, this number will be shown appended to the menu-item.

### Using custom tags in parts and labour filters

The tags you create become properties (columns) you can add to Parts and Labour Filters of the appropriate categories. These properties can be used to direct the flow of the filter (i.e. to spec parts and labour based on the value of the tags in the job).

Tags for the specific category of the filter, plus tags which is “broader” than the specific category of the filter, are generally available to the filter. For example, in the ShoeRail filter, the categories of Custom Tags available are: Balustrade Rake, Unit and Stair. In other words, any tags you have for Stair and Unit are also available to you in the ShoeRail filter. This means that you can create a “Stair” custom tag that affects all sections of shoerail (if that’s what you need).

### Which tags are available to which filters

*Tag Category: Filter Category:*

Bullnose BullTreads, BullRisers

Newels Balcony NewelsAll, NewelBalcony, Acorns, Fittings

Newels Rake All newel categories except NewelBalcony, plus Acorns, Fittings

Balustrade Balcony Balusters, Handrail, Wallrail, WallBrackets, Fillets, Balconyplate, Balconytrim

Balustrade Rake Balusters, Handrail, Wallrail, WallBrackets, Fillets, Shoerail, WallTrim

Strings Frets, Strings

Unit Treads, Landings, Risers, Bearers, Lining, Cove, Outstep, Skirt, Unit, Strings, CarriageString, BullTreads, BullRisers

Stair Same categories as for Unit, plus Stair

Note that the Fittings filter cannot see the balustrade tags (because a single fitting can relate to two adjacent sections of balustrade). If you want the Fittings filter to intercept a tag it’s best to create the tag in the newel category (which can be seen by the Fittings filter).

Note that a newel tag can be valid even if the newel is not selected (although you would need to select it temporarily so that you can set the tag).

### Using custom tags in Custom sheets

The tags you create become fields you can add to Custom Sheets in the Custom Editor window. By nature they are all LIST fields (i.e. they are listed with other list items of the category in which they were selected.

For example:

First create two Custom Tags in the Custom Tags window – one in the **Balustrade Rake** category and one in the **Stair** category.

Create three lists of fields (i.e. three columns of fields, each column with, say 4 fields); Using the Selection tool, click-drag a rectangle around the first column to select all in that column; Select the Set Field tool, and click any of the selected fields to open the Set Field window; select the Handrail category; double click the **LIST ID (All)** field. Do the same again with the second column, but this time double click the custom tag you created in the Balustrade Rake category (yes, it will be an option in the list). Do the same again with the third column, but this time double click the custom tag you created in the Stair category (yes, it will be an option in the list).

Save the custom sheet, add it to your Custom menu using the Custom Menus window, create a job, and open the custom sheet. Set tags for the stair and some of the rake balustrade sections and see the results in your custom sheet.

See also Chapter 22 : Miscellaneous topics/ Custom tags and part labels in drawings

## Custom Drawing window

### Overview

From : Custom menu ; **Custom Drawing** menu-item

Draws whatever elements of the current stair/well are selected from the list on the left.

Note that a very similar window is used to select elements to be draw in your Custom Sheet stair drawings – see the Custom Editor User’s Manual.

##### Zoom

Click the **Zoom** button and drag a rectangle bounding the area of the drawing you want to expand – that part of the drawing will expand to fill the page (perhaps with some adjustment if the dragged rectangle is not the same proportion as the page).

Click it again to revert to normal scale.

Note you can also use the centre mouse button for zooming.

##### Print

Prints the drawing.

##### Print Preview

Changes the proportions of the page as seen on the screen to match the printed page.

##### Landscape

Changes the proportions of the page to landscape, rather than portrait.

##### Position

Click the **Position** button and drag a rectangle representing the boundaries of the stair/well as you would like it positioned on the page - the stair/well will relocate to fill the dragged rectangle (perhaps with some adjustment if the dragged rectangle is not the same proportion as the drawing).

When the stair is positioned/scaled in this way, the stair will not auto-resize to suit the size of the window.

To revert the drawing to its normal (centred, auto-scaled) position, click the **Position** button then simply left-click (without dragging) anywhere in the drawing window.

##### Separation

Allows you to show temporary separations (spacings) of stairs and wells – useful when you have a stair-over-stair situation. See Chapter 11/ Temporary Separations.

##### Dimension size

Changes the size of the font used for dimensions.

##### Templates

The settings shown in the list can be saved as templates. Create or delete templates using the **Save**, **Save As** and **Delete** buttons. Select (previously saved) templates from the drop-down list.

## Custom Editor window

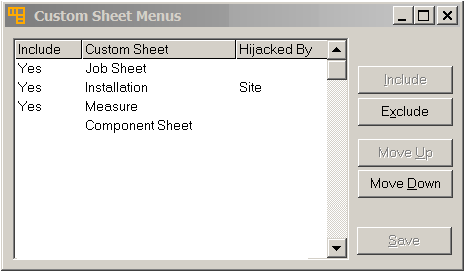
### Overview

From : Defaults menu ; **Custom Editor** menu-item

The **Custom Editor window** is used to create Custom sheets (sheets or forms that look exactly as you want them to look and contain exactly what you want them to contain). These Custom sheets can be used for quotes, invoices, receipts, cutting lists, specification and drawing sheets etc. Drawings and hundreds of different specifications can be laid out on a sheet any way you like, including graphics, logos, lines, boxes and shading.

The **Custom Editor window** has its own Help menu with on-screen help. It also has more recent documentation in the “Custom Editor Help” MS Word document in your StairBiz Program folder.

## Custom Menus window



#### Overview

From : Defaults menu ; **Custom Editor** menu-item ; **Set Menus** button

The **Custom Menus window** allows you to nominate which Custom sheets will be shown in the Custom menu, and in what order.

When you launch StairBiz, if StairBiz can’t find a Custom Sheet that you have ticked as “include”, you will be alerted. You will need to either quit StairBiz and reinstate the file into the Custom sheets folder, or open this window and click **Save**.

#### The List

Shows a list of all the Custom sheets currently in your Custom sheets folder on disc, and shows whether each is currently included in the Custom menu.

#### Include / Exclude

Click this button to include/exclude the currently selected Custom sheet in your Custom menu.

#### Move Up / Move Down

Click this button to move the currently selected Custom sheet higher or lower in your Custom menu.

#### Save to Local

If ticked, this list of included Custom Sheets will be saved on your local computer, and therefore only available to you (otherwise it is saved to the Defaults database and, if this database should be posted to the server, will affect all users).

## Custom Sheets window

From : Custom menu

A **Custom sheet** is a sheet or form that looks exactly as you want it to look and contains exactly what you want it to contain. These **Custom sheets** can be used for quotes, invoices, receipts, cutting lists, specification and drawing sheets etc. **Custom sheets** are created in the Custom Editor window. You can have as many as you like.

### Field override

Even though StairBiz automatically generates the contents of a field in a **Custom sheet**, you have the option to manually override any or all of them. In other words, there may be times when you want to have text that is DIFFERENT to that which StairBiz generates automatically.

To override a field (including any user-fields), double- click the field in the **Custom sheet**. Edit the text as required.

Fields that are overridden will show as red text on your **Custom sheets** when viewing them, but will be printed to your printer as the usual black.

Overridden fields are saved with the job.

To revert a field override (i.e. make it go back to its original, automatic state), simply delete all text from the field. If you want it to be overridden with nothing (i.e. no text), type a space (i.e. use the space key) so that StairBiz will think there is something there.

### Draw override

You can override any StairBiz generated drawing, replacing it with any graphic that has been placed on the clipboard. This can be useful if the drawing StairBiz has generated needs to be modified manually in some way.

Manually overriding a StairBiz drawing:

1. Copy the bitmapped image of the modified drawing to the clipboard (see Copying a drawing to the clipboard).
2. Open the **Custom sheet** where you want the modified drawing to go, and right-click on the current drawing.
3. Select **Override with Clipboard** menu-item (the **Revert** item will be gray if the drawing is not already overridden).

See Manually modifying a StairBiz drawing.

Also see Managing Images.

#### Centred

With this menu-item selected, StairBiz will centre your override graphic within the DRAW rectangle, otherwise it will position it top/left.

#### Scaled

With this menu-item selected, StairBiz will scale the override graphic to fit the DRAW rectangle. StairBiz keeps the horizontal and vertical scale always the same (so that the graphic does not distort). The graphic will scale to the full width, or the full height, whichever is the least.

Note that scaled drawings might not look good on your monitor, but normally regain their quality when they are printed.

### Including a 3D drawing in a Custom sheet

To set up the relevant Custom sheet(s), open the sheet (probably your Quote sheet) in the Custom Editor. Select the Set Field tool and click on the boundary rectangle of the relevant stair drawing. In the drawing properties window that opens, set the DrawId = 99. Close and save.

In a job, design the stair, open the 3D window, and position and light the stair to your liking. Click the “Capture to Custom sheet” toolbar button (far right) – the cursor will change to a cross-hair (just like when you press the F3 key). Click-Drag a rectangle around the 3D image. This captured image will now automatically override the standard (plan) drawing in all custom sheet drawings with a DrawId = 99.

Also see Managing Images.

### Reverting to the normal (StairBiz) drawing

To revert the image (either a 3D image or an override image, which are essentially the same thing) to the standard (plan) drawing you can:

1. Right-click on the modified drawing.
2. Select the **Revert** menu-item.

### Overriding many StairBiz drawings with the same graphic

When you override a DRAW with a graphic from the clipboard, any other DRAWS with the same DrawId (see Custom Editor window) will be overridden with that same graphic. This is true regardless of what they are actually drawing or in which Custom sheet they are drawing it. In other words, if a DRAW with a DrawId of "15" draws a stair, and another DRAW with a DrawId of "15" draws the balcony, if you override either of these two drawings with a picture of a dog, they will both get the dog. This is the only purpose for a DrawId.

### Notes on scaling

When you override a DRAW with a graphic, StairBiz can auto scale it to suit the DRAW rectangle. Sometimes this scaled graphic does not look good in the window (a line one pixel thick scaled to 55% on your screen is still one pixel thick (screens can’t draw a line less than one pixel thick). However, when printed this should look fine (printers have a much higher resolution than screens).

However, if for some reason you want an image to look good on the screen, you can turn the auto scaling off and manually scale the graphic before copying it to the clipboard, as follows:

* If you are copying a drawing from the Design window itself, you can re-size the Design window to produce a larger of smaller drawing, or use the Zoom tool.

### Image from File

In the Custom Editor you can use the **Image From File** tool to create a rectangle. In the Custom Sheet of a job, when you click within the rectangle to select an image from a file existing anywhere on your computer. StairBiz then fills the rectangle with that image.

StairBiz does not save this image with the job, but it does save the file path to it. The next time you open that sheet of that job, StairBiz automatically inserts the image.

If you have since moved the image (such that StairBiz can’t find it), StairBiz will show (within the rectangle) the original path and file name of that image.

If you need to use photos in your custom sheets, this is a far better method than capturing the image and using it to override a Draw field.

### Networking Custom Sheets

See Chapter 17 : Networking - Basics / Defaults Networking / Custom Sheets

### Excluding Cents

If a custom sheet file-name ends with "NC" (upper case, being an acronym for "No Cents") then StairBiz will not display the cents in any currency field in that custom sheet. For example "QuoteNC.stx"

Custom Style Categories window

### Overview

From : Defaults menu ; **Custom Categories** menu-item

StairBiz has many pre-defined categories for Components. For example, “Balusters”, “Treads”, and all the others shown in the Components window. In the Styles window you then create styles for each of the pre-defined categories.

If you have components in a stair for which StairBiz does not provide a pre-defined category, you can create your own in this window (up to 20 categories). You can then create any number of styles for each category in the Styles window.

All your custom categories will show up in the Parts window (where you can create parts for them), in the Parts and Labour filters windows (where you can create filters for them), and in the job’s Components window (where you can select any particular style, including “None”, and select an associated timber).

Because StairBiz doesn’t know what your custom category is for, when you create the style you also specify which pre-defined category your custom category will “piggy-back” on. For example, if sometimes you run a piece of cove down the underside of the string you may want a category for “String Cove”. The piggy-back category in this case would be “Strings”, so that the lengths for your string cove would be based on the lengths of your strings, and this and other string properties are fed to any Parts or Labour filters you create under the “String Cove” category of the Part/Labour Filters window.

### Creating Custom Style Categories

The following relates to the **Custom Style Categories** window.

#### Add

Creates a new category. Enter the name for the category (double click the cell if necessary to start the edit process).

The new category is also automatically created in the Styles, Parts, Part Filters and Labour Filters windows, and the Components window for all jobs.

You can change the name at any time by double clicking the name in the list and amending it (this will not impact previous jobs – categories are held internally as a number, and changing the name does not change this number, so previous jobs will simply open with the changed name).

#### Delete

Deletes the selected category, and deletes all styles, parts, part filters and labour filters associated with that category.

#### Properties

**Piggyback Component:**

StairBiz needs to know which pre-defined category your custom category is based on, so that a style selected in the Custom tab of the Components window knows what information to feed your custom style. For example, a custom style for Tread Protection would probably have “Treads” as the piggyback category, a custom style for Balcony Cove would probably have “Balconytrim” as the piggyback category.

**[None]**: If you set the Piggyback category to None;   
There will not be an entry in the Cutting List or BOM for the job for this category; and  
The item will appear in a Custom Sheet regardless of any other category.

For example, you might create a User Category called "Nosing Radius". If you use a piggy back category of "Treads", the Component window selection will only appear in a Custom Sheet if there are some treads. If you want it to appear in a Custom Sheet whether or not there are some treads, set the piggy back category to "None".

**Piggyback Timber:**

The options are:

**[All]**: In the Components window, you want to be able to choose a timber for the selected style in this category in the usual way.

**[None]**: In the Components window, you do not want to be able to choose a timber for the selected style in this category. StairBiz will disable the timber selection list.

**[Same]**: Means use the same timber as the Piggyback category. StairBiz will disable the timber selection list in the Components window.

A limitation is that if the Piggyback category is Strings or Newels, StairBiz cannot know which specific string or newel, so will used the Tenon String or the Balcony Newel (respectively).

**Other items**: In the Components window, you do not want to be able to choose a timber for the selected style in this category – you want the timber to always be the same as the timber of the piggyback timber category you specify here.

**Label Dimension 1/2/3/4:**

In the Style window for items of this category, you may want to include some user-defined dimensions (up to four of them). These dimensions are not used by StairBiz but are available to filters and Custom Sheets. If a dimension label is entered here, StairBiz will make the dimension field available in the Style window, and will label it as entered here. Otherwise leave these empty.

**Label Checkbox 1/2/3/4:**

In the Style window for items of this category, you may want to include some user-defined checkboxes (up to four of them). The values of checkboxes (True/False) are not used by StairBiz but are available to filters and Custom Sheets. If a checkbox label is entered here, StairBiz will make the check-box available in the Style window, and will label it as entered here. Otherwise leave these empty.

### Creating custom styles

For each style category you create, the category is shown in the Styles window, and you can create any number of styles for it in the usual way.

#### Width and Depth

Unlike pre-defined categories (with the exception of WallBrackets), you do not need to enter a Width or Depth dimension if it is not needed (e.g. styles for a “Tread Protection” custom category probably don’t need a width and depth). If Width is zero and Depth is not, or vice versa, the zero dimension shows up as “N” (for Not Applicable).

A Style with a width or depth of zero can be a blank or a part, but it does not show up in the Timbers window, so cannot be given a timber cost. As a blank you can still assign profiling cost. However, if a component has no timber size, but has a component cost, it would make more sense to make it a Part.

### Parts for your custom styles

For each style category you create, the category is shown in the Parts window, and you can create any number of parts for it in the usual way.

### Filters for your custom styles

For each style category you create, the category is shown in the Parts Filters window and Labour Filters window, and you can create any number of filters for it in the usual way.

When a job is processing labour and materials, each item in the piggyback category will go through its own filter (if one is selected), plus will go through the filter of your custom category (if one is selected). For example, if you have a custom category called “Tread Protection” and its piggyback category is “Treads” then each tread in the stair will go through the “Tread Protection” filter.

The properties available to the filter are as follows: Style, Style Class, Width and Depth properties come directly from the custom style selected in the Components window (as do the four user-defined dimensions and four check-box values). Timber and Timber Class come from the timber selected for the style (or the piggyback timber). All other properties (including Length) come from the piggyback category and their values during processing will be those of the items of the piggyback category.

Custom styles can be auto-filtered or manually filtered in the usual way.

### Selecting custom styles in a job

All your custom categories will be shown in the Custom tab in the components window. All styles created in the Style window for the category will be available for selection, including “[None]”.

If the Piggyback Timber is “[All]” then a timber selection control will be adjacent to it.

All part filters will be available for selection in the Custom Filters tab of the Components window.

**Kill Piggy:**

Adjacent to the Filter selections in the Custom Filters tab of the Components window are check-boxes called “Kill Piggy”. With this checkbox selected, StairBiz will NOT process the items of the Piggyback category. In other words, your custom style components are REPLACING those of the piggyback category, rather than simply been based on them.

### How StairBiz prices custom styles

StairBiz prices custom style components in exactly the same way it prices components of pre-defined categories, and all the usual pricing methods are available. The quantity and length of the custom category items will be the same as those for the items of the piggyback category.

### Using custom categories in Custom sheets

The Categories you create become categories in the Set Field window (which opens which you click a field in the Custom Editor window using the Set Field Tool). All the standard style fields are available. Where possible, the values of those fields in your custom sheets will come directly from the custom style (e.g. Style, Size, Timber, etc.), otherwise they come from the item of the piggyback category (e.g. Length, Qty etc.).

### Examples of custom categories

Custom categories can used for anything. Following are some examples:

**Tread Protection**: The piggyback category would be Treads. Disable timber. Width and Depth would be zero.

**String Cove**: The piggyback category would be Strings.

**Balcony Cove**: The piggyback category would be Balcony Trim.

**False Stringer**: The piggyback category would be Strings.

**Wallrail Spacer**: (Runs full length of wallrail down the wall). The piggyback category would be Wallrail.

**Wallbracket Rosettes**: The piggyback category would be WallBrackets.

**Posts under Landing**: The piggyback category would be Landings.

##### Custom Tags:

Custom Categories, when used in combination with Custom Tags where appropriate, can give you even more flexibility.

## Database Repair window

See Chapter 23 : Database Problems and Repairs.

## Design window

See Chapter 10 : The Design window.

## Directory window

### Overview

From : Project menu ; **Project Directory** menu-item

The **Directory window** helps you manage your jobs. It contains rows representing projects or jobs, and columns representing selected fields (bits of information) from those projects or jobs. Every time you save a job the **Directory window** is updated. It allows you to find, sort and view columns of information about all or selected jobs in the database, and to change much of that information without having to open the relevant job.

The **Directory window** is often the most used window in StairBiz – used in conjunction with the **Job Status** field in the Process window it is at the heart of your business, especially useful for tracking measure-ups, installations, payments etc.

You can have multiple Directory windows (called Views). To create, edit or delete Views, see the Edit Views heading.

Views can be “local” (only available to the current computer), or “shared” (available to all on the StairBiz network); see the Edit Views heading.

### Buttons

#### Open

**** Having located a particular job in the **Directory window**, you can select the job’s row in the list, click the **Open** button, and the job will open (if another job is not currently open).

You can also double click on a job in the listing to open the job.

Also see Opening a saved project.

#### Add Foreign Job to Current Project

Any job in the Directory window (job template or otherwise) can be added to a project.

With the project open, and the Directory window active, double-click on the job in the Directory window while holding the SHIFT key down. It will be added to the current project.

See Chapter 22: Miscellaneous/ Add a Job to a Project

#### Add Foreign Scenario to Current Job

Any job in the Directory window (job template or otherwise) can be added to a job as a new scenario.

With the job open, and the Directory window active, double-click on the job in the Directory window while holding the ALT key down. It will be added to the current job as a new scenario.

See Chapter 22: Miscellaneous/ Add a Job to a Project

#### Delete

**** If there is only one job in the project, this deletes the entire project.

If there is more than one job, you will be given the option of deleting the selected job, or the entire project.

This button will also delete multiple jobs if there are multiple jobs selected. To learn about selecting multiple jobs, see the **Miscellaneous** topic below.

#### Archive Job

 Sends the selected job to an archive database. You will have the option to create a new archive file or select and existing archive file. You will also have the option to delete the archived job from the current jobs database.

To archive a project select all jobs for the project (they will save to the archive as a project, rather than as individual jobs).

See Job Archive window.

#### Columns

**** You can add columns to your View by selecting this **Columns** button. Select from the list the required columns and adjust their order.

Note that in the Available Columns list, categories of columns can be expanded or contracted using the “+” or “-“ buttons to the left of each category heading, or using the buttons at the bottom of the list.

You can remove existing columns by doing the reverse of the above.

You can change the width of columns by dragging the boundary in the Header row. You can change the order of the columns by dragging the heading. You can sort individual columns by clicking the sort arrow in the column header.

Columns in a **view** survive both a window close and a StairBiz shutdown.

#### Group

**** Grouping means to group (sort) rows based on identical information from a certain field. For example, you could group jobs by their Project Folder, in which case all jobs are sorted by Project Folder and then grouped according to this.

Select the Group button, then drag the column header of the field you wish to group by up into the gray grouping area above it.

In the list, to see only the fields in a particular group, click the “+” at the left of the group header in the list.

You can sort the groups by clicking the little arrow in the column header in the grouping area.

You can also nest groups, by dragging more column headers up into the grouping area.

To hide the grouping area, unselect the Groups button.

Groups in a **view** survive a StairBiz quit.

To ungroup, select the Groups button and then drag the column headers back to the column header row.

Note that MyData field columns can be included in the Directory window, but they cannot be dragged into the Group panel.

#### Filter

 Filters are a smart way of searching and displaying only the rows (jobs) you need to see. Literally we “filter” specific information in the jobs and only allow through those jobs we are interested in.

There are three types of filters:

* Core filter
* Column Filter
* Relative Date Rage filter

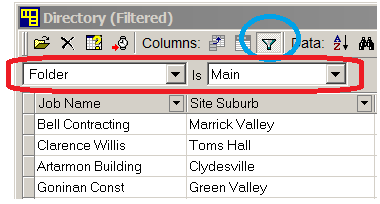
Select the **Filter** button.

##### Core Filters

A core filter does not need to have the relevant column included in the Directory window (an advantage over the column filters - see below).

A core filter works at the database level, meaning that only the relevant jobs are downloaded to the Directory window (another advantage over the column filters).

With the **Filter** button selected, an empty core filter is created. You can select from list of columns (on the left), and specify what you want to find in that column (on the right).



Each time you add a core filter, a new (empty) one is created.

Core filters are saved with the View (i.e. closing the window doesn't kill the filters - they will be there when you re-open). If the View is shared, then so will be its core filters (if the View is local, then so will be its core filters).

Note that for the input of any dates into filters, you can omit the year (e.g. "4/4" means 4/4 of the current year).

Core filters can filter by:

Client Name

CNC Schedule Date

Contact Name

Created By

Date Created

Dispatch Date

Flag Date

Flag User

Folder

Job Date

Job Name

Job Number

Job Status

Measure Date

Modified Date

Paid Date 1

Paid Date 2

Paid Date 3

Production Date

Project Name

Quote Number

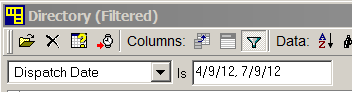
Sales Person

Schedule Date

##### Date Ranges in a Core Filter

A core filter can be used to filter by a date range.

You can enter two dates separated by a comma (or a ">"), and StairBiz will find all dates within (and including) that range.



You can also make a Core filter act like a Relative Date Range filter (see that heading, below). For example, …

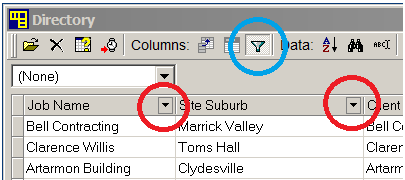
You can enter a number, being the number of days from today. For example, you could enter "1" to find all with tomorrow's date, or "-2" to find all from the day before yesterday.

You can enter two numbers, separated by a comma (or a ">"), to get a range. For example, "-7>7" will find all dates from a week ago to a week from now. "0>7" will find all dates for the next week. "2/2/12,14" will find all dates from 2/2/12 until two weeks from today.

##### Multiple Core Filters

Each time you enter some criteria into a core filter, StairBiz creates another core filter (to the right, or below), so that you can filter by multiple criteria. For example, you could filter "Job Status = Measure" and "Measure Date = 0>7" to have a Directory window which, at any particular time, displays all jobs needing a measure within the next week.

##### Column Filters

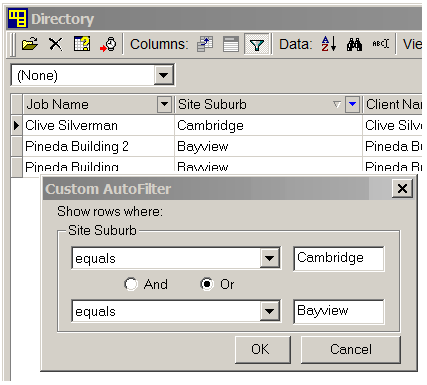


A column filter works at the column level – the relevant column must be displayed. It can filter only those jobs which are already downloaded from the database into the Directory window, so records already omitted by Core filters and Relative Date Range filters can never be included in the results. It works by hiding the records filtered.

With the **Filter** button selected, each column header has a pull-down list containing a summary of all the information contained in the column. To view only rows containing something in the pull-down list, select that item in the list.

To find only blank fields in the column, select **Blank** from the pull-down list.

To customize the filter (i.e. do a search a little more sophisticated than a simple “if this = that”, select **Custom** from the pull-down list.



To switch off the filter select **All** from the pull-down list.

The column header will turn blue to indicate when its filter is in use.

You can filter more than one column at a time, allowing very complex searching.

Column filters do not survive changing Views or closing down StairBiz (although they will survive a window close and re-open).

##### Relative Date Range Filter (All-views)

This Relative Date Range filter permanently or temporarily confines *all views* of the Directory window to within certain time frames - days, weeks or months before and/or after the current (today’s) date.

Towards the end of the row of icon-buttons at the top of the Directory window is one with a red calendar with a funnel. It opens the Relative Date Range Filter window. Settings are:

**Date**; Which type of date (they all relate to a job).

**Units**; Days, weeks or months

**StartAt / EndAt**; these are the number of days, weeks or months from today’s day, week or month. A negative number means before today’s date, a positive number means after today’s date, and negative numbers may be used in either field.

**Enable**; Whether or not the filter is currently enabled. The shortcut key to toggle between enabled/disabled is CONTROL-D from within the Directory window.

In the following examples ‘DWM’ means day or week or month, depending on the Units selected.

StartAt=0 means from the beginning of the current DWM

StartAt=-1 means from the beginning of the previous DWM

StartAt=1 means from the beginning of the next DWM

… etc.

EndAt=0 means to the end of the current DWM

EndAt=-1 means to the end of the previous DWM

EndAt=1 means to the end of the next DWM

… etc.

So if you wanted to see jobs booked for installation during the two months following the current month, set Date=SchedInstall, Units=Month, StartAt=1, EndAt=2

If you wanted to see jobs needing a measure this week, set Date=Measure, Units=Week, StartAt=0, EndAt=0

This global date filter works in conjunction with all other filters (except for local date filters – see next heading; so, for the previous example, you could, using other filters, also confine the jobs to only those with a Job Status = Measure, etc.).

Your date filter settings are saved when you exit StairBiz, and will re-apply when you come back.

This date filter is called “global” because it applies to all views (to apply to specific views, see the next heading – Local Date Filtering).

##### Relative Date Range Filter (One-view)

The previous topic relates to all views of the Directory window. However, you can also apply a relative date filter to a specific view, as follows:

Click the “Choose Column” toolbar button while the relevant View is open, then click the Date Filter button.

If an all-views filter applies, this one-view filter will not.

Note that relative date filtering can be turned on/off with shortcut keys CONTROL-D.

#### Multi-Sort

 You can sort individual columns by clicking the sort arrow in the column header. But what if you want to first sort by Job Status, and then sort by Measure Date within each Job Status category.

This is called a **multi-column sort**, and can be done as follows:

1. Click the **Multi- Sort** button
2. Click each column header you want sorted, in the order in which you want them sorted (you can click twice to change the direction of the sort).
3. Click the **Multi- Sort** button again – the sort is done.
4. Click the **Multi- Sort** button again to exit the sort.

These sorts survive a quit.

#### Find

**** To find a specific piece of information in a column (e.g. a particular Quote Number), one way to do it is to sort the column and then scroll down to where that text should be in the sort. You can also use **Group** and **Filter**. A far easier way is as follows:

1. Click the **Find** button.
2. Click in any field within the column in which you are looking.
3. Start typing in what you are looking for – as you type, the list will scroll down to the first example of what you have typed in so far.

#### Edit

 Some columns in the list can be edited without you having to open the job. Others can’t. If a field cannot be edited directly it is because some “resolving” is needed which can only be done while the job is open.

To edit the list, select the Edit button. Click the field to be edited – if it’s possible to edit, the text will become selected, otherwise not.

#### Views

**** The layout of this window is called a **View**. It shows certain fields (i.e. columns) in a particular order. It also may show certain groupings.

From the **View** drop-down list at the top right of the window you can select an alternative view.

To create, edit or delete Views, see next heading.

#### Edit Views

 You can add, duplicate or remove views by clicking this button.

**Add**

Creates a new view. By default, a new view will have two fields – you can change them and add more (see **Columns**).

**Local View (vs Shared View)**

Views can be local or shared. A local View is available only to the computer that created it. A shared View is available to all on the StairBiz network. To keep Views local, tick the **Local View** checkbox.

Local views are held in the file DirectoryWinCfg.DAT located in your Defaults folder. Shared views are held in the Defaults database.

#### Refresh

 Will re-populate the contents of the **Directory Window** with more up-to-date information. This can be useful when connected to the network if you suspect that changes have been made from another computer.

#### Send to Excel

 This will send the current contents of the **Directory window** to Microsoft Excel if you have it installed on your computer. Any current settings such as Sort order or Filtering along with your chosen column configurations will also be sent to the new spreadsheet.

After clicking this button, Excel will open with the contents of the Directory window, at which time you can change the spreadsheet further, and print, save or discard the window.

#### Print

Prints the information currently displayed in the **Directory window**.

#### Help

 Click this button to show a contextual help panel at the bottom of the window. This panel will display informational text about any icons you hover your mouse over.

#### Relative Date Range Filter

See under Filter (above).

#### Templates Database

If your jobs database is particularly large (i.e. over 1GB, which means you are saving lots of images – probably 3D images), and if you have lots of Job Templates (i.e. many hundreds or more), you have the option to save your job templates in a separate database. This system will work almost as if you are using a single database, as follows:

1. Create an archive (database) called “Templates”.
2. To get job templates into the “Templates” database, select them in the Directory window and send them to the Templates archive as if you were archiving them.
3. To show job templates in the Directory window, click the “T” (Templates) toolbar button. This button is the right-most of the toolbar buttons.
4. To open a job template, show the job templates by clicking the “T” (Templates) toolbar button, then double click the job (or select it and click the ‘Open Job’ toolbar button). The template will open as a new job (it will not give you the option of opening as a template), and the Templates database will automatically close.
5. If the Templates database is open from clicking the “T” (Templates) toolbar button, and you want to close it without opening a template, again click the “T” toolbar button.
6. If you want to open a template to edit it (rather than open it as a new job), open the Templates archive from Project menu > Open Archive (rather than from the “T” button), and open the job template from there (either by double-clicking it in the Directory window, or by selecting “Open Template” from the Project menu.

Note that you are able to open such job templates only from the Directory window.

#### Unlock Job

 This toolbar button is only visible when connected to the StairBiz server. If ever you can't open a job because, according to StairBiz, "SoAndSo has the job open", and you know that he does NOT have it open, probably that job crashed before it was able to close properly. Select the job in the Directory window and click this Unlock Job button.

### Note: Financial Columns and Totals

If a job has a Split Quote (i.e. the Quote Calc and Payments windows are split into Stair and Balustrade, separately), note that financial columns and totals in the Directory window will only show figures for the stair (never the balustrade, even if it is marked as "Active").

### Miscellaneous

If a column is too narrow to see the full amount of information contained in one of its fields, rather than widen the column you can hold your cursor over the information – in about a second the full text will appear.

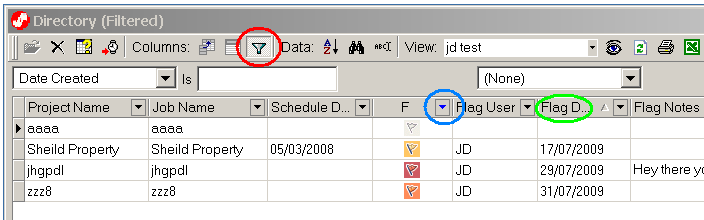
Columns containing currency amounts show (at the bottom of the column) a total amount for the column.

The **Job Name** column shows (at the bottom of the column) the total number jobs in the current list.

You can select multiple jobs in the Directory Window by clicking on each job you wish to select, while holding down the **Control Key**. You can also select a range of jobs by first selecting the top item, then holding down the **Shift Key** and clicking on the bottom item. All Jobs in between will be selected, and will allow you to perform an action on these jobs, such as **Archive** or **Delete**.

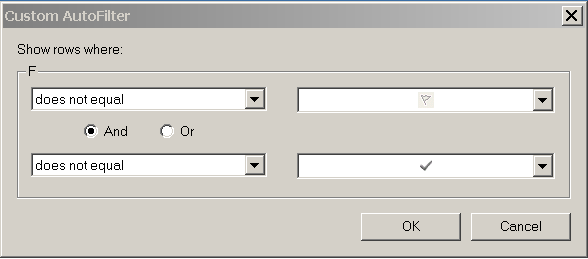
### Example of filtering – Job Flags

The following is an example of how to use filters to create a directory view which shows only jobs that have a job flag that needs to be dealt with, sorted by date.



Click the schedule filter icon (red circle).

Click the arrow on the column filter icon (blue circle – you may need to widen the column to see it) and set up as follows.



Click on the column header for the date field (green circle) to sort by date.

You now have a directory window that shows only jobs that have a flag that needs to be dealt with, sorted by date.

This window will persist (i.e. you don’t need to re-create the filters or sort each time you open it).

### Example of a Directory View – Job Templates

Let’s imagine that you have various builders that you do a lot of work for, and that many of the stairs you do for these builders are the same over and over.

You would probably use Job Templates, but what’s the best way to organise them so that you can find and open them easily.

1. Create your job templates, and assign a client to each (in the Client window of each job).
2. Create a new Directory window (called, for example, "Job Templates") and include the "Is Template" column.
3. Filter by this "Is Template" column so that you only ever see job templates in this Directory window.
4. Optionally (but a good idea) is to Group by Client.

Now, whenever you want to open a job template, open the "Job Templates" Directory window, find the relevant client header and click it to see all the templates for this client. Double click the template to create a new job using this template (and client).

### Directory window refresh speed

If you have thousands of jobs, it's possible that the refresh of the Directory window might be slow, or might even stall (time out). Apart from reducing the number of jobs in your database (e.g. by archiving), you can do as follows:

**1) Reduce the number of columns**; Changing from one view to another view causes a refresh (a download). The more columns being downloaded the more likely to be slow or stall.

**2) Eliminate large columns**; for example, "Notes" columns, or text MyData columns, can contain a lot of data.

**3) Use Filters to restrict the number of jobs being downloaded** from the server and displayed, as follows:

**a) Core filters** and **Relative Date Range filters** (see above) restrict the number of jobs being downloaded.

**b) Column Filters** (see above) do NOT restrict the size of the download – they operate only on what is already downloaded, so are not useful here.

**c) Quick Filters** restrict the number of jobs being downloaded, and work regardless of any other current filters, as follows:

First, if Cell-Edit mode is active, deactivate it.

With the CONTROL key held down, press the following keys to limit what is shown:

"A" show all.

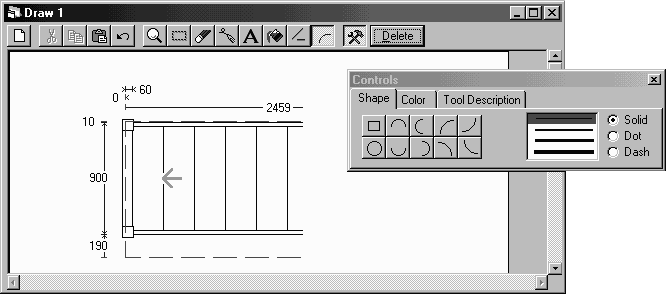
"T" only templates  
"P" only actual projects (no templates)  
"Y" only jobs with a Job Date more recent than one year ago

"1" only jobs with Job Status = 1 (i.e. the 1st item in the Job Status list; "Measure")  
"2" only jobs with Job Status = 2 (i.e. the 2nd item in the Job Status list; "Quote")  
"3" etc. up to 10

For items 11 to 15 (i.e. User Items) you can use the Shift Key (e.g. Item 11 is CONTROL-SHIFT-1). Note that items 11 to 15 must be declared in the Miscellaneous Defaults window.

Your option will be shown in the title bar of the window. Your option is saved when you close the Directory window and re-applies when you open it.

## Draw window



### Overview

From : Draw menu

**Scrap Pad** windows and **Draw** windows are used to manually draw things, or to modify drawings that StairBiz has generated automatically. They function in the same way as a paint program.

**Scrap Pad** windows and **Draw** windows all work in the same way. The difference is that the **Draw windows** relate only to the current job, and are saved with the current job, whereas **Scrap Pad** windows are global - whatever is drawn in them is available for all jobs.

Any graphic (i.e. drawing) copied to the clipboard can be pasted into a **Draw window** or **Scrap Pad** for modification. See Copying a drawing to the clipboard.

To paste the contents of the clipboard into an active **Draw window** or **Scrap Pad**, either:

1. Click the **Paste** tool.
2. Press Control-V.

Drawings that have been manually created or modified in a **Draw window** can be used to annotation any sheet, or, in Custom sheets, can override drawings generated by StairBiz.

See Custom Sheets for more information.

### Delete

Deletes the current **Scrap Pad** or **Draw window**. It is disabled in a Scrap Pad window that is the only one (you must have at least one).

### Name text field

This text field is to the right of the **Delete** button. It allows you to name each window – these names appear in the Draw menu.

### Tools

To find out what each item in the Tool-bar (across the top of the Draw window) does, hold your cursor over it and read the tool-tip label which appears.

Most tools have a control. Open the control window by clicking the Tool-bar icon on the far right (the hammer and spanner). The contents of the **Control window** change for each tool selected, and generally includes various modes and options for the tool and a more comprehensive description of the tool under the Tool Description tab.

### Resizing the Canvas

The canvas is the white part of the window where you draw. It’s best to keep the size of this to not much more than what you actually need. This is designed to minimize the file size of jobs containing bitmap graphics.

Draw windows open with a small canvas. To increase the size, click the resize rectangle at the bottom right corner of the canvas (only available in 100% scale) and drag to the desired size.

### Using another paint program

If these **Draw windows** do not contain sufficient features for you, there is no reason why you can't use a third-party paint program. They work in much the same way as above, but may provide more power.

The third-party program could remain open (at the same time as StairBiz) and you can simply switch between them as required.

Note that the clipboard is universal. Something copied in one program can be pasted into another, and vice versa.

## Email Support window

### Overview

From : Help menu ; **Email Support** menu-item

Allows you to send an email to StairBiz support, and expedites most types of support request.

Your computer must be currently connected to the internet.

Your first support request for any one issue must be made from this window – thereafter you should reply to our reply (etc.) using your normal email browser (so that the thread continuity is maintained).

The window is fairly self-explanatory. If you hold your cursor over any field, pull-down list or button the description will appear.

### Setting up to use this window

You should have a valid User Account (Defaults menu/ Users & Networking) with your name and email address. This is the same window where you would have originally set up your private StairBiz password.

Also, open the Miscellaneous window (Defaults menu), select the Support category, and enter your Company Name (i.e. business name).

In the same section of the Miscellaneous window you have the option to ‘Save email on send’ (do you want StairBiz to save a copy of each email you send to support), and ‘Return copy of email to sender’ (do you want StairBiz to send you a copy of the email you send us – useful if you want all your emails in your usual email program). Generally you don’t need to do both.

### Some of the buttons

 Select from a list for previous subjects you have used when emailing support.

 Refresh the Users list (useful if at the time you created your email you hadn’t created your user account, but since have)

 Shows who to send the email to for the different kinds of support required.

 Shows the full text that will be sent to StairBiz (includes some header information not shown in the body of your email).

 Start a new email (clears any existing email)

 Opens a previously saved email.

 Copies the contents of the existing email to the Windows clip-board.

 Saves a copy of the current email (including the header) in your Support folder (in C:\StairBiz Program\Support).

 Sends the current email to support. If you have optioned to automatically save the email on ‘Send’ (see Miscellaneous window/ Support), you will be presented with a ‘Save’ dialog box. The default location is the Support folder. If you have optioned to automatically return a copy of the email to you (see Miscellaneous window/ Support), you will be sent the same email that you send us (with a list of any files you attached, but not the attachments themselves).

StairBiz is not sent any information other than the information clearly indicated (there is nothing hidden in the email or in any attachments).

If you send an email, then realize you didn’t need to, as soon as possible send another email with the Support Type “Ignore Previous” and the subject the same as the previous.

### Show Status frame

Depending on the Support Type, this frame may become visible, and some or all of the following checkboxes may be shown.

**Relevant: Most recent ERROR MESSAGE:**

If you have had an error message, the most recent one will be shown here. If it is relevant to your enquiry, tick this box.

**Relevant: Most recent WINDOW:**

The window you were in just prior to opening this email window will be shown here. If it’s relevant to your enquiry, tick this box.

**I can REPLICATE the issue:**

If you can’t explain exactly the steps we need to take to see the problem, we probably can’t fix it. Things that are obvious to you are not obvious to us.

**I have researched the User's Manual and can find no reference:**

Depending on your contract you may be charged for a “Need Advice” support type. If you have checked the Uses Manual and genuinely can’t find a reference to your issue we will take this into account. If you tick this and it’s obvious you didn’t look, you get listed in our little black book (and NO WAY do you want that to happen).

### Show Attachments frame

Depending on the Support Type, this frame may become visible, and some or all of the following checkboxes may be enabled. If you tick any checkboxes, the relevant files will automatically be attached to the email

**Job (current):**

The currently open job.

**Job (exported):**

A job that you have previously exported using the Export menu-item (Project menu).

**Job I can’t open:**

If you can’t open the job, tick this. StairBiz will present the Open Job window for you to select the job. StairBiz then archives the job into a temporary one-job database and attaches it.

If the issue relates to a project containing multiple jobs (and the issue is about the project, rather than the individual jobs in the project) then you will need to manually send us an archive file containing the project – see Chapter 20/ What to do if there’s a problem/ Sending us a job archive.

**Jobs Database**

Only attach this if it is imperative that you do so (very rare – basically only if we instruct you to do so). There is a limit to the size of database that can be sent this way (you will be alerted). Before attaching a jobs database, go to the Project menu and select “Database Compact” to clean it up and therefore reduce its size.

This applies the local jobs database only (whether you are connected or not) – we have no mechanism for sending the jobs database from the server – so be sure that the issues are replicable when not connected.

**Custom sheet**

If a particular Custom sheet is relevant, tick this (you’ll be presented with a list of custom sheets).

**Defaults Database**

Only attach this if you know it to be pertinent to the enquiry (otherwise wait for us to request it). All defaults relating to a particular job are saved with the job (except for filters), so unless it’s a filters issue or a unit/stair/bullnose template issue we generally don’t need it. There’s also a chance we already have a relevant copy of you defaults (from the last time you sent them), so keep this in mind.

**CNC Current Prefs**

If the issue relates to or is affected by your CNC Prefs, tick this. Note that CNC Prefs are not stored in your Defaults database (they are in fact stored in the Job’s database, but we can export them from this database so as not to send the whole database).

This attachment does not include the g-code template.

### Password Request

This **Support Type** must be used for all password requests (other than the very first request during the one-week grace period, which can be made from the **Passwords** button in the Passwords window).

If your password has expired and you can’t get in to StairBiz, you can open this Email window by clicking the **Passwords** button in the Passwords window.

**One password is for THIS computer:**

If this is the case, tick this box. StairBiz will automatically insert this computer’s Software Code in the relevant section of the email body.

**1. Please provide more evaluation time:**

Tick this to request an extension to your first evaluation period (generally one month). The request is not automatically granted, so please indicate in the appropriate space in the body of the email the status of your evaluation so far (i.e. why you need more time).

**2. I have made a payment – please remove evaluation notice**

As soon as you make a payment on StairBiz (even if we have not yet received it) we are generally happy to supply a password that removes the “Evaluation Only” notice from windows and sheets in StairBiz.

**3. I have paid in full at least two weeks ago – please provide full password.**

When we’ve had a chance to verify receipt of payment, you are entitled to your full license passwords.

### Email body

Include anything here that is relevant to your enquiry.

You may capture images (with StairBiz capture) and paste them into the body. Do NOT do full-screen captures (they are never necessary and only bloat the email. If you include photos, be sure they are not excessive large or hi-resolution (about one MB would be considered a maximum (otherwise send it zipped in a normal email).

You do not need to include your current version or whether you are currently networked (it is automatically inserted into the header).

If you enquiry is a bug notification BE SURE to include the steps necessary for us to recreate the problem (i.e. for us to SEE the problem). Remember that a picture is worth a thousand words – if we have difficulty trying to figure out what you mean it’s only human nature that your enquiry will go to the bottom of the list (sorry – but that’s the way it works when we’re extremely busy, which is always).

## Export Templates window

### Overview

From : Defaults menu ; **Export Templates** menu-item

Allows you to create templates for exporting job data to an external application. These templates are then listed under the Export menu and can be used at any time during job processing.

#### Buttons: Templates

**New**: Creates a new template

**Save As**: Saves the current new or existing template using the name you give in the Save As dialog window.

**Delete**: Deletes the current template.

**Save**: Saves changes to the current template.

#### Buttons: Fields

**Add**: Adds a field to the field list. The Set Field window will open where you can select any of hundreds of job fields. Select the field category from the list on the left. Select the field from the list on the right and click the Paste button (or simply double click the field). The Set Field window will close and the field will be added to the Field list.

**Change**: Opens the Set Field window where you can change the currently selected field.

**Delete**: Delete the currently selected field.

#### Buttons: Field Order

The order of the fields in the list is important – fields will be exported in the order shown. You can move fields up or down using these two buttons.

### How to export fields

When a job is open, you can select an appropriate Export template from the main Export menu. The data contained in fields from the job (corresponding to the fields in your export template) are added to the Microsoft clipboard. If there is more than one field they will be separated by tabs. From here you can insert these tab delimited fields into any external application that will accept tab-delimited text pasted from the clipboard. All fields are formatted as text.

## Extra Length Defaults window

### Overview

From : Defaults menu ; **Extra Lengths** menu-item

Allows you to specify how much extra length should be allocated to each component when listed in the Materials window, the **Bill Of Materials** sheet, and Custom sheets. Note that these extra lengths do not show in other specifications and drawings - they are for costing and cutting only.

Also allows you to specify a wastage or round-up on a category-by-category basis.

Note that there are settings in the “GLUE-UPS” category of the Setout window that affect how extra lengths are applied to glue-ups for strings, treads and landings.

See: Chapter 22 Miscellaneous Topics / “Waste, Extra Length and Rounding Up”.

## Fittings window

### Overview

From : Defaults menu ; **Fittings** menu-item

Here we set the default properties and dimensions (settings) for handrail fittings.

These settings affect the way StairBiz draws these fittings, and in most cases also affects the calculation of the length of adjacent handrail sections. The settings should reflect the dimensions *in the field* (i.e. as installed), rather than the dimensions of the fittings as purchased.

You can save multiple copies of the **Fittings window**, each containing different settings (for different styles of handrail). The appropriate settings are then linked to each handrail style in the Styles window (Handrail category).

Which fittings are used in what situations as selected in the Elevations mode of the Design window (defaults are saved with the relevant newel in the Unit Templates and Stair Templates).

### Amending

To amend a value, double-click the value, change it, then either press the **Enter** key or simply click somewhere else. See Editing.

If you want changes to affect the current job, you need to reselect the fitting in the job’s Style window for Handrail (see Components window).

### Buttons

#### Save

Saves changes made to the current **Fittings window**.

#### Save As

Saves the current **Fittings window** under a different name. You can then change values as required.

#### Open (pull down list)

Opens an alternative **Fittings window** and loads the values into the list. These settings were created using the **Save As** button.

#### Delete

Deletes the current **Fittings window**.

#### Print

Prints the current **Fittings window**.

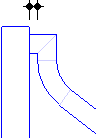
#### Export/Import

Exports the current window to a file or imports a previously exported file to the current window (overwriting the current settings). This is useful only for moving settings from one computer to another where you don’t wish to move the entire defaults database.

### Gooseneck

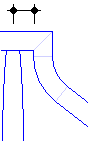
#### ~1 Min horizontal

Minimum horizontal distance from the face of a newel flat to the inside of a gooseneck vertical. If the gooseneck ends at a wall (i.e. no newel and no rosette) this same distance would apply.



#### ~2 Inside vert to pin (no cap)

Horizontal distance from the centre of a OTP newel (called the “pin”) to the inside of a gooseneck vertical.



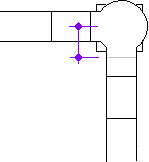
#### ~112 Inside vert to centre cap

Horizontal distance from the centre of tandem cap to the inside of a gooseneck vertical.

See diagram ~2

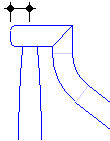
#### ~3 Inside vert to turn

Plan-view horizontal distance from the intersections of the centre of the rails (i.e. centre of the newel) to the inside of a gooseneck vertical. This is similar to ~2 (above).



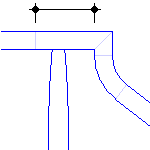
#### ~4 Pin to end

Horizontal distance from the centre of a OTP newel to the end (for return ends or any other termination other than a rosette).



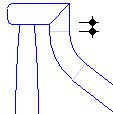
#### ~5 Tandem Length

Horizontal distance from the inside of a gooseneck vertical to the start of level rail above the gooseneck. The tandem has no cap. See also **Inside vert to pin** (~2)



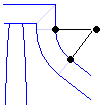
#### ~7 Default Vertical Drop

Vertical distance from the underside of the horizontal rail to the bottom of the vertical drop in all cases where the stair design is not dictating this distance (i.e. usually where there is no rail on the high side of the gooseneck).



#### ~8 UpEase inside radius

The radius of the upease measured at the top of the rail.



#### ~113 Overease inside radius

The inside radius of an overease used at the top of the vertical of a gooseneck. If you don’t use an overease (which you probably don’t – most people use a mitre), leave this at zero.

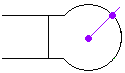
For an overease to work, **Min Horizontal** (~1), **Default vertical drop** (~7) and **Inside Vertical to turn** (~112), all in this Gooseneck category, must be at least the amount of this radius.



### Opening Cap

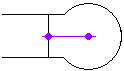
#### ~9 Radius of cap

The plan-view radius of the opening cap.



#### ~10 Pin to back

The distance from the centre of the cap to the end of the opening cap.



### Tandem Cap

#### ~110 Pin to level rail

The distance from the pin to the start of level rail.



#### ~111 Radius of cap

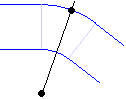
The plan-view radius of the tandem cap.



### OverEase

#### ~11 Outside radius

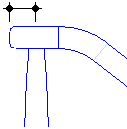
The radius measured to the top of the rail.



### OverEase ReturnEnd

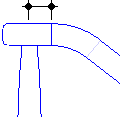
#### ~12 Pin to front

From the centre of the newel to the front of the return end.



#### ~13 Pin to back

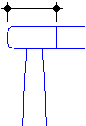
From the centre of the newel to the back of the return end.



### ReturnEnd

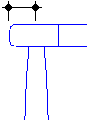
#### ~14 Total Length

Total length of the return end.



#### ~15 Pin to front

From the centre of the newel to the front of the return end.



### Rosette 1 and 2

Rosette 1 and Rosette 2 are not distinguished by any particular attribute, although probably one would be round and the other oval (the user chooses which in the Design/Elevations window).

#### ~16 Horizontal width

From left edge to right edge.

#### ~17 Vertical Height

From top to bottom.

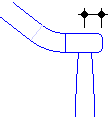
#### ~18 Thickness

Thickness (depth).

### StartEase

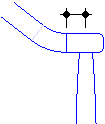
#### ~19 Pin to front

From the centre of the newel to the front of the return end.



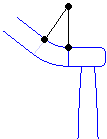
#### ~20 Pin to back

From the centre of the newel to the back of the return end.



#### ~21 UpEase radius

The radius measured to the top of the rail.



### Turn

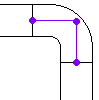
#### ~22 Inside radius

Radius of inside of turn.



#### ~39 Centre to each end

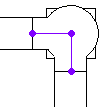
Distance from the intersections of the centre of the rails (i.e. centre of the newel if there was one) to the ends of the turn.



### TurnCap

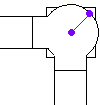
#### ~23 Pin to each end

Distance from the centre of the newel to the ends of the turn.



#### ~24 Cap Radius

Radius of the cap.



### Corner Wreath

#### ~118 Inside corner; centreline radius

Used for a rake to rake transition at the inside corner of a landing.

Imagine the wreath rail has a round profile (whether or not it has) so there is no twisting effect. If you lay the fitting on the floor, this value is the radius of the centreline.

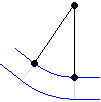
#### ~119 Outside corner; centreline radius

Same as above, but used for a rake to rake transition at the outside corner of a landing.

### UpEase

#### ~25 Inside radius

Radius measured at the top of the rail.



#### ~57 UpEase max angle

The maximum angle of the upease before StairBiz will automatically revert to an UpEase90.

### UpEase90

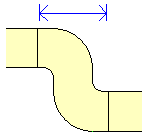
#### ~58 Inside radius

Radius measured at the top of the rail – see ~25.

### Shift

#### ~115 Length end to end

The total length of the shift from end to end



#### ~116 Inside radius

The smaller radius

#### ~117 Outside radius

The larger radius (if zero, StairBiz will calculate it based on the smaller radius and the rail width)

### Turn Into Wall

#### ~76 Hoz length for 'Long'

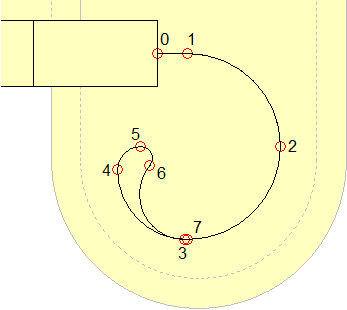
Where a raked rail (usually wallrail) terminates without a newel, fitting options include TurnOverEaseLong, MitreLevelMitre, LevelMitre, LevelUpEase, ReturnEndLevelMitre, ReturnEndLevelUpEase. Each of these have a level section of rail (often required by building code for commercial environments). This setting determines the default length of this level section of rail.

#### ~77 Extra wallbrackets turn-level end

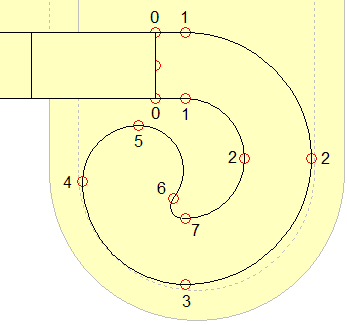
For the level section of rail referred to in ~76 (above), this setting determines the number of extra wallrail brackets required (a number 0 to 4)

### Volute

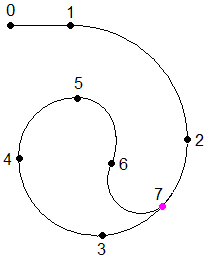
Volutes are measured along the centreline of the handrail.



When we calculate the edges of the volute by adding half a handrail around the outside of the polygon, we end up with a volute.



The centreline is made up of one straight section and six radii. Following is an exaggerated illustration of the first illustration.



The shape of the volute is determined by the following properties. Note that by far the easiest way to set these properties it by measuring an actual volute (or existing CAD drawing).

#### ~40 Straight

Length of straight section from the bottom of the UpEase to start of volute radius (from 0 to 1).

#### ~41 Radius 1

The radius of the first arc (1 to 2).

#### ~42 Radius 2

The radius of the second arc (2 to 3).

#### ~43 Radius 3

The radius of the third arc (3 to 4).

#### ~44 Radius 4

The radius of the fourth arc (4 to 5).

#### ~45 Radius 5

The radius of the fifth arc (5 to 6).

#### ~46 Radius 1 sweep

The sweep in degrees of the first arc (1 to 2).

#### ~47 Radius 2 sweep

The sweep in degrees of the second arc (2 to 3).

#### ~48 Radius 3 sweep

The sweep in degrees of the third arc (3 to 4).

#### ~49 Radius 4 sweep

The sweep in degrees of the fourth arc (4 to 5).

#### ~50 Radius 5 sweep

The sweep in degrees of the fifth arc (5 to 6).

#### ~51 Radius 6 sweep

As we move around the second arc from 2 to 3, at a certain point we jump off this second arc (at point 7) to form the arc from 7 to 6. Radius 6 sweep is the sweep in degrees from 2 to 7. It determines the location of point 7.

Radius 6 sweep probably should not be less than Radius 2 sweep (otherwise there may be a distortion of the volute).

The arc from 6 to 7 has a radius calculated by StairBiz. StairBiz attempts to join up arc 5-6 and arc 2-7 the best it can (which may require the addition of a small straight section).

#### ~52 Nose to start X

The distance from the start of the straight section of volute (point 0 in the illustration) to the nose of the bottom tread.

If you leave this dimension as zero, StairBiz will calculate it to balance the volute on the bullnose tread as best it can.

#### ~53 Pin to start X

The distance from the start of the straight section of volute (at the centreline - point 0 in the illustration) to the centre of the newel (along the line of the straight section - positive is towards the bottom nosing).

#### ~54 Pin to start Y

The distance from the start of the straight section of volute (at the centreline - point 0 in the illustration) to the centre of the newel (perpendicular to the line of the straight section - positive is away from the centre of the stair).

#### ~59 Balusters for volute

The number of balusters positioned on the bullnose tread.

### Turnout and Small Turnout

Turnouts are calculated (almost) identically to volutes (see above). The only difference is there whereas for a volute Radius sweep 6 is measured from point 2 along the arc towards point 3, for a turnout it is measured from point 1 along the arc towards point 2. In other words, point 7 is along the 1-2 arc.

Radius 6 sweep probably should not be less than Radius 1 sweep (otherwise there may be a distortion of the turnout).

Other than that the only difference is in the properties you set. Generally the sweeps would be less than for a volute, and the radii would need adjusting.

### Disassemble

#### ~33 Goosenecks

With this set to true (T), StairBiz will disassemble goosenecks into their individual components (upeases, vertical, turn, tandem etc) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send the goosenecks to the Part Filters window as a single assembled unit.

#### ~34 Start/End Easings

With this set to true (T), StairBiz will disassemble start and end easings into their individual components (upease/overease and return end/start cap) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send them to the Part Filters window as a single assembled unit.

#### ~35 Volutes

With this set to true (T), StairBiz will disassemble volutes and turnouts into their individual components (volute/turnout and upease) and send and these components to the Part Filters window one at a time. With this set to false (F) StairBiz will send them to the Part Filters window as a single assembled unit.

#### ~114 Spec Vertical as Handrail

Applies only if Gooseneck parts are set to disassemble. If you want verticals to be processed as handrail, set this to True (the default setting is True). If there is a fitted mitre or overease at the top of gooseneck you may want it to go through the filter as a Vertical – set this to false (F).

### Divert GNeck

#### ~106 Parts; Block/Tandem to Terminate

The fitting types GNeckBlock, GNeckTandem and GNeckTerminate may all amount to the same thing in the Parts window. If you want each GNeckBlock and GNeckTandem to be sent to your Fittings part filter as a GNeckTerminate, set this to “Y” (yes), otherwise “N” (no).

Note that this would be redundant if you disassemble goosenecks (see above).

#### ~107 Labour; Block/Tandem to Terminate

Same as above, except relates to labour filters.

## Folders window

From : Defaults menu ; **Folders** menu-item

Projects, Stair Templates, Unit Templates, Well Templates and Bullnose Templates can be grouped in folders. When you view projects in the Open Project widow, you are viewing the projects from the current project folder. When you view stair templates in the Stair Templates section of the Design window, you are viewing templates in the current Stair Templates folder, etc.

#### Add

To create a new folder, select the appropriate category, click the **Add** button, type in a new name, then press the Enter key. The folder will be added to the list on the right.

This list can be speed searched – see Speed Search Lists

#### Rename

Select the folder you wish to rename, click the **Rename** button, edit the name in the text box, then press the Return key.

#### Delete

Select the folder you wish to delete, then click the **Delete** button. If you delete a folder, you delete the entire contents of the folder, so be careful (you will be alerted).

#### Saving a job into a particular folder

Before saving the job, select the appropriate folder at the top/right of the Process window. After saving you can change folders the same way – select a different folder and then save the job. Setting or changing the folder of a job sets or changes that folder for all jobs in the project.

#### Opening a job from a particular folder

In the Open Project window, select the appropriate folder at the top of the window.

#### Saving a template into a particular folder

Stair Templates, Unit Templates, Well Templates and Bullnose Templates all operate the same way. When you save a template with the “Send To Templates” menu-item, it will save that template into the current folder. To change the current folder right-click the relevant pane button (e.g. Stair Templates, Stair Design, Well design or Bullnose) at the top/right of the Design window, and select the appropriate folder from the list.

#### Opening a template from a particular folder

Right-click the relevant pane button in the Design window as discussed in the previous paragraph.

## Inventory window

From : Project menu ; **Inventory** menu-item

### Overview

The **Inventory Window** is very similar to the **Directory window**, but it contains extra information that relates to item inventory. You will find that the window functions exactly the same as the **Directory Window**. Please see the section entitled **Directory Window** for an explanation of how to use the various toolbar buttons in this window.

Like the Directory Window, you can also set up views which allow you to customize the column layout of the **Directory Window**. The Views you set up in this window are independent of the views set up in the Directory Window.

When you click on the **Choose Column** toolbar button, you will notice that there is an additional category of columns called **Inventory**. These columns will display information about each part that was used in a job.

In the **Directory** window you will see one row per Job. In the **Inventory** window however, you will see as many rows per job as there are inventory items in each job. This will allow you to see how much material and how many parts are required for any given period of time.

By setting up your views and your column filters, you can create any type of Inventory usage report that is needed. You can then Print or Export these reports to Excel.

### Inventory Active

All job items do not appear in the **Inventory** window, only those jobs that have been set to Inventory Active.

To manually set a Job’s Inventory to active, open the **Materials Window**, and select **Inventory Active**. See **Materials Window** for more explanation of this.

### Inventory Preferences

There are options that determine when a job will be included or excluded from the Inventory Window on the **Inventory** tab of the **Preferences** window. See the **Preferences** window section for more explanation of this.

## Invoice window

From : Process menu ; **Invoice** menu-item

Only applicable for Estimate module.

The **Invoice window** may be used to generate an invoice in the form of a letter for presentation to the client.

All the features and functions available in the Quote window apply to this window.

## Job Archive window

### Overview

StairBiz allows you to create multiple Archive Database files that you can send jobs to when they are no longer needed. This allows you to keep a copy of your legacy job information without being required to sort through every job you have ever completed, each time you open the Directory Window.

### Sending Jobs to an Archive

To send a job or multiple jobs to an archive, open the Directory Window and select the jobs you wish to archive (for projects containing multiple jobs, see next heading). Next, click on **Send to Archive** button on the toolbar. At this point, the **Job Archive** window will open, allowing you to select the archive you wish to send the job(s) to.

Select the Archive from the list, or create a new Archive file to use. If you don’t wish for the jobs to be deleted from your main database as they are moved to the Archive, be sure to de-select the **Delete Selected jobs after Archiving** option.

Next, click **Archive** to begin the process of moving the jobs to the archive file.

### Sending Projects to an Archive

If you wish to send an entire project (i.e. containing multiple jobs) to an archive, be sure all jobs in the project are selected in the Directory window.

You may send just some of the jobs in a project to an archive – StairBiz will recreate the project in the archive. If you send more jobs from that project to the archive, StairBiz will add them to the corresponding project in the archive.

The same thing happens in reverse, when restoring jobs from an archive.

### Creating a new Archive

You can create as many Archive files as you like and time you like. Open the **Job Archive** window and click on the **New Archive** button. Name the new archive file (with a name that has not already been used) and click **Ok**.

### Opening an Archive

To open an Archive file to retrieve or check old jobs, click on the **Project** menu, then click **Open Archive**. StairBiz will present a list of existing Archive files. Select the Archive and click **Open**.

The window will close and the title bar area of StairBiz will say **Using Job Archive [Name]** where [Name] is the name of the selected Archive. At this point, you can use StairBiz to Open and Close or even make changes to jobs. All of the Jobs you see listed in the **Open Jobs** window or **Directory** window will be jobs that are contained in the current Archive.

Until you close the Archive (see below), you will not be able to access your regular jobs.

At this point, you can also open the **Directory Window** and restore jobs back to the main database, much the same way you moved them into the Archive. When an Archive is open, the Directory Window displays a **Restore from Archive** button instead of a **Send to Archive** button.tory Windowou can also open the w), you will not be able to access your regular jobs. the Archive to Open. u have ever

### Closing an Archive

Select **Close Archive** from the **Project** menu. You will be returned to the main database, and your normal jobs will be available.

**Note**: You cannot Open or Close an Archive while jobs are active. You must first save and close any jobs before using this feature. If you attempt to do otherwise, StairBiz will notify you.

### Backing up an Archive

An archive is held as a single database file (no different to the StairBiz Jobs.mdb database file that stores your normal jobs). These files are in the folder …

Local (i.e. not networked):

C:\StairBiz Program\Defaults\Job Archive\

Networked:

C:\StairBiz Program\Server\Job Archive

Back up these files as required.

### Deleting an Archive

You cannot delete an archive from within StairBiz, so navigate to the folder indicated in “Backing up an Archive” and send the relevant archive file to the recycle bin as required.

## Job Details window

### Overview

From : Process menu ; **Details** menu-item

The **Job Details window** holds miscellaneous information about the job. The default settings for each new job come from the Job Details Defaults window (under the Defaults menu)

NOTE: If "Not used by StairBiz" is noted with any of the following items, it means that StairBiz does not account for it in either materials or labour costing. If a cost allocation needs to be made, it must be done manually. StairBiz will, however, indicate these items in your Custom Sheets.

### Fields and buttons

#### Dispatch

Choose between Pickup, Deliver Only, or Install.

#### Agreed Date

The date on which job completion is promised to the client.

#### Scheduled Date

The date on which job completion is currently scheduled according to the Schedule window.

#### Travel Time

Travel time settings used to be here - now they are in the Quote Calculation window.

If you enter both minutes and dollars, StairBiz will calculate labour cost using only the dollars, but will include the minutes in the total time calculation (for scheduling purposes only).

#### Weights

Tick if you want weights and volumes calculated for this job. See Chapter 22 : Miscellaneous topics / Weights and Volumes.

#### Schedule Colours

These set or reflect colours in the Schedule window for this job. See Schedule window.

#### Schedule Icons

An icon is a small image. This setting sets or reflects icons in the Schedule window (and also the Directory window) for this job. See Schedule window.

#### Job requires CNC

Tick this is the job requires CNC. If you do not tick this button, and you export a CNC session from this job, StairBiz will automatically tick it. This setting can be seen in the Directory window and, more importantly, the CNC Sessions List window.

#### CNC Scheduled Date

The date the job is scheduled for the CNC machine. This setting can be seen in the Directory window and, more importantly, the CNC Sessions List window.

#### Upper Floor

Select the upper floor material (not used by StairBiz - your record only), and the tongue length and rebate for the top outstep (the tongue length is used by StairBiz to calculate the width of the nosing blank). The default settings are from Dimensions 22 and 24 in the Setout Defaults window.

#### Lower Floor

Select the lower floor material (not used by StairBiz).

#### Finish

Select the finish. If **By Us** is selected, it is assumed that the finish is your responsibility (not used by StairBiz).

#### Quote From Plan

The quote has been done without a site inspection. There is a custom field which checks this prior to nominating a head-height, and will show the head-height as "?".

#### Remeasure

A re-measure is required (not used by StairBiz).

#### Job Briefing

Staff need to be briefed - don't rely entirely on StairBiz sheets (not used by StairBiz).

#### No Site Power

There is no electricity on site (not used by StairBiz).

#### Brick Wall Upper

The walls of the upper floor are brick (not used by StairBiz).

#### Brick Wall Lower

The walls of the lower floor are brick (not used by StairBiz).

#### Trim Upper Floor

Do you need to create or trim the well (not used by StairBiz).

#### Trim Centre Wall

Do you need to trim any existing walls (not used by StairBiz).

#### Tread Protection

Do you need to include tread protectors for the treads. This setting can feed into the Parts and Labour filters as a property (treads category).

#### Cupboard From/To

The units of the stair under which cupboards will be built (counting from the bottom up). For example, if there are cupboards under units 2 and 3, type “23”. If there is a cupboard under only unit 2, you can type “2” or “22”. (Not used by StairBiz.)

#### Site Note

Any text you like.

#### Critical

Tick this to turn the Site Note into a Critical Job Note, which means that when any user opens the job, this note will come up as an alert, and the user will have to click OK to get rid of it.

## Job Details Defaults window

### Overview

From : Defaults menu ; **Job Details** menu-item

The **Job Details Defaults window** is where we set the default settings for the Job Details window for each new job.

### Clearing fields on ‘Save Job As’

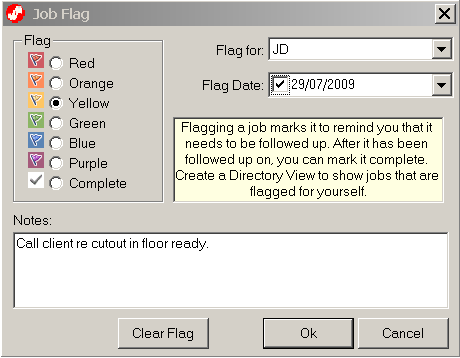
##### Save Job As – Prompt to reset Details window

When you do a ‘Save Job As’ (from the Project menu), some like to reset the Job Details window back to the default settings set in this window. In the Miscellaneous Defaults window (Miscellaneous category) there is a setting for **Reset Details window on 'Save Job As'**: “0” = never; “1” = Prompt me first; “2” = Just do it.

##### Save Job As – Prompt to clear schedule dates

When you do a ‘Save Job As’ (from the Project menu), some like to always clear any existing schedule dates, others like to be prompted first. “T” means prompt first; “F” means just clear them.

## Job Flag window



### Overview

From : Click the field to the right of the small flag icon in the Process window. 

This Allows you to flag a job. In other words, you are alerting either yourself or someone else for a certain reason and (optionally) on a certain date.

Most people monitor these flags in a Directory window (often created just for this purpose). Use the flag fields under the Job category.

You can change the flag (including to “Complete”) by clicking the flag icon in the Process window.

## Labour Filters window

### Overview

From : Defaults menu ; **Labour Filters** menu-item

Only applicable for Estimate module.

See How StairBiz Costs Labour.

In this window you can create filters that generate labour cost transactions for any job. To see how filters work and how to create them, see Chapter 15 : Parts and Labour Filters.

The list at the left shows the **Filter Categories**. These categories correspond to each drop-down list in the Labour window. Essentially there is one for each possible component for a job, plus one for Job, Stair and Unit.

Rates List

To the right of the **Filter Categories** is a **Rates List**. It allows you to set default rates for each category of labour (only relevant for items that use the “Staff” method of labour costing), and set a default loading for labour times for new jobs (see Labour window).

Minimum Installation Charges

The last three items in the **Rates List** (see above) are minimum charges for Installation. They only apply if the Dispatch mode (see Details window) is “Install”.

If a minimum charge is greater than zero, and the total installation labour for a job is greater than zero but less than this amount, then an adjustment for labour will be included to bring the total installation up to this amount, as follows:

**If the quote is not split:**

Even if you have no stair or no balustrade, the minimum charge for **Both** will apply. This is the case even if the **Active** checkbox is set to show only one or the other (in which case the charge will show for Active = Stair.

**If the quote is split:**

The minimum charge for **Stair** will apply to the stair quote.

The minimum charge for **Balustrade** will apply to the balustrade quote.

Labour Cost Methods

To the right of the **Rates List** are buttons which determine the default settings (for new jobs) for how you want the labour to be costed. Select the button if that category of labour is (by default) to be costed based on the Contract Method. Leave it unselected if that category of labour is to be costed based on Staff Method (time in minutes). Your setting can be changed on a job-by-job basis in that job’s Labour window.

If a contract button is NOT ticked for any category, only “Time” result columns (TimePrepare, TimeAssemble, TimeInstall etc.) in the filter are processed for that category when StairBiz calculates labour for the job. If a contract button IS ticked for any category, only “Contract” result columns in the filter are processed for that category (in this case StairBiz still collects any Time data to use for working out total times for the job, but does not use it to cost labour).

Include Parts Labour

You have the option of including an allocation for labour with each part in your Parts window. For any one job, you can enable or disable any such labour items. This button is the default setting for each new job (see the corresponding button in the Labour window for the current job).

## Labour window

### Overview

From : Process menu ; **Labour** menu-item

Only applicable for Estimate module.

See How StairBiz Costs Labour.

This window shows, for this job, the results of the labour cost filters you selected in the **Filters and Rates** section of this window. (These filters were created in the Labour Filters window).

This window shows all labour items for the current job. These labour items can come from:

1. The labour filters selected in the **Filter and Rates** tab of this window.
2. Labour items specified in the Style window for various components.
3. Labour items shown in the Parts window for various parts.
4. Loose items created in the **Loose** mode of this window
5. Minimum install labour shown in the **Rates** list in the **Filters and Rates** tab of this window.
6. Labour generated from the **Special Labour** category of the Miscellaneous Defaults window.

To see how filters work and how to create them, see Parts and Labour Filters.

Note that the **Don’t Process** menu-item when you right-click a stair unit in the Stair Setout pane of the Design window can force StairBiz to ignore certain units of a stair for the purposes of spec’ing and costing labour and materials.

There are two **window tabs**, as follows:

#### List Labour

##### Show

This confines the list to show only the labour category selected.

Also, the labour categories shown in the Labour sheet will correspond with those shown here. This can be useful for things like printing an invoice for contract installers (select show **Installation**, then print the Labour sheet).

Preparation will shown both Prep (preparation) and Mach (machining/turning) categories.

When you close the Labour window, the **Show** setting will revert to "Show All".

**Loose**

Loose allows you to add or delete labour items additional to those generated automatically by your labour filters. In Loose mode there is an **Add** and **Delete** button above the list. Loose items costs are added to the job labour calculation.

##### Calculation

Shows the totals for the list (when not is Loose mode).

The **Load Times%** comes directly from your Labour Filters window (a defaults window) and can be changed here just for this job. It is used only to adjust labour times (minutes) under circumstances that may have impacted labour productivity across the board, and is not intended to be used as a profit margin. It does not impact contract labour values.

**Done** simply puts a tick against the **Labour** menu-item under the Process menu.

##### The list

**Stage:** indicates the five labour stages – Prep (preparation), Mach (machining/turning), Assm (assembly), Delv (delivery) and Inst (installation).

Mach items (if any) come directly from styles selected in the Components window for the job which (in the related Style window for that component – click the button on the left of that component) has the style-type set to **Blank; Staff Profile**. In other words there is a labour component for turning or machining that component.

**Category:** corresponds to the filter category – which filter did this labour cost item come from.

**Description:** comes from the most recent *.Caption* setting in this filter.

**Ref:** comes from the most recent *.Ref* setting in this filter and is just a reference to help you track items and debug your filters.

**Qty:** is calculated by StairBiz from the design. It can be the number (count) of this item, or total length of this item, depending on the unit type (see next line)

**U:** is the unit type for this quantity- “m” is per meter, “f” is per foot, otherwise it is per number of items.

**Method:** is the labour cost method used to calculate each item. Staff means the item is being costed as Time (minutes, from the filter or the Style window) times Rate (from the Staff Rates list shown in the Filters and Rates tab of this window). Contract means the item is being costed at a fixed value (as specified in the filter or Style window).

**Time:** is the number of minutes (set in your filter) allocated to each item, meter or foot. It will only be applied to the labour cost calculation if the relevant labour stage is not set to **Contract** (unless this has been overridden in the filter) – see Filters and Rates (below). Also see Staff Method. Profile stage items are an exception – see **Stage** (above).

When entering minutes in Loose Items, there is a limit of 32000 minutes (about 540 hours) for any single labour stage. You can enter the minutes in an “hour” format (e.g. “2:45” is 2 hours 45 mins). Without a colon separator, any entry is treated as minutes only.

**Rate:** If Method is Staff, this is the staff labour rate per hour for this labour stage. The default comes from the Labour Filters window, and can be overridden for this job in the **Filters and Rates** tab of this window. If the Method is Contract, this is the contract fixed dollar amount per item or per length for this item.

**Total:** shows the total dollar allocation for this item. If Time (i.e. Staff method) is used, it will show the Time (minutes) divided by 60 (to get hours) multiplied by Rate multiplied by Qty. If Contract is used (i.e. Contract Method) it will show Rate multiplied by Qty. The sum of these totals is shown next to the **Labour As Shown** heading at the top of the window.

##### Done

Simply places a tick against the **Labour** menu-item under the Process menu.

##### Include Parts Labour

Instructs StairBiz to include installation labour shown in the Parts window. For example, you may have labour in the Parts window and want it to be used only under certain circumstances. The default setting for this button (for each new job) comes from the corresponding button in the Labour Filters window.

##### Include Extra Lengths

Instructs StairBiz to include extra lengths and rounding-up in the lengths used for the purposes of costing labour. The default setting for this button (for each new job) comes from the corresponding button in the Labour Filters window.

See: Chapter 22 Miscellaneous Topics / “Waste, Extra Length and Rounding Up”.

##### Manual Mode

This adds all (non-loose) labour items to the Loose category of the window. This allows you to manually delete or amend any or all items generated automatically by StairBiz.

You do not need to be in Manual Mode to add items – simply go to the Loose category of the window.

To amend Staff Rates, you do not need to be in Manual Mode – simply edit the staff rates in the list shown in the Filters and Rates tab of this window.

##### Include in Inventory

Instructs StairBiz to include labour items when exporting inventory.

##### Refresh

In the same way that there is a Refresh button in the job's Components window, this button updates all values in this window to those from your current Defaults database (e.g. labour rates, minimum charges etc.) - see Chapter 14: Pricing Refresh

#### Sort by Category

For both the Labour Cost window and the Labour Cost sheet, you can optionally swap the **Stage** and **Category** columns. This might be useful to group items by their category, rather than by their stage (e.g. all “Tread” items would be grouped, regardless of Prep, Build, Install, etc. stages). See the **Labour window sort by Category** setting in the Miscellaneous Defaults window, View Sheets category.

#### Manual Sorting

In the **Labour Cost list**, for both the **Stage** and **Category** columns, if the text in a cell is identical to the text in the cell above, StairBiz leaves the cell blank (for the sake of clarity). This is fine, except if you want to manually sort one or other of these two columns (by clicking on the column header), in which case you really need all cells to contain their actual text. To achieve this, you can click the **For Sort** checkbox at the top of the window.

#### Filters and Rates

##### Labour Category (Rates)

Shows the default staff rates for each labour stage (they come from the Labour Filters window). It is only relevant is there are any Staff Method items (i.e. based on Time) in the list. They can be amended just for this job by double clicking a rate and changing it. The list will update to reflect any changes.

Minimum Installation Charge

See this heading in the Labour Filters window.

##### Contract

Shows the default Contract settings for each labour stage (they come from the Labour Filters window). It is only relevant is there are any Contract Method items in the list. You can change these settings just for this job here. The list will update to reflect any changes.

##### Shared

This window can be shared amongst multiple jobs in a project. If this job is the only job in the current project, this button will be disabled. If there are multiple jobs in this project, this button will be enabled and ticked by default. If you do not want this window shared with other jobs in the project, un-tick this button – the window will be disconnected from the project and any changes you make to it will only affect this one job. See Shared Windows.

##### Newels, Stair, Balustrade etc.

Opens the relevant tab showing current filter selections.

##### Filter selections

Click the down-arrow to the right of each filter category to select from the list of filters available for this category (i.e. filters you have created in the Labour Filters window).

You can select a filter, or select “None”.

This list can be speed searched – see Speed Search Lists.

You can modify the contents of any filter by clicking the button to the right of the filter selection. You can even modify a “None” filter (a “None” filter is actually a filter with no current contents.) All filters for this job (and any changes you make to them) are saved with the job.

To see how filters work and how to create or modify them, see Parts and Labour Filters.

##### Selection Templates

Your current filter selections can be named and saved, so that next time you want to select all those same selections required only a single click.

By defaults, the “Default” selection template is selected for each new job.

**To modify an existing selection template, do as follows:**

1. Select the template to be modified from the drop-down list to the right of “Selection Templates” (you can also modify the “Default” template).
2. Select the appropriate filters for each category.
3. Click the **Save** button.

**To create one or more alternative templates, do as follows:**

1. Select the template which most closely resembles the template you wish to create.
2. Select the appropriate filters for each category.
3. Click the **Save As** button.
4. Type the name of the new template at the top
5. Click **OK**.

**To delete a template:**

1. Select the template.
2. Click the **Delete** button

##### Regenerating default labour costs

The contents of labour cost filters selected for a job are not saved with that job (although the names of the filters for each category are). If you make changes to a labour filter (either from the defaults window or from within the Labour Cost window of a job), those changes apply immediately to the current job, and all other jobs when you open them.

This is one of the reasons why it’s important to put the Quote Calculation window in **Lock** mode prior to issuing a quotation for that job – it ensures that the quoted amounts do not change.

## Language window

### Overview

From : Defaults menu ; **Language** menu-item

The **Language window** allows you to

1. Modify some of the terminology used in the StairBiz program (e.g. change “Bullnose” to “Starter Step”),
2. Modify the functionality of some buttons and text fields. For example, in the Details window there is a check button for “No Site Power”. This is just for you – StairBiz does not use it in the design or costing of stairs. If you don’t need such a button, but do need a “Poor Access” button, you can change it here (be sure that the functionality of a button or text field is not used directly by StairBiz before changing it – if in doubt check with support).
3. Change the shortcut keys for buttons and menus.
4. Completely translate into a different language.

This window operates in the same way for all three tasks, so when I use the term “translate” in the following discussion, I’m referring to any of these things.

Every piece of text ever shown in the StairBiz program (menus, buttons, labels, reports, alert messages etc.) can be translated (with a few minor exceptions). This includes single words, phrases and sentences – for the sake of simplicity I will refer to all these as “phrases”.

#### Language

Select your local language here.

**None** – You do not intend to modify any existing terminology or language. With this selected, there is no second column in the main list in the tabs of this window.

**English** – Your local language is English, but you wish to change some of the terminology

**Anything else** - There may or may not be a translation if your language is other than English – contact StairBiz Support.

##### The list

Has the same function as the list under the **Translate** tab, so we’ll discuss it there.

#### Translate

##### Translate From:

Select the language from which you wish to translate. In most cases this should be **Base English**. The language you select will be shown in the Left hand column of the list below.

##### In-cell editing

Determines whether you will be translating directly in the list (i.e. typing in the right-hand column) or translating from the two text boxes directly below this button. The difference is that with in-cell editing, the text is side by side, otherwise it is vertically aligned. Whatever you prefer is OK.

##### Group By Context

Phrases can be (and probably should be) organized according to their context (in most cases this context is the window in which the phrase would be seen).

If this button is selected, the blue rows in the list below show the context headings. Each context can be expanded to show all the phrases used in that context by clicking the “+” at the left of the context heading.

If this button is not selected, there is no context grouping. The problem with this is that there may be a word that is used more than once and has a different meaning (and therefore translation) depending on the context.

##### Move All >>

Copies all text in the left hand column across to the right hand column. Note that in most cases this is not necessary – read on.

##### Clear

Deletes the contents of the right-hand column.

##### The list

The column on the left shows the language you are translating from. The column on the right shows the translation. If any field in the right-hand column is empty, StairBiz will use the phrase in the left-hand column (i.e. none, some or all fields on the right can hold a translation – it’s up to you).

If there is no second column (i.e. no column on the right), it is because you have "<None>" set as your language in the **Language** tab of the Language window. You probably need to set it to "English".

##### Translating

Click the row you wish to translate.

Either in the right-hand column (same row), or in the lower of the two text fields at the top of the window, type your translation.

In many cases there will be a vertical red line some way along the text field. This indicates the maximum length of the translation. This is, in most cases, because that translated text will go into a button or label etc. which has a specific length. If the text is longer than the button or label, it will wrap – any words after the maximum length will probably disappear, and if it is a single word phrase being translated the entire contents of the button or label could disappear, leading you to think there is some bug in the translator.

Do NOT exceed maximum length if the red line indicator appears.

Once again – you do not need any text in the right hand column for phrases which do not need a translation. If nothing is in the right-hand column StairBiz will use what’s in the left-hand column.

To copy a left hand column text field to the clipboard, copy it from the text field at the top of the window.

##### Shortcut keys

Some phrases (only those for buttons and main menus) can have a “&” inserted at some point along the phrase (usually at the beginning, but not necessarily). The letter *after* the “&” is the short cut key to enact that button or menu using the keyboard. On your screen, the letter *after* the “&” is underlined (i.e. you won’t see the “&” – you will only see the underlined letter). For example …

In the translation; “&Done”

Will show in that button as “Done”

With the window containing this button is active, pressing Alt-D is the same as clicking this button.

In the translation; “Ne&w”

Will show in that button as “New”

Here, pressing Alt-W is the same as clicking this button.

You can completely customize your shortcut keys for all main menus, main menu-items and buttons by making a translation of the appropriate phrases and changing, deleting or adding the “&”.

Be sure you don’t use the same shortcut key for multiple buttons in the same window or main menu heading (for the purposes of shortcut keys, main menu headings are treated the same as buttons in the active window) – StairBiz will obviously only enact the first menu or button it finds associated with that shortcut.

##### Sorts

To sort a column, click its header row (at the top). To reverse sort, click it again.

When you sort columns with the **Group By Context** button selected, the **Miscellaneous** context heading will expand (I don’t know why, and we can’t seem to stop it – simply collapse it again after the sort).

#### Find and Replace

Before attempting any replacements in this section of the window, note the **Terminology** tab in the window (and the discussion of it below) – it provides a quick and easy way to make all the most common replacements.

If you have the **Group By Context** button selected, selecting the **Find and Replace** tab will unselect it (finds and replaces operate on all phrases in the list.

##### Find

Enter the text you wish to find.

##### Replace

Enter the text which will replace what is found.

##### Search (Base English)

The language shown in the brackets will be the language selected for your first column (i.e. the language you are translating from).

##### Search (English)

The language shown in the brackets will be the language selected for your second column (i.e. the language you are translating to).

##### Whole word search

With this selected only whole words will be found (e.g. when searching for “cat”, it won’t be found in “catch the ball” but it will be found in “the cat lives here”)

##### Find Next

Will find the next occurrence of the word you are looking for. Searches are case sensitive – a search on “Newel” will not find “newel” (this is deliberate, and can be changed – see **Case Sensitive** below).

##### Replace

When there is a “find”, you can replace the relevant word by clicking this **Replace** button.

If the search is on the first column, it will copy the contents of the first column for the row and insert it into the second column for the row, but with the change according to your **Replace** text.

If the search is on the second column, it will change the second column text according to your **Replace** text.

##### Replace All

This is the same as clicking **Find** and then **Replace** multiple times until there are no more finds.

##### Mixed Case

Find/Replace on a *single* word can be mixed case (i.e. a search on “newel” will also find “Newel” and the replacement will be sensitive to the case). To do this, select the **Mixed Case** checkbox prior to clicking the Find/Replace buttons.

##### Singular/Plural

Find/Replace on a *single* word in the singular case can also find and replace the plural of that word (i.e. a search on “newel” will also find “newels” and the replacement will be appropriate). To do this, select the **Singular/Plural** checkbox prior to clicking the Find/Replace buttons.

#### Terminology

This section of the window provides a quick and easy way to make all the most common terminology replacements (i.e. it is an easier alternative to using **Find and Replace** for the most common terminology changes).

The wording of our common terminology as shown here is specially chosen to facilitate this process – no term shown here is used in any other context within StairBiz, or within this User’s Manual, so that you can safely do a global find/replace without worrying about unintended consequences.

The terms on the left are what we call things. Click on any term you do not understand to read its definition in box at the top of the window.

Type your replacement term in the box on the right of the original term. (If you are happy with the original term and don’t need to change it, leave the box on the right empty.) Do not use any upper case letters – StairBiz will resolve all that appropriately for you.

When you've typed in all your changes you want, click the **Go** button at the top/right of the window – StairBiz will update all terminology in one hit.

To change terminology you have already changed using this utility (e.g. you made a mistake), simply type in the alternative replacement phrase(s) and click **Go**. If you want to revert a change to its original StairBiz terminology, you cannot simply delete the replacement terminology from the column on the right and click Go (StairBiz ignores any empty replacements) . You can either type the original terminology into the column on the right, or you can go back to the **Translate** tab and either manually delete the relevant items in the column on the right, or click the **Clear** button to clear all translations (StairBiz uses Base English for items that do not have a translation).

#### Updating StairBiz with the changes

After you have completed any translations, close the Language window.

Windows already open will not update until you close those windows and re-open them.

The Components window will not update until you quit StairBiz and re-launch.

The main menus will not update until you quit StairBiz and re-launch.

All else will update immediately.

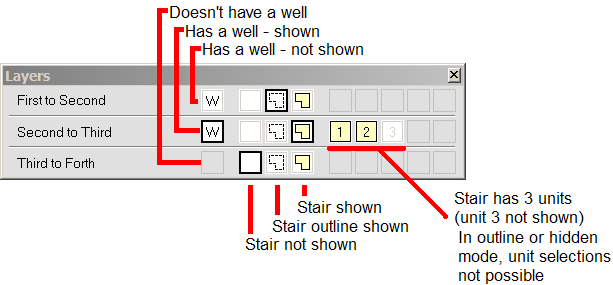
#### Special Note

In the Set Field category, the word “LIST” is important. You can change it, so long as every instance of it is changed in an identical way.

## Layers window

You can open the **Layers window** by clicking the  button located just above the dimension tools in the Design window.

The Layers window shows all layers and levels which have any stair and/or well associated with them. It gives very precise control over what is shown, outlined or hidden and is very useful when working in stacked stairs and/or wells (i.e. one over the other). For example, if you want to marry the well on the second level with the bottom of a stair going from second to third, you can hide everything except that stair and that well – it makes it much easier to work with stacked stairs.



The easiest way to learn about the **Layers window** is to create a design with multiple stairs/wells and just start clicking on the buttons. The Layers window applies to all panes of the Design window (including the Elevations pane).

The Layers window hovers over the Design window when not active, otherwise you can close it by clicking its Close box, or clicking again the same button used to open it.

The layers window also impacts the spec’ing and pricing or materials. Balconies, stairs and/or units that are hidden are not included in any Cutting List, BOM or pricing. This may be useful (for example) where you have multiple stairs and want to restrict output to Custom Sheets etc. to one stair at a time.

## Materials window

### Overview

From : Process menu ; **Material Cost** menu-item

Only applicable for Estimate module.

The **Materials window** is where StairBiz calculates the cost of materials for the job. Every piece of material in the stair and/or balcony is accounted for, including both blank items and parts. All items of the same timber/part and size are grouped together and a summary is made.

Note that the **Don’t Process** menu-item when you right-click a stair unit in the Stair Setout pane of the Design window can force StairBiz to ignore certain units of a stair for the purposes of spec’ing and costing labour and materials.

Costs for blanks and parts can be amended here.

In this window you can also create “Loose” items (style, part or line items additional to the items created automatically by StairBiz or your part filters for the current design).

See How StairBiz Costs Materials.

### Buttons

#### Part Price

##### Buy, Sell 1, Sell 2

These buttons specify which price column in your Parts window you want StairBiz to use to cost any parts that show up in this window (in all Show modes). The default setting comes from the corresponding buttons in the Parts window. You can change it here just for the current job if required.

#### Show

##### Blank Summary

In this mode StairBiz displays a summary of all sizes and timbers for blank items (i.e. components not converted to parts), and shows the unit cost and total cost for each. The “Cost” fields are generally amendable (see below).

##### Blank Items

Show a full (non-summarized) list of all blank items for the current job.

##### Parts from Filter

Shows all parts generated from part filters selected in the Components window.

##### Loose Items

Loose items are extra items created manually by you for the job – StairBiz has no automatic control over loose items. Loose items can include blank items, parts and line items. You can create loose items even if there is no current design (for example, a client walks in and wants to buy some balusters and handrail).

In this mode you can create, amend or delete loose items.

When you select Manual Mode, all Blank items and Parts as shown as Loose Items (see below).

#### Include

##### Blank Items

Only show (in this window and the cutting list, BOM and Material Cost sheets) items that are generated from blank timber.

##### Parts

Only show (in this window and the cutting list, BOM and Material Cost sheets) parts that are generated from your part filters.

##### Line Items

Only show (in this window and the cutting list, BOM and Material Cost sheets) line items that are generated from your part filters.

#### Inventory Active

When this button is selected, StairBiz will add all items in the Materials window to the Inventory table in the Jobs database. It does this at the time the job is saved.

Inventory items for all or any jobs can be viewed in the Inventory window (Project menu).

Note that the materials for the job are always saved with the job (whether or not the **Inventory Active** button is checked), so only use this button if you have a specific reason to maintain a global inventory.

This button can be triggered by an event other than the user manually selecting it – see the **Archive** tab in the Preferences window.

#### Roundup only for pricing

Normally roundup (a special kind of wastage set in your Timbers window and your Extra Lengths window) applies to both your pricing and to the cutting list. Now, if you want it to apply to pricing but not to the cutting list (and BOM etc.), this is the setting (for the default setting see **Roundup only for pricing** in the **Quote Cal**c category of the Miscellaneous Defaults window.

### Tabs

#### Blank Summary

Although the total lengths in the summary may be rounded, all calculations for costing are done using exact lengths.

If any field in the list is empty, assume that this field has the same information as the first non-empty field above it.

**Description:** The description of the item.

BLANKS include all components that need a piece of blank timber pulled from the rack (that piece may or may not subsequently need machining/turning). If the blank is for a style that needs machining/turning, there will be a cost for that machining/turning shown under the “MACHINING” heading at the bottom of the summary – see Style window.

STYLE PARTS are parts specified by the Styles window of a component (Style Type = “Part Is …”; they do not include parts specified by a part filter – see below). These parts are costed according to the price and UOM (unit of measurement) in the Parts window, and the Part Price category shown at the top of this Materials window).

**Timber/Part:** The timber type if the item is not a part, or Part Id if the item is a part.

**Width/Depth:** Size of the blank or item

**Length/Qty:** The total length of the item(s), rounded, or the total number of items. These lengths do not include waste.

**UOM**: (Unit of measurement); “m” for per metre; “f” for per foot; “e” for per each.

**Waste**: The waste allocation as derived from the Timbers window or the Parts window. It is amendable where appropriate (see below).This waste is factored into the **Total** for the item, but is not factored into the **Length**.

Cost: Cost per UOM, from the Timbers window or Parts window. It is generally amendable (see below).

**Total:** Total cost for this summary line. This includes waste (if any – see above).

##### Amending Cost

This cost (either for a part or a blank) can be amended by double-clicking the cost and editing it (this will not impact your defaults). In other words you can override the default prices for any particular summary item.

If an item is based on another item’s cost, it is not amendable (you will be alerted if you try) - for example, landing nose (which is the pro-rata cost of a tread), skirting (which is the pro-rata cost of a string), plus any item whose size has been changed from that shown in the Components window (which is the pro-rata cost of that item).

Amending a cost will automatically change the cost of any other identical item in the list.

##### Amending Waste

The waste can be amended where appropriate (this will not impact your defaults).

Amending a waste will automatically change the waste of any other identical item in the list.

Five lines, titled **Extra**, are provided at the bottom of the summary for any extras. These are amendable at any time.

Your input into these lines won’t be changed by changes you make in any other window. Only you can change them. Edit the fields as required.

The only text boxes which must have an input are **quantity**, **units** and **cost**. Without these the entire line becomes meaningless. Input into all other text boxes is optional.

If the total cost for any extra shows $0.00, StairBiz ignores it completely, otherwise it will be costed in this window and printed in the **Materials List sheet**.

Only the **Extras** can be amended in **Cost Summary** mode. To amend the list you must select the **Used Materials** button or the **All Materials** button and also select the **Manual Override** button.

#### Blank Items

Quantities and lengths are amendable in **Manual mode**.

#### Parts from Filter

Shows a list of all parts generated by the part filters selected in the Components window for the job. To see how filters work and how to create them, see Parts and Labour Filters.

**Category:** corresponds to the filter category – which filter did this part come from.

**Part Id:** the Id of the part (in your Parts window) which has been specified by the filter.

**Description:** comes from the most recent *.Caption* setting in this filter.

**Ref:** comes from the most recent *.Ref* setting in this filter and is just a reference to help you track items and debug your filters.

**Qty:** is calculated by StairBiz from the design. It is the number (count) of this part.

**$Sell:** is the sell price of this part (from your Parts window).

**UOM:** (Unit of measurement); “m” for per metre; “f” for per foot; “e” for per each (from your Parts window).

**Total:** If UOM is “e” - $Sell x Qty. If UOM is “m”/”f” - $Sell x Qty x Lth.

#### Loose Items

Loose items are extra items created manually by you for the job. You can create loose items even if there is no current design.

Click the **Add** button to create a loose item (short-cut is Alt-A).

Click the **Delete** button to delete a selected item.

##### Types of Loose Items:

Select the type of loose item by clicking the **Type** field (in the first column) for the new item. Note that you can preselect the Type by right-clicking the **Add** button. StairBiz remembers your previous **Type** selection and will set it as the default type for the next item. You can also set the default **Type** in the Preferences window (Inventory tab).

There are four types:

**Blank**; A "Style" item (from your Styles window) comprising a blank piece of timber from your timber rack plus (optionally) some profiling cost (as per the Style window). StairBiz will attempt to auto-price this item based on your selections.

**Filtered Blank**; Same as a blank, but will also run through the Part and Labour filters as selected in your Components and Labour windows.

**Part**; A part from your Parts window.

**Line Item**; Anything you want to make it - basically anything that doesn't lend itself to a blank or part.

##### Blank

**Category**; Select a category from the Category field. The remaining fields (except for length) will automatically fill based on your current selections for the job in the Components window (change them if necessary).

**Style**; If necessary you can select a style other than the one selected in the Components window. Styles shown in the pop-up list come from the selected category in your Styles window (Defaults menu). When you select one, the Width, Depth and $Sell fields will auto-fill to correspond to your selection.

**Timber**; If necessary you can select a timber other than the one selected in the Components window. Timber items shown in the pop-up list come from the Timbers window (Defaults menu). When you select one, the $Sell field will auto-fill to correspond to your selection

**Description**; Enter any text you like.

**Width and Depth**; These cannot be manually edited – they always correspond to the selected style. If you need to manually change them it may be more appropriate to use a **Line Item** type.

**Qty**; Enter any amount you like. The Total field will recalculate.

**Lth**; Enter any amount you like (millimetres or feet/inches). The Total field will recalculate.

**$Sell**; Whenever you select a style, timber, length or quantity, the $Sell field auto-recalculates based on the information about the style and timber in your defaults. You can override this calculation (directly edit the field), but if you then change any of the abovementioned fields the $Sell field will recalculate. Note that the auto-calc by StairBiz can be a little confusing in some cases. For example, depending on your setting in the Style window, a baluster may have the blank cost based on length and the turning cost per baluster (i.e. per each). In these cases the UOM (unit of measurement) is set by StairBiz as “each”, but StairBiz will factor the length into the calculation for blank cost and the turning cost will be per each.

**U**; The unit of measure. It is set by StairBiz based on your Style information and cannot be overridden.

**Total**; The total cost for this item (accounting for quantity, $Sell, length and UOM) is calculated by StairBiz and cannot be overridden. All changes in Total are accounted for in the **Materials As Shown** field at the top of the window. Total is recalculated whenever Type, Category, Style, Timber, Length or Qty change. If you don't want this behaviour, use a **Line Item** instead.

**Note**; Enter any text you like.

##### Filtered Blank

This is identical to the Blank type, except that this item will processed by your Parts and Labour filters (if either is selected for this style category in the Components or Labour window). Thus you can apply labour etc to the blank item. These items can be identified in your filters using the "IsLoose" property (it will be True only for Filtered Blank Loose Items).

A Filtered Blank ignores that the Style window might show "Part" and relies instead on the "Revert" setting of the style. If you want a part, set the Loose Type to "Part".

A Filtered Blank will not calc a price until you key in a Length. However, if it has a profile cost it will show this profile cost.

##### Part

**All fields**; Same as for Blank (above), except for the following:

**Style**; Optional. The main purpose of selecting a style for a 'part' loose item is that the list of parts shown for selection (when you click the 'Timber/Part' cell) will be limited to those in the Parts window of the same style (as shown in the Style column of the Parts window). So it makes the part selection process easier.

If you select a style and that style is set to "Part Is" (as opposed to "Part From Filters") in the Style window, then StairBiz will now put only that specific part in the Parts pull-down list for selection. If you do not want this behaviour, hold the SHIFT key down while clicking in the 'Timber/Part' field.

**Timber/Part**; Select the part from the pop-up list (which shows all parts for the selected category and the General category from the Parts window). The $Sell field auto-recalculates based on the part’s cost in your defaults, and uses the current Part Price column shown in this **Materials window** (you have to switch the **Show** mode to see this) .

Hold down Control key when selecting a PartId and you get a list of Descriptions instead (they are only used for the purposes of selection - once you have selected you will see only the Part ID).

Under all circumstances, if you select a part, the description is automatically inserted in the Description column. Delete it if you don't want it.

The parts in the pull-down list are limited to the current style and size; to see a full list hold the SHIFT key down when first clicking the field.

**Width and Depth**; N/A.

**Length**: If this part has its UOM (from the Parts window and shown here in the UOM field) set as “each”, then length is not applicable, otherwise set it (the $Sell field will recalculate).

##### Line Item

**Category**; N/A.

**Style**; Any text you like.

**Timber**; Any text you like.

**Width and Depth**; Any dimensions you like.

**Position**; Any text you like.

**Qty**; Enter any amount you like. The Total field will recalculate.

**Lth**; Enter any amount you like (millimetres or feet/inches). The Total field will recalculate.

**$Sell**; Any amount you like. The Total field will recalculate.

**UOM**; Select from the pop-up list. Total Cost will recalculate.

**Total**; Same as for Blank (above).

##### All Types

The following columns are visible only when the **Show Loose Item Group Columns** checkbox is ticked in the **Inventory** tab of the Preference window. They are relevant only if you want to categorise your loose items into Stair, Unit, and/or Balustrade/Stair.

**Stair**; The number (index) of the relevant stair (generally the first stair is the first stair you create in the design, and they increment upwards as you add further stairs). You can see the stair number by right-clicking in the Stair Setout pane of the Design window and selecting “Show Stair Id”.

**Stair**; The number (index) of the relevant unit within the stair (generally the first unit is the top unit and they increment upwards as you move down the stair).

**Group**; Stair or Balustrade. Only relevant if you use the **Split Quote** or **Active Stair** features in the Process window.

Changing a value to the same value does not trigger a recalculation; Be sure to change to something different then change back again if you want to pick up on new defaults, etc.

### Total

Shows the sum of all items in all **Show** modes.

## Miscellaneous Defaults window

### Overview

From : Defaults menu ; **Miscellaneous Defaults** menu-item

Here we set the default terms of trade for new clients, and miscellaneous information that affects the way stairs are costed.

To amend a setting, double-click the setting, change the value, then either press the **Enter** key or simply click somewhere else. See Editing.

### Applies to

Much of the discussion that follows relates to settings above, the Quote Calculation window and the Quote Breakdown window.

By way of introduction, total labour and materials as shown in the Quote Calculation window can be broken down (see Quote Breakdown window) as follows:

P Parts total (sell price)  
L Line-Items total (sell price)  
M Timber total (sell price)  
B Labour Build (includes Preparation, Turning/Machining and Assembly)  
D Labour Deliver  
I Labour Install  
T Truck

In your business, each of Overhead, Profit, Discount, Tax 1 and Tax 2 may apply to none, some or all the above categories. Here you get to choose.

For example, look at the line “Overhead applies to”:

If overhead applies to Parts, type a “P”. If it applies to Line-Items, add an “L”. If it applies to Timber, add an “M”, etc.

For example, if “Profit Applies To” = “PLMT” this means that the profit percent (shown in the Quote Calculation window) will apply to the totals for Parts, LineItems, Timber and Truck (and profit will not be applied to anything else).

These values can be overridden on a job to job basis in the job’s Quote Breakdown window.

**SPECIAL NOTE**

If you set that overheads do not apply to some categories, be sure to also remove those categories from the **Total Lab & Materials pw** setting in the Overheads tab of this window. See note under that heading.

##### Tax 2 ignores Tax 1

When set to False, Tax1 is calculated based on the SubTotal and Tax2 is calculated based on the SubTotal plus Tax1. When set to True, Tax1 is calculated based on the SubTotal and Tax2 is also calculated based only on the SubTotal.

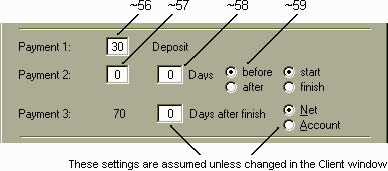
### Batching Materials

See Chapter 22: Miscellaneous Topics/ Materials: Batching & Descriptions/ Batch settings in the Miscellaneous window.

### Client Terms

The four items below set the default terms of trade shown in a job’s Client window (where it is amendable for that job), and for a new client in the Client List window.

The following shows the relevant part of the job’s **Client** window.



##### Due 1 as % of quote

The percentage of the total quote price that the client is expected to pay as a deposit (i.e. Payment #1). If it is unusual for you to request a deposit, set this to zero.

##### Due 2 as % of quote

The percentage of the total quote price that the client is expected to pay sometime after the deposit but before the final payment (i.e. Payment #2). If it is unusual for you to request an interim payment, set this to zero.

##### Due 2 Days before/after

The number of days before or after the start or finish of the job that Payment #2 is expected. If this is set to zero, then the **Before** and **After** buttons shown above become irrelevant (only the **Start** and **Finish** buttons would be relevant).

##### Due 2 Before/After

The code for when Payment #2 is expected. Use a 1, 2, 3 or 4 as follows:

Before start of job = 1  
 Before finish of job = 2  
 After start of job = 3  
 After finish of job = 4

##### Due 3 Days after

The number of days after the finish of the job that Payment #3 is expected.

##### Due 3 Days Is account

If there terms are Net set to “N” (no); for Account set to “Y” (yes).

### CNC

##### Item Labels

Set True to display these labels on each item on the CNC Bed in StairBiz.

##### Session CSV path

A CSV file is a file with “comma separated values”. In this case, StairBiz can write a file to this path on your disc containing information about the export.

##### Set winder risers back

For the purposes of strings on the CNC bed only, StairBiz will move the angled risers of a split or kite landing back (away from the nosing) by this amount. This may be useful if you want to behave as if these risers are not trenched (i.e. the riser will now butt up to the face of the string).

This feature is not supported – we do not vet that the value you use is appropriate for any particular job.

### Design

##### Show Sawtooth Width

In the Design window (Setout pane) you can right-click a white space and select “Show Sawtooth Widths” to set the width dimensions to extend to the end of sawtooth treads (as opposed to the outside of the strings). Here you can set this as the default mode (Y/N).

##### Arrow on each unit

If you want the “UP” arrow (shown at the bottom or top of each stair) to show on every unit of the stair, in the Miscellaneous Defaults window (from the Defaults menu), set "Arrow on each unit" = “Y”.

##### Default Wall Thickness

Sets the default wall thickness (used when you right-click a well line and select “Draw Wall”).

##### Active Stair/Balustrade alert

When Stair or Balustrade (but not both) are Active (checkboxes in the Process window), an alert indicates such in the Alerts window. This setting enables/disables these alerts.

##### Dogleg dim relative to straight unit (Y/N)

When a dog-leg is on the wall side of a straight flight with a landing above, the dimension determining the position of the dog-leg is currently from the back of the landing. If you want it to always be from the zero point of the straight flight (usually the front of the top riser), set this to ‘Y’.

### Filters

##### Suffix PartId with description

In the Part Filters window, in the **PartId** column, there is a drop-down list of parts from your Parts window. Normally the PartId’s in this list include a suffix showing the Style and Description from your Parts window. If your descriptions are long this can be unwieldy. To turn off these suffixes set this to “No”.

### Is This Balustrade

When you use the Split Quote feature (split into stair and balustrade separately - see Process window), StairBiz needs to know which components are stair and which are balustrade. In many cases this is obvious (e.g. treads, strings etc.). In some cases it is not obvious. In such non-obvious cases you can specify which is which here.

NOTE:

These **Is this Balustrade** settings apply in all cases to the Cutting List view window. However, for the Bill of Materials and Materials Cost view windows, these settings apply only to components that are blanks (i.e. not parts from a filter, in which case the **Result Type** setting in the Filter Properties window determines whether the component is stair or balustrade).

This may be inconvenient in some cases, but the reason is that the Cutting List completely ignores the filters, and thus cannot know what the **Result Type** setting in the Filter Properties window is.

### Import Job from Text

See Chapter 22: Miscellaneous Topics/ Import Job from Text.

### Images Save to Job

StairBiz saves images in a job (3D captures from the 3D window, draw field overrides in Custom sheets, Draw windows and picture annotations). In most cases these images are relatively small, and don’t take up too much room in the database (e.g. a stair plan drawing might take about 60K). However … some of our clients are using photos to override Draw fields (these are extremely large – up to 2000K) , and as monitors get larger and have higher resolutions 3D captures are getting larger and larger (up to 1000K). StairBiz is not designed to handle these very large images, from two points of view: 1) When saving and opening jobs across a network, slower or busy networks can “time-out”, and you could lose the image, and 2) The Microsoft Access database that StairBiz uses was never designed to store lots of large images (it gets bloated rather quickly).

There are things your can do to manage this situation (also see Managing Images).

The following relates to Custom Sheet drawing overrides (which includes 3D capture) and Draw windows (under the Draw menu, not including Scrap Pads). It does not apply to images used in annotations – simply try to keep the size of these under control yourself (i.e. use them only for drawings – not photos or 3D captures). It does not apply to Style Photo images (which are never saved with the job).

##### 3D capture Save Type:

This relates to the functionality of the 3D Capture tool in the 3D window. A setting of “0” means always save the resultant image with the job (this is how it’s been working until now, and is still the default mode, but probably shouldn’t be); “1” means never save this image with the job (however, the image is available to the Custom sheets until the job is actually closed), and; “2” means each time you use the capture, prompt the user for whether or not he wants to save it with the job.

Note that you are far better setting this to “1” (never save), and, if you want to save the image, instead save a “snap-shot” of it using the Snapshot tool in the 3D window. This requires less than 1K instead of up to 2000K for the actual image, and allows you to recreate that exact image at any time with a single click (it’s just that you have to wait a few seconds for the 3D to render).

Note that you can also manually delete the image after using the Capture tool (click the Capture tool while holding the Control key down) – the image will be available while the job is open but will not save with the job. You can also delete the image (immediately) by reverting the drawing override in the Custom Sheet.

##### On Compress delete all images older than (weeks):

If you enter a number of weeks here (for example “12”), when you do a database compact (see Project menu) StairBiz will delete all images from all jobs which are older than this many weeks. Note that the weeks are from the creation of the job (i.e. usually the same as the Job Date, but not necessarily). Note that Job Templates are not affected.

##### On Compress delete all images with Job Status set to:

You can also tell StairBiz to (upon a database compact) delete all images from all jobs that have a Job Status (see Process window) set to one or more specific status items. Because you can change the names of the status items, and add your own, we use the index of the item in the list to specify which item. Separate multiple indexes with a comma. For example …

For status = Done (the 8th item in the Status list), set “8”.

For status = Payable or Done (the 7th and 8th items in the Status list), set “7,8”.

You can include any user-defined Status items. For example, you made have created a “Job Lost” item being item 10 in the list – you could set “7,8,10”. If you change any user-defined items in the “Job Status User Items” category of this window, be sure to fix the indexes here if necessary.

Note that Job Templates are not affected.

##### Alert if image size more than (thousand):

You can tell StairBiz to alert you if you create an image more than a certain size. For example, for 100K set to “100”. There is no consequence to this alert – it’s just to let you know. What you set it to depends on how often you save images with a job and how many jobs you keep in the database. It probably doesn’t matter if you save the occasional large image (e.g. 1000K), but if you save these for almost every job and you have lots of jobs, this would be way too much (we would recommend around 100K max). Set to “0” for no alerts.

##### Save job images to file if more than

Large images can be saved to files rather than in the jobs database. This is recommended where there are many jobs with images. See Chapter 23; Database Problems and Repairs / Saving Images to File

##### 3D snapshot on capture

In the 3D window, you can automatically take a Snapshot of the current 3D settings. It will be saved in the current Snapshot (if you haven't yet created one, one will be created called "Default").

This is ideal if you save your 3D to a Snapshot rather than to a Custom sheet (to seriously cut down on your database size) - also see other settings above.

### Job Status User Items

You can add up to five “User Defined” job status items (to appear in the Job Status pull-down in the Process window).

Enter the names of your items here (otherwise leave blank).

Items are added to the end of the current list (they can’t be inserted mid-way through the current list).

If you delete (clear) an item in the Miscellaneous window, and you have jobs that currently use that item, when you open the job it will show “<Undefined>” as the Job Status. We suggest you think carefully about the items you wish to add and in what order before you go selecting them in the Process window for specific jobs.

### Miscellaneous

##### Client List Delay

Advanced:

In the Client List window, as you scroll through the clients (using either the arrow key, or speed search) as each client is selected in the list StairBiz tries to fill the main window with that client's details. With slower connections to the server this can overload the connection and cause problems. This setting allows StairBiz to only try and load the client's details every 'x' tenths of a second (during which time multiple clients may have been selected in the list).

##### Default Job Flag Colour

Sets a default Flag Colour in the Process window for each new job (the Flag Colour is the colour you select from the far right of the Process window where it normally says "No Flags Set"). Enter a number from zero to six, as follows:

None=0; Red=1; Orange=2; Yellow=3; Green=4; Blue=5; Purple=6

##### Save Job As – Reset Job Details window

When you do a ‘Save Job As’ (from the Project menu), some like to reset the Job Details window back to the default settings. In the Miscellaneous Defaults window (Miscellaneous category) there is a setting for **Reset Details window on 'Save Job As'**: “0” = never; “1” = Prompt me first; “2” = Just do it.

##### Save Job As – Prompt to clear schedule dates

When you do a ‘Save Job As’ (from the Project menu), some like to always clear any existing schedule dates, others like to be prompted first. “T” means prompt first; “F” means just clear them.

### Overheads

These settings control how StairBiz calculates overheads. They are used in the Quote Calculation window, and can be seen in the Quote Calculation sheet.

For a description of overheads see How StairBiz Allocates Overheads.

##### ~106 The Period (months)

This is your record (StairBiz doesn’t actually need it) of the number of months you are using for deriving the labour, materials and overheads totals used here. It would generally be 1, 3, 6 or 12 (but doesn’t matter). It would generally be an historical period (i.e. in the immediate past), but then the figures (see below) could be adjusted to predict the situation over the time ahead.

##### ~107 Total Labour per period

The total amount you spent on labour for all jobs during the Period. Include only labour associated with preparation, turning, assembly, delivery and installation of jobs. Include both staff and contract labour (unless you have specifically excluded contract labour under the **Applies To** heading).

Costs associated with those categories of labour (i.e. overtime, holiday pay, sick leave, superannuation, PAYE tax, etc.) can be handled in one of two ways. If they are included in your staff rates as entered in the Labour Filters window, then they must be included in this labour, otherwise they should be treated as an overhead and go in with the overheads total (see below).

Do NOT include labour costs for sales, administration or management staff.

##### ~108 Total Materials per period

The total amount you spend on materials for all jobs during the Period. Include timber wastage.

##### SPECIAL NOTE

If you set that overheads do not apply to some categories of labour and/or materials (see **Applies To** tab in this window), be sure to also remove those categories from the above Total Labour and Total Materials figures. For example, if you set that overheads do not apply to Parts, then do not include parts in the Total Materials. If overheads do not apply to parts, when StairBiz calculates (for a job) the total materials for the purposes of calculating overhead, it removes parts from the equation. You must do the same with the totals mentioned above, otherwise the proportion will be wrong and your total overheads will not be allocated fully across your total jobs.

See a similar note under the Materials Factor (next heading).

##### ~52 Materials Factor as %

Sets the percentage of both the **Total Materials per period** (above) and the materials total for a job which should be used to calculate overheads for the job.

This is used where you want to “weight” the materials content of a job (relative to the labour) for the purposes of calculating overhead. For a neutral weight, set this to “100” (i.e. 100%).

For example, let’s say that for a pine stair your labour is $500 and your materials are $500. For the purposes of calculating overhead, your labour and materials are $1000. Let’s say for the same stair in mahogany, your labour is $500 and your materials are $1500. For the purposes of calculating overhead, your labour and materials are $2000. One could argue that the mahogany job should not be allocated double the overhead of the pine job (it simply doesn’t use double the business’ resources). One could also argue that if your did allocate double the overhead to the mahogany stair, it would be overpriced relative to the market and you simply wouldn’t win these jobs (and because StairBiz allocates all overheads over all jobs, this would mean that your pine stairs are allocated too little overhead relative to the market and you would start winning too many of these jobs).

The solution (if this is either a logical or a market driven issue for you) is to devalue the materials (relative to labour) for the purposes of calculating overhead. For example, if you set this value to “50” (50%), this means that for the purposes of calculating overhead, StairBiz considers 100% your labour plus 50% of your materials. In the above example, for the purposes of calculating overhead the pine stair’s labour and materials would be $750 and the mahogany’s would be $1250 (167% of the pine, rather than the original 200%).

SPECIAL NOTE

If you set a percentage other than “100”, StairBiz still allocates all overheads across all jobs. It’s just that it does this ON AVERAGE. The proportion of overheads to labour and materials might change from job to job (to reflect business logic and reflect market reality), but at the end of the day all your overheads are covered (to the extent that your values in this window are accurate).

##### ~51 Average Overheads per period

Your figure doesn’t have to be exact. For example, if the overhead component of a job is about 20%, and you are 10% out on your average overheads, then the costing of each job will be out by 2% (i.e. 20% of 10%) – significant, but probably not lethal.

### Quote Calc

These settings control some of the calculations involved in quoting a job. They are used in the Quote Calculation window.

##### Profit as Percentage

In the Quote Calc window, the Profit Percentage used can be a 'markup' or a 'margin'. A markup is where profit is calculated as a percentage of cost (labour, materials, overhead and truck). A margin is where profit is calculated as a percentage of the sale price. Markup is probably a more intuitive way to calculate profit and sale price (i.e. predicatively), but you have the choice.

Either way, that percentage is set here.

The method used is set in the Setout window (Quote Calc category).

##### Tax 1

The percentage amount to add to the total for job, being state and/or federal tax. It is the default value shown in the Quote Calculation window for each new job.

##### Tax 2

The percentage amount to add to the total for job, being state and/or federal tax. It is the default value shown in the Quote Calculation window for each new job. It is applied to the total amount for the job after Tax 1 has been applied.

##### Split Quote by default

The Split Quote feature (see Process window) can be set by default for all new jobs.

##### Use roundup only for pricing

Normally roundup (a special kind of wastage set in your Timbers window and your Extra Lengths window) applies to both your pricing and to the cutting list. Now, if you want it to apply to pricing but not to the cutting list (and BOM etc.), this is the default setting (see also the Materials Cost window for a job ('Roundup only for pricing')

##### Default charge for Truck

In the Quote Calc window there is provision for a truck charge. Here you can set a default value for each new job. Note that this setting applies to all new jobs regardless of the Dispatch setting in the Job Details window.

##### Treat Discount as Commission

The *Discount* field in the Quote Calculation window can alternatively be used as a *Commission* field. When used as a commission field, the amount is ADDED to the quotation (rather than deducted).

This setting sets the default behaviour for all new jobs.

To change it in an existing job double-click the Discount label in this Quote Calculation window.

### Special Labour

Although not the usual, some companies calculate labour as a percentage of materials. Because the labour filters have no provision for this, provision is made here.

There are two categories; Build (which adds a labour item to the Assembly labour category) and Install (which adds a labour item to the Install labour category).

To add a labour item to either or both, first type the percentage (e.g. “35%”) followed by which materials category you want the percentage based on (see codes in **Applies to** above).

For example “35%PM” would create a labour item calculated as 35% of total parts and timber, and “20%L” would create a labour item calculated as 20% of total line items.

You can also use this is add a percentage adjustment to labour (i.e. the labour items added do not replace labour items generated by the labour filters).

There is nowhere in any single job where these percentages can be adjusted (they are defaults only), so to adjust them on a job by job basis you will need to select “Manual Mode” in the Labour Cost window and make the adjustment manually.

### View Sheets

##### Space Between Running Dims

Sometimes the space between horizontal running dimensions in View sheets (e.g. Treads) varies from computer to computer. If the space between these dimensions is such that the dimensions seem to run in to each other, you can add extra space here. The value is in pixels.

##### Mat Cost; Don't show $0.00 items

If you don’t want to see materials or parts with a zero dollar value in the Materials Cost sheet, set this to Y (yes).

##### Sheets with lists orient landscape

The Cutting List, BOM, Materials Cost and Labour Cost View sheets normally have a landscape orientation (i.e. they print sideways). If you prefer the portrait orientation then set this to “N” (no). When you print, StairBiz automatically sets these orientations in your printer – you do not have to.

##### Sheet Header

View sheets by default include the Job Name, Job Number and Job Date at the top right. You can control this header by entering one or more of the following letters (upper caps);   
 J=JobName   
 C=ClientName   
 A=Site Number & Street  
 S=SiteSuburb  
 Z=Site Zip   
 Q=QuoteNum   
 N=JobNum   
 D=JobDate.

You can enter other characters and they will be printed. If you don’t use spaces, spaces will be inserted.

If you leave this setting blank the above default is used (“JND”).

##### Hide Profit Column in Project Info Sheet

The Project Info view sheet normally shows a **Profit** column (unless the user's permissions doesn't allow it). This setting hides this column.

##### Weights

Determines what is shown in the Weights sheet. See Chapter 22 : Miscellaneous topics / Weights and Volumes. Note that the Weight checkbox must be ticked in the job's Details window.

##### Labour window sort by Category

For both the Labour Cost window and the Labour Cost sheet, you can optionally swap the **Stage** and **Category** columns. This might be useful to group items by their category, rather than by their stage (e.g. all “Tread” items would be grouped, regardless of Prep, Build, Install, etc. stages).

## My Data Defaults window

From : Defaults menu ; **My Data** menu-item

Imagine that for every job, you need to save certain information that StairBiz does not provide for (e.g. “Stair Is Carpeted”). In this window you can create as many “user” fields as you like. Any fields you create in this window will show up in the My Data window for every job (and information you enter in that window will be saved with the job).

My Data fields can ultimately contain anything (i.e. numbers, currency, dates, text).

MyData field columns can be included in the Directory window. Editing these fields in the Directory window directly changes the field values.

MyData fields can be included in Custom sheets. Editing these fields in the Custom sheets directly changes the field values (i.e. it is not the same as an override).

#### Advanced Management license

Some of the features shown below might not be applicable to standard StairBiz licence and are only available to the "Advanced management" license.

The standard license only contains provision for up to 20 MyData fields, and does not have provision for the setting of Macros.

The Advanced Management license allows unlimited fields, and allows for Macros.

#### Add Field

Opens the MyData Field window for creation of a new field.

You are allowed twenty fields. If you need more fields than twenty, please contact StairBiz.

#### Modify Field

Opens the MyData Field window for amending the currently selected field.

#### Delete Field

Deletes the currently selected field.

Note that when you delete a field, you also delete the information contained in this field in every job saved in your database.

#### Move Up

Moves the currently selected field higher in the list.

#### Move Down

Moves the currently selected field lower in the list.

### The grid

The grid shown on the left of the window lists your current MyData fields. For a description of the columns, see the next heading.

### MyData Field window

#### Field Name

Enter a **Field Name** to uniquely identify the field (duplicate names are not allowed).

The name can be up to 25 characters long.

The following characters are safe to use in a Field Name; A-Z, a-z, 0-9, and the underscore "\_". You can use other characters ("+", "-", "/" etc), but if you do you will not be able to use this field as a column in the Directory window (you will be alerted when you create/amend the Field Name). We do not recommend you use such characters.

You can subsequently change the field name without losing any data associated with this field in existing jobs (including jobs in external databases (e.g. Archives).

#### Field Type

There are six types of fields. The type will determine what StairBiz allows you to enter as a field value in a job, and determines how StairBiz can process the data (for example, in a macro).

**Text**

Can hold any text of any length.

**Currency**

Can hold a currency amount. StairBiz will correctly format this value when it is displayed.

**Check**

Can hold 'Yes' or 'No'.

If you need to provide for a "[Blank]" (simply meaning "not yet set") value in a Check field, change it to a pick-list (containing, for example, items "Yes and "No". "[Blank]" is always an option in a check-list.

Note that you are able to convert from a "Check" to a "Pick-list" type safely without affecting existing jobs (see below).

**Date**

Can hold a date and time. StairBiz will correctly format this value when it is displayed, and will correctly sort the date values where appropriate (date types sort differently to a date held as text)

**Pick-list**

Allows you to select one of a list of predetermined values. Enter your predetermined values in the list on the right. You can change these at any time.

**Macro**

A Macro allows you to manipulate data held in StairBiz jobs (including but not limited to data held in MyData fields), plus a whole range of other possibilities. It's like being able to do your own programming.

Advanced - contact support.

**Changing Types**

After you create a new field and set the 'Type' of field, you can only subsequently change the type as follows:

You cannot change a Macro type.

Apart from a Macro, you can change ANY type to a Text or a Pick-List.

You cannot change any other type.

#### Default Value

All fields can have a Default value. This is the value of the field when you create a new job. A default value is optional (if you don't really need it, do not enter a default value).

However, you cannot set a Default Value for a "Check" field (the default is always "No"). This is because StairBiz does not save MyData values in a job where the value is empty (contains no text) or the value is the Default value. This stops the jobs database from bloating.

In a job's MyData window, if a field has a Default value you need to be aware that if you set the value to nothing (i.e. if you remove all text from the value) the value will revert to the Default value. For example, if the Default value for a "Text" field is "Needs Measure", and you delete the text from this field, when you re-open the MyData window for the job the value will show "Needs Measure". This is because StairBiz does not save empty MyData values in a job (to stop the database from bloating). If there is no record, StairBiz assumes it should use the Default value.

The exception to this is a "Pick-List" (where you can always select the "[Blank]" value, and this value will save with the job if that field has a Default value).

Note that you cannot use a space character to try and fool StairBiz that there is nothing in the field (StairBiz strips leading or trailing spaces). If you want to override a Default value, you have to set another value (if you want to indicate that the field contains no value you could use something like "-").

You can change this Default value at any time, but be aware that Default values are not saved with a job (if a job contains no value for field, StairBiz assumes the Default value, if any). Which means that if you change or delete a Default value for a field, all existing jobs previously saved with this Default value (in reality, not saved with any value for this field) will now have the NEW default value.

In the case of Pick-List, it's more efficient to have a Default value, rather than most times select the value most used. This is because a Default selection is not saved in the job, whereas all other selections are, so it saves space in your database.

#### Group Name

Fields can be arranged in groups. You can optionally enter a group name here.

#### Use in Filters

If ticked, this field can be used in the Filters window.

#### Clear during Job Save As

If ticked, this field will be cleared when you do a 'Save As' on a job. If the field contains a Default Value, it will not be cleared.

#### Description

You can optionally enter a description of this field. It is simply to help you note anything about this field or how it is used.

#### Macro

If the Field Type is 'Macro', this is where you write your macro. Advanced - contact support.

#### Expand

Expands the Macro field.

#### OK

Saves your changes and closes the window.

#### Cancel

Cancels your changes and closes the window.

## My Data window

From : Process menu ; **My Data** menu-item

This window is specific to any one job. It contains the names of all fields you have created in the My Data Defaults window (i.e. fields that are additional to all the standard job fields that StairBiz provides).

Information you enter into this window will be saved with the job.

These fields can be included in Custom Sheets, and are shown and can be edited in the Directory window.

## Notes window

From : Process menu ; **Notes** menu-item

Use the **Notes window** at any time to jot down anything about the job you wish to record, or any notes, memos or reminders for your staff.

All the features of the Quote window apply to this window.

## Open Project window

### Overview

From : Project menu ; **Open Project** menu-item, and Process window; **Open** button.

Select the project folder from the folder list – a list of projects in that folder displays on the list on the left.

Select the project from the list – a list of jobs in that project displays on the list on the right.

If you double-click the project name, the first (or only) job in the list on the right (i.e. the one selected) will open, otherwise double click the required job in the list on the right. Note that all jobs in a project will be shown (and can be opened from) the **Jobs** menu.

#### Default Project Folders:

The project folder selected in this window when it first opens is the same as the last folder used to open or save a project. If you want to change this behaviour click the D button to the right of the folders list.

To make the currently selected folder the default folder when this window opens, click **Open**.

To make the currently selected folder the default folder when you start a new job, click **New**.

To revert to the default behaviour (i.e. the default folder is the last folder used) for either, hold the **Control** key down while clicking the button.

## Part Filters window

### Overview

From : Defaults menu ; **Part Filters** menu-item

Only applicable for Estimate module.

The Part Filters window is optional. You do not need to use it unless you have a specific reason to do so.

Without any reference to parts whatsoever, StairBiz can very accurately specify the *blank items* (including timber, width, depth, length and quantity) for every component (except for hardware) in the stair/balustrade as designed. This will show in the Cutting List sheet for the job.

However, some companies need to take that *Cutting List* and cross reference those items against particular Part Codes (SKU numbers) to come up with a list of specific parts. This process if sometimes called a “take-off”. You may also want to add items to the job which are not specified in the Cutting List (hardware etc.)

In this window you can create filters that will automatically do this. These filters can then be selected in the Components window of a job. StairBiz pushes every component of the design through the appropriate filter. Based on the various properties of each item, and the criteria you present in the filter, parts are added to the Bill Of Materials (note that these parts must have previously been loaded in the Parts window).

Two examples …

1. For each stair baluster on a sawtooth string specify a dowel with part id DW842
2. If a tread is less than 275mm wide, is between 900mm and 1000mm long, and is Oak, then specify part TDK725 for this tread

### How parts are costed

When a part is specified by a filter, the cost of that part is multiplied by the quantity for the part and added to the total cost for the job. The costs for parts can be seen in the Materials window for the job.

Parts in the Newels, Balusters, Frets, Wallbrackets, Acorns, Fittings and General categories are always costed per each (with no regard to length). Other categories are costed on a per each or per metre/foot basis, depending on the UOM specified for that part in the Parts window.

### Part Filters Window Layout

For a full discussion about the use of the Part Filters Window, please see Chapter 15 : Parts and Labour Filters.

Also see:

How StairBiz Costs Materials

Parts window

Components window

## Parts window

### Overview

From : Defaults menu ; **Parts** menu-item

Only applicable for Estimate module.

See Materials and Parts, Part Filters window, Part and Labour Filters, Components window, and Style windows.

The **Parts window** is where you list all the parts you use to build stairs and balustrading.

Before we begin, it’s important to know the difference between a *part* and a *blank item*.

A *blank item* is a component of the stair or balustrade that has been created from a piece of timber (a blank) that has been pulled from your timber rack. In some cases it is simply cut to length (e.g. strings); in other cases it must be cut and profiled. Every component of a stair can be treated as a blank item (with the exception of wallbrackets, and hardware).

A *part*, on the other hand, is a finished component purchased (normally) from a supplier in its finished state. It may need trimming to length. It has a fixed price. It always has a PartId (SKU), whether this PartId has been assigned by the supplier or by you. Parts are what you enter into the Parts window.

Without any reference to parts whatsoever (i.e. even if you do not use this **Parts window**, and do not use the Part Filters window), StairBiz can very accurately specify the *blank items* (including timber, width, depth, length and quantity) of every component (except for hardware) in the stair/balustrading as designed. This will show in the Cutting List sheet for the job. However, StairBiz cannot automatically allocate specific Part Id’s to these blank items, and for some companies that’s important.

Parts can be allocated to a job in three ways:

1. The part is specified in the Style window of a component used in the job using the **Part Is** field.
2. The part is specified by a part filter (the filter must be first created in the Part Filters window and then selected in the Components window of the job)
3. The part is specified in the Materials window of a job in the Loose Items tab (i.e. extras for the job as specified by you).

Either way, that part must first be created in this **Parts window**.

### Category List

At the left is a list of all relevant parts categories. Plus there is an **All** category. Click the relevant category to view, amend or create parts for that category.

Newels are broken down into their locations, however there is also a **Newels All** category for parts that apply to all newels regardless of location.

There is also a **General** category for parts that may apply to *any* category (i.e. parts in the General category will show up in lists of parts for every category).

### Parts List

Shows the parts previously created for the relevant category. To edit the existing fields, click the field or tab into it, make the required changes, then press the Return key.

To delete all parts in the database and start fresh, hold down both the Shift and Control keys and click the **Delete** button.

Parts in the parts list are can be sorted by column – simply click the column heading.

For an explanation of why the Style, Timber, Width, Depth, Length, Flat, Turn, Sidenose and Radius Type columns might be more useful that it initially appears, see Parts and Labour Filters / Auto Filtering.

For an explanation of how dimension columns work (e.g. Width, Depth, Length etc.) see Parts and Labour Filters / Auto Filtering / How to auto-filter dimensions.

An explanation of each column follows:

##### Category:

Only shown for the All category. Select from the pull-down list. It shows the category for each part listed.

##### Style:

Optional. The style name. Select from the pull-down list. Can be used for auto-filtering. Max 35 characters.

##### Timber:

Optional. Select from the pull-down list. Can be used for auto-filtering. Max 25 characters.

##### Width:

Optional. A dimension. The section width of the item (horizontal). Can be used for auto-filtering. Not applicable to WallBrackets. For Fittings it is the width of the associated handrail.

##### Depth:

Optional. A dimension. The section depth of the item (vertical). Can be used for auto-filtering. Not applicable to WallBrackets. For Fittings it is the depth of the associated handrail.

##### Length:

Optional. A dimension. The length of the item. Not applicable to WallBrackets. Can be used for auto-filtering.

For fittings, it only applies to assembled goosenecks and is the height from the top of the horizontal section to the bottom of the vertical. If you disassemble you goosenecks this is not relevant.

For balusters, it should include any bottom pin length if the **Pin Bottom** option in ticked in this baluster’s Style window, in which case the length of the pin also needs to be set in the Setout window (Balusters ~19). If the bottom pin length is included here, it must also be included in the **Lower Flat** field (see below).

For newels, the length is measured from the top of the acorn (or upper flat if no acorn). For a detached base, the length is measured to the bottom of the turning (otherwise the bottom of the newel).

##### Turn Angle:

Optional. Applies to Fittings only. The angle of a Turn or TurnCap. A right-angle is 90 degrees. A 45-Lshape stair would use a 135 degrees. Can be used for auto-filtering.

##### Fitting Type:

Optional. Applies to Fittings only. Select from the pull-down list. Can be used for auto-filtering.

##### Lower Flat:

Optional. A dimension. Applies only to balusters. It is the lower flat for both pin-top and square-top (but is only relevant for balusters with “Fixed Lower Flat” = True in that baluster’s Styles window).

It can include any bottom pin length if the **Pin Bottom** option in ticked in this baluster’s Style window, in which case the **Bottom Pin Length** also needs to be set in the Setout window (Balusters ~19). If the bottom pin length is included here, it must also be included in the **Length** field (see above).

Can be used for auto-filtering.

##### Plow Width:

Optional. A dimension. Applies to handrail only. It is the width of any plow (zero or empty for no plow). Can be used for auto-filtering.

##### Block Length:

Optional. A dimension. Applies only to newels. It is the length of the upper flat (block) for PTP newels. It does not apply to OTP newels (set to zero). For square newels that have a detached base (rare but possible), the block length is from the top of the flat to the point of detachment, ignoring the pin length (and set Turn Length to zero).

Can be used for auto-filtering.

##### Turn Length:

Optional. A dimension. Applies to newels and balusters. Can be used for auto-filtering.

For newels it is the distance from the TOP OF THE FLAT to the bottom of the turning (yes, that's correct). For pin-top newels it is measured from the top of the turning (ignore the length of the pin). If newels are not turned, set this to zero.

For balusters it is the length of the turning (but is only relevant for balusters with “Fixed Lower Flat” = False in that baluster’s Styles window).

##### Sidenose:

Optional. Applies to Treads and Landings. Select from the pull-down list. Can be used for auto-filtering. It describes the presence or otherwise of sidenoses on the treads. See Parts and Labour Filters / Auto Filtering / Special properties for some categories.

##### Radius Type:

Optional. Applies only to Handrail and Wallrail. Select from the pull-down list. Can be used for auto-filtering. It describes the presence or otherwise of a radius (curve). See Parts and Labour Filters / Auto Filtering / Special properties for some categories.

##### Curved:

Optional. Applies to most parts that may somehow be associated with a curved part of the stair or balustrade. Select from the pull-down list (True/False). Can be used for auto-filtering. See Parts and Labour Filters / Auto Filtering / Special properties for some categories.

##### Description:

Optional. The details of the part (anything you like). Max 50 characters.

##### Part Id:

The unique id of the part – without a part ID the part does not exist. Max 25 characters.

If you need to include a single PartId in multiple categories, see Duplicate PartIds (below)

##### Prices (generally):

In any one job you have the option of choosing which parts price (i.e. that from Buy Price, Sell Price 1 or Sell Price 2) to use when costing parts for the job (this choice is made in the Materials window of the job). The default choice (i.e. the one used for all new jobs) is set here using the **Default Price** buttons.

Having three price columns allows you to adjust your parts pricing for a job instantly to reflect various situations.

##### Buy Price:

This can be any price you like, but you might note the discussion in **The Price of Parts** (below). If you have selected the “1” option in the **Default Price** frame then this column will be used to cost your parts.

See **Note to Developers** (below)

##### Sell Price 1:

This column is optional (only use it if you have a good reason to).

In the **Default Price** frame, if you have selected the “Sell 1” option then this column will used to cost your parts. This column can contain a price, or a percentage.

In the **Is Percent Inc** frame, if “Sell 1” (meaning **Sell Price 1**) is selected then this list carries a number being the percentage INCREASE of the **Buy Price**. For example, If **Buy Price** is $5.00 and **Sell Price 1** is 10% then the **Sell Price 1** for this part will be calculated as **Buy Price** plus 10% (i.e. $5.50).

In the **Is Percent Inc** frame, if “Sell 1” is not selected then this list carries an actual price (like in **Buy Price**). This price can be anything you like.

Whether a percentage or a price, if you leave any cell in this column empty then StairBiz will assume its price is the same as **Buy Price**.

##### Sell Price 2:

Operates in exactly the same way as **Sell Price 1** (see above).

##### UOM (unit of measurement):

Not applicable for Newels, Balusters, Frets, WallBrackets, Acorns, Fittings (where the UOM is always “each”, with no regard to length). Otherwise …

Select from the pull-down list. The price can be per each (“e”) or per metre/foot (“m” or ”f”), depending on your measurement system). If this part is costed as per metre/foot, enter “m” or “f”, otherwise type “e” (for “each”) or just leave it empty.

See **Note to Developers** (below)

##### Labour Cost:

You have the option of including an allocation for labour with each part. It is assumed that any such labour allocation applies only to the installation of the part. This column holds the contract amount ($) for labour (i.e. to be used when the cost method for installation, as shown in the Labour window for the job, is set to “Contract” (i.e. you are using the Contract method for installation).

If the UOM for the part is “e” (each) then this labour amount if for each item, otherwise it is per unit length of the component.

##### Labour Mins:

See previous paragraph. This column holds the minutes amount for labour (i.e. to be used when the cost method for installation, as shown in the Labour window for the job, is NOT set to “Contract” (i.e. you are using the Staff method for installation).

##### Waste:

Applies only where the unit of measure is Length (“f” or “m”). It does not apply where the UOM is Each (“e”). This can be a percentage amount to be added to lengths for the purposes of calculating inventory and materials cost, or can be a rounding-up to a specified multiple.

See: Chapter 22 Miscellaneous Topics / “Waste, Extra Length and Rounding Up”.

##### Hidden:

At this stage this field is not used for anything.

##### Note:

Optional. This field may hold a number from 1 to 9999. You can use it for anything you like, but it is normally used as the legend for standard notes. For example, “1” could mean a “Non-stocked item”. This note number is printed on all sheets which show parts (e.g. BOM). If your standard parts notes were numbered 1 to 9, you could use this field to include up to 4 notes (e.g. “1724” could mean refer to standard notes 1, 7, 2 and 4).

##### Notes2:

Optional. For extended notes for each part. This field in the list shows only the first 50 characters of your notes. You cannot edit the notes directly in this field - instead double click either inside this field, or in the margin for that row, and a text window will open. In this window you can view/modify the full notes.

### Buttons

##### Add

Creates a new part transaction at the end of the list, ready for input of the relevant details. This button will be disabled for the **All** category (you must be in a specific category to create a new part). Short-cut is Alt-A.

##### Insert

Creates a new part transaction immediately below the currently selected part, ready for input of the relevant details. The **Description** and **Cost** will be the same as the previously selected part until you change them.

##### Delete

Deletes the currently selected part. If that part is referenced by a style (Part Is) or a part filter, you will need to amend those items in their respective windows – StairBiz will not do it automatically.

##### Export

Allows you to export the entire parts list to a Microsoft Excel spreadsheet. See Export Parts below.

##### Import

Allows you to import an existing parts list from a Microsoft Excel spreadsheet into the Parts window. See Import Parts below.

##### Print

Prints the current list.

##### Default Price

Indicates which price column you want to use to price parts in each new job. This can be changed on a job-by-job basis (if necessary) in the Materials window for that job.

##### Is Percent

Indicates which of the Price 2 and Price 3 columns are using a percentage basis rather than an actual price basis for pricing the part. See the discussion under the **Parts List** heading (above).

##### Group

Sometimes several parts always come together in a group (sometimes called an assembly). For example, a gooseneck may be made up of several fittings. In a StairBiz job, it may be convenient to be able to select or specify the entire group in one hit. The Group feature allows you to create or modify such part “groups”.

A group is a pseudo part, or “header” (not an actual part) that can be selected like any other part, except that when it appears in the BOM for a job it expands out into two or more actual parts (i.e. all the parts in the group).

To create a group …

1. Create a part that will be the group “header”. It will need a PartID, and you may include other columns for the purposes of auto-filtering (price columns are not relevant).
2. In the **Group** frame at the top of the window, click the **Open** button. StairBiz will prefix the PartId with an asterisk. (Note: do not prefix any part that is not a group with an asterisk – this is the only way StairBiz knows that a this item is a group heading rather than an actual part.)
3. A separate list (the **Group List**) opens below the parts list . The group description (i.e. as shown in the Description field of this group item) is shown above this list. (Note that after you click **Open**, this **Open** button changes to a **Close** button – when you have finished the group work you must close the list to resume normal work in the parts list.)
4. Navigate to any actual part in the parts list, select it, and click the **Add** button – this part is added to the group and will appear in the group list at the bottom. Note that you can add parts from any category (you are not confined to the category of the group item).
5. To delete an item in the group list, select it and click the **Delete** button. This does not delete the actual part – it only detaches it from the current group.

Note that group items (i.e. those prefixed with an asterisk) perform no function other than to act as a group header. A group item with no parts in its list is redundant.

When a group item is selected or somehow specified anywhere in a StairBiz job, when that item is being processed by StairBiz for inclusion in the BOM, StairBiz will replace the group item with all the actual items in that group.

##### Allow List Searching

This provides a fast way to find any item in any column of the parts lists.

With this checkbox selected, select any field in the column you wish to search. Start typing the word you are looking for. As you type, the row selection will scroll to the first item that matches what you have typed so far.

You cannot edit in this mode – unselect this check box to resume editing.

##### $ Update

Opens a window that allows you to increase/decrease the prices of parts by a percentage amount. Also allows you to update prices in the Parts window from a price update spreadsheet (probably obtained from your parts supplier).

See Part Price Change window.

##### Show Not Updated

When you update prices in the Part Price Change window, StairBiz tags all items in the Parts window that did not get an updated price (because StairBiz was not able to find that item in the price update spreadsheet. To show these items, click this button. To export only these items, do an export with this button ticked.

### Duplicate PartIds

There may be times when you want a single PartId (SKU) in different categories in the Parts window. For example, maybe your Outstep and Balcony plate share the same parts. StairBiz does not normally allow duplicate PartIds. The solution is as follows:

If you want to include a PartId in a particular category, but that PartId already exists in some other category, append the duplicate PartId with a “&” (e.g. in a second category “B256” would be “B256&”. You can have as many such duplicates as you wish. When StairBiz processes a PartId, it first strips any “&” suffix, which then points StairBiz to the original PartId.

A part in the Parts window that is a duplicate does not need prices (StairBiz refers to the original PartId for this) although it will need an entry in any columns required for auto-filtering.

### Note to Developers

If you look at the Parts table in the defaults database, you might be surprised to find that some prices are different to those you see on your screen. This is the case for items with a UOM in feet – StairBiz holds all currency relating to lengths as a cost per metre (in the same way it holds all lengths as hundredths of a millimetre, regardless of your chosen UOM). To convert from price-per-metre to price-per-foot, divide the price by 0.3048.

### The Price of Parts

Some like to price their parts in this window at cost. Others like to add a profit margin. Obviously you can do it any way you like, but there is an argument for the “at cost” method:

It’s always useful to know the net cost of each stair that goes out your door (as shown in the Quote Calculation window). If you are adding profit to the parts in this window, the calculated net cost of the stair will not reflect the actual situation (it will have some profit included already).

If you have different profit margins for different parts (reflecting either variable purchasing power or the fact that you manufacture some parts yourself), this presents a problem (adding an across-the-board profit margin to the net cost of the stair assumes that profit on each item in the stair is the same). The work-around could be as follows:

Set up two profit centres (theoretical divisions) for your business – one for stairs and the other for parts. The Parts Division sells parts to the Stair Division (at whatever profit for whatever part, although it makes sense that each price is competitive in the real market). This way your Stair Division and Parts Division can each face their respective (and different) market realities, and you can now list the “cost” price in the Parts window (being the cost to the Stair Division of those parts, whether you purchased them from your Parts Division or from a 3rd part vendor).

### Export Parts

NOTE: Do not use Export Parts as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

Click the **Export button** to export parts in the StairBiz database to a Microsoft Excel spreadsheet.

1. If the current category is “All”, StairBiz exports all parts from all categories. If the current category is other than “All”, StairBiz will give you the option of exporting all categories or just exporting the current category.
2. Then you are presented with the **Save As** dialog box. Enter a name for the Excel file, or choose an existing file to overwrite. Click the **Save** button.
3. If you select an existing file name, you will be asked if the file is currently closed. If it not, click **No**, close the file, and try again.
4. Wait until you get the message “Export Completed”.

Open the exported spreadsheet and have a look:

When you open the Excel spreadsheet, if you get a message that starts *"The file you are trying to open"*, simply click "Yes" to continue opening it.

The first row in the spreadsheet is a “master header” row (yellow), showing the purpose of each column. Never delete this row from your spreadsheet – it contains version and other tags that are needed by any subsequent import of this spreadsheet.

Each different category also has its own header row (grey), because some columns are used for different purposes depending on the category.

There is no reason why you can’t delete header rows if you like (on import, StairBiz checks the “PartId” cell in each row – if it contains the heading “PartId”, the whole row is ignored – i.e. header rows are irrelevant for the purposes of import).

If there is a category with no entries to export, StairBiz will still export that category’s header row, plus another row showing “?” in each cell except the category cell. This extra row is to make it easier for you to start creating entries for that category (the “?” helps keep rows in a logical order during a spreadsheet sort). On import, StairBiz will ignore any row that has a PartId = “?” (so you don’t need to delete these redundant rows prior to an import).

When sorting the spreadsheet, be sure to indicate that there is a header row (the yellow one).

For an explanation of the columns/fields, see **Import Parts** (below).

### Import Parts

NOTE: Do not use Export Parts as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

Note that it is always best to import a spreadsheet that has previously been exported from StairBiz. This is because the exported spreadsheet contains the version number and other tags in the header (first) row that StairBiz needs to read on import.

Click the **Import button** to import a list of parts from a Microsoft Excel spreadsheet into the StairBiz Parts List (study the following before doing anything).

If you are importing more than a single category, a dialog window opens – select what you want to do, as follows:

#### Import Options

**First delete existing parts from database**

Tick this if you want to delete all parts in your database prior to importing the new ones. If for some reason the import is aborted, the existing parts are not deleted (StairBiz does a roll-back of your original Parts window).

**Create Timbers from spreadsheet**

Tick this is you want StairBiz to automatically create new timbers in your Timbers window using the timbers contained in your Parts spreadsheet.

NOTE: If you do not tick this, and you have any timbers listed in the Timber column of your spreadsheet, these timbers must exist in your Timbers window prior to this import (otherwise StairBiz will alert you and abort the import).

**First delete existing timbers from database**

If a timber in the Parts spreadsheet already exists in your database, under all circumstances (i.e. regardless of this setting) StairBiz will simply leave the existing timber as is (i.e. with all its current settings).

If you tick this setting, any timber that are currently in the database are NOT contained in the Parts spreadsheet will be deleted.

**Create Styles from spreadsheet**

Tick this is you want StairBiz to automatically create new styles in your Styles window using the styles contained in your Parts spreadsheet.

StairBiz determines that a row of your spreadsheet contains a style by looking at unique (distinct) combinations of Category/StyleName/Width/Depth. All four fields must contain something (except in the case of WallBrackets, in which case Width/Depth are ignored).

In the case of Newels, StairBiz is not able to determine the height of Acorns – you will need to set these manually in the Style window for the newels.

In the case of Newels, StairBiz determines positions as follows: If the newel is contained in a specific newel category in the spreadsheet (e.g. Newel Bottom), StairBiz will give that newel that position in the Style window. If that same exact style in also contained in the NewelsAll category of the spreadsheet, StairBiz will give that newel all positions that are not taken by newels of the same style in specific categories.

In the case of Balusters, StairBiz determines that it is a pin-top baluster if Length = TurnLth + FlatLth.

In the case of Balusters, StairBiz determines (for the Style window) the turn and flat heights for each of stair and balcony based on a rather complicated combination of factors. If these factors become too complicated and you feel the results are not accurate, contact StairBiz support.

StairBiz sets all styles as “Part From Filter” (except WallBrackets, which are usually set as “Part Is”).

**First delete existing styles from database**

With this ticked, any styles currently in your database that are NOT contained in the spreadsheet will be deleted.

If there are no styles for a particular category listed in the spreadsheet, regardless of this setting StairBiz will not delete any items for this category from the database.

**Create Timber Themes from spreadsheet**

Tick this is you want StairBiz to automatically create new timber themes in your Timber Themes window using the timbers and styles contained in your database following the this import.

#### Creating the Spreadsheet

To set up such a spreadsheet (PRIOR to attempting an import), do as follows:

1. Most databases allow you to export to an Excel spreadsheet, so if your parts are in a database you will need to do this first.
2. It is CRITICAL that the spreadsheet contains at least 20 columns in a very specific order. To see what columns are required and in what order they are required, do an Export as discussed above. Open the exported file and study the column headings. There is a discussion below about each of the fields/columns.
3. If the spreadsheet contains more than 20 columns, that’s OK (the extra columns will be ignored, even if they contain data).
4. Even if a required column contains no data (i.e. you do not have that field/column in your existing client database/spreadsheet), you must still include it in the spreadsheet to be imported.
5. The spread-sheet may contain header rows (yellow or grey rows describing the contents of the column). StairBiz ignores them (provided the PartId cell contains the word “PartId”). StairBiz also ignores any row where the PartId cell contains a question mark (?).
6. There must be no empty rows before the end of the list. When StairBiz finds a row without any text in the first column, it assumes there are no more parts.

#### Column Explanations

Note that the following columns/fields correspond to those in the Parts window. For a description of the field, see above.

Field Name Notes

1) Category Must contain the exact wording shown in the categories list to the left of the parts list in this window. Note that you may have changed these terms in the Languages window, and might not have been changed them in this manual – the terms you use must correspond exactly with the categories as shown at the left in the window. You might first like to do an export and study the terminology – these are the terms you must use.

They will probably (mostly) be as follows:

Balconyplate

Balconytrim

Balusters

Bearers

Bullnose Risers

Bullnose Treads

Cove

Fillets

Frets

General

Handrail

Handrail Fittings

Landing Treads

Lining

Newel Acorn

Newel Balcony

Newel Bottom

Newel Inside Landing

Newel Outside Landing

Newel Top

Newels All

Outstep

Risers

Shoerail

Skirting

Strings

Treads

Wallbrackets

Wallrail

Walltrim

2) Style Max 35 characters. The style name of the part. Optional.

3) Timber Max 25 characters. One of the timbers in the Timbers window. Optional.

4) Width Note that if the **Depth By Width** button in the Dimensions section of the Preferences window is ticked, the Width and Depth columns are swapped. The section depth of the item. Not applicable to WallBrackets. Optional.

5) Depth See Width above.

6) Length The length of the item. Not applicable to WallBrackets and Acorn. Optional.

For fittings, it only applies to assembled goosenecks and is the height from the top of the horizontal section to the bottom of the vertical. If you disassemble you goosenecks this is not relevant.

For everything else it is the total length of the component.

7) Flat Applies only to Newels, Balusters, Fittings, Handrail and Wallrail. Optional.

For square top newels, this is the length of the upper flat (block). For pin top newels, it is not applicable.

For balusters, this applies to the length of the bottom flat. For baluster styles that NEVER have a fixed lower flat (i.e. it is always a fixed turning - see the “Fixed Lower Flat” setting in the Styles window), this setting is redundant. If the baluster style always or sometimes is used with the “Fixed Lower Flat” set to true, this setting is relevant.

For Fittings, this is the Fitting Type (to see which options are available click the “Fitting Types” worksheet at the bottom of the exported spreadsheet).

For Handrail and Wallrail this is the Radius Type (to see which options are available click the “Radius Types” worksheet at the bottom of the exported spreadsheet).

8) Turn/Plow Applies only to Newels, Handrail and Fittings. Optional.

For newels this is the distance from the top of the flat (PTP) or turning (OTP) of a turned newel down to the bottom of the turning.

For Handrail this determines whether the rail is plowed (enter the width of the plow) or not plowed (zero or nothing). StairBiz determines that a rail is plowed if it is associated with square–top balusters AND there is either a PlowDepth value in the handrail’s Style window OR a Plow Override value in the Setout window. Handrail can be auto-filtered based on this value. Note that a non-zero plow depth in a handrail's Style window will always resolve to zero if the balusters are pin-top.

For Fittings this is the angle of a turn (applies only to fittings that are or include a turn).

9) Curved Applies to Handrail, Wallrail, Balconyplate, BalconyTrim, Frets, Strings, Walltrim, Fillets, Risers, Bullrisers and Skirt. Optional.

Accepts “Y” (yes) or “N” (no) or nothing (no).

10) Description Max 50 characters. More details about the part. Optional.

11) PartId Maximum 25 characters. This is the unique identification of the part (usually no two parts can have the same PartId, but there are exceptions - see Duplicate Parts below). Note that on import you will be given the opportunity to first delete all existing parts in the StairBiz database (although it is NOT required that you do so). When you import, if there are duplicate Part Ids, StairBiz will alert you and give you the option to abort the import or skip over the duplicate part.

12) Buy Price A dollar amount. (e.g. “$4.50”, “4.5”). This is the price you pay for the item.

13) Sell Price 1 A dollar amount. (e.g. “$4.50”, “4.5”) OR a percentage (e.g. “12”, “6.5”). Do NOT include a percentage sign (i.e. the “%”).

14) Sell Price 2 Same as Sell Price 1

15) UOM Is the cost of this part based on length (“m” or “f”) or per each (“e”). Note that this field applies only to Wallrail, Balconyplate, Shoerail, Walltrim, Balconytrim and Fillets (all others are assumed to be costed per each)

16) Waste Applies only where the unit of measure is Length (“f” or “m”). It does not apply where the UOM is Each (“e”). This is a percentage amount to be added to lengths for the purposes of calculating inventory and materials cost (e.g. “10%” or “10”), or it can be a round-up (e.g. “(6)”). See Waste, Extra Length and Rounding Up.

17) LaborCost If you want this part to automatically add contract installation labour to the Labour Cost window, enter the currency amount here. This contract labour amount will be added only if the “Contract Installation” button is ticked in the Labour Cost window.

18) LaborMins If you want this part to automatically add staff (i.e. time/rate based) installation labour to the Labour Cost window, enter the number of minutes here. This staff labour time will be added only if the “Contract Installation” button is NOT ticked in the Labour Cost window.

19) Hidden Would generally only apply to parts that are part of a group (see Groups). Accepts “Y” (yes) or “N” (no) or nothing (no).

20) Note A number from 1 to 9999.

Don’t be overly concerned about your fields. StairBiz does a test run on the entire imported list before it commits anything to the StairBiz database. If something is wrong in such a way as to cause a major problem, StairBiz will advise you and abort the import before anything is committed.

#### Duplicate Parts

Normally you cannot have two parts in the Parts window (and therefore the spreadsheet) with the same PartId.

However, sometimes you do need to duplicate parts (e.g. some or all of your wallrail parts are the same as your handrail parts; i.e. you want the handrail to ALSO be in the wallrail category).

You can have duplicate PartIds in the Parts window (and therefore the spreadsheet) so long as the duplicate part has a PartId appended with an ampersand (a "&").

So, for example, in the Handrail category you can have a "HRCapri7045" and in the wallrail category you can have "HRCapri7045&" (note the ampersand).

The usual way to do this is to copy items from one category in the spreadsheet and paste then into another category of the spreadsheet, then append each duplicated Part Id with the ampersand.

**StairBiz can add the ampersand for you in some cases:**

In some cases (i.e. in some categories), to save you having to manually add the ampersand in the spreadsheet (this can be tedious), StairBiz can add it for you during the import.

StairBiz will add the ampersand to PartIds of:

Wallrail items which are duplicating Handrail items.

Bullnose Riser items which are duplicating Risers items.

Bullnose Tread items which are duplicating Tread items.

Carriage String items which are duplicating String items.

Shoerail items which are duplicating BalconyPlate items.

Note that this only works if the part which is being duplicated is imported BEFORE the part it is duplicating, or is already in the database and not being deleted. So, for example, Wallrail items (which are duplicating Handrail items) would need to be listed BELOW Handrail items in your spreadsheet (unless the handrail items were already in the database and were not being deleted).

#### Importing

After your spreadsheet is set up correctly and populated with parts, do as follows:

1. Click the **Import** button
2. In the Open File dialog window, navigate to the spreadsheet, select it and click **Open**.
3. If there are parts existing in your StairBiz database, you will be asked if you want to delete them first. You do not have to. If the spreadsheet was exported by StairBiz as a “single category” export, and you elect to delete existing parts, only the existing parts of the category exported will be deleted. (StairBiz tags single-category exported by putting a “\*” after the version number in cell (1,1). On import StairBiz checks for this tag. The single category is assumed to be the first valid category in the spreadsheet
4. StairBiz will do a test run on the entire import. If there is a problem, you will be alerted and the import may be aborted (so that you can fix the problem and try again). StairBiz will give you some information about the problem, including the row and column of the problem cell. Note that StairBiz uses numeric columns references (i.e. 1, 2, 3 rather than A, B, C). To show numeric column references in your spreadsheet, go to Tools/ Options/General, and select “R1C1 Reference Style”.
5. When the import is done, you will get the message “Import completed”.

## Part Price Change window

### Overview

From : **$ Update** button in Parts window.

The **Part Price Change window** allows you to change some or all of the prices in your Parts window by a percentage amount, or to update existing prices from a price update spreadsheet (e.g. from your parts supplier).

### Change By Percentage

##### Category

If the current category in the Parts window is “All”, then these option buttons will be disabled and the change will affect all categories. Otherwise you must select either the Current Category or All Categories.

##### Buy Price: Change by:

Enter the percentage amount you wish to change the buy price by. For example “10” will increase the BuyPrice of the selected category by 10%. You may enter a negative amount to decrease the prices.

##### Sell Price 1: Change by/to:

If the SellPrice2 column is a “percentage” column (i.e. it shows percentage amounts rather than currency amounts), the label for this field will show **Change to**, and the percentage amount shown in the Parts window will be changed to the amount you enter into this field. If the **In % columns ignore empty cells** button is ticked, StairBiz will ignore any cells in the Parts window which are empty (i.e. it will only change those cells that have a current non-zero value).

##### Sell Price 2: Change by/to:

Same functionality as **Sell Price 1** (above) but relates to the SellPrice2 column.

##### Change button

Click this button to affect the changes. Click the **Close** button to exit the window.

### Update from Spreadsheet

##### Set File

Click this button to browse to the spreadsheet file containing the updated prices.

The spreadsheet doesn’t need to be closed, but it must be saved.

The structure of this spreadsheet is not important, so long as it has two vertical columns (in any location) for each of PartId and SellPrice1, and optionally another column (in any location) for SellPrice2.

The spreadsheet may contain empty rows – StairBiz ignores any row that does not contain text in the PartId cell and a valid non-zero price in the BuyPrice column. StairBiz deems the end of the spreadsheet to be the bottom-most cell in the BuyPrice column with any text in it.

##### Prices under timber columns

Some price spreadsheets have prices in a single column (adjacent to each individual Part ID). In this case the Part ID includes some designation for the timber of the part (e.g. R5002-MA where “-MA” means maple).

Other’s have Part IDs without any designation for timber (e.g. R5002), then have a price column for each timber.

If you case is the later, tick this check-box.

The following deals with each method differently.

#### With Timber Columns:

##### 

##### PartId column

In which column of the spreadsheet is the PartID (e.g. “1” in the illustration). User only numbers (not A, B, C etc).

##### Timber start column

In which column of the spreadsheet is the first timber column (e.g. “3” in the illustration).

##### Timber end column

In which column of the spreadsheet is the last timber column (e.g. “7” in the illustration). Note that StairBiz expects timber columns to be contiguous (all columns between start and end are price columns, with no gaps in the columns).

##### Update button

Click this button to affect the update.

StairBiz tags all items in the StairBiz database that were not updated – see Show not updated (below). StairBiz also indicates which items in the spreadsheet were used to update the database (the cell is highlighted in yellow).

##### Notes

You cannot use this method unless the Part Ids in the Parts window are SUFFIXED with a timber designation (e.g. PS01K-MG where “-MG” means Mahogany). You can use whatever designation you want, with or without a dash, and the designation can be as many characters as you want, but they must be a suffix.

The PartIds in the spreadsheet must correspond to the PartIds in the Parts window, except that in the spreadsheet they do not have the timber suffix.

If you include a dash (minus sign) in the timber suffix, the very first row in the spreadsheet must be formatted as text (select the row, Format menu/ Cells/ Number tab/ select “Text”).

In the very first row of the spreadsheet, above each timber column you must enter the timber suffix (e.g. “-RD”, “-MG” etc.) for each timber.

Do not have anything in the PartId column of the spreadsheet other than PartIds.

It’s OK to have PartIds in the spreadsheet that are not in your Parts window – StairBiz will try to reconcile them and simply not be able to.

#### Without Timber Columns:

##### 

##### PartId column

In which column of the spreadsheet is the PartID (e.g. “1” in the illustration). User only numbers (not A, B, C etc).

##### Buy Price column

In which column of the spreadsheet is the BuyPrice (e.g. “3” in the illustration).

##### Sell Price column

In which column of the spreadsheet is the SellPrice. This corresponds to SellPrice1 in StairBiz (there is no provision for updating SellPrice2).

If the field is left empty (or zero), StairBiz will ignore it (i.e. you are only updating the BuyPrice).

It is not possible to update the SellPrice if the SellPrice1 column in the Parts window is set to “Percentage” (this field will be disabled).

##### Done flag column

This is the position of any empty (not used) column in the spreadsheet.

When StairBiz finds a PartId in the spreadsheet, and finds a corresponding PartId in the Parts database, it updates the database price(s) then puts “Done” in this column. If it can’t find a match it puts “Not Found” in this column. This allows you to check what was found and what was not.

##### Update button

Click this button to affect the update.

Apart from putting “Done” or “Not Found” in the Done Flag column of the spreadsheet, StairBiz also tags all items in the StairBiz database that were not updated – see Show not updated (below).

#### Show not updated:

StairBiz tags all items in the StairBiz database where the price was not updated (i.e. a corresponding PartId was not found in the spreadsheet). To see only these un-updated items in the Parts window, tick the **Show Not Updated** button just below the **$ Update** button in Parts window. With the **Show Not Updated** button ticked, when doing an Export only these items are exported. Note that these tags do not get exported to or imported from Excel when doing a normal Parts window export/import.

#### Notes:

Rows in the spreadsheet do not need to be contiguous (i.e. there may be blank rows) – StairBiz ignores any row that does not have something in the designated PartId column.

StairBiz also ignores any item in the spreadsheet that does not have anything in the price cell (i.e. if there is nothing in the price cell, StairBiz simply ignores that part; if there is anything in the price cell (even $0.00), StairBiz will try to update the price.

If you have a price spreadsheet that uses both “with” and “without” timber columns in the same spreadsheet, separate them into two spreadsheets and do two update (one for each method).

Prices can be with or without “$” signs, and with or without decimal places.

## Pass Protect window

#### Overview

From : Help menu ; **About StairBiz** menu-item

The **Pass Protect window** prevents further access to the StairBiz program until a valid password in entered . The clearance level of that password will determine which of StairBiz windows can be opened and what is shown.

This is useful if you need to leave the computer unattended without having to quit StairBiz.

See Passwords. Also see Password window.

#### Password

Enter the password for the level of access required

#### Quit

Quits the StairBiz program

#### OK

Allows access to StairBiz with a level of access according to the password entered. If the password is not recognized, you will be given one more chance.

## Password window

### Overview

The **Password window** is the first window displayed each time you start the StairBiz program.

* It shows the version number of the current StairBiz.
* Software Code (a unique number derived from the computer’s chip).
* Registration status.
* It allows you to enter your password in order to gain access to StairBiz.

### Text boxes

#### Password

Before you can begin to work in StairBiz, you must type a password in the **Password window**.

You can either enter your Registration Password, or one of the user passwords you have entered in the Preferences window.

If you make a mistake when typing in your password (or suspect that you may have - your password is not actually displayed on the screen) use the backspace key to delete the relevant number of characters and then retype your password.

For registration passwords, if you’re unsure whether a character is the letter “O” or a zero, it doesn’t matter – StairBiz will accept either interchangeably.

See Passwords.

### Buttons

#### Password?

Click this button to find out how get a password, either for an extended evaluation of StairBiz, or because you have changed licensing options.

#### OK

When you are finished entering your password, click the **OK** button.

The **Password window** will close and the Process window will open.

Note; if you enter an invalid password, StairBiz will give you one more chance, after which it will quit and you’ll have to start again. This prevents someone trying to “guess” your password by typing in many different words - it slows them down.

#### Quit

Forces StairBiz to quit.

## Payments window

#### Overview

From : Process menu ; **Payments** menu-item

Only applicable for Estimate module.

The **Payments window** is used to record payments made to you by the client for the current job.

Provision is made for up to three payments. There is also provision for a date, type and detail for each payment.

The **Quote Total** is shown at the top of the window. The **Balance** remaining to be paid is shown at the bottom and auto-calculates.

Values entered here are shown in the **Job Info sheet**, and any Custom sheet with the relevant fields.

**Date:** is the sate the payments was made.

**Type:** Can be any text, but is probably something like “Check” or “MasterCard”

**Detail:** Can be any text but is probably the check or card number.

**Notes:** Can be any text but would probably relate to any communication with the client regarding payments.

#### Quote

The **Quote Total** as seen in the Quote Calculation window for the job.

#### Payment 1

Details for the first actual payment made by the client in payment for the job. It needs to be entered manually.

#### Payment 2

Details for any second actual payment made by the client in payment for the job. It needs to be entered manually.

#### Payment 3

Details for any third actual payment made by the client in payment for the job. It needs to be entered manually.

#### Balance

A calculation showing the **Quote Total** (shown at the top of the window) less any payments entered.

## Preferences window

### Overview

From : Defaults menu ; **Preferences** menu-item

The **Preferences window** allows the user to change some aspects relating to the way StairBiz works, where it looks for things, and how it displays things.

### Prefs 1

#### MISCELLANEOUS

##### Keep Preferences Local

This button is at the bottom of the window.

The following applies only if you network StairBiz, and applies to all the settings in the Preferences window (except for items under the “Networking” heading).

With this button NOT ticked, your Preferences settings are saved in the Defaults database. The problem with this is that some settings may be specific to your computer and/or monitor and your particular way of doing things, and when you downloaded defaults from the server your own settings are overwritten by the administrator who posted his defaults to the server.

With this button ticked, your Preferences settings are saved to a local file in your Defaults folder ("LocalPrefs.DAT"), so they are never overridden when you accept a defaults database download from the server.

If this check-box was ticked and you un-tick it, your Preference settings will revert to those in the Defaults database.

It is recommended that the person with authority to post defaults to the server does not tick this checkbox (firstly because he normally doesn’t download defaults from the server so is in no danger of a bad overwrite, and secondly because if he makes changes to the Preferences which need to be network wide, others in the network can simply (probably temporarily) untick this checkbox to take on the new settings.

##### Backup Alert

With this selected , on quitting StairBiz you will be alerted to back up (save on a separate disc) changed files.

StairBiz tells you which folders contain items which need backing up (see Backing up your files).

##### On job close alert if alerts

With this ticked, if there are any alerts current in the Alerts window StairBiz will warn you when you close the job and give you the option of aborting the job close.

Note that regardless of this setting, if there are any alerts current then the Alerts Current field in the Job Directory will indicate such (providing you are showing that field – see Job Directory / Field Chooser / Job category).

##### On job change alert if exported

With this ticked, if the Export menu (the one to the left of the Help menu) has been used for the job since the job was created, and you try to change any part of the job, you will be alerted.

This is useful where exported data relating to a job is considered fairly “final”, and the user of that exported data would not be expecting that data to change.

However, you could use this to alert all users that you are not expecting anyone to change the job. For example, let's say a job is ready for construction and has been signed off – you don’t want any further changes made by anyone on the network. You could set up a dummy export template called “Sign Off” where the contents of the template are irrelevant (see Export Templates window). On sign-off, simply select the “Sign Off” item from the Export menu (even though the template has no export purpose). From this point on, if anyone makes a change to the job they will be alerted (provided this button is ticked).

##### Full Printer Features

When you launch StairBiz, StairBiz sets you printer to be the last one you used in StairBiz. This saves you having to keep resetting it.

StairBiz also sets the PaperSize, ColorMode, PrintQuality, Duplex and PaperBin properties of this printer to be the same as the last time you did a page set-up or printed in StairBiz.

By default, StairBiz will not set these properties for any printer with “PDF” in its name.

However, some other printers do not like some of these properties being set, and there is no real pattern to this. So, if StairBiz is generating errors on launch, first try doing a Page Setup. If this doesn’t stop the error messages, un-tick this checkbox (in which case StairBiz will not set these properties). If you still get errors, please advise us.

##### List Grids

With this selected all lists (e.g. in the Setout window etc.) will display lines separating the rows and columns in the list.

##### Fix Off-screen Windows

Ticking this button will cause StairBiz, upon opening any window, to bring it fully within the viewing area of the monitor if it is not already so.

See Window Size & Position.

#### QUOTE/JOB NUMBERS

##### Quote# Prefix

An optional prefix to all automatically generated **Quote Numbers**. Max 8 characters.

The prefix is specific to each user (i.e. it is tied to your password). Unlike other settings in this window, prefixes are saved in the Jobs database, so if you work connected to a StairBiz server, but sometimes work when disconnected, you will also need to set them when not connected (to set them in your local jobs database) - StairBiz does not automatically synch the local and server jobs database in this regard.

See Quote and Job Numbers and Process window.

##### Job# Prefix

Same as **Quote # Prefix**, but relates to Job Numbers.

##### Leading Zeros

Sets the total number of characters in the non-prefix part of a job or quote number, and pads the difference with zeros. For example, with this set to “5” (meaning five characters total), a quote number of 321 would be “00321”. The behaviour of Prefixes under this system remains the same (e.g. “Q00321”).

##### Def Project Name

If you double-click the “Project Name” label in the Process window, StairBiz automatically inserts the Client Name (if you hold down the Shift key StairBiz inserts the Site Street). This setting enhances this behaviour - here you can define which fields will make up the default Project Name, as follows:

CN Client Name  
JN Job Number  
QN Quote Number  
SA Site Address (Street)  
SS Site Suburb  
SZ Site Zip

Enter one or more of the above codes (separated by spaces); for example “QN SS SZ” or “CN JN”.

##### Def Job Name

See previous paragraph, but relates to Job Name.

##### Auto Increment Quote Number

With this selected, for each new job StairBiz will insert the next-in-line Quote Number into the relevant field in the Process Window. The next-in-line number can be local (your computer only) or global (across all computers connected to the StairBiz server) depending on the following settings.

Also see Quote and Job Numbers.

##### Use Server When Connected

With this not selected, the next Quote and Job number will come from you local database. If you have more than one StairBiz user there is the potential for duplicate quote/job numbers, in which case it is suggested that each user has a different Quote and Job number prefix. Alternatively you could have each user start at a different number (e.g. Joe starts at 2000, Sue starts at 4000, etc.).

With this selected, and you are on-line, the next Quote and Job number will come from the server.

With this selected, and you are off-line, it will depend on your **Set When Re-connect** setting.

##### Set When Re-connect

With this selected, the next Quote and Job number will **Always** come from the server. If the computer is currently offline, then the word “Next” will appear in the Quote or Job number field. When you check the job into the server, the next number in the series will be assigned.

#### BACK-UPS

See Chapter 22: Miscellaneous Topics/ Backing up your files/ Auto Back-up.

### Prefs 2

#### JOB SHEETS

##### Print Border

Job sheets normally have a border drawn around the perimeter of the page. If you are using a dot-matrix or bubble-jet printer, printing this border can slow down the printing speed (because the entire length of the page has to be printed, even if only a small part of the page contains information). Unselect this button to prevent the printing of the vertical component of these borders. Note that this only effects the printing of borders - the borders will still be displayed on the screen.

This setting applies only to the current printer. If you select a printer you’ve never used before in StairBiz, you need to set it for the new printer. StairBiz will remember this setting for each printer you use and apply it automatically the next time you select that printer.

##### Scale%

You may find that the ‘what-you-see-is-what-you-get’ size of Job sheets is too large for your monitor (or just plain too large). You can change their scale here (about 90% seems to work quite well). Note that Custom sheets are not affected (usually they have a graphic background which, when scaled, looks terrible).

##### Column Space

Some of the Job Sheets have information arranged in columns (e.g. Cutting List, Labour Cost etc.). In such sheets the column width is automatic (based on the width of the widest text in the column). This setting determines the amount of space between the columns. The value does not represent any particular unit of measurement – just increase it for more space or decrease it for less space.

#### QUOTE/INVOICE SHEETS

##### Left Margin

The distance (always in millimetres – there are 25.4 mm to an inch) between the left edge of the printed page and the start of the text when printing the **Quote**, **Invoice**, **Receipt** and **Notes** Job sheets. This margin is only used when printing.

##### Right Margin

The distance in millimetres between the right edge of the page and the end of the text when printing the **Quote**, **Invoice**, **Receipt** and **Notes** Job sheets. This margin is only used when printing.

#### MISCELLANEOUS

##### Show Stair Arrow

Tells StairBiz to draw an up or down arrow on your stairs.

##### Arrow Points Down

If **Show Stair Arrow** is selected, select this to have the arrow point down, otherwise it points up.

##### Arrow At Top

If **Show Stair Arrow** is selected, select this to have the arrow at the top of the stair, otherwise it will be at the bottom of the stair.

##### Show Tread Numbers

Tells StairBiz to draw tread numbers on your stairs.

##### Tread Numbers Top Down

If **Show Tread Numbers** is selected, select this to have the tread numbers numbered from top to bottom, otherwise they number from bottom to top.

##### Show busy during Lab/Mat recalc

If you have very long and complicated filters (and have not subdivided them using Branch filters) a labour and materials recalc can take a noticeable time (up to a few seconds), during which time normal activity in StairBiz gets queued. If this causes confusion, tick this checkbox to see a progress bar during such long recalcs.

##### No alert on To Riser switch

StairBiz can so setouts to the riser face or to the nosing (according to the ‘To Riser’ setting in the Treads category of the Setout window). If a stair template or job is opened which has a ‘To Riser” setting contrary to the current setting, StairBiz alerts you. If you don’t want to be alerted, tick this checkbox.

#### SET FONT

##### Set Font

Allows you to select the font and font size used for Job sheets when viewed on your screen and for printing. Only TrueType fonts are available. An example of the current selection is shown below the button. The default font is Ariel 10, which has proved itself to be suitable (other fonts or sizes may display unpredictably). See Fonts.

#### CHECK QUOTE ON OPEN

When you open a job, there are rare circumstances where the quote total may have changed since you last saved the job, as follows:

If the quote is locked (which it should be if you have presented the quotation), it is remotely possible that some update in StairBiz has introduced a bug that may affect the locked quote total.

If the quote is not locked, changes to your Parts window, Part Filters window or Labour Filters window may cause some movement in the total calculation.

When you open a job, StairBiz recalculates the Quote Calc window, and compares that against the Grand Total that was last saved. If there is a difference, StairBiz can alert you under the following circumstances:

##### Always

StairBiz will always alert you if there is a difference. With this button selected, the other two buttons become redundant.

##### Locked

StairBiz will alert you if there is a difference and the quote is locked.

##### If Job Status > Confirm

StairBiz will always alert you if there is a difference and the Job Status in the Process window is Remeasure or anything greater than this.

##### Tolerance

This sets the amount of the error above which StairBiz will alert you. For example, if you set the tolerance to zero, StairBiz will alert you if there is any error at all (even 1 cent). If you set it to $5.00, StairBiz will alert you only if the difference is more than $5.00.

### Dimensions

Select the measurement system you prefer.

Regardless of your selected measurement system, all dimensions are held internally by StairBiz in hundredths of a millimetre (0.01mm, 0.0004" or 1/2500"). This means that you can happily swap between measurement systems any time you like. For example, you may prefer to design in metric, then switch to imperial prior to printing job sheets for the shop.

##### Decimal Inches

If you are working in decimal inches, you may notice that StairBiz will display these dimensions to the nearest 1/64 inch. This is because StairBiz will only display up to 4 decimal places (if you have selected that option), and some fractions are more than 4 decimals (e.g. 3/64 = 0.046875).

So, for example, if you enter the dimension “36.3”, you will notice that StairBiz converts this to “36.2969” (i.e. to the closest 1/64 inch, which is 36 19/64).

StairBiz does this to maintain conversion compatibility between fractional inches and decimal inches. Without it there would be cases where you could not accurately enter a decimal which converted to the fraction you were expecting. This can have major ramifications where StairBiz is comparing one dimension (entered in decimal) with another seemingly identical dimension (entered as a fraction). Whereas you would imagine they were the same, StairBiz would see them as different, and the results might not be as expected. This is especially the case when setting up all your defaults.

The exception to the above is in the case of goings (run). StairBiz will maintain this value exactly as entered (because it’s a running dimension and unlikely to be compared to anything).

So, whereas you can safely switch between any 2 decimal systems (mm to metric inches and vice versa), if you intend to design and amend stairs in a fractional system, it may be safer to create all your defaults (including styles and design templates) in a fractional system, or vice versa.

##### Round to nearest millimetre

With this selected all metric dimensions in StairBiz will be displayed to the nearest millimetre (otherwise tenths of a mm are normally used). This does not affect the level of precision of the calculations, which are always done to 6 decimal places.

##### Fraction Accuracy

All fractional dimensions in StairBiz can be displayed to the nearest 1/64” or 1/32”. This selection does not affect the level of precision of the calculations.

##### Show Depth Before Width

By default, StairBiz shows size dimensions as Width x Depth. If you prefer to show them as Depth x Width (common when using imperial measurements), select this option.

##### If Width/Depth are same only show Width

When a section size had a width and depth that are the same, by default StairBiz shows only the width (e.g. “10 x 10” is just shown as “10”). Un-tick this button to always show both dimensions.

##### Custom Sheet Dimensions

Choose a dimension type to be used only for Custom Sheets (or select 'Same as Above' for consistency).

##### Round millimetres

If you use millimetres, and do not round them to the nearest millimetre, but would like to do so just for dimensions in custom sheets that are not contained within a stair drawing, then tick this. Note that this setting also applies to the Cutting List and BOM View sheets.

##### XML Dimensions

Choose a dimension type to be used only for XML export (or select 'Same as Above' for consistency).

##### Miscellaneous

If you are in metric mode, there is a way to still enter imperial fractions. You can also use calculations in dimensions. See Chapter 22 : Miscellaneous topics/ Editing/ Editing Dimensions

### Inventory

These buttons determine at what point (if ever) inventory for any one job is added to or discarded from the inventory database.

Note that the materials for the job are always saved with the job (whether or not inventory is used), so this only applies if you have a specific reason to maintain a global inventory.

Inventory items for all or any jobs can be viewed in the Inventory window (Project menu).

##### Include Inventory

**Manual:** Include and maintain inventory after the user selects the **Inventory Active** button in the job’s Materials window.

**Allocation of Job Number:** Include and maintain inventory after the user sets a Job Number for the job.

**Job Status = :** Include and maintain inventory after the user sets the Job Status (in the Process window) to Remeasure, Build or Install.

##### Exclude Inventory

**Manual:** Discard inventory when the user un-selects the **Inventory Active** button in the job’s Materials window.

**Job Status =:** Discard inventory after the user sets the Job Status (in the Process window) to Payable or Done.

Note that inventory is automatically discarded when the job is deleted.

##### Other

**Include Labour in Inventory:** Includes all labour items in any inventory export (i.e. to the Inventory database as discussed above, or in an XML export).

**Parts Acquire Cut List Sizes:** All parts (generated by your Part filters) in an inventory export (i.e. to the Inventory database as discussed above, or in an XML export) will include the width/depth/length shown in the Cut List.

**Group Unique Part Refs:** All parts (generated by your Part filters) in a Materials list or an inventory export will be grouped (i.e. sorted) by their Part Ref. The sort order is Category, PartId, PartRef.

**Default Loose Item Type:** When you create a Loose Item in the Materials Cost window, by default the Item Type will be as per your selection here.

**Show Loose Item Group Columns:** If ticked, there will be three extra columns in the Loose Items tab of the Materials Cost window; Stair (the index number of the stair to which the loose item belongs), Unit (the index number of the unit, from top down within the relevant stair, to which the loose item belongs) and Group (Stair or Balustrade). See Chapter 13; Materials window | Loose Items | All Types

## Print Job window

#### Overview

From : Project menu ; **Print Job** menu-item

Allows you to create saveable templates for printing multiple View reports and/or Custom sheets (and multiple copies of each) in one hit.

#### Copies

Input the number of copies required for each sheet (zero if none). Click Save to save these values in the current template.

#### Status

Shows “N/A” for any sheet that is currently unprintable for any reason (in which case StairBiz ignores any value for “Copies”).

#### Print

Prints the indicated copies of each sheet in a single hit.

A **Print** dialog window is displayed (see Printing a Single Sheet).

You will not need to do a **Page Setup**, even if some of your Custom sheets are landscape orientation (see Page Setup.)

#### Save

Saves the current settings to the current template.

#### Save As

Creates a new print job template.

## Print Settings window

From : Defaults menu ; **Print Settings** menu-item

The **Print Settings window** allows you to set default quantities for the Print Job window of a new job. The window is identical to the Print Job window except that in place of the **Print** button there is a **Save** button.

1. Establish which sheets would be needed for most of your jobs most of the time.
2. Set the number of copies of those sheets which you want to be the default values in the Print Job window.
3. Click the **Save** button.

Your settings in this window cannot be effected by any changes you might make to them in the Print Job window for any particular job.

The **Print Settings window** can be changed and saved anytime you like (provided a job is not currently in progress).

## Process window

### Overview

From : Process menu ; **Process** menu-item

The **Process window** is like home base when processing a job. Most of the buttons in this window are replicated in the Project menu and Process menu and Toolbar.

The **Process window** can be closed (and reopened from the Process menu) as you progress through the stages of a job, but it would normally stay open on your screen.

See Using StairBiz to process your jobs.

### Buttons and text boxes

#### New

Starts a new project containing one new job. This button is enabled only when no other job is open (you can only process one job at a time).

See Creating a New project.

#### Open

Opens a previously saved job.

This button is enabled only when no other job is currently in progress.

For other ways to open a job, see Opening a Job.

#### Save

Saves the current job.

See Saving a Job.

#### Close

Closes the current job.

If the current job needs saving, you will be alerted.

See Closing a Job

#### Delete

Closes the current job and deletes it. No trace of the job will remain.

See Deleting a Job and Deleting a Project

#### Split Quote

Splits the quote into Stair and Balustrade separately. When ticked, there are two Quote Calculation windows (one for stair, one for balustrade – see the tab button at the top of this window) and two Payments windows (see the tab button at the top of this window).

Also See Chapter 22; Miscellaneous topics/ Split Quote

#### Active

Determines what elements of the current design show up in the Cutting List and Bill Of Materials.

If **Stair** is ticked (and not **Balustrade**), only the materials for stairs are shown in the Cutting List and Bill Of Materials.

If **Balustrade** is ticked (and not **Stair**), only the materials for balustrade are shown in the Cutting List and Bill Of Materials.

If both (or neither) are ticked, then both are included.

Note that this setting does not affect the totals shown in the Quote Calc window (for that, see **Split Quote**).

When Stair or Balustrade (but not both) is active, an alert indicates such in the Alerts window. To disable these alerts see Miscellaneous Defaults window (Design heading)/ Active Stair/Balustrade alert.

#### Job Template

Tags the current job as a job template.

See Job Templates

#### Project Name

This name identifies the project. You would normally use the client’s name, or some shortening of it. Some companies identify a project by its site address.

You must have a **project name** before you can save the project. See Naming a Project.

You can open a job directly from this field – see Chapter 8; Opening a saved project.

#### Folder

Shows the current folder in which the job was saved or will be saved. You can change it at any time, even after a project is saved – click and select from the list (the list shows folder names you have set up in the Folders window).

Project folders allow you to group projects; those groupings manifest in the Open Project dialog window, and in the Directory window.

#### Job Name

This name identifies the job within the project. If you leave it empty, StairBiz will assume that it is the same as the **Project Name**. If you have more than one job in a project, each subsequent job needs a unique job name. A job name in one project may have the same name as another job in a different project. See Naming a Job.

The **job name** is printed on all Job sheets.

You can open a job directly from this field – see Chapter 8; Opening a saved project.

#### Scenario Name

The scenario name field is not visible unless:

1. you have more than one scenario in the job, or
2. You have clicked the little **V** button at the right, or
3. You have set **Scenario names always visible** in the Preferences window.

This name identifies the scenario within the job. If you have more than one scenario in a project, each subsequent scenario needs a unique scenario name. A scenario name in one job may have the same name as another scenario in a different job.

You can switch between scenarios using the **Scenarios** menu.

#### Quote Number

This should be a unique number which identifies the quote.

If the **Auto Increment Quote Num** box in the Preferences window is ticked, StairBiz will automatically increment this **Quote Number** for each new job. To manually insert the next-in-sequence **quote number** into this field, double-click on the **Quote#** label at the left of this field (or press the **Alt-Q** keys).

Alternatively, you can manually type in your own **quote number**.

See Quote and Job Numbers

See Job Numbers window to re-set your next-in-sequence quote number.

StairBiz can automatically add a prefix to your **quote number** - see Preferences window.

You can open a job directly from this field – see Chapter 8; Opening a saved project.

#### Job Number

This should be a unique number which identifies the job. It would normally be used only after the quote has been accepted by the client.

To automatically insert the next-in-sequence **job number** into this field, double-click on the **Job#** label at the left of this field (or press the **Alt-J** keys).

Alternatively, you can manually type in any **job number**.

See Quote and Job Numbers

See Job Numbers window to re-set your next-in-sequence job number.

StairBiz can automatically add a prefix to your **job number** - see Preferences window.

You can open a job directly from this field – see Chapter 8; Opening a saved project.

#### Job Date

This should hold the date the job was created (i.e. the date it became a new job). For a new job, the current date is automatically inserted. You can change it if you like.

This **job date** is printed at the top of all Job sheets.

#### PO

Holds the purchase order number if the job is confirmed.

You can open a job directly from this field – see Chapter 8; Opening a saved project.

#### Job Note 1 / Job Note 2

It’s up to you what you type in here (if anything). **Job Note 1** has a limit of 30 characters. **Job Note 2** has unlimited length. You can temporarily expand the **Job Note 2** field by double-clicking the "Job Note 2" label (immediately to the left of the actual field).

#### Job Status

This is a pop-menu from which you can select the next possible action for the job (i.e. what the job is waiting for). It is very useful when used in conjunction with the Directory window.

You may add up to five of your own items to this list – see Miscellaneous Defaults window, Job Status category.

#### Salesperson

Usually holds the sales person responsible for the job. The list is the list of users. The default is the current user (i.e. whoever logged in to this StairBiz).

#### Directory Colour

Sets the colour of text used in the Directory window for this job (and also makes that text bold, so that it stands out). You must add the "Job Colour" column to the Directory view (which shows as a "C" heading in the Directory window).

#### Job Flag

This allows you to flag a job. In other words, you are alerting either yourself or someone else for a certain reason and (optionally) on a certain date.

You can set a colour, date and notes in the Job Flag window (which you open by clicking the field to the right of the flag).

You can change the flag (including to “Complete”) by clicking the flag itself.

Most people monitor these flags in a Directory window (often created just for this purpose).

You can set a default flag colour for each new job in the Miscellaneous Defaults window/ Miscellaneous category/ Default Job Flag Colour.

You cannot name the flags – they are colours only. This is because flag colours are designed exclusively for the Directory window, to set a colour for the job. You will need to remember what the colour means.

#### Client / Site / Details etc.

These icon buttons represent the 15 stages (processes) of a job. Each button opens the relevant **Process sub-window** for input.

They are only enabled when a job is in progress.

See Processing a Job

### Copy/Paste Design

To copy the design of the currently open job, right-click on the Design button and select “Copy Design & Components”. This copies the design, all the selections in the Components window, and all MyData settings.

You can then open a different job, or start a new job, and right-click on the Design button and select “Paste Design & Components”.

### Customizing buttons in Process window

You can add or re-define job-stage buttons in the Process window by holding down the Control key and Right-Clicking on any of these buttons (a job must be in progress). When doing so, you will be given a menu that will allow you to change the Caption, Icon and Action of each button. There is also an option to display an additional (fourth) row of buttons, giving you up to 20 total buttons. A few notes:

* The action for each button can be any process window, plus a few others (e.g.: CNC, 3D, Related Files, Alerts, Notes and Notes with History), or any custom sheet of your choice.
* There are default icon images (bmp) for most of the extras, in the folder C:\StairBiz Program\Defaults\Images. You can create your own (maximum 56 pixels wide x 53 pixels high)
* If you wish for the caption to be reverted back to the default text, set the caption to nothing. You will need to close and re-open the Process window to see the change.
* If you wish to change the icon, you must point to a BMP, GIF, or JPG on your hard disk (the default folder is C:\StairBiz Program\Defaults\Images). If you operate in a network environment, when you post your defaults for other users, the other users will need the same image files in the same folder (usually the Images folder) on their hard disk in order for them to see the same picture.
* If you wish to revert an icon back to the StairBiz Default, select the 'Icon' menu item and click 'Cancel'. You will need to close and re-open the Process window to see the change.

## Quote Breakdown window

### Overview

From : Quote Calculation window ; click the **Show Breakdown** button

Only applicable for Estimate module.

Here you find the basis for the values shown in the Quote Calculation window. Apart from being useful in analysing your estimate and quotation, it is necessary because Overhead, Profit, Discount and Taxes do not necessarily apply to all labour and materials items (see **Applies To** in the Miscellaneous Defaults window).

If a cell can NEVER apply, it will show a “-“. If a cell can sometimes apply, but does not apply at the moment, it will show a “N/A”.

### The columns

**Category** The category to which the rest of the columns relate.

**Buy** For materials items (the first three rows), it represents the totals of the Buy price for Parts, Line-Items and Timber. For Labour items (the next three rows), it is the same as the Sell Price (StairBiz does not have separate Buy and Sell prices for labour)

**Markup** The net difference between the Buy price and the Sell price as shown in the Parts window (for Parts), the Parts Filters window (for Line-Items), and the Timbers window (for Timber).

**Markup%** The net percentage markup (i.e. the net difference between the buy and sell price expressed as a percentage).

**Lock** More appropriately called a “Lock Adjustment”. Applies only if the Quote Calc window is in Lock mode. It is an adjustment to keep the Sell totals at the same values they were at the time the Quote Calc window was locked. If the design changes, or the materials or labour windows are amended in any way, the Lock values represent the difference between the values as calculated by StairBiz and the values as locked by you. These Lock Adjustments are included as items in inventory so that the inventory totals will properly represent the materials and labour totals.

**Sell** If the Quote Calc window is not locked, Sell represents Buy plus Markup. If in Lock mode, the Lock adjustment is deducted to properly represent your ultimate sell price. In the Quote Calc window, the sum of the first three rows are shown in the MATERIAL field, the sum of the next three rows are shown in the LABOUR field, the Truck row is shown in the TRUCK field

**Overhead** The amount of overhead allocated. See Quote Calc window and Miscellaneous Defaults window. In the Quote Calc window the total is shown in the OVERHEADS field.

Note: If any of the rows (Parts to Truck) are not to be allocated overheads (because of your settings in the Miscellaneous Defaults window), the relevant cell with show “N/A”. Your default settings in this regard can be overridden just for this job by double clicking the relevant cell (i.e. you can switch overheads on or off for each row).

**Net** The sum of Sell plus Overhead. This represents the cost of the stair to your company, and is shown in the NET COST field in the Quote Calc window.

**Profit** The allocation of profit based on the PROFIT% field in the Quote Calc window. Profit is calculated based on Net. Also see “Note:” in Overhead (above) and apply it to Profit.

**Discount** The allocation of discount based on the DISCOUNT% field in the Quote Calc window. Discount is calculated based on Net + Profit. Also see “Note:” in Overhead (above) and apply it to Discount.

**Total** Net + Profit - Discount. This is the price of the stair to your client (ex-tax).

**Tax1** The allocation of tax based on the TAX1% field in the Quote Calc window. Tax1 is calculated based on Total. Also see “Note:” in Overhead (above) and apply it to Tax1.

**Tax2** The allocation of tax based on the TAX2% field in the Quote Calc window. Tax2 is calculated based on Total + Tax1. Also see “Note:” in Overhead (above) and apply it to Tax2.

### The rows

Parts Parts in the job derived from the Styles windows (Part Is) or the Part Filters window. All parts exist in your Parts window.

Line Items Line-Items in the job derived from your Part Filters window.

Timber Timber in the job derived from your Style windows. All timbers exist in your Timbers window.

Parts, Line-Items and Timbers are collectively called “Materials”

Labour Build Labour in the job derived from your Styles or Labour Filters windows. It included Preparation, Turning/Machining and Assembly.

Labour Deliver Labour in the job derived from your Job Details or Labour Filters windows. It includes labour to deliver the job but not to install it.

Labour Install Labour in the job derived from your Parts window or Labour Filters windows.

Truck The allocation for truck as input in the Quote Calculation window.

Profit Adjust If you are in **Lock** mode in the Quote Calculation window, and you manually change the **Sub-Total** or **Total** fields (presumably to round these totals), your change creates an adjustment (which logically must impact your profit). This adjustment is shown here. Overheads, Profit and Discount do not apply to it.

Total The sum of all the above categories.

Materials Total A summary being the sum of Parts, Line-Items and Timber.

Labour Total A summary being the sum of Labour Build, Deliver and Install.

Net Profit Calc Shows the columns (and amounts) that form the basis of the calculation of your actual total profit for the job. If a column has any text in it (including $0.00), this column’s total forms part of the calculation of your net profit on the job.

Net Profit The sum of the previous row. This is how much money you make on the job.

## Quote Calculation window

### Overview

From : Process menu ; **Quote Calc** menu-item

Only applicable for Estimate module.

The **Quote Calculation window** is where the final calculations for the costing and quoting of the job take place. The cost of materials was set in the Materials window. The cost of labour was set in the Labour window. Now we need to make allowances for truck, overhead, profit, discount and tax.

See How StairBiz costs jobs and Quote Breakdown window.

Note that in the following discussion, Overheads, Profit, Discount, Tax1 and Tax2 apply in accordance with your settings in the Miscellaneous Defaults window.

### Quotation

#### Disable

Where you have long elaborate filters, the recalculation time for materials and labour can be noticeable (and perhaps slightly irritating). You can turn off these calculations with this checkbox.

StairBiz will alert of this status in the Alerts window. You will need to re-enable the calculations to generate a valid materials list and quote calculation.

Note that all new or opened jobs are enabled by default.

#### Labour

Comes directly from the Labour window. There are some Quick Labour settings on the right-hand side of this window - be sure to understand them before using them (see below).

#### Materials

Comes directly from the Materials window.

#### Overhead

A StairBiz calculation for the allocation of your organization’s fixed overheads to this job. The calculation can be seen in the Quote Calculation sheet. See also **Overheads Calculation** below.

#### Truck

An appropriate amount for truck usage for this job if applicable. It must be entered manually (StairBiz cannot automatically calculate truck usage because this cost can vary from situation to situation).

Note that there is a default Truck fee setting in the Miscellaneous Defaults window. If you change your Dispatch setting in the Details window of a job, StairBiz will prompt you to apply/delete this default Truck fee.

Note that the Truck fee in the Quote window is otherwise independent of the Dispatch setting. StairBiz will apply this Truck fee even if the Dispatch setting is “Pick-up” (we don’t know or care why you are using a truck for this job – it may be to fetch some special materials for the job).

#### Net Cost

Shows total cost of **Labour**, **Materials**, **Overhead** and **Truck** for the current job. This is the cost to your organization of the stair as designed.

#### Profit @

The percentage amount comes from the Miscellaneous Defaults window. The dollar value in this line shows this percentage of the **Net Cost** (if profit does not apply to some sub-categories of materials and labour, click the **Show Breakdown** button to view the calculation).

Also see the **Profit** heading below.

#### Discount

The percentage amount comes from the client’s details in the Client List window if the client for the job was selected from there, otherwise the amount is zero. You can change it here just for this job (changes will not affect the client’s details in the Client List window).

The dollar value in this line shows this percentage of the sum of **Net Cos**t plus **Profit** (if discount does not apply to some sub-categories of materials and labour, click the **Show Breakdown** button to view the calculation).

Also see the **Profit** heading below.

The **Discount** field can alternatively be used as a **Commission** field (see next paragraph).

#### Commission

The **Discount** field can alternatively be used as a **Commission** field. When used as a commission field, the amount is ADDED to the quotation (rather than deducted).

To set the default behaviour for all new jobs, see Defaults menu/Miscellaneous/QUOTE CALC/Treat Discount as Commission.

To change it in an existing job double-click the **Discount** label in this Quote Calculation window.

#### Profit Adjustment (lock)

If you are in **Lock** mode (see below), and you manually change the **Sub-Total** or **Total** fields (presumably to round these totals), your change creates an adjustment (which logically must impact your profit). This adjustment is shown here.

Also see the **Profit** heading below.

#### Tax1

The percentage amount comes from the Miscellaneous Defaults window. The dollar value in this line shows this percentage of the **Sub Total** (if Tax1 does not apply to some sub-categories of materials and labour, click the **Show Breakdown** button to view the calculation).

#### Tax2

The percentage amount comes from the Miscellaneous Defaults window. The dollar value in this line shows this percentage of the sum of **Sub Total** plus **Tax1** (if Tax2 does not apply to some sub-categories of materials and labour, click the **Show Breakdown** button to view the calculation).

#### Quote Total

**Net Cost** plus **Profit** less **Discount** plus **Tax1** plus **Tax2**.

#### Round

Clicking either of these buttons the first time will round the relevant total to the nearest dollar. Clicking again will round to the nearest $10. Clinking again will increment by $10 each time.

Rounding recalculates the **Profit Percent**.

Rounding automatically sets the **Lock** button (see below), because you have manually overridden the default calculations.

#### Notes

Any note relevant to the Quote Calculation window.

### Quick Labour

This is called Quick Labour because for simple applications it saves you having to go into the Labour Cost window and setting labour Loose Items.

#### Travel:

If **Deliver** or **Install** options are selected in the Job Details window, this text box is enabled. Enter the number of minutes (or hours and minutes in the form "h:m") you estimate for travelling time to and from the site. It is used by the Labour window to calculate the cost of travel. It should show the total man-minutes (i.e. if the trip is 20 minutes each way and there are two men installing then type “80” or "1:20").

The hourly rates charged for these times comes from the Labour Cost window.

Alternatively you can enter a dollar amount in the $ field.

**If you enter a dollar amount, only this amount is used for the purposes of calculating labour cost** (minutes are not considered). However, you can still show minutes, and they will be used to calculate total labour times for scheduling purposes.

#### Install:

If the **Install** option is selected in the Job Details window, this text box is enabled. It behaves in the same way as Travel (see heading above) except that it applies to Installation Labour.

**Override:**

If you tick the **Override** checkbox, the times/dollars in these Install fields will override all other installation labour (e.g. labour filters, minimum install charges and labour as a percentage of materials). Installation loose items will not be affected.

#### Recalc Quote:

If you change any of the Quick Labour fields, either finish with an ENTER key, or click the Recalc Quote button, to tell StairBiz to recalculate the quotation. StairBiz will also recalc the quote (if it has not already been done) when you leave this window or close this window.

### Payments

#### Payment 1

The percentage comes from the Client window, which by default comes from the Miscellaneous Defaults window. The value is the amount required as a deposit on acceptance of the job.

#### Payment 2

The percentage comes from the Client window, which by default comes from item the Miscellaneous Defaults window. The value is the amount required as an interim payment.

#### Payment 3

The percentage comes from subtracting the percentages for **Payment 1** and **Payment 2** from 100. The value is the amount required as a final payment.

### Profit

To get a better feel for what constitutes profit on a job, click the **Show Breakdown** button.

Profit on a job will be the sum of …

Total Markup, plus Total Profit, less Total Discount, plus the total for Profit Adjustment.

### Overheads Calculation

The overhead amount is calculated in the Quote Calculation sheet. It is explained as follows:

#### L&M PW (All jobs av.)

The total labour and materials for the average week (from the Miscellaneous Defaults window).

#### This stair's L&M as %

This stair's labour and materials as a percentage of total average labour and materials per week. This is the percentage of all overheads which should be allocated to the current job.

#### Overhead - All Jobs

The total cost of sales, management, administration, depreciation, leasing, premises etc. per week. In other words, all the costs of running the company other than labour, materials and truck (see Miscellaneous Defaults window).

#### This stair’s Overhead

The percentage value comes from two lines above. The dollar value is the portion of total overhead for the average week which should be allocated to the current job. This value is transposed to the third line in the window.

#### Updating overhead values from your defaults

The two values used to calculate overheads for a job (**Labour & Materials PW** and **Overheads PW**) are brought in to the job from the Miscellaneous Defaults window when you create the job. If you change these settings in the defaults, and need to refresh the job with the amended values, click the **Refresh** button in the Components window.

### Lock

With the **Lock** button selected, no future changes in the job will impact the totals in the **Quote Calculation window**. Many of the values in the window become editable, and the actual (StairBiz generated) values are shown to the left in italics.

In **Lock** mode, any changes you make to a value will automatically change the calculations below it. The exceptions are the **Sub Total** and **Quote Total**, which, if manually changed, will backtrack to recalculate the **Profit Adjustment**.

Lock also fixes any rounding errors so that your Quote Total will always be the exact sum of your Sub Total plus Tax1 plus Tax2 (rounding errors can be caused if two numbers in the addition contain a hidden half cent).

ALWAYS lock your quote calculations before advising the client of a quote total. If you decide to make changes and re-quote the job, you can always unselect this button it. If you decide to make some minor changes to the design during manufacture and NOT re-quote the job, it’s important that those changes don’t impact the quote total (which has already been given to the client). Also, if a future update of StairBiz has a change (or fix) in the way it calculates labour, materials or overhead, and your quote is not manually overridden, the next time you open the job the values may be slightly different.

So, BEFORE SUBMITTING A QUOTATION to a client, ALWAYS open this **Quote Calculation** window and click the **Lock** button.

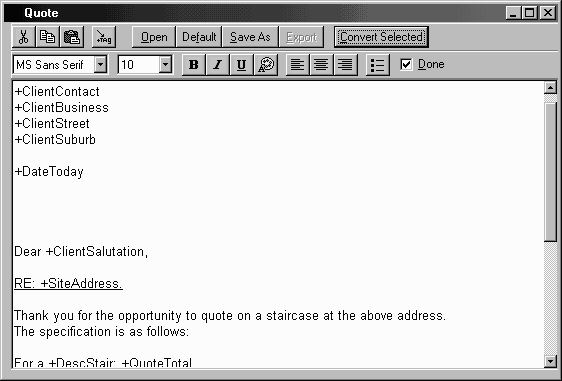
### Hide Cents

Hides the cents part of all figures. The amounts are not rounded to the nearest dollar – the cents exist but are simply not shown in this window. See Rounding the Quote Total.

### Show Breakdown

Opens the Quote Breakdown window where you can see a total breakdown and the basis for all calculations.

## Quote window



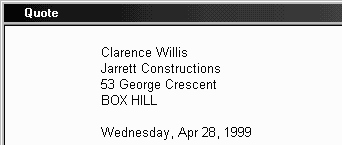
### Overview

From : Process menu ; **Quote** menu-item

Only applicable for Estimate module.

The **Quote window** (sometimes called the “Quote Letter” window) shows a template for a quote or quote covering letter which may be presented to the client (note that most quotes are set up in a Custom Sheet, and that this window is more suited to creating an automatic covering letter to the quotation).

Tags are used as placeholders for actual information - the tags are resolved when you view or print the template using the **Quote sheet**.



Using this method you don’t have to type a new quote or quote covering letter for every job – you simply use a template. Many different templates can be created and saved.

Note; the Invoice window and Receipt window work in an identical way to the **Quote window** – it’s just that they are used for invoices and receipts. Throughout this documentation, a reference to the **Quote window** can also be a reference to those other windows.

### Quote Template

A **template** is a layout, format or structure for a letter. Tags are used within the text as placeholders for actual information relating to the current job.

The tags are in the form of a “+” followed by a description of the information they represent. For example, instead of the actual business name of the client (from the Client window) you will see “+ClientBusiness”. Instead of the quote total (from the Quote Calculation window), you will see “+QuoteTotal”, and so on.

**Templates** can be changed. The **template** in the **Quote window** is in a text box, and can be edited in all the usual ways. You can scroll, type, delete, and change font, font size and font style. You can delete tags and add tags (see Tag). You can paste graphics (e.g. logo, stair drawings etc) into the **template** (place a graphic on the clipboard, insert your cursor anywhere in the text, and paste).

Every change you make to the **template** in the **Quote window** will be reflected (after the tags convert to actual details) in the **Quote sheet** (see Job Sheets).

All changes to the **template** in the **Quote window** are saved with the job.

### Printing the Quote

The template in the **Quote window** can be viewed and printed in the corresponding **Quote Sheet** (see Job Sheets). The tags are resolved first (i.e. the actual information is shown rather than the tags.

Left and right margins for printing the corresponding **Quote sheet** are set in the Preferences window.

See Printing a Job.

### Buttons

#### Tag

Opens a pop-menu from which you can select a **tag** for insertion at the current cursor position.

**Tags** can be deleted from the template using normal text editing (e.g. select the text then press the delete key).

For a list of available **tags** and a description of each, see Tags in the Quote window.

Note that all fields in StairBiz are available, but only some fields are listed in the menu. To find out how to use fields not included in the menu, see Tags in the Quote window.

#### Open...

Opens an alternative template.

When you first open the Quote window for the current job, a default template is shown. However, any number of templates can be designed and saved in the Templates folder (see the **Save As** button).

To open an alternative template, click the **Open** button.

A dialog window will ask you to select from those available. The name of the template opened will be displayed to the right of **Quote Name** at the top of the window. If the default template is current, it will read “Default”

#### Default

Makes the current template (in its current state) the default template for all new projects. Next time you start a new project, and open the Quote window for the first time, the default template will be shown.

#### Save As...

Saves a copy of the template, in its current state, with a different name.

For example, you could change an existing template to be more appropriate for regular clients, and then save it under its own name. In the future, for any regular client, this template could be opened and used (see the **Open** button above). You can save as many different templates as you like.

#### Convert Selected

There may be times when you want to “freeze” certain job details in the quote template. If you select any text in the template, then click the **Convert Selected** button, tags in the selected text will be converted to actual details. If necessary you can edit those details in the usual way, and because the details are no longer tags, they can only be changed manually.

Note that tags which are converted in this way cannot be re-converted (although you can open a fresh template with the **Open** button). For this reason it’s probably a good idea to save a copy of the default template (e.g. as "Default Quote" – see **Save As**).

### Tags in the Quote window

Below is a list of the tags available in the pop-menu in **Quote window**, **Invoice window** and **Receipt window** (click the **Tags** button). The tag is inserted at the current cursor position.

The tags can be typed in manually if you prefer.

+DateToday Today’s date

JOB DETAILS:

+JobDate As shown in the Process window   
+QuoteNumber As shown in the Process window  
+JobNumber As shown in the Process window  
+SiteAddress As shown in the Site window  
+JobDispatch Pickup, deliver or install  
+DateInstall As shown in the Job Details window

CLIENT:

+ClientBusiness The name of the client’s business  
+ClientContact Your contact person within that business  
+ClientSalutation What comes after “Dear ...” in the quote  
+ClientStreet House number and street of the client  
+ClientSuburb Suburb of the client  
+ClientPC Post code of the suburb  
+Terms1 The terms of the 1st payment  
+Terms2 The terms of the 2nd payment  
+Terms3 The terms of the 3rd payment

DESCRIPTIONS:

+DescNewels Describes the size and style of the newels  
+DescBalusters Describes the size and style of the balusters  
+DescHRail Describes the size and style of the handrail  
+DescCBand Describes the size and style of the balconyplate  
+DescCapT Describes the size and style of the shoerail  
+DescCapW Describes the size and style of the walltrim  
+DescBalconytrim Describes the size and style of the balconytrim  
+DescTString Describes the size of the tenonstring(s)  
+DescWString Describes the size of the wallstring(s)   
+DescTreads Describes the number and going of the treads  
+DescLanding Describes the landing and number of landing treads   
+DescRisers Describes the height and number of risers   
+DescHeadClear Describes the head clearance  
+DescPaint Describes the finish of the stair and who does it  
+DescLining Describes the soffit lining situation  
+DescCupboard Describes the cupboard under situation

QUOTE:

+QuoteTotal The total amount of the quote  
+DueAmount1 The amount of the 1st payment due  
+DueAmount2 The amount of the 2nd payment due  
+DueAmount3 The amount of the 3rd payment due

PAYMENTS:

+PayAmount1 The amount of the 1st payment made  
+PayAmount2 The amount of the 2nd payment made  
+PayAmount3 The amount of the 3rd payment made  
+PayChqNum1 The check number of the 1st payment  
+PayChqNum2 The check number of the 2nd payment  
+PayChqNum3 The check number of the 3rd payment  
+PayDate1 The date of the 1st payment  
+PayDate2 The date of the 2nd payment  
+PayDate3 The date of the 3rd payment  
+Pay Total The sum of payments 1-3 above  
+DueBalance Equals Quote Total less Pay Total (i.e. balance owing)

##### If the field you want is not in the list?

If you require a field not listed above, type a “~” (usually the top-left key on your keyboard) where you want the field inserted, and select a field from the list. The field will be inserted as a number (a little bit cryptic) but it will do the job.

### StairBiz versus a word processing program

In most cases, printing the converted quote (i.e. in the **Quote sheet**, on your letterhead) will give a perfectly presented quotation for your client, however ...

The **template** is a simple text box . It does not have the same functionality as a word processing program. One of the few times that you might notice the difference is when you try to align numbers one above the other (for example, the schedule of payments). Because you cannot use decimal tabs in the **Quote**, **Invoice** and **Receipt** windows, this could be a problem.

There are two categories of fonts: proportional-space and fixed-space. Proportional-space fonts use a variable width for each character. Fixed-space fonts use the same width for every character. If you are using a proportional-space font (e.g. Helvetica) the width of a “space” character (the invisible character you get when you press the space bar at the bottom of your keyboard) is not the same width as a numeric character (1,2,3 etc). So if you want numbers to line up one above the other you will need to use a fixed space font (such as Courier, which is not a pretty font).

If this is a problem for you, the easiest solution is to copy the output from the **Quote sheet** (simply select the text and press **Control+C**), and paste it into a word processing program which supports decimal tabs.

## Receipt window

From : Process menu ; **Receipt** menu-item

Only applicable for Estimate module.

The **Receipt window** may be used to generate a payments receipt in the form of a letter for presentation to the client. An alternative is to use a Custom sheet.

All the features and functions available in the Quote window apply to this window.

## Related Files

In this window, folders or individual files on your computer which relate to the current job, or to the current client, or to a client in the Client List can be "attached" to the job or client for easy future reference.

### For current job

From : Process menu ; **Related Files** menu-item.

This window can also be opened by dragging a file or folder onto the StairBiz application background window (while the application is running and a job is in progress). Note that dragging a file or folder over the StairBiz icon in the task bar for a couple of seconds will cause the StairBiz application to temporarily move to the front so that you can drop the file/folder onto it.

In this window, folders or individual files on your computer which relate to the current job can be "attached" to the job for easy future reference.

Note that any of the twenty 'Stage' buttons in the Process window can be set to "Related Files" (see Process window /Customizing buttons in Process window).

### For client (in Client List)

From : Client List window ; **Related Files** button.

In this window, folders or individual files on your computer which relate to the currently selected client can be "attached" to the job for easy future reference.

Note that if there are any related files, the "Related Files" button caption will be appended with a ">".

### For client (in job)

From : Client window ; **Related Files** button.

In this window, folders or individual files on your computer which relate to the client for the currently open job can be "attached" to the job for easy future reference.

If the client is linked with the Client List then related files will be as per the Client List.

Note that if there are any related files, the "Related Files" button caption will be appended with a ">".

### Buttons

#### Attach ...

Opens a window where you can select a folder or file for attachment.

For a **folder** attachment, StairBiz saves the path to the folder; the folder is shown in the Folder List and all the files that happen to be in that folder at the moment are shown in the Files List.

For a **file** attachment, StairBiz saves the full path to the file; the **[Unspecified]** folder is shown in the Folder List and the attached file is shown in the Files List.

The Help panel at the bottom of the window shows the path of the currently selected file.

#### Unattach

Unattaches the currently selected folder or file.

You cannot unattach the [Unspecified] folder.

You cannot unattach a single file contained in an attached folder (you can only unattach that folder)

#### Kill File

Kills the file on the disc. It does not go in the Trash - it's just gone forever.

You cannot kill a folder (it's too risky - better to use the Browse button and delete it yourself).

#### Open File

Opens the currently selected file if possible. It will not be possible if you do not have the relevant application on your computer.

#### Browse File

Opens the folder containing the currently selected file.

## Setout window

### Overview

From : Process menu ; **Setout** menu-item

The default setout for a new stair comes from the Setout Defaults window and can be changed here for the current job if necessary.

For a detailed description of each item, refer to Setout Defaults window.

By default, the “Default” setout is used for each new job. You can select an alternative setout using the drop-down list at the top of the window. These alternative setouts are created in the Setout Defaults window. When selected, they are loaded into the window and into the job, replacing the existing. The job will automatically update to reflect the new settings.

If you make changes in the Default Setout window, be aware that existing job’s Setout window are not automatically updated – you need to reselect the appropriate Defaults Setout window from the dropdown list at the top/left of the window, or click the **Refresh** button (a shortcut to the abovementioned reselection).

This window is shared by all jobs in the project, unless the **Shared** button is unselected – see Shared Windows.

## Setout Defaults window

### Overview

From : Defaults menu ; **Setout** menu-item

Items in the **Setout Defaults window** control some aspects of the way a design is setout or processed. These dimensions generally remain consistent from job to job, but can be amended for any particular job (if necessary) in the job’s Setout window.

You can save multiple copies of the **Setout Defaults window**, each containing different settings, and open the one appropriate to the job at hand (otherwise the setout call “Default” is used).

### Amending

To amend a value, double-click the value, change it, then either press the **Enter** key or simply click somewhere else. Note that changes will only affect FUTURE jobs - it will not affect current or past jobs. See Editing.

If there is “(Y/N)” at the end of the title, the setting expects a “Yes” or “No” setting. You can simply type “Y”, “y”, “N” or “n” rather than the full word.

### Buttons

#### Save

Saves changes made to the current **Setout Defaults window**.

#### Save As

Saves the current **Setout Defaults window** under a different name, which can then be called up at any time as an alternative to your default setout.

#### Open

Opens an alternative **Setout Defaults** and loads them into the window. These setouts were created using the **Save As** button.

#### Print

Prints the current **Setout Defaults window**.

#### Export/Import

Exports the current window to a file or imports a previously exported file to the current window (overwriting the current settings). This is useful only for moving settings from one computer to another where you don’t wish to move the entire defaults database.

### Setouts

NOTE: All values in this window control the default status of various options for a job’s stair setout, and can be amended for any particular job in that job’s Setout window.

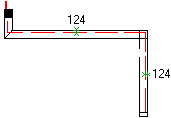
### Balconyplate

#### ~1 Overlap into well

The default distance which balcony balustrade newels extend into (overlap) the well hole, which in turn determines the distance which balconyplate extends into the well.

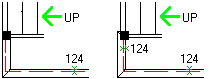
NOTE: If the **Overhang** dimension in the selected balconyplate’s Style window is non-zero, it overrides this setting (i.e. this setting will be ignored).

This setting is amendable for a particular job on a section-by-section basis in that job’s Design: Balcony Setout window.



#### ~2 Align with top newel

In each illustration below there is a short section of balconyplate associated with the top newel. If this value is set to true (T), StairBiz will override the default overlap (Item ~1 above) for this section, and will align it with the top newel (first example). If this item is set to false (F), the default overlap will apply, which may cause a mitre-wrap situation around the top newel (second example).



#### ~3 Wrap Type

Sets the default wrap type for balcony sections of rail wrapping a newel (i.e. where the section terminates but both edges of the section do not butt the newel). The following values (1-3) produce the result indicated.

**1. Wrap Start**

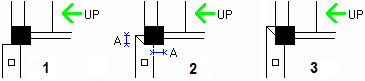
The section terminates at the start of the newel

**2. Wrap Mid**

The wrap section extends the same distance along the side of the newel as the non-wrapped part of the adjacent face of the newel, giving a "balanced" wrap.

**3. Wrap End**

The wrap section always extends to the far side of the newel



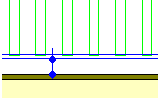
This default value can be overridden on a section-by-section basis for the job in the Balcony Sections part of the Design window (right-click on the relevant newel). They can also be set to manual override, after which you can set a dimension and angle to determine the wrap.

#### ~4 Level with floor

If set to True, for the purposes of calculating the length of the balusters the Balconyplate is treated as having its top level with the floor.

#### ~5 Raised Margin

If the balcony plate is raised (see Styles window – Balcony Plate) above the level of the floor, this is the margin (gap).



### Balusters

#### ~10 Max between balusters (stair)

The maximum space between balusters (stair only – for balcony see next heading). StairBiz auto-calculates baluster spacings to comply with this setting. The user can override this auto calculation in the appropriate baluster spacings window (i.e. StairBiz will not vet user changes to baluster spacings).

#### ~18 Max between balusters (balcony)

Same as ~10 (above) but applies to balcony (some building codes have different specs for each).

#### ~218 Fixed between balusters (balcony)

Use this to create fixed space balusters around the balcony. The value you enter is the fixed face-to-face distance. StairBiz will make up any discrepancy in spacings at the two ends. It will not apply for curved sections.

#### ~11 Mark baluster centres

Set to True (T) if you want StairBiz to mark the *centres* of balusters when showing baluster spacings (appropriate if you dowel the balusters).



Set to False (F) if you want StairBiz to mark the *face* of balusters when showing baluster spacings.



#### ~12 Blank length - stair

If you buy your stair baluster blanks pre-cut to a particular length (e.g. all pre-cut to 900 mm), input this length.

If you buy your stair baluster blanks in random lengths, input “0”.

StairBiz uses this information to calculate material costs in the Materials window: For example, if this default is set to 900, StairBiz will use 900 mm to cost the blank of each baluster, even if the finished baluster length is only 700 mm. If set to zero, StairBiz will use the finished length. Note that the Cutting List window will always show the finished length.

#### ~13 Blank length - balcony

Exactly the same as for ~12 above only this time for balcony balusters.

#### ~130 Length - Low face only

Instead of the length of the baluster being measured vertically from the highest point to the lowest point, this causes the baluster to be measured along the lowest face of the baluster.



#### ~14 Wastage for turning

The amount at the top and bottom of a baluster blank that is allocated for wastage when the baluster is turned, i.e. the amount added to each end of a finished baluster size for the purposes of turning.

#### ~15 Pin top into handrail

The distance the centre of a pin-top baluster bores into the handrail.

#### ~16 Plow override for square top balusters

If you have handrail that comes in both a plowed and non-plowed versions and is otherwise identical, you can (if you like) include only one (not both) of these rails in the Styles window (in the Handrail category), and give it a plow depth of zero. When StairBiz notices a square-top baluster used with a handrail with plow depth of zero, it will assume that you want the plow depth to be as indicated by this plow override setting.

#### ~17 Minimum Lower Flat

When using balusters with a fixed turning (i.e. the **Fixed Lower Flat** check-box in the Baluster’s Style window is not ticked), StairBiz assumes that for the selected baluster style the **Turn Length** specified in the Style window is suitable. If this is not the case you can change it on a job-by-job basis in the baluster’s Style window (opened from the Components window).

To save you having to do this manual vet and change, set this **Minimum Lower Flat** (MLF) value. When MLF is zero, StairBiz ignores it. When MLF has a non-zero value, and the baluster has a fixed turning, StairBiz may adjust the specified fixed turning as follows:

For each of tenon and wall side (separately), StairBiz calculates the length of the lower flat for each baluster, and finds the baluster with the LEAST lower flat. If that lower flat is less than the MLF, then StairBiz will adjust the specified fixed turning to comply with the MLF rule (for that baluster), and then re-apply this adjusted turn length to ALL balusters on that side of the stair. The result is that, for each side of the stair, all balusters will have a lower flat at least as long as the MLF, and all balusters will have the same turn length (albeit perhaps shorter that the **Turn Length** specified in the Style window).

#### ~19 Bottom Pin Length

The length of the bottom pin for those balusters which come with a bottom pin (i.e. balusters with the **Pin Bottom** option ticked in the Style window). Balusters with the **Pin Bottom** option ticked are assumed to have this pin length already included in any dimensions in the Length and Lower Flat fields in the Balusters category of the Parts window, and the Lower Flat fields of the Style window.

Bottom pins are NOT included in the baluster lengths shown in the Cutting List. Bottom pin lengths are included in the **Length** and **LowerFlat** properties of balusters sent to your filters EVEN IF the bottom of the baluster is cut on the rake (so that the baluster spec’d by your filter can allow for a clean rake cut in the non-pin area of the lower flat).

#### ~220 Extend balusters below string

Extends the bottoms of balusters down below the top of the strings. Balusters will extend below the string only if there is no shoerail. Balusters will extend below the upper floor with or without balconyplate. Enter the distance.

#### ~221 Extend balusters below balcony

Extends the bottoms of balusters down below the surface of the upper floor (balcony) level. Balusters will extend with or without balconyplate. Enter the distance.

#### ~222 Volute baluster count override

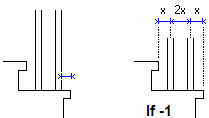
The number of volute/turnout balusters is set in the Fittings window and can’t normally be edited on a job-by-job basis. If you wish to override this for a job, you can do it here. If left at zero, the setting in the Fittings window is used.

#### ~70 Nose to baluster

The distance from the nosing of a tread to the face of the baluster (sawtooth only). See the first illustration below.

Note that if you “set out to line of riser” (see above), the distance is from the riser face (not the nosing).

If this value is set to “-1”, StairBiz will space the balusters uniformly on the tread (see the second illustration below).



#### ~73 Baluster into Tread

The depth into the tread for the housing of the bottom of balusters (zero if none – i.e. you use dowels instead).

#### ~322 Sawtooth Alternate feather spacing

See Chapter 11 : The Design window in depth/ Combo Balusters/ Manual Mode/ Sawtooth schemes/ Feathered Spacings. The value is Yes or No.

#### ~323 No arcs in glass panels

Where you are using glass panels for balustrade, by default StairBiz will ignore handrail fittings that have arcs (and simply extend the top of the main section of the panel through until it reaches the vertical).

If you want glass panels to follow the exact line of the handrail, set this to No (it is Yes by default).

#### ~204 Plow even for short sections

This relates to Handrail, Shoerail and Balconyplate. When these sections are very short such that there is no room for balusters, StairBiz normally specs them with no plow (e.g. PlowWidth property for filters is set to zero). As such, if you don't have a corresponding component in the Parts window that does not have a plow, the filter won't find what you're looking for. This setting overrides that behaviour (i.e. it will spec the plow even when there are no balusters).

### Bearers

#### ~20 No bearers in winders > than ...

The value you enter determines under what situations bearers are specified for landings. The default is "4", meaning that bearers are specified for all landings. A "2" means that bearers will be specified for landings with up to 2 treads. A "1" means that bearers will be specified for landings with only one tread. A "0" means that bearers will never be specified.

There is also a "None" option in the size pop-up list for bearers in the job's Components window. Use this to specify no bearers on a job-by-job basis.

### Bullnose

#### ~27 Block Depth

The thickness of each riser block (only relevant to CNC so that the correct Z-depth can be set for cutting).

If this depth is zero, StairBiz will not include a block.

#### ~28 Price Timber for Block

You can elect whether or not to allow StairBiz to price the timber for bullnose blocks. Note that StairBiz uses tread material as the basis for pricing (there is no special category in the Components window). Item ~27 (block thickness) must be set regardless of the fact that the timber is priced based on the tread.

#### ~29 Labour cost; separate tread sides

Double-ended bullnoses go through the Parts and Labour filter as a single item with BullName = [Bullname1/Bullname2]. If you want each bullnose side to go through the Labour filter separately, set this to True. With this set, the tread will be sent to the filter twice (the only difference being that the first will have BullName = [Bullname1] and the second will have BullName = [Bullname2]. Note that this only applies to the Labour filter.

#### ~25 Labour cost; separate riser sides

Same as above, but for risers.

#### ~109 Add extra to bull back (closed rise)

The value should be the amount a bullnose tread extends back behind the face of the riser above it. You can see the effect with “Show Tread” in the Stair Setout pane of the Design window. Also see following setting.

#### ~302 No extra at highest bullnose

This is a companion setting to the one above (Add extra to bull back). Set this to True if you do not want the extra to apply to the highest or only bullnose tread (i.e. if it applies only to bullnose treads below the highest bullnose tread).

#### ~303 Add extra to non-bull end

You can extend (i.e. over-length) the non-bullnose end of a bullnose tread. Enter a dimension. You can see the effect with “Show Tread” in the Stair Setout pane of the Design window.

### Cove

#### ~170 Adjust Width for Frets

With this set True, the width of any side sections of cove (as specified in the Components window) is decreased by the width of the frets (if used).

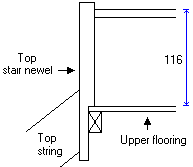
#### ~171 Materials: Total length for tread

With this set to True, the Materials list will combine the lengths of any side cove pieces (i.e. for cut string treads) into the length of the main nose cove (i.e. giving a single total length for each tread).

### Handrail

#### ~30 Rail to floor (balcony)

The distance from the level of the upper floor to the top of the balcony balustrade handrail.



#### ~31 Rail to rake nose

Used for raked strings (sawtooth and box). It is the distance from the line of the tread nosings vertically to the top of the rail.



#### ~32 Rail to level landing

Used for rail at a level landing (i.e. one that has a single tread). It is the distance from the top of the tread vertically to the top of the rail.

#### ~33 Rail to raked landing

Used for rail at a raked landing (i.e. one that has more than one tread). It is similar to ~31.

#### ~34 Ceiling Rail Override

In the Design window/ Elevations pane, the fittings selection at a newel includes the option for Reducing (levelling the handrail at the underside of the ceiling) where applicable. By default, this option includes the level rail (along the ceiling) in drawings and specifications, however, if you have your own special component to replace this level rail, set the value of this item with the depth dimension of this component (or set “-1” to have raked rail and balusters simply run into the ceiling). StairBiz will not spec or draw your special component (invariably it will be an irregular length, so you can create this in Loose Items in the Materials window), but it will make the allowance. See also Chapter 11/ Reducing Balustrade.

### Handrail Curve

#### ~35 Max angle sweep

For a single piece of curved rail, shoerail and balconyplate that is curved, what is the maximum arc angle (sweep) allowable before StairBiz will break the rail into shorter sections. For example, if the sweep of the rail is 100 degrees, and this **Max angle sweep** setting is 45 degrees, StairBiz will divide the rail into 3 sections (each 33 degrees) because dividing into two sections of 50 degrees would violate this setting.

This setting is further subject to the next setting (**Max Length**)

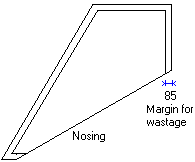
#### ~36 Max length

See the previous setting. StairBiz will first divide curved rail into sections according to **Max angle sweep**. StairBiz then checks that the length of each section (along the centreline of the rail) is not longer than this **Max Length** setting. If it is, StairBiz will further divide the rail until this Max length setting is not violated.

### Glue-ups

#### ~190 Tread/Winder; Wastage

When StairBiz calculates the setout of a winder blank (which will be then cut and glued up to create a winder tread if grained timber is not used), it allows a margin for waste. In other words, the tread which is created from the glue-ups will be slightly oversize - in preparation for its final exact cut. Wastage may or may not be added to the nosing side (see next item).



Note that if glue-up Method 2 is used (see below), StairBiz calculates wastage slightly differently (adding the wastage horizontally to each board in the glue-up).

This wastage does not apply to straight-flight treads which are perfectly rectangular.

#### ~191 Tread/Winder; Include wastage at nose

Include the wastage at the nose of the tread.

#### ~192 Tread/Winder; Apply Extra Length

Wastage for tread/winder glue-ups is specified above (~190), and by default extra lengths specified in the Extra Lengths window (Treads and Winders categories) do not apply to glue-ups. Set this to True to include them. If they apply, and you use Method 2 for glue-ups (see below), the Extra Length will apply to each piece in the glue-up.

#### ~193 Tread Square; Do glue-up

If a normal (not landing) tread has its nose and back edge parallel, but the width selected in the Components window is less than the actual width of the tread, then …

If set to True:

StairBiz will do a glue-up (a strip across the back of the tread – Method 2 only), and will show the individual glue-up strips in all material lists and costing.

If set to False:

StairBiz will NOT do a glue-up. In all materials lists StairBiz will show the tread’s actual width (according to the Design), and if costed as blank items will add a pro-rata cost (plus 20% wastage) to account for the excess width.

#### ~194 Tread Irregular; Do glue-up

By default, StairBiz will do a glue-up for bullnoses that are wider than the plank width (Method 2 only – see below).

Item ~193 (above) applies where the tread back is parallel to the nosing.

Where the tread back is NOT parallel to the nosing (e.g. treads in circular stair) …

If set to True:

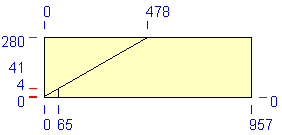
StairBiz will do a glue-up (Method 2 only – see below).

If set to False:

StairBiz will NOT do a glue-up because often what comes off the back of one side of the tread gets glued on to the back of the other side of the tread. In this case the width of the tread specified in materials lists is the width of the tread blank as selected in the Components window (it is assumed to be sufficiently wide).

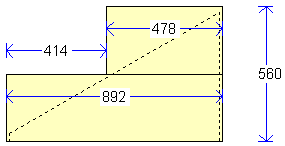
#### ~195 Winder; Use Method 2

Method 1 is as follows:



Note that the Method 1 setout (as shown here) can be put on the CNC bed for cutting.

Method 2 (more wasteful, but faster and easier for manual setout) is as follows:



Note that regardless of this setting, Method 2 is the only method used for square landings, half-space landings and bullnoses.

#### ~196 String; Wastage

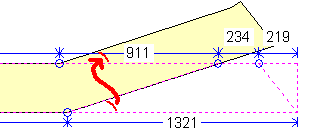
When StairBiz calculates the setout of a hockey string blank (which will be then cut and glued up to create a hockey string if grained timber used), it allows a margin for waste (it is not added to the width of the main horizontal board). In other words, the ‘wings’ created from the glue-ups will be slightly oversize - in preparation for its final exact cut.

#### ~197 String; Apply Extra Length

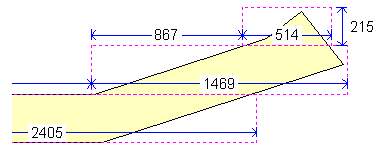
Wastage for string glue-ups is specified in the previous item, and by default extra lengths specified in the Extra Lengths window (strings categories) do not apply to glue-ups. Set this to True to make them apply. If they apply, and you use Method 2 for glue-ups, the Extra Length will apply to each piece in the glue-up.

#### ~198 String; Use Method 2

Method 1 (the default method) for calculating glue-ups in a blank for forming the shape of a hockey string is as follows. It is a very efficient method with minimum timber wastage.



However, some prefer the more wasteful but easier method, as follows:

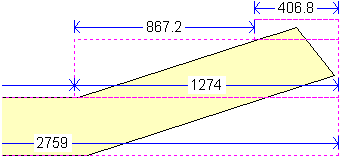


To use this second method, set this value to “Y”. This method also accurately feeds in to cutting lists, BOM and costing. A wastage margin can be set in **Wastage; hockey glue-up** (above).

Also see Chapter 21; String Glue-ups

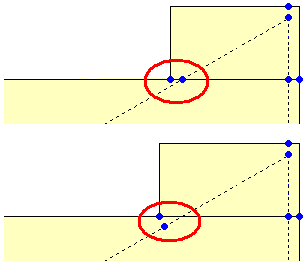
#### ~199 String; Method 2 non-staggered ends

When using Method 2 (above) this setting inhibits the staggering of the ends of the blanks.



#### ~200 Method 2 margin is horizontal

The first example (below) shows the waste margin measured horizontally (between the two blue dots). The second example shows it measured diagonally.



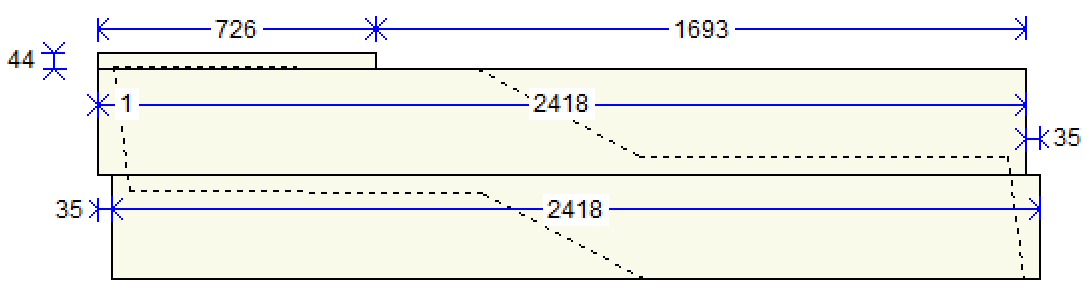
A horizontal margin means a glue-up board could move horizontally either way by half the margin and the tread or string would still be within it. This is good if the board widths are exact, and (if using CNC) you’re putting the strings/treads on a CNC bed against stops (such that you are very confident about the “Y” position, but less confident about the “X” position).

A non-horizontal margin means that StairBiz applies the waste margin around the entire perimeter of the tread/string prior to calculating the glue-ups. This may be better if the board widths are not exact, for manual cutting (i.e. not CNC), or where a CNC uses laser positioning (i.e. not stops) such that you are less confident about the “Y” position of your piece on the bed.

#### ~201 Double Hockey orientation low

This determines the orientation of a double hockey string glue-up (i.e. a landing string either side of a straight flight string, all as one piece). With this set appropriately, the entire glue-up will be the same orientation as the lower landing string (otherwise it will be orientate to the centre string).

You can enter a number, being the number of treads of the intermediate straight flight up to which you want this to employ this feature. So, for example, if you enter “3” then if the straight flight has one, two or three treads, this feature will be used (with four treads or more it will not).



### Levels

#### ~45 Default Bulkhead

For each new level created in the Levels pane of the Design window, this will be the default bulkhead depth (the distance between the floor and the ceiling below it. It can be changed in each job for each level in the Levels pane.

#### ~46 Ground Floor is called ‘First’

In some countries ground floor is call “Ground” and the floor above it is called “First” etc. In other countries ground floor is called “First” and the floor above is called “Second” etc. If you fall into the second category, set “Y” (Yes), otherwise set “N” (No).

#### ~47 Extra Below Floor

You can get all strings, risers and newels to extend below floor level by right-clicking the stair in the Design window (Stair Setout pane) and selecting the “Extra Below Floor” menu-item. This is the default value. If set as non-zero, all new stairs will automatically take on this value. (Available only in the Defaults Setout window – not in a job’s Setout window).

### Newels General

#### ~52 All newels float

With this set to true, all stair newels will be treated as floating (i.e. not a part of the stair’s structure). The strings and treads will ignore all newels, as if they didn’t exist.

Note that with this set to False, a newel is treated as floating only if both string edges do not intersect it, or if “Floating” has been selected in the newel’s menu (right-click the newel)

#### ~50 Half newel cut width

The width of the cut when cutting a full newel up the middle to create two half newels. StairBiz uses this setting to calculate the depth of half newels as follows; the depth of a full newel minus this cut width then divided by two.

Note that StairBiz assumes that the depth of a half newel which is not turned is the same as a half newel which is turned (i.e. the depth arrived at in the above way).



#### ~53 Wastage for turning

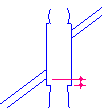
The amount at both ends of a newel blank that is allocated for wastage for turning (i.e. the amount which needs to be added to both ends of the finished length for the purposes of turning).

This setting is used by StairBiz to calculate the length of blanks for turned newels.



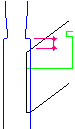
#### ~55 Min Flat Below Rail

The minimum distance from the bottom of the lowest handrail to the bottom of the upper flat of a PTP (post-to-post) newel. If necessary, StairBiz will override your default turning setout (as shown in the Style window) to achieve this (provided that the *Auto Adjust* tag is set – see Design Window / Elevations pane / Right-click a string / Show Turn Lengths).



#### ~56 Min Flat Above String/Shoerail

For a box string, the minimum distance from the top of the highest string to the bottom of the turning. If necessary, StairBiz will override your default turning setout (as shown in the Style window) to achieve this (provided that the *Auto Adjust* tag is set – see Design Window / Elevations pane / Right-click a string / Show Turn Lengths).



If a non-raised shoerail exists, the top of the string is deemed to be the top of the shoerail.

#### ~57 Min Flat Above Raised Shoerail

Same as the previous setting (~56), but used where there is a raised shoerail (i.e. where there is a gap between the string top and the shoerail). Otherwise the bottom newel flat may look awkwardly long.

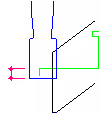
This setting also applies to raised balconyplate (where is it the alternative for “Min flat above balcony floor” (see below).

#### ~58 Min Flat Below String

When you set the bottom of the newel to “Bottom of String”, this amount will be added such that the newel actually terminates this distance *below* the bottom of the string.

#### ~60 Floating newel into tread

For a floating newel with its bottom set at the level of a tread (see Newel Setout menu item in the Elevations pane of the Design window) this is the distance (if any) that you want the newel to extend down below the surface of the tread.



#### ~162 Min separation for same setout U-Loose newels

The following applies to a U-Shape stair where there are two selected centre newels. In such cases you may want the newels to be exactly the same height and turning setout.

This value can be set to -1 (which means not applicable), or can be set to a dimension (including zero). As a dimension, if the gap between the adjacent centre newels is less than or equal to this dimension then StairBiz will pretend that the lowest rail into the upper newel is that of the lower newel, and the highest string into the lower newel is that of the upper newel. This provides the basis for both newels to calculate out to be same height and turn setout.

### Newels Balcony

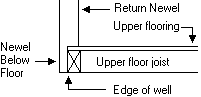
#### ~51 Balcony newels below floor

If you normally cut the balcony balustrade newels around the well such that the bottoms of the newels extend below the upper floor level to the level of the ceiling, set to any negative number (e.g. “-1”). If you normally finish your balcony newels at a certain distance below the floor level, set this to that distance. Otherwise set it to zero. (Also see ~61.)

If set to any negative number, StairBiz will set the length below floor to correspond to the thickness of the floor (the difference between the floor to floor and the floor to ceiling as input in the Design: Well Dimensions window ).

This dimension is amendable on a newel by newel basis in a job’s Design: Balcony Balusters window.

This setting is used by StairBiz to calculate the length of a job’s balcony newels, and to show the cut-away pattern in the Balcony Components sheet.



#### ~61 Vet for overlap into well

This can instruct StairBiz to only use the “Below Floor” setting (see ~51 above) if the balcony newel is overlapping into the well. The amount that it needs to overlap is the value of this setting (e.g. if you set this to “1.5”, then the at least one corner of the newel would need to be 1.5 inches into the well before the “Below Floor” setting takes effect.

#### ~59 Min flat above balcony floor/balconyplate

The minimum distance from the balcony floor level (or the top of the balcony plate, if used) to the bottom of the turning of a balcony newel. If this value is not zero, and the turning of the newel (according to the newel’s Style window) is such that the bottom of the turning is below this setting, StairBiz will override your default turning setout to achieve this.



In the case where a raised balcony plate is used, StairBiz uses setting ~57 instead of this one.

### Newels Top

#### ~54 Match Top Newels

With this value set to true (T), when there are two top stair newels (tenonside and wallside) and balcony balustrade is associated with only one of them, StairBiz will give the one without the associated balcony the same turning setout as the one with the associated balcony.

With this value set to false (F), when there are two top stair newels (tenonside and wallside) and balcony balustrade is associated with only one of them, StairBiz will give the one without the associated balcony the same turning setout as a balcony newel.

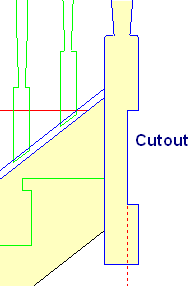
Note that when a single top newel (i.e. one side but not the other) has no associated balcony, StairBiz gives it the same turning setout as a balcony newel.

#### ~62 Top newels assume balcony rail

Set to True if you want the height of your top newels to assume there is balcony balustrade, even when there is not. This does not apply to pin-top newels (whose height will be determined by fittings at the top of the lower rail).

#### ~63 Trimmer; top newel cut around

Where a top newel hooks over the trimmer, StairBiz can draw and CNC the cut-out in the newel. This setting sets whether or not you want the cut-out (Yes/No).



Note that if a well is a ‘Reverse-L” well (where a line of the well extends backwards from the back of the top newel), StairBiz not allow a trimmer cut-around on the CNC (because it’s possible that the cut-out should not extend all the way across the back of the newel).

The following two settings are related.

#### ~64 Trimmer; top is floor surface

Where a top newel hooks over the trimmer, True sets the top of the cut-out to the floor surface, otherwise it is the top of the trimmer.

#### ~65 Trimmer; bottom is ceiling

Where a top newel hooks over the trimmer, True sets the bottom of the cut-out to the level of the ceiling, otherwise it is the bottom of the newel.

#### ~366 Use I-Joist (I-Beam) T/F

For CNC only:

If the trimmer joist at the top of the stair is an I-beam, and you want to trench the top newel for the trimmer joist, you can set this trenching to follow the shape of the I-Beam (i.e. it can hug the two flanges and the web, if possible). To do this:

Set this value to True, then …

**Flange Height** is the vertical thickness of the flanges

**Web Height** is the vertical height between the flanges, and

**Channel depth** is the width of the flanges less the thickness of the web, then divide by two (i.e. from outside edge of flange to the face of the web).

### Orientation

#### ~65 Default Design Orientation

In the Design window (Stair Design tab) you can right-click on a empty space and set the orientation (angle) of the entire design. This setting allows you to set the default orientation for each new job (from 0 degrees to 359 degrees).

### Outstep

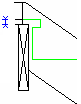
#### ~116 Detached Nose Use Tread (Detachednose)

A detached nose is where a standard landing tread (on a regular landing – not a platform, which doesn’t have a tread) has the tread nosing of the bottom tread separated from the tread (do a find on “detachednose” in this manual). With this setting = True, such outstep takes its material from the treads category of the Components window. With this setting = False, the material is from the Outstep category (which may point to Balconyplate).

#### ~117 Default Floor thickness

The standard floor thickness used in your region (this setting is used by the Outstep to set the default tongue thickness – set zero if you don’t do this).

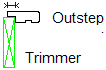
This item is only shown in the Defaults Setout window (not the Job’s Setout window)



#### ~118 Default Outstep rebate

The distance that the upper floor is chopped back from the face of the trimmer (to accommodate the tongue of the outstep). Set zero if you don’t do this.

This item is only shown in the Defaults Setout window (not the Job’s Setout window)



### Risers

#### ~66 Splayed Risers

Set this to “Y” if you want the risers to run from the bottom of the nosing above to the back of the tread below (i.e. deleting the lip normally under the nosing).



Note that for CNC purposes you should avoid having a single splayed riser that spans two faces of a newel (i.e. goes around a corner) – the CNC will not handle the trenching of this newel well in this situation.

Note that StairBiz does not support spayed risers for a sawtooth string. It will do them perfectly in 95% of situations, but there are some situations where things can’t be resolved. If they look OK in the Elevations window, you’re probably OK.

#### ~67 Splay nose for splayed riser

Set this to “Y” if, when **Splayed Risers** is set, you also want the nose of the tread to be splayed.

#### ~68 Splayed riser angle override

When using splayed (angled) risers, this sets a specific angle for the riser (relative to the vertical). Note that if this setting is non-zero the Nose to riser face (~106 in Treads category) setting is redundant (it is calculated from the angle and the rise of the tread).

#### ~69 Riser height extra all

Adjusts the finished height of all risers (not including the very bottom riser of the stair) by this amount. Negative is less height, positive is more height. Normally used for when you don’t want you risers to go exactly to the bottom of the tread below.

#### ~152 Riser height extra at Outstep

Adjusts the finished height of any riser immediately under an Outstep. Negative is less height, positive is more height.

#### ~153 Riser height extra at Landing

Adjusts the finished height of any riser immediately under a quarter-space or half-space landing (not a platform, which is handled by the preceding setting). Negative is less height, positive is more height.

#### ~253 Riser height bottom make same

Normally StairBiz specs the width (height) of the very bottom riser (i.e. at the floor) accurately, to reflect that it is less than usual. If you don’t want this, set this False.

#### ~154 Open Rise; Riser at top of stair (Y/N)

Set this to “Y” if you want a full riser at the very top of the stair when the unit is otherwise open rise.

#### ~155 Open Rise; Riser under platform (Y/N)

Set this to “Y” if you want a full riser under a platform when the unit is otherwise open rise.

#### ~156 Open Rise; Riser under landing (Y/N)

Set this to “Y” if you want a full riser under a landing (not a platform, which is handled by the preceding setting) when the unit is otherwise open rise.

#### ~161 Riser sits on platform (Y/N)

When set to True, the riser above a platform will sit on top of the platform rather than extend down behind it.

### Sawtooth

#### ~71 Rise end at tread end T

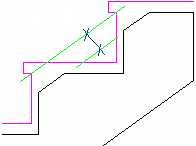
Applies only if sawtooth on the tenonside side. If you want the end of the riser to extend to the end of the tread on the tenonside side, set this to “Y”. Otherwise the riser will extend to the outside face of the fret (or the string if there is no fret).

#### ~72 Rise end at tread end W

Same as above, except applies to wallside side.

#### ~74 String margin Tenonside

The distance from where the front of the riser meets the underside of the tread to the top edge of the string (before the string is cut). A value of more than zero would mean that the corners would be left out (i.e. only suitable if using frets, but would leave more meat in the string). Applies only to the tenonstring (the next setting applies to the wallside side).



#### ~75 String margin Wallside

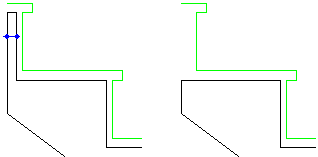
Same as above, except applies to wallside side.

#### ~76 String margin mitre

Same as above, except applies when risers mitre the string.

#### ~77 Outstep minimum meat

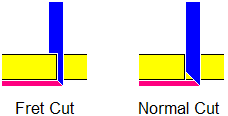
The minimum horizontal width of the tongue between the top riser and the trimmer for a sawtooth top string. If the tongue is less than this amount, StairBiz will disregard it (as shown in the illustration on the right).



#### ~81 String Vertical is Fret Cut

The vertical cut on a sawtooth string (against which the riser sits) where a fret is used can be one of two types. The first type (shown below) is called a “Fret Cut”, and if you wish to use this option you should set this value to True (“T”).

The illustrations are in plan view. Yellow is the sawtooth string, pink is the fret, and blue is the riser.



#### ~278 Sawtooth Flush (treads/risers sit inside)

Normally the outline of a sawtooth string follows the underside of the treads and the back of the risers. If you want it to following the top of the treads and the front of the risers (such that the treads/risers sit WITHIN the string, set this to True.

Also see next heading for CNC tips.

#### ~279 Sawtooth Flush extra

If you want the sawtooth outline to extend ABOVE the treads and in FRONT of the risers (to provide a rebated key for a sawtooth shoerail), you can set the above ~278 to True then set this to the dimension of the extra amount.

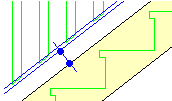
Note that you may decide to adjust the "Sawtooth Minimum Meat" (~77 in the Setout window) - it does not account for the extra meat gained with this method.

On the CNC, to trench a rebate into this string to house the treads/risers, you can use the Sawtooth Riser and Sawtooth Tread categories of the Cut Templates window. For the Treads, set the CutOffset to "-%TT + %TR ! %TD"; this will give you two appropriate cuts for each tread. For the Risers, set the CutOffset to "-%RT + %TR ! %TD"; this will give you two appropriate cuts for each riser (provided it is not a splayed riser).

### Shoerail

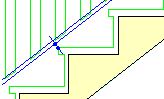
#### ~85 Raised margin box string

When the shoerail is raised above the level of the top of a box string (see Styles window – Shoerail category), this is the margin (gap).



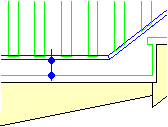
#### ~86 Raised margin sawtooth nose

When the shoerail is raised above the level of the nosings of a sawtooth string, this is the margin (gap).



#### ~87 Raised margin sawtooth nose

When the shoerail is raised above the level of a sawtooth landing tread, this is the margin (gap).



### Sidenoses

#### ~78 Sidenosing width

The width of the tread’s sidenosing.

For a width the same as the distance from the outside of the string to the end of the tread, enter “0” ; for a width the same as the nosing, enter a “-1” (minus 1); for a width the same as the tread depth, enter a “-2” (minus 2); otherwise enter the actual width as a dimension.



#### ~79 Sidenosing radius

The radius of the obtuse corner of the sidenosing (usually would apply only to CNC). Enter a zero if there is no radius.



#### ~80 Sidenosing extension

The distance the sidenosing extends beyond the back of the tread (see above).

#### ~281 Curved sidenose maximum angle

Sets the maximum allowable arc angle for any one piece of curved sidenose (landing treads only). If this angle is exceeded, StairBiz breaks the sidenose into smaller lengths (subject to the next setting).

#### ~282 Minimum break length

Sets a further test on the above **Curved sidenose maximum angle** vet, in that regardless of that setting, the sidenose must be more than this length before StairBiz will insert a break.

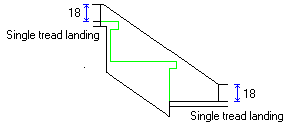
#### ~283 Minimum include length

If there are two adjacent in-line sections of sidenose (which would only happen where at least one of them is a curve), and the combined length is less that this setting, StairBiz will join them together into a single piece. This happens mostly where a sidenose starts or ends with a short straight section, and there is a curved section running into it.

### Skirting

#### ~90 Landing skirting height

The height of the skirting used on level landings that do not have a full string.



NOTE that this setting applies ONLY where the selection for Skirting in the Components window is “Same as strings” (otherwise the Skirting selection takes precedence).

#### ~91 Upper floor skirting height

The standard height for skirting (the board that covers the gap between the floor and the wall) used in homes in your region.

### Strings

#### ~93 String to nose margin

Used only for straight flight strings. The distance from a point being the intersection of the top of the tread with either the nose or riser face (depending on the **Setout to line of riser** setting), to the top of the string (at right-angles to the rake of the string).

 OR 

#### ~94 String to nose margin landing

Used only for landing strings. The distance from a point being the intersection of the top of the relevant landing tread with either the nose or riser face (depending on the **Setout to line of riser** setting), vertically up to the top of the string (i.e. NOT at right-angles to the rake of the string).

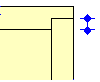
 OR 

#### ~95 Curve start maximum before break

Where a curved string has a straight section at the top which is more than a certain length (called the “break-limit”), StairBiz splits the string into two separate strings (straight and curved). This setting allows you to decide where this break-limit is (in the range 100mm to 500mm; 4” to 20”). If, for example, you set this to 200mm (8”), if (in the Curves pane of the Design window) your spring line is set at more than this you will get a break in the string, less than this and you won’t. The default setting is 300mm (12”). StairBiz cannot guarantee that changing this setting will work out – it depends on many factors, so be careful.

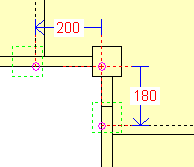
#### ~96 Rebate depth at corner joins

Where two string meet at a corner, and the join option (in the String Setout window) is “Upper Rebates” or “Lower Rebates”, this is the depth of the rebate. It is measured as a depth from the inside face of the string.



#### ~971 Inside corner break-length Hi

If the ‘200’ dimension example in the following illustration is sufficiently long, StairBiz will need to break the upper string and add a new (short) string between the corner and the upper string. This setting determines the maximum distance before which StairBiz will break the string.



The minimum setting is 60mm, however, where a corner unit is the top unit, a minimum of 40mm applies regardless of your setting.

If a string appears that you don’t want, right-click the string and select “Delete”.

#### ~972 Inside corner break-length Lo

The same as the previous setting, except relates to the lower dimension (the ‘180’ in the above illustration example).

The minimum setting is 60mm, however, where a corner unit sit on the floor, a minimum of 40mm applies regardless of your setting. If a string appears that you don’t want, right-click the string and select “Delete”.

#### ~973 Hypotenuse method for lengths

The following might be useful for those using trenching machines.

When set to non-zero StairBiz will calculate string lengths (only non-hockey, non-curved, straight-flight strings) based on the number of treads in the string multiplied by the hypotenuse of the tread/rise at the string. The setting holds the number of EXTRA hypotenuses to add to the number of treads (e.g. with this setting at ‘1.5’ a string with 5 treads would calculate length as 6.5 x Hypotenuse).

### String Hockey

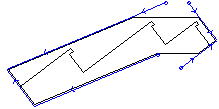
#### ~95 Straight decides orientation (CNC)

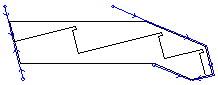
This setting influences two things relating to hockey strings on a CNC bed:

* 1. The default orientation of the string:   
     Strings come into the bed horizontal. For a hockey string, the horizontal could be based on the longest string within the hockey, or the longest STRAIGHT FLIGHT string within the hockey. If the orientation should always be based on the longest straight flight string, set this value to “T” (True).
  2. How StairBiz determines which are the “ends” when not cutting top or bottom edges of the string.

For example; below is a hockey string where the straight flight string is shorter than the landing string. In both cases we are not cutting top or bottom edges.

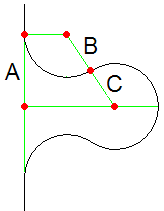
With this setting = True, the straight flight string (even though shorter) determines the orientation, and we get:



With this setting = False, the landing string (because it is longer) determines the orientation, and we get:   


### String Key

String Key settings relate to the male and female key StairBiz can create to marry two adjoining strings (see String Setout window). It would probably only be relevant if you use CNC (in that without a CNC it’s unlikely you would be creating a key manually).



#### ~100 Pitch

Dim A (above)

Minimum = Radius Small + Tool Diameter

#### ~101 Radius Small

Dim B (above)

Maximum = Pitch - Tool Diameter

#### ~102 Radius Large

Dim C (above)

Minimum = Pitch - Radius Small

There is probably no strength advantage in making this radius larger than Radius Small (i.e. Radius Small and Radius Large would normally be the same).

#### ~103 Male Adjust

If there is any slack in the CNC gantry, you might not get a perfect fit between the male and the female. This setting will adjust the size of the male key (and will not affect the size of the female key). A positive value will make the male smaller. A negative value will make the male larger.

Note that the value set here is TEN TIMES the adjustment required. This is done so that regardless of your level of accuracy of your dimensions, you can set very small adjustments). For example, a value of “2” here will produce an adjustment of 0.2 in whatever dimension system you are using.

#### ~104 Split arcs over 180 degrees

Following applies only to Masterwood CNC clients. If you have a CNC problem with string keys, set this to True (then refresh any items on the CNC Bed).

### Treads

#### ~105 Setout to line of riser

Some manufacturers, when they design a stair, pretend that nosings (the part of the tread that overhangs the front of the riser) don’t exist – all calculations are done from the face of the riser. Others pretend that risers don’t exist – all calculations are done from the nosing of the tread.

If you work to the riser face, type a “Y” (for Yes) here, otherwise set “N” (for No).

Note that this setting is not one that can easily swapped back and forth. StairBiz can handle it, but the problem is the way StairBiz interprets dimensions set in the Design window. For example, imagine your default dimension for the Outstep is 60mm - if you work to the riser, that 60mm is from the trimmer to the face of the riser, whereas if you work to the nosing, that 60mm is to the nosing. If you change from a Nosing Setout to a Riser setout, StairBiz can’t go through and add the amount of the nosing to each such dimension (because the Nosing can be variable from job to job – depending on your setting for it in any particular job).

So this value (True or False) should be set before you start setting up your templates in the Design window, and not touched again unless there’s a good reason (or unless you’re in the mood to adjust all your design templates accordingly).

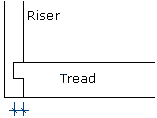
#### ~106 Nose to riser face

Horizontal distance between the nosing of a tread and the front of its associated riser.



#### ~107 Add extra to tread back (closed rise)

If the back of your treads mortise or rebate into the front of the riser such that you need StairBiz to spec an extra distance to the back of every tread, this setting will do it. The value should be the amount the tread extends back behind the face of the riser. You can see the effect with “Show Tread” in the Stair Setout pane of the Design window.

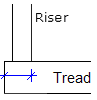


This setting is ignored for treads containing curves.

See the Bullnose category for a similar setting applying to bullnose treads.

#### ~108 Add extra to landing back (closed rise)

Same as ~115, except applies to landing treads. This can also be used to sit the riser of the tread above on top of the tread below.



This setting is ignored for treads containing curves

#### ~300 Add extra to all backs (open rise)

Same as above, except applies to treads with no riser above it. Unlike the next setting, there is a corresponding adjustment to the string trenching

#### ~301 Add extra to all backs (open rise #2)

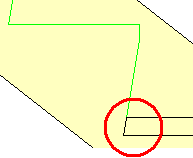
Same as above (applies to treads with no riser above it except that there is NO corresponding adjustment to the string trenching

This may be useful where (for CNC) you want to use the standard outline cut to cut the tread, but want the back edge of the tread cut slight over-width such that you can fully clean it up with a nosing cutter. In such cases you would need to reduce the nosing cut offset by the same amount to bring the tread back to the final required width.

This setting is ignored for treads containing curves

#### ~163 Add to back of tread for splay riser

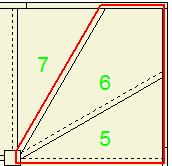
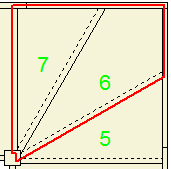
Where a riser is splayed, to set the back of the tread to the same angle as the splay set this to True. It will add slightly to the width of the tread.



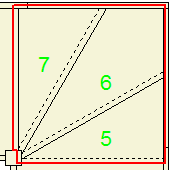
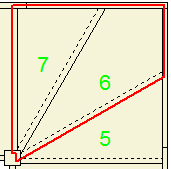
#### ~110 Box Winders

Allows you to extend the back of a winder under the winder above it.

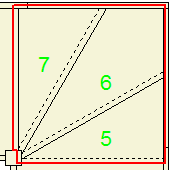
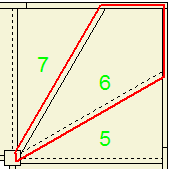
A value of “1” extends the back of each winder (not including the top winder) to the face of the SECOND riser above it, as follows:

A value of “2” extends the back of each winder (not including the top winder) to the face of the TOP riser in the unit, as follows:

A value of “3” extends the back of the bottom winder to the face of the TOP riser in the unit, but changes nothing else, as follows:

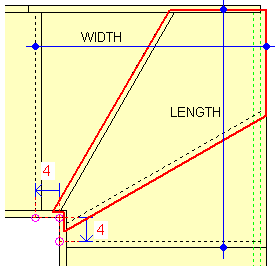
Box winders may be used in conjunction with “Add extra to landing widths” (~115 above).

#### ~140 Landing tread Wth/Lth override

Relates to Landing Tread filters.

With this set to “Yes”, EVERY landing tread going through the Parts or Labour Filters window will have its Width and Length properties set to the width and length of the entire landing. Sometimes this may be more convenient for auto filtering.

The Width is in the direction of the nosing of the bottom tread, and extends from the face of the riser above the landing to the end of the actual tread (whether sawtooth or box). The Length is in the direction of the riser above the landing, and extends from the nosing of the bottom tread back to the end of the actual tread (whether sawtooth or box).



With this set to “No”, EACH landing tread going through the Parts or Labour Filters has its own width and depth as shown in the Treads sheet (View menu – Stairs).

#### ~141 Hand Property – allow ‘Both’

Relates to Landing Tread filters.

The Hand property of a landing tread normally has a “Left” or “Right” value. However, if the landing tread is a single tread landing, such a tread in your Parts window may be reversible (i.e. used for left and right hand landings).

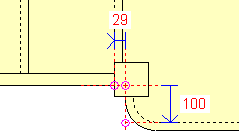
With this set to “Yes”, IF the landing tread is a single tread landing (i.e. a quarter-space or half-space tread, not a winder tread), StairBiz will set its Hand property to ‘Both’.

#### ~164 Bullnose Winder Radius

Where a corner unit is the bottom unit, and the nose of the bottom landing tread juts out in front of the line of the upper string, and the lower (very short) tenon string is deleted (right-click the string and select Delete String), StairBiz can put a radius on the corner of the landing tread (like a blunt bullnose) to return it gracefully into the front of the post.

This setting holds the radius of that bullnose.

StairBiz will fully vet the situation to see if a radius is possible, so you may maintain a permanent non-zero setting. If the specified radius is larger than is possible, and a smaller one is possible, StairBiz will reduce it to suit. The riser will also have a corresponding radius where possible.



#### ~1641 Fake Nose Depth (Closed rise/CNC)

This gives you the option to trench tread and winder nosings on strings which are thicker than the rest of the tread. Set it to the total required thickness (height) of the nosing of the tread. It applies only to CNC trenching. It applies to all treads, winders and outsteps in the job. At this stage it does not apply to newels. At this stage it may leave a small island which you would need to break off by hand.

### Trenching

NOTE These settings control the depths that various components are trenched into other components. They are amendable for a particular job in that job’s Setout window.

#### ~120 Treads into strings (straight tenonside)

The depth the treads (including landing treads) and risers are trenched into the strings, i.e. the depth of the trench. Applies only where there is no curve in any string for that side for the unit. There is a separate setting for wallside strings (see next).

NOTE: If you want your trench depth into strings to LEAVE a consistent distance between the bottom of the trench and the outside edge of the string, regardless of the thickness of the string (useful for when string thicknesses are a little inconsistent), set this value as a negative. When StairBiz sees a negative, it treats the dimension as the distance from the bottom of the trench to the outside of the string. For example “-1” with a 1.5 inch string would trench 0.5 deep, but with a 1.75 inch string would trench 0.75 deep. Note that using this negative setting when using a dovetail trenching tool will be problematic.

#### ~120 Treads into strings (straight wallside)

Same as for straight tenonside (see previous), except applies to wallside.

#### ~121 Treads into strings (curved tenonside)

Same as ~120, but applies where there is a curve in any string in the unit on the tenonside side. The “NOTE” in ~120 also applies here.

#### ~122 Treads into strings (curved wallside)

Same as ~120, but applies where there is a curve in any string in the unit on the wallside side. The “NOTE” in ~120 also applies here.

#### ~123 Treads into newels (normal)

The depth the treads (including landing treads) and risers are trenched into the newels, i.e. the depth of the trench. (Does not include landing inside-centre newels - see next item).

#### ~123 Treads into newels (inside landing)

The depth the treads (including landing treads) and risers are trenched into landing inside-centre newels.

Note that for string-newels (i.e. newels that are the same depth as the string), there is good reason to make **Treads into Newels** the same dimension as Treads into Strings (see Newel position flush with string (string newel)).

#### ~124 Riser into treads

The depth the top of the riser boards are trenched into the underside of the treads.



#### ~125 Strings into newels

The depth the strings are trenched into the newels, i.e. the depth of the trench or mortis.

#### ~126 Handrail into newels

Applies only to CNC. The depth the handrails are trenched into the newels, i.e. the depth of the trench or mortis.

#### ~127 Newel mortis square limit

Applies only to CNC. This setting is an angle in degrees. If the string is out of square to the newel by more than this setting, then the mortise for string and handrail will not be sent to the CNC bed with the newel. This setting should probably be no more than about 2 degrees.

#### ~128 Mortis adjustment Z

Applies only to CNC. The depth of a string or handrail mortise trenched into the newel will be the length shown in settings ~125 and ~126, plus the amount of this setting. This provides for a gap between the end of the tenon and the bottom of the mortise.

#### ~129 Mortis adjustment XY

Because a newel mortise is generally a fit between two surfaces both machined on the CNC bed (string or handrail and newel), it may be that the fit is slightly too tight or slightly too loose. This setting is an adjustment to the mortise to gain a cosy fit. A positive value makes the mortise bigger all around; a negative value makes it smaller. It applies whether the tenon is reduced in the X/Y or not (see Tenon Reductions above).

If you imagine a newel as it sits up-right in the stair, the X value affects the horizontal width or the mortise and the Y value affects the vertical height.

The X value is added to both sides (a value of 0.5 would give a mortise 1 mm wider than normal). The Y value is added to both top and bottom (a value of 0.5 would give a mortise 1 mm higher than normal).

### Tenon Reductions

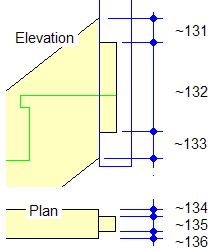
#### ~130 Strings – use reduction (Y/N)

Set to “Y” (Yes) or “N” (No). Instructs StairBiz to reduce the tenons of strings, as shown in the diagram below. Settings ~131 to ~142 only apply if set to “T”.

If the newel is floating, or the mortise length is set to zero (either in the Setout window or in the String Setout window) then this and the following settings do not apply.

If you feel that the reduction should apply, but the elevations window (or CNC bed) is not showing a reduction, it’s probably because StairBiz was not able to resolve the following settings.

#### ~131 to ~136 Box strings



Dimensions in the above illustration correspond to the reference numbers. There are a few rules and tricks – for the exercise we will look are ~131 to ~133;

Dimensions can be fixed or floating – for a floating dimension set to “-1”; for a fixed dimension set the dimension (which may include zero).

With regard each set of three dimensions, **you cannot have two floating dimensions adjacent to each other** (i.e. if either outside or inside are floating, the centre can’t float), and **there must be at least one float**. On that basis the four possible combinations are Float/Fixed/Float or Float/Fixed/Fixed or Fixed/Float/Fixed or Fixed/Fixed/Float.

If ~132 is floating, then ~131 and ~133 must be fixed, in which case dimension ~132 will resolve to be the total height less ~131 less ~133.

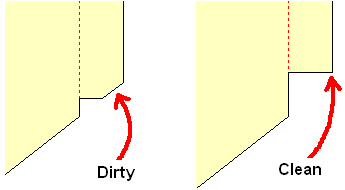
If ~131 and ~133 are both floating, then ~132 must be fixed, in which case dimension ~131 and ~133 will resolve to be the total height less ~132 divided by 2.

Other possibilities are that ~131 is fixed, ~132 is fixed and ~133 is floating, or ~133 is fixed, ~132 is fixed, and ~131 is floating.

Note that in all cases at least one, and no more than two, dimensions must be set to “-1” (floating).

For the low end of the string, if the string is a bottom newel cut at floor level, ~131 will calculate as it the string were not cut at the floor,~132 will extend down to the horizontal string cut (regard of the value of ~132), and ~133 will be set to zero (again regardless of its value).

For some CNC functions, the tenon must be “clean”, meaning that the ends of the tenon (top and bottom) must come to a 90 degree point. To achieve this either shorten the length of the tenon or raise/lower it. For this purpose it may be better to set the Y length of the tenon to float (-1) and have fixed distances above and below.



#### ~137 to ~142 Sawtooth strings

These apply in the same way as ~131 to ~136, except that they apply to sawtooth strings. The top of the string is deemed to be the underside of the associated tread.

#### ~143 to ~148 Sawtooth strings

These apply in the same way as ~131 to ~136, except that they apply to handrail.

#### Strings; Tenon above floor

Applies to the bottom of a string sitting on the floor and controls the level of the bottom of the tenon.

Is zero, always extends to the floor.

If ‘-1’ (negative one) then StairBiz does not interfere and the bottom of the tenon is where it would otherwise be if it string was not sitting on the floor (or the floor level, whichever is the higher).

If set to some other value (e.g. 20mm) then it will always be this value above the floor level.

## Schedule Window

### Overview

From: Project menu; Project Schedule menu-item

The **Schedule Window** allows you to view your jobs (as they relate to other jobs) on a calendar. There are separate schedules for production and installation. There are user definable rows that can represent people or resources that a job is assigned to, and columns that represent a day of the week.

### Weekly and Monthly View

 The schedule can be viewed one week , two weeks or one month at a time. To view 7 days of the schedule at a time, click on the “7” icon. To view 28 days of the schedule, click on the “28” icon. The size of each column will be adjusted to fit the requested number of days onto your screen.

### Production vs. Installation

**** StairBiz maintains two separate schedules – one for production and one for installation. Toggle between them using these buttons.

### Rows

When looking at the schedule, there are 3 main sections, organized as rows.

#### Header Rows

The top 3 rows are row header and statistical information. These contain the day of the month, the total hours and total number of jobs assigned to each day.

#### User Rows

Below these 3 rows are the User Rows. When you run StairBiz for the first time, there may not be any user rows created. To add a User Row, click on the **Add User Row** icon. Each time you click this icon, a new row will be added to the Schedule. These rows can be used to organize your schedule in any way you see fit. You may decide to use each row to represent someone who is responsible for a job. Each row may contain a label in the leftmost column.

To edit a label, double click in the leftmost column, on the user row you wish to edit. The cell will turn white and a cursor will appear. Type in a label, which might be a staff members name, and press Enter and your label will be complete. To remove unused rows you can click on the **Remove User Row** icon.

Jobs assigned to these rows will remain unless you move them to another row.

#### Pending Rows

The bottom section of rows are designated Pending Rows and are used to contain jobs that have not yet been assigned to User Rows. There is always at least 1 Pending Row, and additional Pending Rows will appear as they are needed. For example if there are two jobs in Pending Rows for a given date, there will be 3 Pending Rows available.

Pending Rows are distinguished by a darker shade of gray than the User Rows. The first column for these may not be labelled like the User Rows.

### Moving a Job

To move a job to a new Row or Column, click on the job and drag it to the desired location. As you drag a job, a yellow box will draw around the cell that would become the new location for this job when the mouse is released. You may not drop a job on another job, only in a vacant cell.

To move a job further than one screen, you can right click on the job and select Cut. This will place the job on the clipboard and allow you to scroll and locate another date. Right click an empty cell and select Paste, and the move will be completed.

### Opening a Job

You can double click on any job by double clicking on the Job in the Schedule view. This will only work if there isn’t already a job open.

### Agreed and Scheduled Dates

When a job is moved, the **Scheduled Date** field of the Job Details window is updated to reflect the new date. If an **Agreed Date** has been set and the new **Schedule Date** is earlier than this date, the job is annotated as ahead of schedule with **a >n:** notation. For example if the job is 2 days ahead of schedule, it will appear as **>2:Job Name**.

Likewise if a job is scheduled later than the **Agreed Date**, it will be annotated as **<n:** and also coloured yellow to make it stand out as an alert.

### Finding a Job

 If the Schedule window contains many jobs and you wish to find one in particular, you can click on the **Find Job** icon. This will open up a panel to the left of the schedule, listing all jobs that are on the schedule. Clicking on a job in this list will move the focus to the selected Job.

### Adding a Job to the Schedule

Jobs that do not have a **Schedule Date** set in the Job Details window, will not appear on the schedule at all. There are two ways to set the **Schedule Date** field.

With the job you wish to schedule open:

1. Open the Job Details window and type in the desired **Schedule Date**.
2. From the Process window, click on the **Schedule** icon. The current job will be placed on a Pending Row for today’s date. From there you can move the job to the desired User Row and appropriate date.

### Schedule Settings

 Open by clicking this toolbar icon.

Only available if you have permission as set in the Permissions tab of the Users and Networking window.

In the Schedule setting window you can set various attributes for displaying the schedule, as follows:

**Local Settings:**

When this check-box (at the bottom of the window) is ticked, the settings you create in this window remain local (i.e. only apply to your computer and do not impact any other computer on the StairBiz network.

#### Settings

**Schedule Font:** Sets the font and font size used in the Schedule.

**Row Padding:** Adds the specified number of pixels above and below each row of the schedule. Labels displayed within the cells will thus have this “margin” above and below them.

**Border Thickness:** The thickness of the border of each cell.

**Cell Lines:** The number of lines of text that can fit within a single row. If you show multiple fields in each cell (see below) you will need to add extra cell lines to see them at one time.

**Use Agreed Date:** With this ticked StairBiz will show how far ahead or behind a job is relative to the Agreed Date as shown in the Details window of the job. A “>” indicates the job as scheduled is early. A “<” indicates the job as scheduled is late (and also shows a yellow fill colour if fill colours are not already in use.

**Split hours for Production/Installation:** When ticked, the Hours totals in the header of each date will show only the portion of hours relevant to that pane of the Schedule window. For Production, it will show hours for Preparation, Assembly and CNC. For installation, it will show hours for Delivery and Installation. When not ticked, both panes show the total job hours in both cases.

**Show $ values Production: Option:** In the header, you can optionally show an extra row with the total value of jobs for each date. You will need permission for this (see the **See Job Values in Schedule Header** setting in the **Permissions** tab of the Users & Networking window). The field can take the following settings:

"0" = Do not display this row.

"1" = Show the pre-tax total value of the job

"2" = Show the pre-tax total value of the job less the net value for Delivery, Installation and Truck.

**Show $ values Installation: Option:** See the previous heading, but in this case a setting of "2" is slightly different ...

"2" = Show the net total value for Delivery, Installation and Truck.

#### Fields

Allows you to select which fields are displayed in the cell for each job on the schedule.

NOTE: If you currently have job open, the schedule will only show the Job Name field. To see multiple fields you need to close the job.

#### Colours

When you right-click a job in the schedule, you can select a colour for the border, fill and text. These colours are probably not much help if you don’t know what they mean.

This tab allows you to create headings for each colour category. For example, the border colour may indicate the type of builder (in which case you could enter “Builder Type” adjacent to the “Usage Label” heading, just under the “Border” heading, etc.)

This tab also allows you to create a label for each colour.

Thus when you right-click a job on the schedule, instead of seeing “Border”, “Fill” and “Text” menu items you would see your usage labels, and the sub-menu-items would show your colour labels rather than “Red”, “Blue” etc.

#### Actions

You can create your own right-click menu items, and assign certain actions to those menu-items. For example, if you create a label called “Open” and assigned the action “Open Job”, when you right-click the job in the schedule you will see this menu-item and when you click it the relevant job will open.

#### Icons

An icon is a small image. One can be shown for each job in the Directory window (in the Job/Icon column), and one or more can be shown with each job in the Schedule window.

Tick "Show Icons" in the Schedule Settings window (Settings tab).

In the Icons tab of the Schedule Settings window, set a label and a path to the image file for each icon. For example,

Glass = C:\StairBiz Program\Defaults\Images\Glass.jpg

Cable = C:\StairBiz Program\Defaults\Images\Cable.jpg

In the above example, "Glass" is the label for the icon (i.e. what the icon means), and the part after the "=" is the full path to the image file.

Icon images should be jpg, bmp or ico format. If they are ico format they will show in the Schedule window but not in the Directory window. Icons should ideally be 16 x 16 pixels, although you can technically make them larger if you don't mind some idiosyncrasies. Icons in the Schedule window will show full size, whereas in the Directory window they are scaled to 16x16.

**Show Icons on Bottom of Cell** means that they will be drawn across the bottom of the job cell rather than down the left.

**Icon Margin** is the gap between the cell border and the icon.

If you re-define an image in the Schedule Settings window, and it is used in the Directory window, you may need to refresh the Directory window.

Icons which you have defined can also be set for a job in that job's Details window.

## Site window

### Overview

From : Process menu ; **Site** menu-item

The **Site window** holds information about the site (the place where the stair will be delivered or installed). This information can be used by the Labour window, Quote window and Custom sheets.

Sometimes you may want to open the Client window and the Site window simultaneously. If you hold down the **Control** key when opening the Client window, the Site window will also open. As with all windows in StairBiz, they will open where you last closed them, so you can have them side by side. This can be useful when a client rings up to request a measure, and you need to input into both (and only, for now) the Client window and **Site window**.

Simply type in the relevant details:

### Fields

#### Measure Date

The date agreed for the site measure.

#### Measure Time

The time agreed for the site measure.

#### Site Contact

The person on site who represents the client (if applicable).

#### Site Address / Suburb / City / State / Zip

The address of the site.

#### Map Ref / Cross Street

Reference to help locate the site.

#### Site Phone / Mobile

The contact numbers for the site.

#### Building Codes

Select the applicable code for this site location. The list of codes shown are created in the Building Codes window.

#### Measure Note

For example “Beware of the dog” or any similar short instruction for the measurer.

### Buttons

#### Load from Client

When clicked the site window will be filled out automatically using the corresponding details from the Client window. This might be useful when the client is an owner builder.

#### Shared

This window is shared by all jobs in the project, unless the **Shared** button is unselected – see Shared Windows.

## String Setout window

#### Overview

From : Design window ; Right-click a string and select **Show String Setout** (or just double-click the string).

Also from: Design window ; String Elevation pane, right-click a string and select **Show Setout** (or just double-click the string).

See also Chapter 21 : Stair Components quick reference/ Strings/ String Faces

In this window you can create the string setout for the selected string. This mainly involves the position and type of the cut at the top of the top string, the bottom of the bottom string, and all the string joins between.

Strings are pretty complicated (from a computer’s point of view). If you find the following discussion a bit tough on the first read, we recommend that you re-read, play, re-read etc. We’ve made it all about as simple as it can possible be, but it still may take a bit of concentration to wrap your brain around it.

This window would normally be used in conjunction with the **String Elevation** pane of the Design window, so that you can see the effects of your setouts on adjacent strings.

#### Creating default string setouts

String setouts can only be done to the strings of an open job (albeit that the job might be a dummy job for the purpose of creating unit or stair templates).

When you modify a string setout, and save the job, the modifications are saved with the job.

To create default string setouts, simply create unit or stair templates which include your desired string setouts.

If you send a unit to the unit templates, the string setouts are saved with the unit template and becomes the default for jobs you create from that template.

If you send a stair to the stair templates, the string setouts are saved with the stair template and becomes the default for jobs you create from that template.

#### String joins

With the exception of the top of the top string and the bottom of the bottom string, all string ends are a “join” (in that the bottom of one string matches the top of the string below it). For the sake of simplicity we’ll call all string ends a “join”.

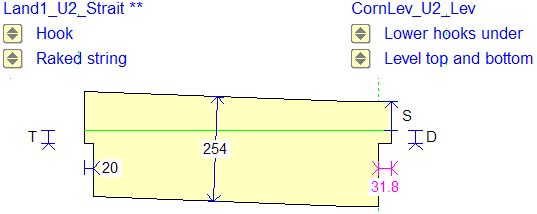
In StairBiz, we do setouts for joins. Remember that there are not two setouts (one for one side of a join and another for the other side of the join). A join is a join - it doesn’t matter from which side of the join you make the change, the change is to the “join” and will affect the strings on either side.

#### Who owns the join?

If a join applies to two strings (except for the top of the top string and the bottom of the bottom string), and joins are saved with the strings, which of the adjacent strings owns (saves) the join?

This is important when saving string setouts in unit templates. For example, consider the join between a straight flight and landing string below it. The low side of the join (Land1\_U2\_Stait in the illustration below) owns the setout (even though you can change this setout either at the top of the landing string or the bottom of the straight string). However, this setout is not saved with the straight string (i.e. in the straight unit template) – it is saved with the landing string (in the landing unit template).

In the String Setout window, the type of join is indicated at the top and bottom of the string (more about this later). If there are two asterisks (\*\*) after the name of the join, the string owns that join. If not, the join is owned by the adjacent string.



Note that, generally speaking, if a landing string and a straight flight string are involved in the same join, the landing string will own (save) the join.

#### The joins in detail

StairBiz has identified 20 join types (some relate to the position of the join, and some relate to the context of that position). They are listed below. You do not need to learn them.

In this list, ‘U2’ means ‘up to’.

‘Lo’ and ‘Hi’ in the list relate to which side of the join owns the setout.

Note that you can see the labels in the following list in the String Elevations pane of the Design window (right-click and select **Show Labels**).

In the following, to avoid confusion, a ‘corner’ refers to a join where there is a change in direction of the two strings (rather than a corner unit, which we’ll call a landing). “Aligned” refers to a join where there is no change in string direction at the join.

Bot Hi The termination cut at the bottom of a bottom string

CornLev\_U2\_Lev Lo A corner join where a level landing string goes up to a level landing string (or a string that could be level)

CornLev\_U2\_Rake Lo A corner join where a level landing string goes up to a raked landing string

CornLev\_U2\_Strait Lo Level landing string up to a straight flight at an inside corner.

CornLShape1 Lo A corner join at the tenonside corner of an L-shape one-tread landing. Note that the *lower straight flight* owns (saves) this join.

CornLShape23 Lo A corner join at the tenonside corner of an L-shape landing containing more than one tread. Note that the *lower straight flight* owns (saves) this join.

CornRake\_U2\_Lev Lo A corner join where a raked landing string goes up to a level landing string

CornRake\_U2\_Rake Lo A corner join where a raked landing string goes up to a raked landing string

CornRake\_U2\_Strait Lo Raked landing string up to a straight flight at an inside corner.

CornStrait\_U2\_Lev Hi Straight flight up to a level landing string at an inside corner.

CornStrait\_U2\_Rake Hi Straight flight up to a raked landing string at an inside corner.

CornUTight Lo A corner join at the tenonside corner of an U-shape landing (where there is no space between the tenonside strings of the upper and lower flights) . Note that the *lower straight flight* owns (saves) this join.

Land\_U2\_Land1 Lo An aligned join where a landing goes up to a landing with one tread

Land\_U2\_Land23 Hi An aligned join where a landing goes up to a landing with more than one tread.

Land1\_U2\_Strait Lo An aligned join where a landing with one tread goes up to a straight flight

Land23\_U2\_Strait Lo An aligned join where a landing with more than one tread going up to a straight flight

MidLand\_U2\_Strait Lo Mid landing (i.e. a landing created from a single straight flight tread) up to a straight flight.

RadiusJoin Lo An aligned join where any string meets a curved string

Strait\_U2\_Land1 Hi An aligned join where a straight flight goes up to a landing with one tread (and the landing has a string).

Strait\_U2\_Land23 Hi An aligned join where a straight flight goes up to a landing with more than one tread.

Strait\_U2\_MidLand Hi Straight up to mid landing (i.e. a landing created from a single straight flight tread)

Strait\_U2\_MidPlat Hi Straight up to mid landing (i.e. a landing created from a single straight flight tread) where the landing is a platform(i.e. pre-existing).

Strait\_U2\_MidSkirt Hi Straight up to mid landing (i.e. a landing created from a single straight flight tread) where skirt and bearer replaces the string.

Strait\_U2\_Plat Hi An aligned join where a straight flight goes up to a platform (i.e. pre-existing landing).

Strait\_U2\_Skirt Hi An aligned join where a straight flight goes up to a landing with one tread (and the landing uses a bearer and skirting instead of a string).

Strait\_U2\_Strait Lo An aligned join where a straight flight meets a straight flight.

Top Lo The termination cut at the top of a top string.

Where a join has a fixed (i.e. non-floating) newel, the above joins do not apply – the string on either side of the join will enter the newel.

#### Contextual Setouts

String setouts (joins) are contextual. This means that different setouts for the end of a single string are saved for different situations.

For example, consider the illustration above. At the left is the top of a landing string. This end of the landing string holds (saves) the following joins, and which setout is used for the end of this string depends on the situation (context).

Land1\_U2\_Strait  
Land23\_U2\_Strait  
Land\_U2\_Land1  
Land\_U2\_Land23  
RadiusJoin  
Top

For this reason, when you are creating unit templates, you should put that unit template into all possible contexts and save the unit template in each of those contexts. This way you can use that one unit template in any of the contexts and it will automatically reflect your desired setout.

#### Navigating the strings



At the top of window on the left, click the arrow to more up or down the current side of the stair. Click the empty button to move to the other side of the stair.

Alternatively you could have the Design window (Elevations pane) open in the background, and double click the string you want in the Strings Setout window.

#### Bezier curves – transitions in string rake





See Chapter 11 : Bezier curves – transitions in string rake

#### Edit Dowels



Shows dimensions for overriding the default settings for the positions of dowel holes in a string tenon (and corresponding newel). Only relevant to CNC. See Users Manual CNC, Cut Templates.

#### Dimension Tool, Zoom and Undo



These work the same as in the Design window.

#### Join Options



At either end of the string are (in most cases) either one or two option menus (with an up/down arrow at the left). These options relate to the join as shown. There are too many options to discuss in detail – just play with them until you get what you want.

##### Butt join and Rebate join terminology

When selecting a rebate joint you have the option of “Lower Rebates” or “Higher Rebates”. This terminology can be confusing, because we applied the concept of “Lower Butts” and “Higher Butts” to rebates. In other words, we say the “Lower Butts” or the “Lower Rebates” if the lower string is the one that doesn’t make it to the corner. The “Upper Butts” or the “Upper Rebates” if the upper string is the one that doesn’t make it to the corner. The following is an example of “Lower Rebates”.



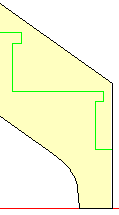
#### String Ends - Detached

Where a straight-flight string joins another string at an inside landing corner (e.g. L-Shape, U-Shape, U-Tight), for the purposes of string ends some stair builders want the straight flights to behave as if they were separate independent straight flights. In other words, the string ends at the inside landing join should not relate to each other but should behave as if they were terminations at a landing. This gives the advantage of manufacturing the straight flights as if they were completely independent (i.e. detached), but at the same time the balustrade behaves in way that acknowledges the relationship between the flights.

To achieve this for such strings, select one of the Detach settings from the first **Join** **Options** menu for the relevant string end.

Note that for a U-Tight stair (i.e. U-Shape with vertically aligned strings) the string ends at the inside landing are permanently detached (i.e. they don’t require you to select this option).

#### Heels



Where the underside of a raked string meets the floor, you can insert a heel. This is most often used where there is a large bullnose tread (to give the back of the bullnose something to return into). You can also apply a Bezier curve to it (almost always the case).

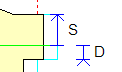
Select ‘Heel’ from the upper of the Join Options pull-down. It applies to any bottom string without a newel, or where there is a bullnose (newel or otherwise).



#### Setout dimensions

Most dimensions are editable – click, change, then press Enter.

Many dimensions are Tags.



A tag is a calculated dimensions, or a dimension that represents some default dimension. To see what the tag represents, right click it. To see the value of a tag, left click it. To change a tag, either enter a hard dimension, or right-click to select an alternative tag (if available).

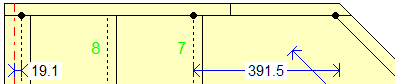
Note that if you can use a tag rather than a hard dimension, it’s best to do so (especially when setting up unit template or stair template strings). For example, the “S” in the illustration above represents the default standard landing skirting height. You might have these “S” tags in a hundred different places throughout your stair templates and unit templates – a single change of the default dimension (in this case in the Default Setout window) will reflect in them all. On the other hand the “D” represents the current landing thickness (as shown in the Components window). If you change the landing thickness in the Components window, all these tags will reflect your changed landing thickness.

#### Boundaries

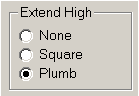
The horizontal solid red line at the top is the upper floor level. If you have a well with a bulkhead depth, the ceiling level will be shown also.

The horizontal solid red line at the bottom is the lower floor level.

The vertical dotted red lines represent the unit’s “base” points at the inside of the string (the inside is the side of the treads). For straight flights this point will be at the top and bottom riser (or nosing if you work to the nosings) at the inside of the string. At corners this will be where the two string inside edges intersect.

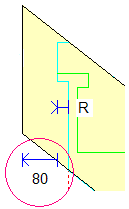


#### Extend Hi/Lo

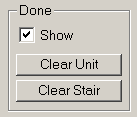


There may be times when you may want the string slightly over length so that the installed can trim exact on site. There may be other times (hopefully few) when StairBiz will not give you the string end that you want, and you want to extend the string so that you can cut your own end (especially if you're using CNC).

Using Extend Hi and Extend Lo, you can extend the ends of the strings by an amount of your choosing. For the purposes of calculating string lengths, and cutting the string on a CNC, the string will be as extended.



#### Done



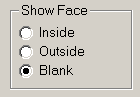
When setting up for your defaults (i.e. setting up unit templates), it may be useful to track which joins you have set to your own specifications (and which are still yet to do).

When you select the **Show** check box, a **Done** checkbox appears to the right of the join name (but only if that string owns the join, i.e. there is a double asterisk).



After you have set the options and dimensions for this join, tick this **Done** box. It will be saved with the string, reminding you that the join has been set to your liking. Note that we are talking about joins (not strings) - there might be a different join here if the context is different (which might NOT have been “Done” yet).

#### Show Face



Inside

The inside face of the string is the side that the treads are on.

If the vertical cuts of a string are exactly square (in plan view) then the inside face and outside face will be the same. Otherwise they will be different (e.g. a corner join where the strings intersect at 45 degrees, as shown the illustration below).

This mode shows the inside face at the front (in black), and the outside face behind it (in green). The inside face will have the fill colour.

Outside

This mode shows the outside face at the front (in black), and the inside face behind it (in green). The outside face will have the fill colour.

Blank

To calculate string lengths, StairBiz needs a string which shows the longest of the inside or outside at the top, and the longest of the inside and outside at the bottom. If you’re sending the string to the CNC bed, and the machine is not 5-axis, again you need such a string. The **Blank** is such a string. Regardless of the angles (in plan view) of the top and bottom ends, the blank will accommodate this string (exactly).

If the string is sawtooth, and in plan view the riser cuts are angled, again the blank will show the most forward of the inside or outside of these riser cuts.

The blank also accommodates any over length situation.

## Style windows

#### Overview

From : Process menu ; **Components** menu-item ; **Show Properties** button.

Styles for components for a particular job are selected in the Components window for that job. To view and amend the details for any selected style (just for the current project), click the **Show Properties** button adjacent to the relevant style. The Style window for that style will open.

Changes made in this window will not impact the Style Defaults window.

For a comprehensive discussion, see Style Defaults window.

## Style Defaults window

### Overview

From : Defaults menu ; **Styles** menu-item

A “Style” is the combination of a style name (usually indicating a type of profile or some other significant characteristic) and a size (e.g. Colonial 40x40). A style doesn’t have to have a style name.

In this section of the **Components Defaults window** you are able to list all the various styles you have for each category. These items are selectable for a particular job in that job’s Components window.

The list below the categories pull-down shows your list of current styles for the selected category.

This list can be speed searched – see Speed Search Lists

##### New

Creates a new style

##### Delete

Deletes the current style.

You can delete all styles in the category by deleting one while holding down the Control and Shift keys.

### Properties common to all styles:

##### Style Name

The name you use to refer to that style within your organization. Max 35 characters.

A style doesn’t have to have a style name, but for the purposes of the following discussion not having a style name is the same as having a style name of nothing.

Style names can be the same as style names in other categories (e.g. a “Colonial” baluster and a “Colonial” handrail).

Style names can be the same within a single category provided that the widths and/or depths are different (e.g. a “Colonial 70x40” handrail and a “Colonial 70x70” handrail).

In the Newels category, two or more newels can have the same style name even if the widths and depths are the same, provided that the Position Options (the first five buttons at the bottom/right of the window) do NOT overlap (e.g. a “Colonial 90x90” newel as a “Top” newel and a “Colonial 90x90” newel as a “Bottom” newel).

In the Fillets category, two or more fillets can have the same style name even if the widths and depths are the same, provided that the Position Options (the first three buttons at the bottom/right of the window) do NOT overlap (e.g. a “Standard 30x9” fillet as a “Handrail” fillet and a “Standard 30x9” fillet as a “Shoerail” fillet).

In the Handrail category, the style names of handrail sub-types that might use common fittings can be included in brackets and the bracketed text will be ignored by the Fittings filter (see Properties for individual styles: Handrail).

For both newels and fillets, when position options are not available for a newel/fillet with the same name, width or depth, the overlapping option buttons will be disabled.

##### Style Class

This field doesn’t have a label – it is the field to the right of the Style Name.

You can optionally set a “class” for each style, which can be any text up to 10 characters. The purpose of the class is to identify “groups” of styles. It is used in the StyleClass property in the Part Filters and Labour Filters windows.

For example, you could have two classes that covered all your handrails – “Pre Plowed” and “Needs Plow” (indicating which rails need to be plowed in the shop). In your Labour Filters window you could filter for the “Needs Plow” class and add extra labour accordingly. Obviously in this case you actually only need one class (“Needs Plow”), because you are only filtering for this class text. All rails that come pre-plowed could have the class left empty.

##### Description

The name you use to refer to that style in communications to your client. Max 50 characters.

If you leave the field empty, StairBiz will assume that **Description** it is the same as **Style Name** and will simply show a double quotation mark (indicating ‘same as above’) in this field.

##### Width/Depth

There is a convention about which is the width and which is the depth of a style. For newels that are not square - the depth is the smaller of the section sizes; for balusters - the depth is perpendicular to the face of the string; for strings, risers and skirt the 'Depth' is the thickness of the timber; for all other components the 'Depth' is what you see in the elevation view of the total stair and the 'Width' is what you see in the plan view. If you want BalconyTrim to swap that behaviour, tick the Swap Wth/Dth checkbox in the relevant style window.

For example, a handrail can be 70mm wide and 42mm deep, and another might be 42mm wide and 70mm deep. These two rails are not the same. The width of the first is 70mm. The width of the second is 42mm.

Note that in the Timbers window (for costing timber), the depth is always the smaller of the sectional sizes.

If you change width or depth, and the old size is not used by any other component in your defaults, StairBiz will ask if you want to delete the old size from your timber cost list (*"A timber size has just been amended ..."*). If you see no use for this old size in the foreseeable future, delete it. If this message becomes a nuisance (e.g. during the initial setup or major changes) you can turn it off by double-clicking the label "Width/Depth" (to the left of the width and depth fields) - it will stay turned off until you reopen the window.

Note that if StairBiz prompts you to delete an old size, but you have not changed the size, it’s probably because you have recently changed from a metric to an imperial measurement system (or vice versa) and the slight conversion errors (extremely slight) are enough to make StairBiz think it’s a different size – click Yes to delete the old size.

##### Blank; No Profile

This component is made from timber in your timber rack, and there is no turning or machining. The cost of the timber comes from your Timbers window.

##### Blank; Staff Profile

This component is made from timber in your timber rack, and there is turning or machining done by your staff paid at an hourly rate . The cost of the timber comes from your Timbers window, and the cost of the labour for machining comes from your Labour Filters window using the amount of time you enter in the **Minutes** field.

##### Blank; Contract Profile

This component is made from timber in your timber rack, and there is turning or machining done by a contractor paid on a piecemeal basis. The cost of the timber comes from your Timbers window, and the cost of the labour for machining comes from the **Cost $** field.

##### Parts; No Profile

This component is purchased in a finished state (i.e. is a Part). It has no profile. The part is specified according to the buttons to the right (see below).

##### Parts; Profile

This component is purchased in a finished state (i.e. is a Part). It has a profile. The part is specified according to the buttons to the right (see below).

##### Parts From Filters

Select this button to have the appropriate part selected (or not) by your part filters (see Components window). In this case StairBiz does not itself specify any blank items or part items for this category – you specify the parts yourself in the relevant part filter based on information (properties) sent to the part filter about the particular component. If there is no part filter, or no “hit” in the part filter, this component is completely ignored by StairBiz.

See also The Revert Option (below)

##### Part Is …

Select this option to set a specific PartId (it will be shown in the text box below). You can click the **Set** button (to the left of the text field) to get a list of all parts in your Parts window for this category, or you can type in the part id. The part is costed from the Parts window. In some cases (newels, balusters, frets, wallbrackets) the cost shown in the Parts window is per each. In other case (handrail, shoerail etc.) the cost is per metre/foot.

When you set a specific Part ID, the Timber is technically irrelevant (in the Components window you cannot select a timber for a specific Part ID because a specific Part ID can only be in one timber). However, you may still like to have a Timber shown in a Custom sheet for that category. For this purpose only, StairBiz will see if the Parts window has a Timber for this Part ID, and if it does will show it in the relevant Timber field of a Custom sheet.

##### Photo and Caption …

Opens the Style Photo & Caption window. Here you can set a photo and photo caption for this style which can then be displayed and printed in a Custom sheet whenever the current job uses this style (as selected in the Components window).

See Photo and Caption window.

##### Style Notes

There is a checkbox at the bottom right of this window. Tick it to show the Notes field for the current style. If the notes field is not visible, and there are notes, there will be a green stripe down right-hand side of the checkbox (to indicate to you that there are some notes).

StairBiz remembers whether this checkbox is ticked or not (for next time you open the window).

### The revert option:

When a style type is set to “Part From Filter”, you may specify in your Part Filters to REVERT this setting under certain circumstances (e.g. there is no part) to a blank option. In this case StairBiz needs to know which blank option to revert to.

StairBiz holds a memory of the last blank option set prior to setting the part option (and the minutes or dollars as appropriate for staff or contract options). It displays this revert setting adjacent to the “Blank No Profile” option button, and uses this setting in the event of a revert.

### Properties for individual styles:

#### Acorn

**Finished Height**; the height of this acorn.

StairBiz only uses Acorn styles if one is selected in the Components window, and the Detached Acorn checkbox for the *Newel* Style is ticked. If it is not ticked then StairBiz will ignore any Acorn selection in the Components window.

#### Balconyplate

**Baluster Plow**; How deep is groove (for balusters) in the top-side of this Balconyplate (zero if none).



**Tongue Thickness**; If the balconyplate rebates over the edge of the floor cut-out, this is the thickness of the tongue (otherwise set to zero, which StairBiz reads as “no tongue”).

If the “Level Width Floor” checkbox is ticked, this dimension is just for your records (StairBiz doesn’t use it). If not ticked, StairBiz assumes that the top of the balcony plate is this distance above the floor (or fully above the floor if zero)



**Overhang**; The default distance the balconyplate overhangs (protrudes) into the well is determined by a value in the Setout window (Balconyplate, **Overlap into well**, ~1). If you have different balconyplate styles where the style should determine this protrusion (i.e. the non-tongue part of the plate is pre-fabricated and fixed), set this value for this style (it will override the Setout window default), otherwise leave it as zero.



**Raised**; Raise the balconyplate to float above the floor level. The amount of the gap is set in the Setout window (Balconyplate heading)

**Level with Floor**: If ticked, StairBiz positions the top of the balcony plate level with the floor level (i.e. with the top of the outstep). If not ticked, the top of the balcony plate is positioned above the floor by the amount of the “Tongue Thickness” (or fully above if this is zero).

**Marry with Outstep**; Allows the possibility to marry Balconyplate to the Outstep of the stair forming a single piece. See Chapter 21 : Stair Components quick reference/ Balconyplate/ Marrying Balconyplate with Outstep

If you with to use balconyplate for your outstep, see Components window/ **Outstep – replacing it with balconyplate**.

#### BalconyTrim

By convention, for strings, risers and skirt the 'Depth' is the thickness of the timber; for all other components the 'Width' is what you see in the plan view and the 'Depth' is what you see in the elevation view of the total stair. If you want BalconyTrim to swap that behaviour, tick the Swap Wth/Dth checkbox.

#### Balusters

**Upper Flat**; the length of the baluster’s upper flat (**A** in diagram) measured from the top of the pin (for pin-top balusters) or the highest point on the finished baluster (for square-top balusters). If the "Pin Top" option is checked, this field is disabled.

**Turning**; the length of the turning (**B** in diagram).

This setting is not immediately relevant if “Fixed Lower Flat” option is ticked (see above).

If there is more than one baluster of this style in your Parts window (i.e. in the parts catalogue), and the turn lengths are not the same, then it is likely that at least some of the balusters SHARE a common turn length and have DIFFERENT lower flat lengths – this is the turn length required here.

NOTE: If you have a Minimum Lower Flat setting in the Setout window (Balusters category) then StairBiz may adjust the turning specified here to keep the lower flat within this setting.

**Lower Flat**; the length of the lower flat (**C** in diagram) measured from the lowest point on the baluster. If **Pin Bottom** is ticked (see above), add the pin length to this length (see Setout window, Balusters ~19)

This setting is not immediately relevant if “Fixed Lower Flat” option is not ticked (i.e. if we are using fixed turnings - see above).

If there is more than one baluster of this style in your Parts window (i.e. in the parts catalogue), and the lower flat lengths are not the same, then it is likely that at least some of the balusters SHARE a common lower flat length and have DIFFERENT turn lengths – this is the lower flat length required here.

See also Setout window; Balusters category, Item ~17 “Minimum Lower Flat”.

**Min Turn Diameter**; The diameter of a turned baluster at its narrowest point. This is used to space the balusters such that the gap between them takes into account the turning. If you don’t required such an adjustment, set this dimension to zero.

**Pin Top Diameter**; The diameter of the upper pin (only used for drawing or CNC).

**Combo Bals**; Used for Combo Balusters (see Chapter 11/ Combo Balusters). For regular basket balusters this setting is the number of regular balusters that would normally combine with this one basket baluster to form the “combo” (e.g. “2”). Note that this setting can be changed on a job-by-job basis (in the job’s Style window). To specify a “panel”, this setting must be “P”.

Balusters styles with this “Combo Bals” setting will show up in the **Baskets** category of the Components window.

**Pin Top**; indicates that this baluster does not have a flat at the top.

**Special Spacing**; tells StairBiz to override the baluster spacings set in the Setout window, and to instead use the maximum spacing in the Max Spacing field (below).

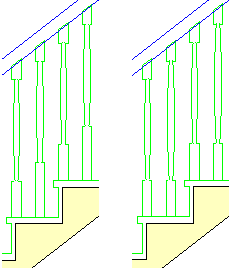
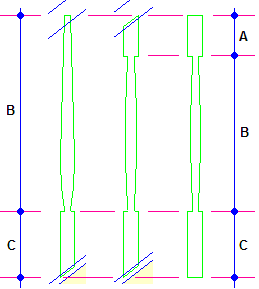
Note that when used with sawtooth strings, StairBiz ignores the treads for the purposes of spacing (i.e. all spacing is calculated based on the **Max Spacing** field).

**Max Spacing**; See **Special Spacing** (above).

**Fixed Lower Flat**;

The following values can be set independently for stair (rake) balusters and balcony balusters:

A turned baluster has a fixed upper flat if square-top (**A** in diagram), and always has either a fixed turning (**B** in diagram) or a fixed lower flat (**C** in diagram) but never both. There is provision in the Style window for each of these three dimensions. Which of the latter two StairBiz uses depends on the **Fixed Lower Flat** setting. If **Fixed Lower Flat** is ticked, StairBiz ignores the Turning dimension. If **Fixed Lower Flat** is not ticked, StairBiz ignores the Lower Flat dimension. However, it may be useful to include both dimensions so that you can swap between them on a job-by-job basis. Most catalogues include some fixed turning balusters and some fixed lower flat balusters within a single style.

Fixed Turning Fixed Lower Flat

**Pin Bottom**; indicates that this baluster has a pin bottom, that any Length and Lower Flat fields in the Balusters category of the Parts window includes the length of the pin, and that the Lower Flat fields of this Style window includes the length of the pin. The length of these pins in set in the Setout window (Balusters ~19).

**Fixed Length**; With this ticked the length of the baluster determines the height of the handrail. If the baluster has a profile, it’s length with be the sum of the upper flat, turning and lower flat, otherwise there are two fields to take the baluster length for both stair and level. The Fixed Length baluster setting is ignored for sawtooth strings.

**Full Panel**; With this ticked StairBiz creates a single full panel for the balustrade (usually glass). Set Depth as the thickness of the panel. Set the top, bottom and end margins for the panel.

For more details see Chapter 22 Miscellaneous Topics/ Glass Panels

**Round Balusters**;

To create a round baluster (i.e. completely round from top to bottom), set the DEPTH for the baluster to “R”.

Note that StairBiz sets the plow depth (in handrail, shoerail and balconyplate) for round balusters as zero (always, regardless of any other setting to the contrary). StairBiz will, however, calculate baluster lengths considering the specified plow depth.

**Cable**, **Use Max Between**, **Max Space Between**, **Space Between**, **Qty Cables**

See: Chapter 22 : Miscellaneous topics/ Cable Balustrade

#### Fillets

**Style Name**; See **Style Name** (above)

**Handrail** / **Shoerail** / **Balconyplate;** where this particular fillet style can be used in the stair. Different fillet positions in a stair may have different properties, so we need to know where a fillet with these particular properties can be used. As a result, fillet styles may have the same name so long as they have different positions on the stair (which is why you may see more than one fillet style with the same name in the styles list on the right). If any of these position options are disabled, it’s because there is another fillet style with the same name, width and depth that has taken that position.

#### Frets

**Non-Mitred**;

Tick this to have the riser finish flush with the outside of the string (i.e. it does not extend to the outside face of the fret in order to mitre with it).

#### Handrail

**Style sub-types**;

Handrails can have sub-types (e.g. a Classic can come in “Classic”, “Classic Solid Top”, “Classic 3-Ply”, “Classic NFJ” etc. For the purposes of handrail fittings, all these are “Classic”. If you want each of these styles to go to the fittings Part Filter simply as “Classic”, put the sub-type in brackets (e.g. “Classic”, “Classic (Solid Top)”, “Classic (3-Ply)”, “Classic (NFJ)”. When StairBiz sends a rail style to your fittings filter (as the StyleName property of the fitting), it first strips off anything in brackets.

**Baluster Plow**; How deep is groove (for balusters) in the underside of this handrail (zero if none). Note that a non-zero plow depth will always resolve to zero if the balusters (as selected in the Components window) are pin-top.



If **Ranch Style** is ticked, the balusters are on the outside of the handrail and this value is the distance from the bottom of the handrail to the top of those balusters.

If the baluster is set to Round Baluster, StairBiz will consider this depth when calculating baluster lengths but will otherwise pretend there is no plow.

**Number of Rails**; applicable only if balusters are not used, and **Rail Offset** is non-zero. It is the number of rails per section (e.g. ranch style). It can be auto-set – see **Max between rails** below.

**Rail Offset**; Applicable only for multiple rails. It is the distance from the top of a rail to the top of the rail below it measured vertically, or the gap between the rails measured perpendicular to the rake, depending on the **Offset is between** check-box.

**Ranch Style**; indicates that the balusters (if any) continue up the *outside* of the handrail by the distance shown in **Baluster Plow**.

**Offset is between**; indicates that the **Rail Offset** is the space BETWEEN the rails.

**Max between rails**; when ticked, the **Rail Offset** field becomes a **Max Between** field and holds the maximum spacing between the rails. StairBiz will fill the gap between the handrail and the floor evenly with the required number of rails to stay within the maximum spacing (thus overriding the **Number of Rails** field, which becomes disabled).

#### Midrail

You can have an upper and/or lower midrail in a balustrade. They will both be the same. Any balusters will span between the midrails (i.e. the midrails will interrupt them).

There may be length issues (i.e. lengths might not be spec'd correctly) at a 'reducing' situation - they will be spec'd over length.

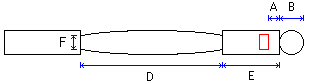
#### Newels

**Style Name**;

See **Style Name** (above)

**Rail to top of flat**;

the distance from the top of the highest handrail making contact with the newel to the bottom of the acorn (if one, otherwise to the top of the newel). See dim “A”. Not applicable for OTP.



**Length of upper flat**;

for turned newels only – the length of the flat (un-turned section) where the handrail enters the newel. See dim “E”. Not applicable for OTP.

Note that you can have a single newel style which can be suitable for multiple newel situations and setouts (allowing StairBiz to automatically adjust the flat length and turning length to suit the exactly situation in the design). See Setout window / Newels / Min flat below rail. Also see Design window / Elevations pane / Show Newel Setout (set flat length to Auto Adjust). Under these circumstances you should set this upper flat length to the **shortest** upper flat length of all newels covered by this newel style (and StairBiz will adjust it if it's too short for the situation).

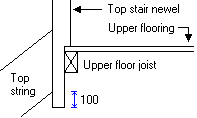
**Length of turning**;

for turned newels only – the length of the main section of turning. See dim “D”. For OTP, the turning is measured to the underside of the handrail (i.e. the top of the newel). There may be times where StairBiz needs to override the length of this turning - see Setout window / Newels / Min flat above string.

Note that you can have a single newel style which can be suitable for multiple newel situations and setouts (allowing StairBiz to automatically adjust the flat length and turning length to suit the exactly situation in the design). See Setout window / Newels / Min flat below rail, Min flat above string, and Min flat below string. Also see Design window / Elevations pane / Show Newel Setout (set turning length to Auto Adjust). Under these circumstances you should set this turning length to the **longest** turning length of all newels covered by this newel style (and StairBiz will adjust it if it's too long for the situation).

**Top newel below string**;

for newels at the very top of the stair only (i.e. in contact with the upper-floor) – the amount of newel extending down below the bottom of the string.



**Minimum Turn Diameter**;

The diameter of a turned newel at its narrowest point. This is used to position an adjacent baluster such that the gap between the newel and the baluster takes into account the turning. If you don’t required such an adjustment, set this dimension to zero. See dim “F”.

**Acorn Height**;

If the acorn for this newel is detached (i.e. you can select the required acorn in the Acorns category of the Components window), tick the **Detached Acorn** check-box (and this field becomes disabled).

Otherwise, for an attached acorn, enter the height here. If there is no acorn, enter zero.

**Detached Base If >**;

A detached base is where the newel comes in two main (and separate) parts – the top part (including upper flat and turning), and a base (which extends down from the lower end of the turning).

Leave at zero if a detached base never applies.

Leave at something small (e.g. 300mm) if a detached base always applies.

If a detached base is only required if the total length of the newel is more than a certain amount, set this to that amount.

If there is a detached base, StairBiz will send two items for each newel to the Cutting List and Part Filters (see Detached Base in the sample filter for Newels in Chapter 15). If there is extra length associated with these newels, the base gets the extra length and the upper part does not.

**[Square Newel with Detached Base]**

There may be situations where you want a square newel but with a detached base (it probably has some sort of moulding at the point of the detachment). In which case set the **Length of Upper Flat** to be the distance from the top of the flat down to the point of the detachment, and set **Length of Turning** to zero.

**Balcony** / **Top** / **Inside Landing** / **Outside Landing** / **Bottom**;

Where this particular newel can be used in the stair. Different newel positions in a stair may have different properties, so we need to know where a newel with these particular properties can be used. As a result, different newel styles may have the same name/width/depth so long as they have different positions on the stair (which is why you may see more than one newel style with the same name in the styles list on the right). If any of these position options are disabled, it’s because there is another newel with the same name, width and depth that has taken that position.

**Pin Top Newel**;

Is this newel a “pin-top” (used with over-the-post handrail fittings)? Otherwise is assumed to be PTP (post-to-post).

**Force Default Turnings**;

In the Elevations window (select ‘Show Newel Setout’) the dimensions for turning and flat lengths can hold tags for ‘Default’ (meaning use exactly the values shown in the Style window for this newel) and ‘Auto Adjust’ (meaning if the default values don’t work, StairBiz can adjust the newel setout so that it works).

However, in your Style window you may have some newels for which you always want the default setout (e.g. newels that you buy in as parts) and some newels that you turn or get turned as specials.

With this checkbox ticked, even if ‘Auto Adjust’ tags are used in the Elevations window, StairBiz will ignore them for this newel and pretend they are ‘Default’ tags. We suggest you tick this if the turning and flat lengths should never change for this newel. Note that the tags will still show in the Elevations window as ‘Auto Adjust’, but the values they hold will be your Style window values.

**Chamfered Newels**;

Chamfered newels need to be set as turned (at minimum for the purposes of doing chamfer profiles on the CNC), so their Turning and/or Acorn dimensions need to be set. However, to indicate that these dimensions are for a chamfer rather than a turning, make the dimension negative.

In the last release we introduced newel chamfer cuts on the CNC. However, such chamfer cuts applied to a turned newel because there was no way to indicate a chamfered newel as such. Now, in the Style window, when you set a turn length or an acorn length, if you make the length negative then StairBiz will treat that acorn and/or turning as a chamfer (rather than a turning) and will represent it a little differently in the Elevations window.

#### Lining

To specify lining in a stair (i.e. in the job) you need to select a style in the Components window (Miscellaneous tab), and you also need to right-click the relevant unit(s) in the Stair Setout pane of the Design window and select "Lining Under".

This style has a "Price by Area" check-box. Within certain limits, this tells StairBiz to cost the timber by its surface area (regardless of the Cost Method set in the Timbers window).

See Chapter 22: Miscellaneous topics/ Sheet Material

#### Outstep

If you with to use balconyplate for your outstep, see Components window/ **Outstep – replacing it with balconyplate**.

See also: Chapter 21 : Stair Components quick reference/ Outstep/ The dimensions of the outstep.

**Use Tread Material:**

***The following is recommended for an outstep style where the outstep is always the same depth and timber as the treads.***

When this is ticked, StairBiz gets the depth and timber from the Treads component (the **Depth** field will show “N”, and the Timber selection in the Components window is disabled). If the outstep is a blank (not a part), StairBiz uses the tread as a basis for costing the outstep material (a pro-rata cost of the tread material, plus 20% wastage). This is the way StairBiz previously costed outsteps.

***The following is recommended for an outstep style where the outstep is not always the same depth and timber as the treads.***

When this is not ticked, the **Depth** field is active, and the timber selection is active in the Components window.

**Dims From Design:**

***The following is recommended where you fabricate the outstep from a blank and can create whatever you need for the situation.***

When this is ticked, StairBiz ignores the **Width** field (it shows “N”) and take the width of the outstep from the Design (as held in the unit template and amended by you in the Design window). The Rebate Width and Floor Thickness is taken from the Details window. This is the way StairBiz previously set the dimensions for outsteps.

***The following is recommended where the outstep is a pre-fabricated part with fixed dimensions.***

When this is not ticked, the width of the outstep will be as you enter it in the **Width** field. The overhang (distance from the trimmer to the nosing) will be taken from the **Overhang** field, and the Rebate Width will be calculated as the Width less the **Overhang**. The floor (tongue) thickness will be taken from the **Floor Thickness** field. The corresponding dimensions in the Design window and Details window will be disabled.

**Floor Thickness:**

***The following is recommended where the outstep is a part with a fixed (pre-fabricated) tongue.***

The thickness of the tongue. Only applies if **Dims From Design** is not ticked and the dimension is non-zero (otherwise floor thickness is taken from Details window).

**Overhang:**

***The following is recommended where the outstep is a part with a fixed (pre-fabricated) overhang.***

The distance from the trimmer to the nose of the outstep. Only applies if **Dims From Design** is not ticked and the dimension is non-zero (otherwise overhang is taken from your entry in the Design window).

#### SafetyBar

**Centred:**

Sets the safety bar to half way between the underside of the tread above and the top of the tread below.

**Rod:**

Tells StairBiz that we are dealing with round rod.

**Don’t Trench String:**

Tick this to switch off trenching the SafetyBar into the string. This setting feeds into materials and CNC.

#### Shoerail

**Baluster Plow**; How deep is groove (for balusters) in the top-side of this Shoerail (zero if none).



**String Plow**; How deep is groove (for the string) in the bottom-side of this Shoerail (zero if none).



**Raised**; Raise the shoerail to float above the string/nosings. The amount of the gap is set in the Setout window (Shoerail heading). It can apply to both box and sawtooth strings.

**Sawtooth**; Shoerail that mitres down each tread and riser of a sawtooth string. When you tick this, the **Raised** button will become disabled (and vice versa) – the two settings are mutually exclusive.

Note that StairBiz does not draw this type of shoerail (for now).

Lengths are calculated to include the extra for the mitres.

Extra Lengths apply as usual, so you may decide to adjustment it for jobs of this type.

There is a property for this kind of shoerail in the Filters window.

#### Sidenoses

Side noses do not have their own category in the Components window (except for filters). They are turned on with the “Sidenoses” checkbox next to the treads category. They take their Timber, Style and Depth from the treads selection.

They also take their Blank/Part settings from the treads selection. If a Blank, cost is pro-rata that of treads. If part from filter, and filer reverts the part to a blank, then also reverts sidenoses.

Filtering for sidenoses may be done in the Treads and Landings filters (there is generally enough information about sidenoses to do so), however they also have their own filters for parts and labour.

#### Skirt

**Use String Material:**

***The following is recommended for a skirt style where the skirt is always the same depth and timber as the landing string.***

When this is ticked, StairBiz gets the depth (thickness) and timber from the Landing strings component (the **Depth** field will show “N”, and the Timber selection in the Components window is disabled). If the skirt is a blank (not a part), StairBiz uses the landing string as a basis for costing the skirt material (a pro-rata cost of the landing string material, plus 20% wastage).

***The following is recommended for a skirt style where the skirt is not always the same depth and timber as the landing strings.***

When this is not ticked, the **Depth** field is active, and the timber selection is active in the Components window.

Note that where the skirt depth is not the same as the string, StairBiz still draws it as if it were. This will be fixed some time soon.

**Dims from Design:**

***The following is recommended where you fabricate the skirt from a blank and can create whatever you need for the situation.***

When this is ticked, StairBiz ignores the **Width** field (it shows “N”) and take the width (height) of the skirt from the Design window.

***The following is recommended where the skirt is a pre-fabricated part with fixed dimensions.***

When this is not ticked, the width (height) of the skirt will be as you enter it in the **Width** field. The corresponding dimensions in the Design window will be disabled.

#### Strings (Laminations)

***The following may be relevant to you if you use laminated strings.***

If a string is laminated, it’s important to set a style name that indicates the laminated nature of the string so that you can easily identify it in the Components window.

***The following may be relevant to you if use CNC.***

The six fields for this style are only used by StairBiz for CNC purposes – if you are not using CNC then you can ignore them.

You have the option of having different thickness laminations for the inside and/or outside lamination, for each of straight and curved strings, as follows:

**Lams: Num Straight**; The total number of laminations when this string is straight.

**Lams: Dth Outer**; The depth of the outer layer (straight strings).

**Lams: Dth Inner**; The depth of the inner layer (straight strings).

**Lams: Num Curved**; The total number of laminations when this string is curved.

**Lams: Dth Outer**; The depth of the outer layer (curved strings).

**Lams: Dth Inner**; The depth of the inner layer (curved strings).

***The following may be relevant to you if break down your laminations for the purposes of spec’ing and costing.***

A blank item can hold only one size and timber, so is not suited to breaking down a lamination into its constituent layers for the purposes of spec’ing or costing the each layer separately. To get around this issue, do as follows:

Give the laminated string an indicative style name. Treat it as a part, and intercept the style name in your filters or auto-filters. Create a group for this string in the Parts window and add the various laminations to that group, such that when that string is specified as a part it will up-group in the materials and costs specifications.

#### Treads, Bullnose Treads, Landings

These have a "Price by Area" check-box. Within certain limits, this tells StairBiz to cost the timber of this component by its surface area (regardless of the Cost Method set in the Timbers window).

See Chapter 22: Miscellaneous topics/ Sheet Material

#### Wallbrackets

**Wall To Centre**; the distance from the outside of the string to the centre of the wall rail for this wallbracket.

#### Wallrail

**Style sub-types**; See the note in **Handrail**.

**Max between wallbrackets**; If wallrail is included in a job, StairBiz allocates a wallbracket 200 mm (8”) in from both ends. If the distance between these wallbrackets is greater than the value in this setting, StairBiz will allocate an extra wallbracket, and so on, until that the distance between wallbrackets doesn't exceed the value in this setting.

**Max after wallbrackets**; This is the nominal distance from the start of the wallrail to the first bracket, and the end of the wallrail to the last bracket, for the purposes of calculating the quantity of brackets. A value of zero would put a bracket at the very start and end of the wallrail.

### Export Styles

NOTE: Do not use Export Styles as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

Click the **Export button** to export all Styles in the StairBiz database to a Microsoft Excel spreadsheet.

1. First you are presented with the **Save As** dialog box. Enter a name for the Excel file, or choose an existing file to overwrite. Click the **Save** button.
2. If you select an existing file name, you will be asked if the file is currently closed. If it not, click **No**, close the file, and try again.
3. Wait until you get the message “Export Completed”.

When you open the Excel spreadsheet, if you get a message that starts "The file you are trying to open", simply click "Yes" to continue opening it.

The first row in the spreadsheet is a “header” row, showing labels for the columns. For an explanation of the columns/fields, see **Import Styles** (below).

All rows of the spreadsheet where “/” is the first character of the first cell are ignored (they are notes only to help you read/amend the spreadsheet - all but one of these notes rows are also yellow to help you distinguish them).

### Import Styles

NOTE: Do not use Export Styles as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

NOTE: You can also create all your styles from a Parts spreadsheet when you import the parts into the Parts window – see Parts window/ Import. The following does NOT relate to that method.

Click the **Import button** in the Style window to import a list of Styles from a Microsoft Excel spreadsheet into the StairBiz Styles List (study the following before doing anything).

#### Creating the Spreadsheet

To set up such a spreadsheet (PRIOR to attempting an import), do as follows:

1. Most databases allow you to export to an Excel spreadsheet, so if your Styles are in a database you will need to do this first.
2. It is CRITICAL that the spreadsheet contains at least 18 columns in a very specific order. To see what columns are required and in what order they are required, do an Export as discussed above. Open the exported file and study the column headings. There is a discussion below about each of the fields/columns. Note that in the spreadsheet, the Depth field is before the Width field if you have the **Depth before width** check button ticked in the Preferences window (otherwise the Width is before the Depth).
3. If necessary you can change the order of existing columns in the spreadsheet using cut/paste.
4. If the spreadsheet contains more than 18 columns, that’s OK (the extra columns will be ignored, even if they contain data).
5. The spread-sheet may contain a header row (i.e. the very first row being a row of labels describing the contents of the column), plus any number of “Notes” rows. Header and notes rows must always have a “/” as the first character of the first cell of the row. When importing, StairBiz ignores any such row (except for row 2 column 1, which should include a version number in the format in which StairBiz exports it).
6. There must be no empty rows before the end of the list. When StairBiz finds a row without any text in the first column, it assumes there are no more styles.

#### Column Explanations

Note that the following columns/fields correspond to those in the Styles window. For a description of the field, see above.

Field Name Notes

1) Category Must contain the exact wording shown in the categories list above the styles list in this window. Note that you may have changed these terms in the Languages window, and might not have been changed them in this manual – the terms you use must correspond exactly with the categories as shown in the window (not this manual). You might first like to do an export and study the terminology – these are the terms you must use.

2) Style The name of the style (max 35 characters). Each style within any one category must be unique, however there a few things that create uniqueness. Style Name, Width and Depth create uniqueness, but for newels and fillets the position is included in the uniqueness. For example, it’s OK to have 2 of more newels, all Colonial 90x90, so long as the newel positions (as seen by the check buttons at the bottom/right) are different. The same applies to Fillets.

3) Description This is what the client sees. If left empty, StairBiz assumes it’s the same as Style. Max 50 characters.

4) Depth The depth dimensions of the item. The dimensions system used (i.e. metric or some kind of imperial system) must be the same as the dimension system used in StairBiz at the time of the import (see Preferences window - Dimensions). This field must contain a dimension (you cannot leave it empty).

Note that the Depth field is before the Width field if you have the **Depth before width** check button ticked in the Preferences window (otherwise the Width is before the Depth).

5) Width See Depth (above).

6) Type The type of style. It must be one of the following (these words are shown in the Styles window, however you may have changed them in the Language window – you must use YOUR terminology as seen in the window (which is not necessarily the terminology as shown below):

Blank No Profile

Blank Staff Profile

Blank Contract Profile

Part No Profile

Part Profile

7) Type Value For:

Blank No Profile; leave it empty

Blank Staff Profile; the number of minutes

Blank Contract Profile; a currency amount

Part No Profile and Part Profile; if the part is specified, show the Part Id (i.e. from the Parts window). If the part is from the Part Filters, leave it empty. Note that if you specify a Part Id, that part must exist in your Parts window before you can successfully import.

8) Dim 1 The first dimension in the list of dimensions at the bottom/left of the window (if appropriate). It may be left empty if you like (you might want to fix them later).

9) Dim 2 “

10) Dim 3 “

11) Dim 4 “

12) Dim 5 “

13) Dim 6 “

14) Dim 7 “

15) Dim 8 “

16) Options These relate to the check boxes at the bottom/right of the window (where appropriate).

**For Newels**:

Type the letter “A” if this style applies to all newel positions, otherwise … “R” for balcony, “T” for top, “I” for inside, “O” for outside and “B” for bottom. For example, a newel which can be used for balcony, top and bottom would be “RTB”. If the newel is an Pin Top newel, add a “V” (e.g. “RTBV”). If the newel has a detached base, add “D”

**For Balusters**:

Include the letter “N” for Pin Top (no upper flat), “S” for Fixed Lower Flat (Stair), “B” for Fixed Lower Flat (Balc), and/or “P” for Pin Bottom”. For example, “NP”.

**For Fillets**:

Type the letter “A” if this style applies to all fillet positions, otherwise … “H” for handrail, “S” for shoerail, “B” for balconyrail. For example, a fillet which can be used for handrail and balconyrail would be “HB”.

All other categories: N/A

17) Style Class Optional. Max 10 characters. The style of the class (used only for vetting “groups” of styles in the Part Filters and Labour Filters window).

18) Photo File Optional. Max 45 characters. The file name of a graphics file residing in StairBiz Program/Custom Sheets/Style Photos. Must include only the file name and extension (not the full path).

#### Importing

After your spreadsheet is set up correctly and populated with styles, do as follows:

1. Click the **Import** button
2. In the Open File dialog window, navigate to the spreadsheet, select it and click **Open**.
3. If there are existing styles in your StairBiz database, you will be asked if you want to delete them first. If any of the imported styles are used in your selection templates in the Components window, it is better not to delete them. The reason is that if a style is included in a selection template in the Components window, deleting it causes StairBiz to see the imported style as different (even though ostensibly it is identical), and you would need to re-set the affected selections. On the other hand, if you import a style that is already in the database, StairBiz simply adjusts its data to correspond with the imported data.
4. You will be asked if there is a header row in your spreadsheet (i.e. containing column headings). If there is, your first part in the spreadsheet should start at row 2 (otherwise it should start at row 1).
5. StairBiz will do a test run on the entire import. If there is a problem, you will be alerted and the import may be aborted (so that you can fix the problem and try again). StairBiz will give you some information about the problem, including the row and column of the problem cell. Note that StairBiz uses numeric columns references (i.e. 1, 2, 3 rather than A, B, C). To show numeric column references in your spreadsheet, go to Tools/ Options/General, and select “R1C1 Reference Style”.
6. When the import is done, you will get the message “Import completed”.

## Style Photo and Caption window

### Overview

From : **Photo and Caption** button in the Style Defaults window.

In Custom Sheets (for example, your Quote custom sheet) you can have StairBiz automatically insert a photo (or line drawing) and caption for any or all of the components selected in the Components window for the current job. For example, if a Colonial pin top baluster is selected in the Components window, a photo of that baluster will automatically insert into the Quote. Thus the client knows exactly what to expect, and it’s taken you zero time for this service.

With the desired category and style selected in the Style Defaults window, click the **Photo and Caption** button.

The list on the right shows a list of graphic files contained in the StairBiz Program/Custom Sheets/ Style Photos folder (obviously you will need to put them there first – maybe your parts supplier can help out). When you select (click on) a file, the image from the file is shown on the left.

File types supported at this stage are .JPG and .GIF (although if you have other types it may be easy for us to accommodate – just ask).

Styles may share photos (e.g. two Colonial balusters of different sizes may both use the same image if it’s more convenient).

You can associate a caption with this image, either by manually creating a text file (.txt) with exactly the same name as the graphics file (except for the extension, which must be “.txt”), or by typing a caption in the text box at the bottom left and then clicking the **Set Caption** button (which will either create or amend this text file).

Note that in this window you can set a caption for any graphics file selected (for these purposes you are not restricted to the file you intend to select for the current style).

When you are done, click **OK**.

Click **Cancel** to leave things as they were before you opened the window (with the exception of setting captions, which are saved at the time you click the **Set Caption** button).

If you prefer, double-clicking the file name on the right selects this file and immediately closes the window.

To see the effect of your selections, in the Custom Editor window select the **Style Photo** tool from the tools menu, and create a rectangle with it. Then select the Field Definition tool (from either the tool bar or the Tools menu) and click the border of the rectangle you created. Select the style category for this photo (also select centre and scale options). Do the same thing using the **Photo Caption** tool (photo caption objects behave identically to normal text objects in this window, with the exception that you can set a style category in the same way you did for the Style Photo). Set the font attributes in the usual way.

## Timbers window

### Overview

From : Defaults menu ; **Timbers** menu-item.

The **Timbers window** is used to set the timbers that you use, and set the cost for those timbers (where necessary).

### Timbers List

To add a timber, click the **Add** button, edit the “New” timber created, then press the ENTER key.

To delete a timber, select it and click the **Delete** button. You can delete all timbers by deleting one while holding down the Control and Shift keys.

Note that there are various ways to import timbers from an Excel spreadsheet – see **Import Timbers** (below).

##### Timber

The name of the timber can be changed at any time. If that name is referred to by other items in your defaults, those items will be automatically updated. Changing a name will not affect the prices associated with that timber.

##### Grain

If the timber has no grain (e.g. MDF, metal or plastic), change this to “No” by double-clicking on the field and selecting from the drop-down list. If the timber has grain and the field is empty, you can leave it empty. StairBiz uses this information in a variety of ways (e.g. knowing when glue-ups are required, grain direction for CNC etc.).

##### Cost Method

Set the cost method by double-clicking on the **Cost Method** field and making your selection.

There are seven methods available for costing a timber (and each timber in your list doesn’t need to have the same cost method):

Base Percentage:

The cost is calculated as a percentage of the cost of another timber (the **Base** timber, which is the timber that has the word “Base” set in **Base %** field). The percentage used needs to be indicated in the **Base %** field of this timber. For example, if Pine is the **Base** timber, and this timber shows “120” in the **Base %** field, then StairBiz will cost this timber at 120% of the cost of Pine.

Lineal Metre:

The cost per lineal meter is set for each size shown in the sizes list.

Cubic Metre Per Size:

The cost per cubic meter is set for each size shown in the sizes list.

Cubic Metre All:

The single cost per cubic meter is set and applies to EVERY size; individual sizes become irrelevant and are not shown on the right.

Lineal Foot:

The cost per lineal foot is set for each size shown in the sizes list.

Board Foot Per Size:

The cost per board foot (12” x 12” x 1”, sometimes called a “super foot”) is set for each size shown in the sizes list.

Board Foot All:

The single cost per board foot is set and applies to EVERY size; individual sizes become irrelevant and are not shown on the right.

Cubic Foot Per Size:

The cost per cubic foot is set for each size shown in the sizes list.

Cubic Foot All:

The single cost per cubic foot is set and applies to EVERY size; individual sizes become irrelevant and are not shown on the right.

Square Foot:

The cost per square foot is set for each size shown in the sizes list. The area is based on the width times the length (ignoring depth).

Also see Chapter 22: Miscellaneous topics/ Sheet Material

Square Metre:

The cost per square metre is set for each size shown in the sizes list. See note in **Square Foot** (above).

Also see Chapter 22: Miscellaneous topics/ Sheet Material

Converting between cost methods

In most cases StairBiz will convert costs between cost methods. If you change from an non-“All” method to an-“All” method, StairBiz is not able to convert between cost methods. In converting to or from a square (area) cost method StairBiz does not attempt to convert. In all other cases it will do the conversion.

Costing Sheet

See Chapter 22: Miscellaneous topics/ Sheet Material.

##### Class

You can set a “class” for each timber, which can be any text up to 10 characters. The purpose of the class is to identify “groups” of timbers. It is used in the TimberClass property in the Part Filters and Labour Filters windows.

For example, you could have four classes that covered all your timbers – Hardwood, Softwood, MDF and Laminate. In your Labour Filters window you could filter for these classes and price the labour accordingly.

### Sizes List

##### Size

To amend a cost, double-click on the cost, edit it, then press the ENTER key.

Depending on the Cost Method (see later) of a timber, the list on the right shows every size previously created in the Style Defaults window.

This list is refreshed each time you click a timber (i.e. the prices list relates ONLY to the timber selected).

* Sizes can NOT be manually inserted directly into this window. The sizes list will always (and only) reflect the sizes in your Style Defaults window.
* Sizes prefixed with “\*” are not used – they relate to Styles (in the Style Defaults window) that have been designated as Parts and therefore never use a blank. They cannot be deleted, but obviously do not need a cost (unless they can be reverted from a part to blank item by a filter – see elsewhere).
* You do not need to enter a cost for every size in every timber. If you are sure that that size in that timber will never be used, you can leave it empty.
* NOTE: Landing strings in the Components window are shown as their width x N, where “N” stands for depth of the wall string as currently selected (this is because whereas landing strings can be a different width to normal wall strings, they cannot have a different depth). If you select a landing string where the “N” does not translate to a size listed in your Style window, StairBiz will not know how to cost it (because the size will not show up in the Timbers window). For example; the wall string is 240 x 32, and the landing string is 290 x N. If you do not have a 290 x 32 in the Timbers window, StairBiz can’t cost the string. The solution is to include in your Style window (strings category) all likely landing string sizes.

##### Buy$

The cost price of this timber.

##### Sell$

The sell price of this timber. If left empty of zero, StairBiz will use the buy price.

You can set the sell price as a percentage increase of the buy price. Set the “Sell is %” button in the window. Note that this is an all-or-nothing exercise – it is set for all timbers. If set accidentally or for testing, the original dollar values are preserved (i.e. $20 becomes 20% and vice versa). A setting of 20% means that the sell price is to be calculated as the buy price plus 20%. Negatives are allowed.

##### Waste

You can allocate a wastage for each timber/size. Wastage should be in the form of a percentage amount to be added to the lengths of these timber/sizes for the purposes of calculating inventory and total materials cost for a job.

Wastage does not impact the lengths specified in the Cutting List or Bill Of Materials sheets or Custom sheets for a job.

The Wastage percentages are shown in the Materials window and Materials Cost sheet for the job. The lengths shown in these windows do not include wastage, however the subtotals for each item includes the wastage.

Materials added to inventory will include the wastage.

See Waste, Extra Length and Rounding Up.

##### Copy/Paste

The entire price column can be copied from one timber to another. Click the **Copy** button in one timber, select a different timber, then click the **Paste** button if its enabled (if it’s not enabled then the Cost Methods of the two timbers are incompatible).

##### Delete Size

If you delete or make redundant a size in the Style Defaults window, that size is NOT deleted from this window, however, a "\*\*" prefixes the size, indicating that it is redundant and may be deleted using the **Delete Size** button.

##### Print

Prints the costs for the currently selected timber.

##### $ Increase

Costs for the currently selected timber can be increased or decreased all at once by a percentage amount using the **$ Increase** button.

##### Sell is %

Directs StairBiz to treat the $Sell column as a percentage column, allowing you to enter a sell price as a percentage increase or decrease of the Buy price. See **$Sell** (above).

##### Alert if $0.00

When this button is ticked, if you select a component (in the Components window) that uses a timber and size that has a zero cost, you will be alerted.

In this way you can go some way towards vetting any timber/size selections in the Components window. For example, let’s say that 90x90 Birch is not part of your normal inventory (but you use 90x90 for some other timbers, thus 90x90 Birch also shows up in this window and is theoretically selectable as a timber/size for some items in the Components window). Set its cost to zero and the user will be alerted if he makes this selection.

##### Export

Allows you to export the entire Timbers window to a Microsoft Excel spreadsheet. See Export Timbers below.

##### Import

Allows you to import an existing Timbers window from a Microsoft Excel spreadsheet into the Timbers window. See Import Timbers below.

### Timber Notes

There is a checkbox at the bottom right of this window. Tick it to show the Notes field for the current timber and another for each size of that timber. If the Timber notes field is not visible, and there are notes, there will be a green stripe down right-hand side of the checkbox (to indicate to you that there are some notes).

StairBiz remembers whether this checkbox is ticked or not (for next time you open the window).

There is also a checkbox at the bottom of the **Sizes** list, to make that list temporarily invisible, just in case you have a small screen and need more room for your notes.

### Export Timbers

NOTE: Do not use Export Timbers as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

Click the **Export button** to export all timbers and costs in the StairBiz database to a Microsoft Excel spreadsheet.

1. First you are presented with the **Save As** dialog box. Enter a name for the Excel file, or choose an existing file to overwrite. Click the **Save** button.
2. If you select an existing file name, you will be asked if the file is currently closed. If it not, click **No**, close the file, and try again.
3. Wait until you get the message “Export Completed”.

The first row in the spreadsheet is a “header” row, showing labels for the columns. For an explanation of the columns/fields, see **Import Parts** (below).

When you open the Excel spreadsheet, if you get a message that starts *"The file you are trying to open"*, simply click "Yes" to continue opening it.

### Import Timbers (from a simple list of timbers)

NOTE: Do not use Export Timbers as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

You can import from a spreadsheet containing a simple vertical list of timbers. Hold the **Control** and **Shift** keys down while you click the **Import** button. Select the appropriate spreadsheet.

The first timber must be in row 1 column 1, and subsequent timbers must be listed vertically below that. Any information in any other column is ignored.

Cost methods, prices etc. are not imported, and any such data existing in StairBiz for any of the imported timbers will be cleared and will need to be re-set after the import. For this reason this type of import is suitable only when setting up your Timbers window initially.

You will be given the option to delete existing timbers prior to the import. If you do so, timbers held in the Components Window selection templates and in your Parts window will need to be reset (even if they are the same name).

### Import Timbers (from a Parts window spreadsheet)

You can import from a valid Parts spreadsheet (which holds timbers in column 3). In fact, all timbers listed in a Parts spreadsheet MUST exist in the Timbers window prior to importing the spreadsheet into the Parts window, so this is a good way to do it.

Hold the **Control** and **Shift** keys down while you click the **Import** button. Select the appropriate Parts spreadsheet (StairBiz can recognize the difference between a simple timbers list as described in the previous section and a valid Parts spreadsheet).

Cost methods, prices etc. are not imported, and any such data existing in StairBiz for any of the imported timbers will be cleared and will need to be re-set after the import. For this reason this type of import is suitable only when setting up your Timbers window initially.

You will be given the option to delete existing timbers prior to the import. If you do so, timbers held in the Components Window selection templates will need to be reset (even if they are the same name).

NOTE: You can also create all your timbers from a Parts spreadsheet when you import the parts into the Parts window – see Parts window/ Import.

### Import Timbers (from an exported spreadsheet)

Click the **Import button** to import a list of timbers and costs from a Microsoft Excel spreadsheet into the StairBiz Parts defaults database. Ideally this spreadsheet is one that was exported from the Timbers window, then modified and saved. If this is not the case, the spreadsheet must at least have an identical structure.

Study the following before doing anything.

#### Creating the Spreadsheet

To set up such a spreadsheet (PRIOR to attempting an import), do as follows:

1. Most databases allow you to export to an Excel spreadsheet, so if your parts are in a database you will need to do this first.
2. It is CRITICAL that the spreadsheet contains 2 columns for sizes, plus three columns for each of your timbers. It must contain 6 rows for the details of the timbers, plus a row for the Width and Depth header, plus an empty row, plus a row for each of your sizes (sizes/costs start at row 9). To see what columns and rows are required and in what order they are required, do an Export as discussed above. Open the exported file and study the format. There is a discussion below about each of the fields/columns.
3. The spread-sheet must not contain a header row (i.e. the very first row is a list of your timbers, starting at column 3).
4. There must be no empty rows between your first size row (row 9) the end of the sizes list, and no empty columns between the first timber column (column 3) and the last timber column. When StairBiz finds a row (after row 9) without any text in the first column, it assumes it has arrived at the end.
5. Timbers can be duplicates of timbers already in the database. Sizes can be duplicates of sixes already in your database. This is true regardless of whether you choose to first delete existing database data or not (see below). If a timber, size or cost in your list already exists in the database, that existing timber, size or cost will be replaced by the new one. You will not be alerted.
6. The sizes you enter don’t have to already exist in your Styles windows (you may plan to create the styles later). However, if this is the case, when you are asked if you want to delete pre-existing un-used sizes first, click No.

#### Column Explanations

Note that the following columns/fields correspond to those in the Timbers window. For a description of the field, see above.

The following assumes you used a header row. If you did not, subtract one from all the row references.

Field Name Notes

1) Depth Sizes start at row 9. The Depth dimension goes in column 1 and the Width dimension in column 2.

Note that in the Preferences window (Dimensions) if **Depth x Width** is set to False, columns one and two will be reversed (i.e. the first column is Width and the second is Depth).

The dimensions system used (i.e. metric or some kind of imperial system) must be the same as the dimension system used in StairBiz at the time of the import (see Preferences window - Dimensions). This field must contain a dimension (you cannot leave it empty).

If you have exported, you may see a “0” dimension in the spreadsheet. This is for Wallbrackets (which do not use a width or depth).

2) Width See Depth (above).

3) Timber 1,2,.. List your timber names in row 1, starting at column 3 and repeating every three columns after that (6, 9, 12 etc). There is a limit of 25 characters.

For each timber, in row 2 enter the word “Grain” (or your Language window translation of it) if the timber is grained (otherwise leave it empty or type a “-“).

In row 3, enter the cost method used (see above). You must use the exact terminology as shown in the pull-down list in timbers section of the Timbers window (i.e. as translated in the Language window).

The un-translated terms are as follows (their meanings are discussed above):

Base Percentage

Lineal Metre

Cubic Metre Per Size

Cubic Metre All

Lineal Foot

Board Foot Per Size

Board Foot All

Cubic Foot Per Size

Cubic Foot All

Square Foot

Square Metre

In row 4, enter the Base information, as follows.

If the timber is used as a Base for the costing of other timbers, enter the word “Base” (or your translation of it).

If the cost method for the timber is **Base Percentage**, enter the amount of the percentage (e.g. “120”, meaning 120% of the “Base” timber). Do not include the “%”.

In row 5, enter the TimberClass (if you use it).

Row 6 holds the Texture of the timber (for 3D). Note that texture is something usually only set in the Textures pane of the 3D window (and held in the Timbers table of the database), and it would be unwise to try and enter new values here. However, if you are modifying a spreadsheet you previously exported from the Timbers window the textures will already be included and should be left as is. There is nothing to say you can’t copy/paste textures from one timber to another – just don’t go making stuff up.

4) Buy: Enter a dollar amount. (e.g. “$4.50”, “4.5”) for your buy price

5) Sell: Enter a dollar amount. (e.g. “$4.50”, “4.5”) for your sell price (optional – if no sell price in entered, StairBiz will revert to your buy price). Sell price can be entered as a percentage markup on the Buy price if the **Sell is %** button is ticked. For example, “20” or “20%” would set a sell price of 20% more than your buy price.

6) Waste: Optional. Enter a percentage wastage (e.g. “20” or “20%”) or a round-up, indicated by using brackets; for example “(6)”.

The costs you need to enter depend on the cost method, as follows:

**Base Percentage**: No costs are needed

**Cubic Metre All**, **Board Foot All** and **Cubic Foot All**: The Buy and Sell goes in row 9 (it applies to all sizes listed).

**All other cost methods**: Starting at row 9, for each size shown in columns one and two, enter the price for this timber.

Don’t be overly paranoid about your fields. StairBiz does a test run on the entire imported list before it commits anything to the StairBiz database. If something is wrong in such a way as to cause a major problem, StairBiz will advise you and give you the opportunity to abort the import before anything is committed.

#### Importing

After your spreadsheet is set up correctly and populated with timbers, sizes and costs, do as follows:

1. Click the **Import** button
2. In the Open File dialog window, navigate to the spreadsheet, select it and click **Open**.
3. StairBiz deletes all existing timbers not imported. For this reason it’s best to export existing timbers, make changes/deletions to that spreadsheet, save it, then import that same spreadsheet. If you import a timber that is already in the database, StairBiz simply adjusts its data to correspond with the imported data.
4. StairBiz will do a test run on the entire import. If there is a problem, you will be alerted and the import may be aborted (so that you can fix the problem and try again). StairBiz will give you some information about the problem, including the row and column of the problem cell. Note that StairBiz uses numeric columns references (i.e. 1, 2, 3 rather than A, B, C). To show numeric column references in your spreadsheet, go to Tools/ Options/General, and select “R1C1 Reference Style”.
5. When the import is done, you will get the message “Import completed”.
6. After the import, in the Timbers window, you may see sizes prefixed with “\*\*”. This means that the size is not currently used in your defaults. You may even see duplicate sizes in the list. They are not actually duplicates – they just appear to be. StairBiz holds all dimensions as 1/100 mm. What you see on your screen is rounded to the degree of rounding you specific in Preferences. This problem only occurs when you have swapped between decimal and fractional measurement systems, and the extremely small rounding errors makes two sizes which are not the same appear the same when rounded. If one of the duplicate has the “\*\*” prefix, simply delete it in the window. Otherwise you will need to go through your Styles window, find all examples of the offending dimension, and re-enter either the width or depth of that dimension (it doesn’t matter which – all we need to do is get StairBiz to re-save the dimension). Note; for this reason it’s best not to go swapping between fractional and decimal measurement systems when working in default windows that accept measurement values.

## Timber Themes window

### Overview

From : Defaults menu ; **Timber Themes** menu-item.

In the Components window for a job you are able to select a timber for each component. The timbers available for selection come from your Timbers window. The **Timber Themes window** allows you to limit the range of selectable timbers for each style. For example, if your “Colonial 1 ¾” baluster only comes in Oak and Pine, you can create an “Oak and Pine” theme in this window and then apply it to all styles that are only available in these two timbers. Thereafter, when you click the timbers field for the balusters category in the Components window when a “Colonial 1 ¾” baluster is selected, only these two timbers will be available for selection.

#### Auto-Create All button

StairBiz can automatically create your timber themes using the information in your Parts window.

StairBiz loops through all the styles in your Styles window and creates timber themes for each based on the range of timbers shown for each in the Parts window.

You must set the timber, width, depth and style name for each relevant part in your Parts window. If any of this information is missing for a particular part, the timber for that part will not be included in the created theme.

Themes are only created for items that (in the Style window) are set as “Part From Filter”.

NOTE: If you have two different newels in different newel categories of the Parts window (e.g. one in Newels All and one in Newels Bottom), and both newels have the same style/timber/depth/width (as can happen with volute newels), then StairBiz can get a little confused – you should check that the themes created for such are correct.

NOTE: You can also create all your timber themes from a Parts spreadsheet when you import the parts into the Parts window – see Parts window/ Import.

### The lists

There are three lists in the main section of the window, as follows:

#### Names

Lists the names of timber themes you have created.

To create a new theme, click the **New** button.

To delete the currently selected theme, click the **Delete** button.

To copy the currently selected theme, click the **Copy** button – all the setting for this theme as copied to the clipboard.

To paste a copied theme to the currently selected theme, click the **Paste** button.

#### Available Timbers

Lists all the timbers shown in your Timbers window (except those shown in the **Include/Exclude** list).

To send a timber in this list to the **Include/Exclude** list, either double-click it, or select it and click the **>** button.

To send all timbers in this list to the **Include/Exclude** list, click the **>>** button.

Note that a maximum of 63 timbers are available for themes (this is simply a memory limitation in StairBiz, and should be acceptable in almost all situations).

#### Include/Exclude

Lists all timbers in the current theme.

To delete a timber, click the **<** button. To delete all timbers, click the **<<** button. Deleted timbers are sent back to the **Available Timbers** list.

If the **Inclusive** option button is selected, the timbers in this list are INCLUDED in the current theme and those remaining in the **Available Timbers** list are excluded. If the **Exclusive** option button is selected, the timbers in this list are EXCLUDED from the current theme and those remaining in the **Available Timbers** list are included. If the current theme included all timbers except a few, it would be more convenient to use an **Exclusive** theme (although it really doesn’t matter).

### Applying themes to components

In the Styles window, there is a Theme pull-down to the right of the Width and Depth dimensions. Select any previously created theme to apply to this style, or select **[None]**.

### Using themes

In the Components window, make your Style selection for the job, then left-click on the Timber field. A list of timbers is shown for your selection. If the selected style has a theme, the timbers available for selection are limited to those contained in the theme.

If you wish to override a theme, instead of left-clicking the timber field, right-click it – all timbers are now shown for selection. If you select a timber that it not “within theme”, that timber field will turn yellow to indicate such. In the same way, if you select a style and the current timber is not within theme, the timber field will turn yellow – a reminder that you should probably select a different timber.

Note that if the timber field is yellow (indicating that the timber is not within theme), StairBiz does not care – it will process that style with the selected timber regardless.

## Users & Networking window

### Overview

From : Defaults menu ; **Users** menu-item.

StairBiz allows you to maintain a list of users each with their own passwords and permissions. After registering your copy of StairBiz with a registration password, we recommend that you create a user account for yourself so that you can use a more friendly password.

### System Accounts

When you open the Users window you will see two System accounts at the top of the list. They are called \_OWNER and \_ADMIN. These accounts cannot be changed or deleted.

The \_ADMIN account is the account that is used when you log into StairBiz using the registration password we gave you. This account has full privileges which will allow you to Add, Delete or Modify user accounts.

The \_OWNER account is reserved for the software designers and is something you will not need to use.

### Adding an Account

You can have more user accounts than you have licenses. There is a maximum number of 63 accounts.

If you are logged into StairBiz as an Administrator (by using your numerical registration password or the password to an account that has administrator privileges) you can Add additional user accounts. Click the **Add** button to begin this process.

A **StairBiz User Settings** window will now open and allow you to enter all of the details for the new user account. You will be required to enter a **Login User Name** and a valid **Password** before you can click **Ok**. You must also type your password a second time in the **Confirm Password** field to ensure that you have typed it in correctly. You are not required to fill in the **Email** and **Phone** fields, these are simply to help Administrators.

Note: Each password in StairBiz must be unique, as this is how StairBiz identifies which user is using the system.



### Modifying an Account

There are two situations that will allow you to modify a user account. If you are logged into StairBiz as an administrator or as a user with administrator privileges, you will be permitted to modify any user account (except for the system accounts described above). If you are logged in as a user that does not have administrator privileges, you will be allowed to modify your own User Settings, but you will not be able to modify certain aspects of your permission settings, nor will you be allowed to modify other user accounts. This is a security measure that is intended to keep administrative control in the hands of the owners or management of your business.

To modify an account, highlight the user on the list you wish to modify and click **Modify**. A **StairBiz User Settings** window will now open (see above) allowing you to change a Password, Username etc.

### Removing an Account

If you are logged into StairBiz as an Administrator or as a user with Administrator privileges, you can remove any user (except for the system accounts described above).

To remove an account, highlight the user on the list you wish to remove and click **Remove**. After confirming that you actually wish to remove the selected user, the account will no longer be available in StairBiz.

### Print List of Accounts

You can put the list of users shown in the Users window on to the clipboard (from where you can paste into a spreadsheet or similar). The list includes the passwords, whether or not they are admin, and whether or not they are currently on-line. It alerts you if there are any duplicate passwords (it can happen!).

This feature is only available to the owner of your company (or similarly suitable person) - email John Dibley for how to access it.

### Account Permissions

StairBiz will allow you to assign certain permissions to individual user accounts. When a user logs in using their password, the permissions that are set for their account will enable or disable them from performing certain tasks. For example, a bookkeeper may not need access to any of the Defaults Windows. Or a receptionist may not be allowed to view financial information.

To modify the Account permissions for a given user, highlight the user on the list you wish to edit and click **Permissions**. Note that you will not be able to edit someone else’s permissions if you are not logged on as a user with Administrator privileges. You will also not be able to edit the permissions for a System Account.

After clicking on **Permissions** you will be presented with the following window:



In this window there are 3 sections to be concerned with.

##### Menu Item Permissions

This section (at the top of the window) will allow you to determine which menu items in StairBiz are available. If you wish to hide a menu item for this user, simply tick the **Hide** column of the appropriate menu item.

If you are logged in to StairBiz as a user with Administrator privileges you can also choose to tick the **Locked** column for each menu item. When a menu item is locked, the user you are editing will not be able to Hide or Unhide that menu item. This will allow a user to choose certain menu items they do not wish to see and Hide them from themselves, without giving them the ability to Unhide menu items that an administrator has locked them out of (e.g. Financial windows etc.).

##### Administrator Privileges

To give the user the ability to administrate accounts, select the **Administrator Privileges** option. If you are granting yourself a new account for the first time, it is recommended that you give yourself this permission so that you can Add, Remove and Modify user accounts without being required to login using your numerical registration password.

When an administrator creates a new User in StairBiz, that new user does not have administrator privileges by default. Administrator privileges needs to be set, manually, in the Permissions window for that user, by someone with administrator privileges themselves (which includes anyone logging in with a StairBiz Registration Password).

##### Collapse All / Expand All

These buttons will collapse all the Menu Item Permissions into their categories, or expand them so each one is visible. This is useful for quickly locating a window category. You can Collapse or Expand an individual category by clicking on the **+** next to a category item in the Menu Item List.

##### Write and Overwrite Permissions

These 4 options allow you to assign a user the ability to write or overwrite various parts of the program. A user who does not have write permission for **Job Design/Cost** for example, will only be able to view these items, but cannot save any changes to them.

##### Copy All / Paste

These buttons will allow you to copy All of the user permission settings on this window to the clipboard. You can then close this window down and open the user permission settings for another user and click on Paste to bring all of the settings from the clipboard into the current user. This is useful if you have multiple users that should all have the same permission settings.

##### Permissions Tab

This section needs to be updated. Following are some settings:

**Auto Update**

**Quote Calc: Show Profit**

**Quote Calc: Show Breakdown**

**Materials: Change Price Level**

**Edit Job Templates**

**Unlock Jobs**

**Open Locked Jobs**

**Edit Job Numbers**

**Delete Clients**

**Edit Component & Filter Selection Templates**

Allows you to select filters, and modify selection templates, in the Components window and the Labor Cost window of a job. This includes changing labour rates.

**Modify Directory Views**

**Delete Other User's Jobs**

**Delete Jobs on Serve**

**Post CNC Preferences to Server**

**Edit Schedule 1 Date**

**Edit Schedule 2 Date**

**Change Jobs on Schedule; Installation**

Allows you to place, remove, move and edit jobs in the Installation pane of the Schedule window.

**Change Jobs on Schedule; Production**

Allows you to place, remove, move and edit jobs in the Production pane of the Schedule window.

**Customize Process Window**

**Customize Schedule Window**

Allows you to change the layout and behaviour of the Schedule window, specifically to add or remove rows and to access the Schedule Settings window.

**See Job Values in Schedule Header**

Allows you to see an extra header row in the schedule showing the total value of jobs on each date. Also see Schedule Settings window.

### How to Login a user

When you launch StairBiz you are asked to enter in a password. Entering the **registration** password that we have given you will log you in as the \_ADMIN user described in the System Accounts section above (so be careful who you give it to). Entering a user account password (i.e. created by you) will log you in as that user.

If you wish to log off and log in under a different user account, you can either close the program and relaunch it, or select **About StairBiz** from the Help menu, which will return you to the password window, where you can then enter a different password.

### Auto Update

See Chapter 16 : Updating StairBiz/ Auto Updates.

### Networking

See Chapter 17 : Networking - Basics/ Network Settings in StairBiz

## View sheets

### Overview

**View windows** are opened from the View menu are used to view Job sheets. The layout and content of these windows is fixed (you can’t change it). They can be printed individually, or all at once using the Print Job window.

Following are some notes on selected View sheets.

### Stair > Angles

##### String Rake

**Rake**; The rake of the top of the string, in degrees from horizontal

**90-Rake**; 90 degrees less rake

##### Fitting Sweep

**Rake**; The rake of the top of the string, in degrees from horizontal

**90-Rake**; 90 degrees less rake

**Sweep Angle**; How many degrees does the fitting turn through

**180-Sweep**; 180 degrees less the sweep angle

##### Handrails

The following values will allow you to cut handrail to exact lengths and angles (regardless of the lengths shown in the Cutting List which measure from the extremities of the rail, plus extra length and/or round-up).

**Length Bottom Edge**; exact length of the bottom edge of handrail and wallrail, adjusted for fittings as appropriate. The lengths do not include tenons.

**Angle Lo-End**; the cutting angle of the low end end of the rail. A square end is 90 degrees.

**Angle Hi End**; same as above, but for the high end.

### Stair > Newel Setout

##### Dimensions

Vertical dimensions are running dimensions referenced from the top of the highest string mortise.

If the horizontal distance from the nosing to the associated riser face is standard, StairBiz will not include it in the drawing (to reduce dimension "clutter").

### Labour Cost

##### Sort by Category

For both the Labour Cost window and the Labour Cost sheet, you can optionally swap the **Stage** and **Category** columns. This might be useful to group items by their category, rather than by their stage (e.g. all “Tread” items would be grouped, regardless of Prep, Build, Install, etc. stages). See the **Labour window sort by Category** setting in the Miscellaneous Defaults window, View Sheets category.

# 

# Chapter 14 : Estimating & Pricing

## How StairBiz costs jobs

### Overview

The following is only applicable to the Estimate module.

There is a difference between costing (estimating) a job and quoting a job.

* Costing a job involves knowing exactly how much it will cost your company to produce that stair.
* Quoting a job is putting a figure on what you’ll charge the client.

The variables for costing are roughly as follows:

1. Cost of labour (both staff and contract)
2. Cost of timbers and parts
3. Cost of truck usage
4. The job’s share of all other costs associated with running the company (overhead).

The difference between the cost and the quote is your profit margin (or loss).

Market pressures and marketing policy have nothing to do with costing a stair - they should only impact your margin - to properly control a company you know what the production costs are, and what the margin is, for each job you quote.

The cost of timbers and parts for a job is set in the Materials window.

The cost of labour for a job is set in the Labour window.

Allowances for overhead and profit for a job are set in the Quote Calculation window.

Note that it is possible to cost (quote) for the stair and balustrading separately – see the **Active** buttons in the Process window.

Note also that the **Don’t Process** menu-item when you right-click a stair unit in the Stair Setout pane of the Design window can force StairBiz to ignore certain units of a stair for the purposes of spec’ing and costing labour and materials.

### How StairBiz Costs Materials

StairBiz costs materials for a job exactly (or, at least, as exactly as you want it to).

Component for a job are selected in the Components window of the job, and fall under two categories:

1. Blank items, which include a style and size.
2. Parts

Timber selections are made in the same window.

For blank items:

* If the item type is set as Blank (any of the 3 categories) in the related Style window, then the cost per metre/foot of the blanks for the relevant sizes and timbers are pulled from the Timbers window.
* If the item type is set as Blank; Contract Profile in the related Style window, then the cost for the outhouse machining is added.
* If the item type is set as Blank; Staff Profile in the related Style window, then the labour cost for machining the item is treated as a labour cost (see How StairBiz Costs Labour).
* If the item is a Part then the cost is pulled from the related Parts window and can be cost per each or cost per metre/foot as shown in that window.

So at this point of the job, StairBiz has the default cost of all items (per metre/foot or per each). All these item’s costs can be changed just for this job (if necessary) in the Materials window of the job.

StairBiz then calculates a cutting list showing every component – including the quantity, size and length. From this StairBiz can calculate the total cost of the materials for the job (in the Materials window).

This total cost is then fed into the Quote Calculation window.

##### Exceptions:

Some component’s sizes can be manually amended in the Design window, and therefore would be different to the original size as shown in the Components window.

In these cases there are a variety of options, including Price by Area and both manual and automatic pro-rata pricing systems.

See Chapter 22: Miscellaneous topics/ Sheet Material

### How StairBiz Costs Labour

#### Overview

StairBiz breaks labour down into six main categories:

1. Preparation
2. Profiling
3. CNC
4. Assembly
5. Delivery
6. Installation

Costing is then done as follows:

1. As part of your defaults setup, labour filters may be created in the Labour Filters window, and times and/or costs may be entered into these filters for each possible task in each labour category (except Turning/Machining - see below). When you start a new job, these labour filters can be selected (either by default, or manually in the Labour window) and are brought into the job. The job uses the filters to create a list of labour activities.
2. As part of your defaults setup, labour times and/or costs may also be associated with each part in the Parts window. If a part is used in a job (either specified by the Style window or by a Part Filter), StairBiz will add any labour associated with that part to the job.
3. As part of your defaults setup, times/costs for the Turning/Machining of components may be entered into the Style window for each component (providing that the style type is set Staff Profile or Contract Profile). If that style is used in a job, StairBiz adds the associated labour to the job.
4. Quick Labour (called "quick" only because it's fast to apply it) for travel time and installation can be added to the job in the job's Quote Calculation window. In the case of installation labour, if the Override checkbox is ticked the labour entered here will completely replace most other installation labour (see the Quote Calculation window).
5. Each time you change anything in the Design window of the job, StairBiz recalculates the labour, and comes up with a total cost as shown in the job’s Labour window and Labour sheet. This total is then fed into the Quote Calculation window for the job.

#### Two main ways of costing labour

With StairBiz you can cost labour using the Staff Method, or the Contract Method, or you can use the Staff Method for some categories of labour and the Contract Method for others. You are also able to switch methods on a job-by-job basis using the relevant buttons in the job’s Labour window.

##### Staff Method

If you tell StairBiz how much time it takes to do each task, and how much you pay the person doing that task, StairBiz can calculate the cost of labour. This method would lend itself to costing labour for in-house staff.

Using the **Staff** method:

1. In the Labour Filters window, for each task in each category of labour that usually or occasionally uses in-house staff, you need to specify the average time it takes for the average worker to complete that task. This is done using TimePrepare, TimeAssemble, TimeDeliver and TimeInstall properties.
2. In the **Labour Rates** list in the Labour Filters window, you also need to set the wage cost for each category of labour that may use the Staff Method. This is done in the column called “Rate”.
3. Finally, you need to be sure that the relevant **Contract** button at the top of the window is NOT ticked.

##### Contract Method

If you tell StairBiz how much you pay for each task, StairBiz can calculate the cost of labour. This method would lend itself to costing labour for subcontractors on piecemeal rates.

Using the **Contract** method:

1. In the Labour Filters window, for each task in each category of labour that usually or occasionally uses contract staff on a piecemeal basis, you need to specify the price charged by those contractors for that task. This is done using the ContractPrepare, ContractAssemble, ContractDeliver and ContractInstall properties.
2. Finally, you need to be sure that the relevant **Contract** button at the top of the window is ticked.

#### Costing Travel Time

**Travel time** for a job is entered in the Quote Calculation window of the job as the number of minutes (or hours:minutes) of travel multiplied by the number of men travelling (i.e. total man-minutes). Alternatively, enter a dollar (contract) amount.

The cost of the truck is entered manually in the Quote Calculation window.

#### An alternative way of costing

Many stair manufacturers currently cost stairs using a “per tread” and “per landing” etc. process. Materials, labour, overheads and profit are all bundled together.

Whereas we seriously discourage this method for a variety of very good reasons, StairBiz can emulate it, as follows:

1. Set all prices in the Timbers window to zero.
2. Set the **Overheads p.w.** value in your Miscellaneous Defaults window to zero.
3. Create line items in your Part Filters window to price your jobs.

#### Simple or sophisticated

The costing of labour in StairBiz can be as simple or as sophisticated as you like. You can be as simple as an amount per tread, or you can cost down to the last nail and glue block.

#### Note regarding the schedule

If you use the Contract Method for costing any category, and you intend to use the Schedule, then you should ALSO specify a time (so that the Schedule knows how long your contractors are tied up for).

For example:

TimeAssemble = 12  
ContractAssemble = $4.50

When the above filter is run, if the mode is Staff (i.e. the Contract button is not ticked) then the 12 minutes is used and the $4.50 is ignored. If the mode is Contract, the $4.50 is used and the 12 minutes is ignored. However, in this case the 12 minutes is only ignored for the purposes of costing – it may still be used to inform the Schedule of labour durations.

This can also apply to labour in the Parts window.

### How StairBiz Allocates Overheads

StairBiz views overheads as being the cost of running your business (i.e. expenses) EXCEPT FOR:

* the cost of materials
* all costs for all labour directly associated with manufacture, delivery and installation of stairs (including overtime, holiday pay, sick leave, superannuation, tax, subcontract and contract payments etc.)
* (optionally, but recommended) a portion of the costs associated with your truck(s) – the remaining portion being set on a job-by-job basis in the Quote Calculation window for the job.

Overheads would include sales, administration or management labour costs, leasing, depreciation, rent on premises (or the opportunity cost thereof if you own your own premises) telephone and electricity, stationery, accounting, legal coats etc. etc.

The best way to determine your company’s overheads is to check your last annual tax return; get total expenditure and exclude those materials and labour items indicated above.

Your overheads are set in the Miscellaneous Defaults window.

#### Using overheads to go broke:

The most common method of allocating overheads is to calculate (from last year’s figures) the percentage of total overheads to total labour and materials, then apply that percentage to individual jobs.

Before we talk about how StairBiz can allocate overheads, consider the following (admittedly extreme) scenario:

You have a business manufacturing mouse traps. You have two models – one that uses a steel latch mechanism and one that use a titanium latch mechanism (each of which you buy in, complete, from another manufacturer). The steel mechanism costs you $1.00 and the titanium mechanism costs you $99.00. Labour to make either model is $1.00 (you simply screw the latch to the wooden base which, for the purposes of the exercise, we’ll pretend costs you nothing – you steal them from the scrap bin of the stair manufacturer next door).

The total cost of labour and materials for the steel model is $2.00. The total cost of labour and materials for the titanium model is $100.00.

You have set your total overheads at 25% of your total labour and materials (based on last year’s accounting figures).

Overhead allocation for the steel model is 25% of $2.00 = 50c, giving a total cost of $2.50. Overhead allocation for the titanium model is 25% of $100.00 = $25, giving a total cost of $125.00.

There are two questions:

1. Did you really use 50 times more of your company’s overheads to make the titanium model? (No, in fact you used about the same.)
2. Will you be able to sell any titanium models at $125 when the market is supplying them for $110, more accurately reflecting the overheads reality? (Probably not.)

Note that in the above scenario you will probably sell heaps of the steel models, because a 50c overhead allocation hugely underestimates the manufacturing reality. You will also go broke.

The similarity between the above mouse trap scenario and your own business is that there are timbers that might be five times more expensive than others, but you are not necessarily using five times more overheads to manufacture stairs made from them.

At the end of the day all overheads need to be allocated across all mouse traps, but it needs to happen in a way that reflects manufacturing and market reality. The alternative is to reduce the importance (weighting) of materials relative to the labour - Scenario B (below) as opposed to Scenario A (below).

Note that if you choose to make more PROFIT on certain jobs, that’s a different discussion (and should be dealt with in the profits allocation) – in the discussion on overheads, we are concerned only with the COST of jobs.

#### Two Scenarios:

StairBiz needs to know your overheads to calculate an appropriate amount to add to each job, as follows:

Imagine the following scenarios:

**Scenario A: Materials Factor as % = 100**

1. You have designed a job and the labour and materials for the job total $1,000.
2. Your overheads are $12,000 for the period (see Miscellaneous Defaults window).
3. For the period (see Miscellaneous Defaults window) your total labour is $10,000 and total materials is $20,000 (so total labour and materials are $30,000).

StairBiz calculates that this job’s labour and materials ($1,000) is 3.4% of total jobs for the period ($30,000), so that 3.4% of your overheads of $12,000 should be allocated to this job. The amount allocated would be $408.

**Scenario B: Materials Factor as % = 50**

1. You have designed a job and the labour is $500 and materials is $800.
2. Your overheads are $12,000 for the period (see Miscellaneous Defaults window).
3. For the period (see Miscellaneous Defaults window) your total labour is $10,000 and total materials is $20,000 (so total labour and materials are $30,000).

StairBiz will use 100% of the labour from this job ($500) and 50% of the materials ($400) to get a total NOMINAL labour and materials for the job of $900.

StairBiz will use 100% of the Total Labour for the period ($10,000) and 50% of the Total Materials for the period ($10,000) to get a total NOMINAL labour and materials for the period of $20,000.

StairBiz then calculates that this job (nominal $900) is 4.5% of total jobs for the period (nominal $20,000), so that 4.5% of your overheads of $12,000 should be allocated to this job. The amount allocated would be $540.

These calculations and allocation is done in the Quote Calculation window.

Note that there are ways to omit certain categories of materials and/or labour for the purposes of calculating overhead (see Miscellaneous Defaults window/ Applies To).

See the Quote Calculation window for a breakdown of the actual Overheads calculation.

## Blank Items, Parts & Line Items

The following is only applicable to the Estimate module.

Items in the Bill Of Materials of a job can be ***blank items***, ***parts*** or both. A recap on the difference between a blank item and a part …

In the following discussion, in relation to a style, we will refer to the *Blank options* or *Part options* for that style. These refer to the option buttons shown in the component’s Style window (i.e. the three blank options which determine that the component is a *blank*, or the two part options that determine that the component is a *part*).

**Blank items** are blank pieces of wood pulled from your rack, cut to length, and (if appropriate) profiled either by staff or by contract. There is only one way a blank item can show up in the Bill Of Materials for a job – a style selected in the Components window of the job has one of the three *Blank option* buttons selected.

**Parts** are items from your Parts window. There are two ways a part can show up in the Bill Of Materials for a job:

1. A style selected in the Components window has the Part Is … option selected.
2. A part filter has specified it (i.e. a part filter created in the Part Filters window and selected in the Components window of a job has found a “hit” and specified the part. See Parts and Labour filters).

Additionally, both blank items and parts may be created manually as loose items in the Materials window.

### Various approaches to specifying components:

#### All Blank items

If you take all your timber from the rack, then trim, mould or turn the components from these blanks, all your styles (in their Styles window) would have one of the three **Blank** options set, so no *parts* would be specified by any of your styles.

If you did not create any part filters (in the Part Filters window) or select any of those filters (in the Components window of a job), no *parts* would be specified by filters.

Therefore only *blank items* (no *parts*) would show up in your Bill Of Materials for the job.

#### All Parts

If all styles (in their Styles window) have one of the two **Part** options set, then no blanks are used. Either StairBiz specifies the part (if the **Part Is …** option is set) or you specify it according to your part filters (if the **Part From Filters** option is set).

Therefore only *parts* (no *blank items*) would show up in your Bill Of Materials for the job.

#### Parts and Blank items

Generally most companies use a combination of the above methods. For example they could use balustrading components which they buy in pre-profiled (*parts*), and treads, strings etc. from the rack (*blank items*).

Additionally they may have part filters specify hardware (handrail bolts etc.) – this is the only way to specify hardware (with the exception of wallbrackets).

#### Line items

Line items may also show up in the BOM. A line item is neither a blank item nor a part, but rather something a little less tangible. For example, some clients price stairs based on a certain price per tread/rise/string combination. This tread/rise/string combination could be generated in the part filter as a line item (it doesn’t exist in your parts window). Line items are more about pricing than they are about specifying materials.

## Bill of Materials (BOM)

The following is only applicable to the Estimate module.

##### Including or excluding items with $0.00 value

**Materials Cost sheet**

If you don’t want to see materials or parts with a zero dollar value in the Materials Cost sheet, in the Miscellaneous Defaults window (View Sheets category), set “Mat Cost; Don’t Show $0.00 Items” to Y (yes).

**Custom Sheet BOM**

When you have BOM lists in Custom Sheets, you can choose whether that BOM shows only items with a non-zero dollar value, only items with a zero dollar value, or all items. In the Custom Editor open the sheet containing the BOM list. Select “BOM List Type” from the File menu, and set to: 1= show only items with non-zero $; 2= show only items with zero $; 0= show all items. This may be useful where your job pricing is not based directly on the components in the stair, in which case your pricing items can be listed separately from your component items. It can only apply on a whole-sheet basis (i.e. you can’t have different types of BOM lists within the one custom sheet).

## Export to Excel

Various View sheets (Mat Cost, Mat List, BOM and Labour Cost) can be exported to Excel - click the ‘Export’ button at the bottom/right of the sheet.

When you open the Excel spreadsheet, if you get a message that starts *"The file you are trying to open"*, simply click "Yes" to continue opening it.

## Pricing Refresh

All prices, and the settings that impact pricing, are saved with each job (with the exception of parts and labour filters, where only the names of the current filters are saved with each job, not the filters themselves).

There may be times when you create and save a job, then change the pricing in your defaults, and then want that job to refresh to those defaults.

For this purpose there is a "Refresh" button in both the Components window and the Labour Cost window of the job.

There are also times when you open an old job, then do a "Save As" to create a new job, or you create a new job from a Job Template (both from the project menu). Once again, the prices held in that job may be old (i.e. you may have changed your pricing since the original job or template was saved). In both cases, on creating the duplicate job, you will be asked whether you want to refresh all pricing using you current Defaults. If you say yes, it is the same as clicking the "Refresh" button in both the Components window and the Labour window of the job.

##### Filter check

On opening a job, StairBiz will check to see that all filters current at the time the job was saved are still available; see Chapter 22 : Filter check on opening job

### What is refreshed?

#### From the Components window

It refreshes the properties of the styles selected in your Components window (i.e. everything you see when you open the Style window), the properties and prices of any timbers selected, the values and wastage in the Extra Lengths window, the settings used to calculate overheads, and your ‘Applies To’ settings (see the ‘Applies To’ category of the Defaults/Miscellaneous window)..

It does not affect the Part filters, which are never saved with the job so are always the most current regardless.

It does not change your Part filter selections.

#### From the Labour Cost window

It refreshes all values in the Labour Cost window to those from your current Defaults database (e.g. labour rates, minimum charges etc.).

It does not affect the Labour filters, which are never saved with the job so are always the most current regardless.

It does not change your labour filter selections.

It does not impact your loose items.

#### From "Save As" or Job Template

Clicking "Yes" to the prompt will refresh all the above.

### Quote Locked

Note that if you have the Quote Calculation window in **Lock** mode, you may need to (even just temporarily) un-tick this mode to regenerate the quotation based on the refreshed values..

# Chapter 15 : Parts and Labour Filters

## Overview

Note that the following is only applicable to the Estimate module..

Filters allow you to be as simple as you like or as complex as you like with regards specifying parts and labour.

For example, using filters you can cost labour for a job in exactly the same way as you do now, regardless of how rudimentary or sophisticated your current system is.

Filters are created in the Part Filters window and the Labour Filters window. For a job, part filters are selected in the Components window and labour cost filters are selected in the Labour window for the job.

Both types of filters operate in exactly the same way (with some minor exceptions), so we can discuss both in the same breath. In fact, you can specify parts in a Labour filter and you can specify labour in a Parts filter. The main reason why there are separate windows is:

1) It may make it more simple to create and debug the separate filters,

2) You may have different criteria for specifying part and specifying labour, and

3) It allows you to select a filter for parts independently of the filter you select for labour (and vice versa).

## Using the Part and Labour Filters Window



The list on the left shows the **Filter Categories**. These categories correspond to each drop-down list in the Component window (Parts tabs) and Labour window (Filters and Rates tab). Essentially there is one for each possible component for a job.

Near the top left is a list of filters you have created for the currently selected category. You can create one or more for any category, however only one filter per category can be used in any particular job (the one you select in the Components window or Labour window for the job). You can also have no filters for any particular category.

### Adding and Deleting Filters

##### Add a new filter

Click this toolbar button to add a new filter to the current category. When you do so, a **Filter Properties** window will open, allowing you to name the new filter, and to select which **Properties** and **Results** columns you will use for this particular filter.

Try and keep filter names no more than 20 characters, otherwise you may have difficulty exporting them.

Property columns allow you to specify which conditions or criteria are required before specifying a certain part. As StairBiz scans through all of the components in your design, it will compare them to each row in your filter. If a component’s properties match those in your **Properties** columns, a hit will result, and the values you have placed in the **Results** columns will be specified for the job.

##### Save As

Click this toolbar button to save the current filter to a different name. When you click this, a **Filter Properties** window will open to allow you to give the filter a new name. The other properties will be disabled, only allowing you to rename the filter. When you click **Ok**, a copy of the current filter will be made and saved to the new name you have specified.

##### Delete a filter

Click this toolbar button to delete the current filter.

On opening a job, StairBiz will check to see that all filters current at the time the job was saved are still available; see Chapter 22 : Filter check on opening job

##### Show filter properties window

Click this toolbar button to modify the properties for the current filter. This will open the **Filter Properties** window that you used to create the filter in the first place. Use this if you wish to rename the filter or to change the columns that will be used.

##### Print filter

Click this toolbar button to print the current filter. When you do, a **print preview** window will open. From there you can print the contents of your filter.

##### Export/Import filter(s)

Allows you to import/export one or all filters to an Excel spreadsheet. This may make it easier to create/amend large filters.

When you open the Excel spreadsheet, if you get a message that starts *"The file you are trying to open"*, simply click "Yes" to continue opening it.

NOTE: Do not use Export Filters as a means of backing up your defaults. Only use it to more easily add or make changes in the immediate term. StairBiz does not guarantee that an export using one version of StairBiz will be importable in a different version (although changes to the format are rare).

### Modifying Filters

##### Insert a Row

Click this toolbar button to add a new row to your filter. The new row will be added to the bottom of the filter, and all **Properties columns** will default to {ALL}.

To change the value of a Properties column, click in the cell you wish to edit, then click the  button to choose a value from the pull-down list. Each list will be specific to the column you are editing, and all lists will also have the option of selecting {INSERT ALL}, {ALL} or {OTHER}.

{INSERT ALL} will insert a row for each value in the list. For example, if the Properties column is Timber, and there are 6 timber types defined, selecting {INSERT ALL} and then clicking off of the cell will add 6 rows to your filter and will set each row to one of the 6 timbers. This is useful if you wish to specify a different part or criteria for each item in a list.

{ALL} tells StairBiz that any value is a match or a hit for that row and column.

{OTHER} tells StairBiz that this row and column can be a hit if there were no previous hits for this column in the filter (see Use of {OTHER} below).

##### Duplicate currently selected rows

Click this toolbar button to make a copy of the currently selected rows. If 3 rows are selected (see Edit Mode below), 3 new rows will be added to the filter, with the same values as the rows that were selected.

##### Delete a Row

Click this toolbar button to delete the current row (or rows if more than 1 are selected).

##### Search Mode

Search mode allows you to place the cursor in a column and begin typing the text you are searching for in a very long filter list. For example, if you wish to search for a row containing the “Maple” timber, perform the following steps.

1. Click on the Search mode button to enter Search Mode.
2. Click on any cell in the Timber column.
3. Begin typing the first few letters of the word “MAPLE”. This will cause the row (if any) to be located that first contains Maple.

##### Fill Down

This feature only works in Edit Mode. Click this toolbar button if you wish to change the value on multiple rows in a particular column, to the same value. For example, if you have 10 contiguous rows where the Timber column is set to “Maple” and you wish to change all 10 to “Pine”, you could make 10 individual changes, or an easier way would be to change the top row to “Pine”, and then click **Fill Down** to copy your changes to the 9 rows below.

Fill down will start in the current column and row and will copy downwards until it reaches a value that is not part of the same grouping.

##### Hide Repeating Rows

This toolbar button allows you to change the display mode of the Part Filters Window. When this mode is enabled, repeating values in the same column will be hidden. Using the previous example of 10 contiguous rows where the Timber column is set to “Maple”, you would see “Maple” only once, and then 9 blanks would follow. In large complex filters, you may find this mode to be an easier way to view the window.

When this mode is disabled, all repeating values are shown.

##### Sort all property columns

Click this toolbar button to re-sort the current filter. All Property columns will be sorted from left to right. This will represent the same order that StairBiz uses to evaluate the filter when a job design is modified, and will also make the filter easier to read.

##### Show column selector

Click this toolbar button to hide the category list and to instead show a list of available columns. These are the same columns you chose when you created the filter, using the **Filter Properties** window.

Each item in this list has a checkbox next to it, allowing you to show or hide the column in the filter view.

This is useful if you have a large complex filter, and you wish to temporarily hide all but a few columns. This setting does not affect the result of the filter calculations performed when you change the design of a job, it is only to make working in this window easier.

##### Show Category List

Click this button to show or hide the category list. If the column selector is visible, then it will be hidden before the category list is shown.

##### Show or hide the Search Toolbar

Click this button to display an additional toolbar that will allow you to search for a specific piece of text in all the filters across all the available categories.

When this toolbar is visible, you can then type in the text you wish to search for (case insensitive) and click **Find Next**. Each time you click **Find Next** StairBiz will begin searching from the current row and column, within the current filter until it finds a match. It will then display where it finds the match. If StairBiz cannot find the text you typed in any of the available filters, StairBiz will beep once.

#### Additional toolbar buttons

The following toolbar button are only shown when you have opened the filter from within a job (by clicking the small square button adjacent to the selected filter in the Components window or Labour window..

##### Show filter hits for this job

When you click this button, all rows in the filter that have a “hit” (i.e. a component from the stair has satisfied every property and has made it to the “results” side of the filter) will turn red. This is a very useful way to test filters.

##### Jump to branch filter

If the selected row in the filter contains a branch filter (see below) this button opens the branch filter.

##### Return to parent filter

If you have jumped to a branch filter this button closes the branch filter and returns you to the parent filter.

## Which components go to which filter:

Generally speaking, a component always goes to the filter corresponding to its category (e.g. treads go to the filter in the Treads category, etc.). The filter would first need to be selected in the Components window or Labour window for a job (and in the following discussion it is assumed that the relevant filter both exists and is selected). However, there are some special considerations:

**Newels All**

Each newel goes to the filter of its own category (e.g. a top newel will go to the filter for **Top Newels**, etc.) However, every newel ALSO goes to the **Newels All** filter, and many users do all newel filtering in the **Newels All** category.

**All others**

All other components go to their own filter, however, it is possible to redirect a component. For example, you may want landing treads to go to the treads filter, or wallrail to go to the handrail filter, etc. This can be done using **branch filters** – see below.

## When does a component go to a filter:

In the Filter tabs of the Components window or the Labour window of a job, if there is a filter selected for a particular category then each component (from the design) in that category will go to that filter. This is the case whether or not the style of that component is set to Blank or Part, or whatever subcategory of Blank or Part it might be.

Once the component arrives at the filter, it’s up to the filter to filter out components it doesn’t want to deal with. For example, parts can be distinguished from blanks by using the *IsPart* property. “Part from Filter” and “Part Is” parts can be distinguished manually (for manual filters) within the filter, or automatically (for Auto Filters) by not including a filtering parameter like “Style” or “Size” in the Parts window. (If this doesn’t make sense now, sorry - come back to it after reading further.)

At any rate, the important thing to remember for now is that ALL components go to the relevant filter if the filter (for that category) is selected.

## Creating and using a part filter – Balusters example:

NOTE that the following shows the long method – in many cases it may be possible to create part filters using only a single row, using a feature called Auto Filtering (see later).

The following discussion assumes the following (each window can be opened from the Defaults menu) …

##### The Parts window:

In the Balusters category there are eight balusters with part id’s as follows: BalColMap36, BalColMap39, BalColWO36, BalColWO39, BalHamMap36, BalHamMap39, BalHamWO36 and BalHamWO39. Whether or not you include the style or description for each part does not matter.

##### Styles window:

In the Balusters category there are two balusters with Style names as follows: Colonial and Hampton. Both have the “Part From Filter” button ticked.



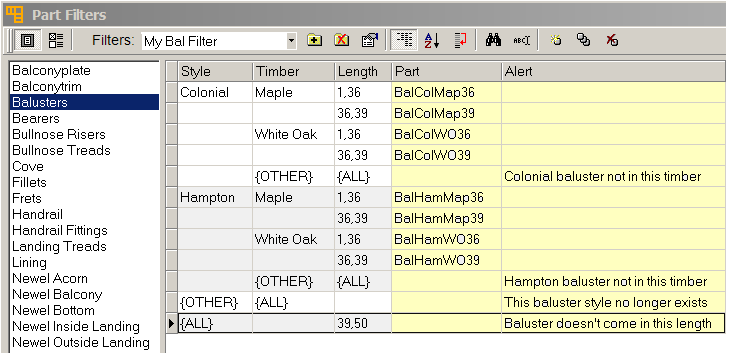
##### Timbers window:

In the timbers list in this window there are two timbers as follows: Maple and White Oak.

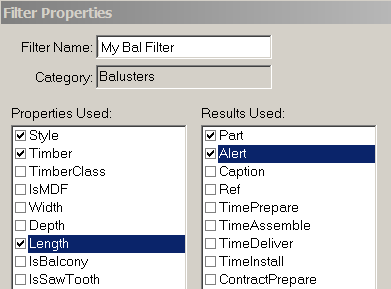
#### The Parts Filters window:

Let’s create the following filter to specify baluster parts.

NOTE: We are not suggesting that the following filter is a template for your balusters filter – there is a far easier way, called “Auto Filters” (see below).



1. Open the Parts Filters window from the Defaults menu.
2. Select the **Balusters** category.
3. Click the **Add a New Filter** button.
4. Change the **Filter Name** to “My Bal Filter” (or anything you like). Try and keep filter name to no more than 20 characters, otherwise you may have difficulty exporting it.
5. Select the Style, Timber and Length property items on the left, and select the Part and Alert result items on the right. (For a full discussion on properties and results, see Filters – Properties and Results.)
6. Click OK.



1. Click the **Insert a Row** button to create the first row of the filter. You will see the Property columns on the left. The Result columns are on the right (normally shaded in light orange, although below they are light blue – sorry).
2. Select *Colonial* in the Style column, *Maple* in the Timber column, type “1, 36” (assuming you’re working in inches, otherwise adjust accordingly) in the Length column, and select *BalColMap36* in the Part column.

At this stage we only have one row in our filter, as follows:



Lets’ see how this very simple filter works so far.

1. Start a new job, and select this filter in the “Balustrade Filters” tab of the Components window.



1. Selected Colonial balusters in the Balustrade tab of the same window and set the timber to Maple.



1. Create a design which contains some balusters.
2. Open the Materials window of the job, click the “Parts From Filter” option, and presto ...



In the above, Style and Description come from the corresponding fields in the Parts window for this baluster (if you didn’t include a style or description then they won’t show up here).

These also show up in

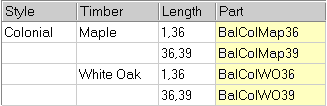


1. Let’s finish creating the filter. Select the first (only) row (or click anywhere in this row), and click the **Duplicate** button. Initially there will be nothing in the first 3 columns, because StairBiz assumes that if a cell has the same content as the cell above, it’s best not to show it for the sake of clarity (you can see this content if you un-select the **Hide Repeating Rows** button, but why bother?). Note that only Property columns have this behaviour (not the Result columns).

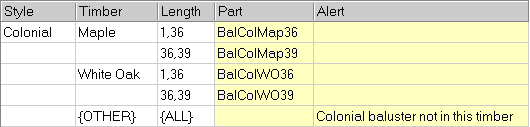
Type “36, 39” in the Length cell of the new row, then select BalColMap39 for the Part cell.



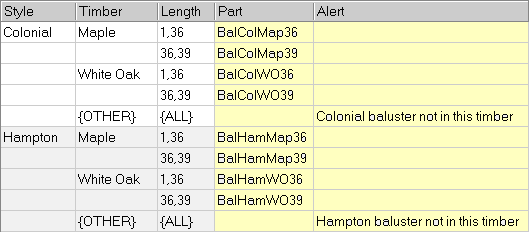
1. Unselect the **Enable Edit Mode** button (to switch off the editing mode so that we can select multiple rows). Select the first two rows by holding down the Control key while you click in the rows. Then click the Duplicate button. Reselect Edit mode. Select White Oak as the timber for the third row, and select the appropriate parts in the Parts column for both new lines.



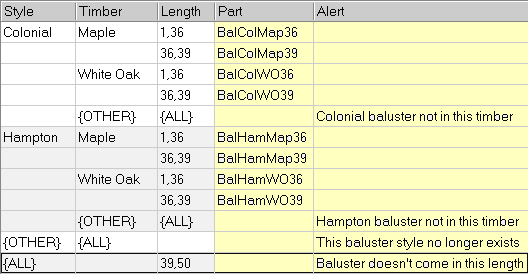
1. Click the Insert button, select {Other} for timber, {All} for Length, and type the message into the Alert column.



1. Unselect the **Enable Edit Mode** button, select all five rows by holding down the Shift key which you click in the first and last row. Then click the Duplicate button. Reselect Edit mode. Adjust these new rows as follows:



1. Now finish off by adding the final two lines, as follows.



#### How this part filter works

Each baluster will come to this filter (if the filter is selected in the Components window for the job). The baluster brings with it the properties (information about itself) corresponding to the Property columns you have selected for your filter (in this case Style, Timber and Length).

The baluster then works its way down the rows.

For example, if the baluster is a Hampton style of White Oak timber and is 38” long, it will get a “hit” on the ninth row (a hit means the baluster’s properties have matched the properties you have specified for that row and has arrived at the Result side of the list). The filter will specify the BalHamWO39 baluster (which will be added to the Bill Of Materials).

If the baluster is a Colonial style of Pine timber, it will get a hit on the fifth row, where no part if specified, but an alert is specified which will show up in the Alerts window for the job (and indicate that alerts are current in the Alerts Current field of the Job Directory).

If the baluster is a Victorian style of any timber, it will get a hit on the second last row, where an alert is specified. This is because an {Other} property always gets a hit for the column if something other than {All} has not been, or will not be, hit for that column.

If any baluster is longer than 39” it will get a hit on the last row, regardless of whether or not it has previously had a hit on any other row – we have {All} for Style and {All} for timber so the only test is in the Length column.

## Creating and using a labour filter

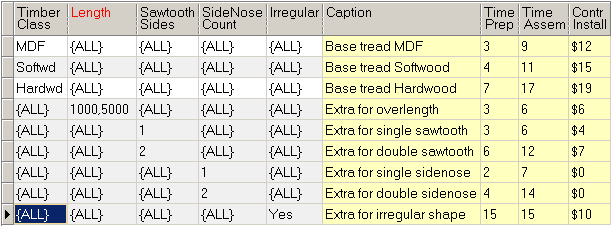
The logic of labour filters is similar to the part filters, except that you don’t have to deal with the Parts window.

Simply decide (in advance):

1. What categories do I want to price (stair, strings, treads etc.)
2. What do I need to know about the stair or components to price them the way I want (filter properties)
3. What cost method will I use for each item (‘Time’ or ‘Contract’)
4. What cost will I give to each activity (in minutes or dollars)

Then get the filters to do that.

For example, the following is a simple Treads filter:



It uses five out of a possible 20 (+ MyData and Custom Tag fields) properties – i.e. the columns to the left of the yellow area.

The first three rows price the basic tread. Only the TimberClass is relevant (so all other properties are set to {ALL}. It is assumed in this case that you have assigned each timber (in the Timbers window) with one of the three listed timber classes (this simply groups timbers, and saves you having to list every timber)

The forth row prices over-length treads (anything between 1000mm and 5000mm) as an EXTRA charge (see note below)

The next two rows price sawtooth ends as an extra.

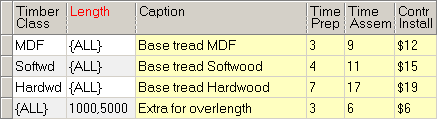
The next two rows price sidenoses as an extra.

The last row prices irregular-shaped treads (curves and angles) as an extra.

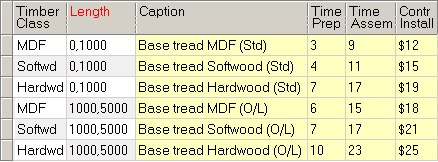
#### Permutations

The big trick in creating simple, easy to read and maintain labour filters is to avoid permutations. Permutations are required where you don’t show variations as an EXTRA. For example:

The following filter is the same as above, but only filtering for TimberClass and Length. It shows over-length as an EXTRA. It has four rows.



The following filter is the same as above (i.e. the result is exactly the same), but uses permutations. It has six rows.



If the original filter (shown earlier, with five properties) were to use permutations, it would have 25 rows (5 times 5) and would be enormously more difficult to create, interpret and maintain.

If you need to use permutations, and your filter has many properties, the best way to create an easy to read and maintain filter is to use Branch Filters (see elsewhere) so that you can break a single long filter down into multiple filters that would be easier to manage. But try and avoid permutations as much as possible.

After you’ve created your filter, don’t forget to turn it on in the Labour window (Filters and Rates tab). Save the selection template if you want the new filter to be permanently selected.

## Filter Logic:

The following is a short course in filter logic. It is divided into a sequential series of short lessons. If you understand these you’ll be able to create filters.

##### Properties and Results

A **property** is something about the component coming through the filter (e.g. Style, Timber etc.). The following examples use either one property column (Timber) or two property columns (Style and Timber). They are shown on the left with a white background. You can have up to 19 property columns in one filter.

A **result** is what you want the filter to do if the component satisfies the criteria shown in all property columns for a particular row (e.g. specify a part, specify some labour, generate an alert, etc.). In the following examples we use just two result columns (Alert and Ref). They are shown on the right with a light orange background. The Alert column specifies an alert in the Alerts sheet. The Ref column is just a reference number to help you manage your filters (in this case were using it to show you row numbers, but that’s just for these examples).

For a full explanation see; Filters – Properties and Results.

##### Cell hits and Row hits

A **cell hit** means that a the contents of the cell in one of the property columns has matched with the corresponding property of the component. For example, if an Oak baluster comes through a filter, and “Oak” is written in a cell in the Timber column, this cell would get a **cell hit** if it were processed.

A **row hit** means that EVERY property cell in that row has got a **cell hit**.

##### The {ALL} property

{ALL} is used in a cell where you want a hit in that cell always. See examples below.

##### The {OTHER} property

{OTHER} is used in a cell where you want a hit in that cell as a consequence of not getting a **specific** hit in any other cell of that column. A **specific** hit is a hit on something other than {ALL} or {OTHER}. See examples below.

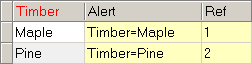
##### Logical row sequence

Rows are processed in their logical sequence. StairBiz sets this logical sequence automatically prior to the execution of a filter

To see this logical order click the  button – it may help you to understand the logic of your filter better.

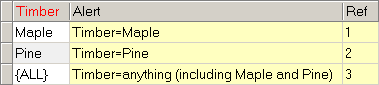
##### For a property cell to get a hit, the contents of that cell must match the corresponding property of the component.

In this filter, if timber is not Maple or Pine, there will be no row hits and no alert will be generated.



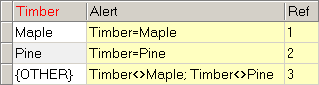
##### {ALL} is always a cell hit, even if there have been other hits in that column.

In this filter, even if we get a hit on row 1 or row 2 we will also get a hit on row 3



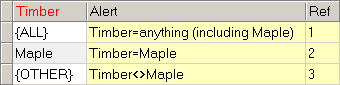
##### {OTHER} is a cell hit if there is no specific cell hit anywhere in that column .

In this filter if timber if not Maple or Pine, there will be a hit on row 3



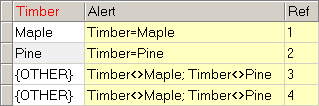
##### {ALL} is not considered a specific cell hit for the purposes of assessing {OTHER}.

In this filter we will always get a hit on row 1, If this timber is not Maple we will get a hit on row 3 even though we got a hit on row 1.



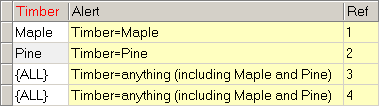
##### {OTHER} is not considered a specific cell hit for the purposes of assessing another {OTHER}.

In this filter, if Timber is not Maple or Pine there will be a hit on rows 3 and 4.



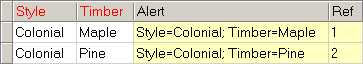
##### Execution of a filter doesn't stop when we get a row hit; StairBiz processes every row.

In this filter, even if we get a hit on row 1 or row 2 we will also get a hit on rows 3 and 4.



##### Within each row, cells are processed in the order of the columns (from left to right). StairBiz aborts the row at the first instance of a cell non-hit (and moves to the next row).

In this filter, if the Style is not Colonial then neither cell in the Timber column is processed.



##### {OTHER} can be in any column and will be a cell hit only if no other cell in that column can get a specific hit.

In this filter, if the Style is not Colonial then the Timber cells of rows 1, 2 and 3 will not get a hit because they won't be visited. Therefore {OTHER} is still available in the Timber column. If the Style is Hampton and the Timber is not Maple or Pine then row 6 will get a row hit.



##### Putting it all together so far; In the following filter …

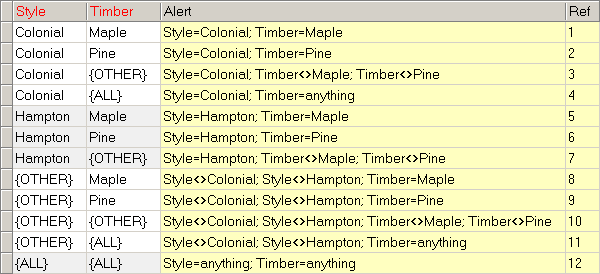
If the Style is Colonial there will always be a row hit on row 4.

If Style is not Colonial or Hampton, there will be a cell hit in the Style column of rows 7, 8 and 9.

If Style is not Colonial or Hampton and the Timber is not Maple or Pine there will be row hit on row 10.

If Style is not Colonial or Hampton there will be a row hit on row 11.

There will always be a row hit on row 12.



## Auto-Filters

Auto-filtering relates to parts only. You cannot auto-filter labour or line items (because these items do not exist in the Parts window).

In most cases, the Parts window has sufficient information to determine which part is needed for any particular item in the stair. For example, you can set values for the Category, Style, Timber, Width, Depth and Length of each part in the Parts window (there may also be some other properties you can set, depending on the category).

Using this information, a filter can send an item to the Parts window and tell the Parts window to do the appropriate filtering (i.e. come up with the appropriate part). In many cases, this can be achieved with a simple one-line filter.

Note that if a property is able to be auto-filtered (i.e. it has a corresponding column in the Parts window) the column header label will be red (see examples below).

##### Example 1:

The following is a simple Treads filter.



Each tread in the stair will come to this filter. When it sees {AUTO} as the PartId, the tread knows it is to be auto-filtered. The tread will go to the Parts window, taking with it any property cells set as {ALL AUTO}.

The “ALL” part of {ALL AUTO} functions the same as {ALL} in normal filters for the purposes of assessing a hit in the cell. The “AUTO” part of {ALL AUTO} tells StairBiz that this property is to auto filtered.

In the Parts window StairBiz will look for a part in the Treads category with a Timber the same as this tread’s timber, and a Length which is the longest length less than or equal to this tread’s length.

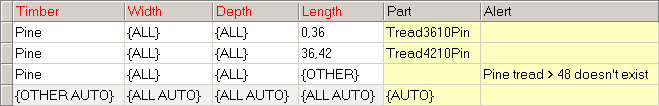
If it finds such a part, that part will be added to the Bill of Materials. If it does not find one, it will create an alert (in the Alerts sheet) advising you that the tread was not found (and giving you the criteria it used to try and find that tread).

##### Example 2:



Above is that same as Example 1, but here we’ve added the Width and Depth columns (so that these criteria are also used to filter the Parts window).

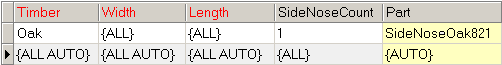
##### Example 3:



The above shows how we can mix auto filtering with regular filtering. Here, if the tread is Pine with a length up to 42 inches either PartID “Tread3610Pin” or “Tread4310Pin” will be specified (regardless of their Width and Depth, as indicated by {ALL} in those fields). If the tread is Pine but longer that 42 inches, the alert will be generated by the third row. If the tread is not Pine (i.e. is “Other” than Pine), it will auto filter according to the fourth row.

The “OTHER” part of {OTHER AUTO} functions the same as {OTHER} in normal filters for the purposes of assessing a hit in the cell. The “AUTO” part of {OTHER AUTO} tells StairBiz that this property is to auto filtered.

##### Example 4:



The above shows how we can add extra items to an auto filter.

In this case, the tread will auto filter according to the second row. The first row will spec the part “SideNoseOak821” if there is a single side nose (tread return) on an Oak tread.

### Creating auto-filters easily

The easiest way to create an auto filter is to click on the **New Filter** button in the toolbar, and when the Filter Properties window opens, simply click **OK** while holding down the Control key. This will create a one line filter containing all the possible auto filter properties available for the current category.

Note that any column in a filter which is an auto-filter column which show the column header label in red.

If you need to delete some of the property columns, click on the Filter Properties button on the toolbar, and un-tick the properties you wish to delete.

You can amend/modify and auto filter any way you like. You can add more lines to this filter if need be.

### Special properties for some categories

In some categories there can be auto-filter properties that need special consideration.

Remember that to see all the possible auto-filter properties for a particular category, create a new filter in that category, and in the Filter Properties window hold the Control key down and click **OK** (without having selected any properties) – StairBiz will add all auto-filtering property columns to your new filter.

Note that the properties referred to in the following discussion are available in both the Filter window and in the Parts window (for the particular category). If this were not the case obviously StairBiz could not auto-filter based on that property.

##### Handrail Fittings

The **Length** property in the filter maps to the **Length** column in the Parts window. It is relevant only where the fitting type is any type of Gooseneck. The Length refers to the length of the vertical, from the top of the horizontal section to the bottom of the vertical. To auto-filter based on vertical length, these fittings must have the Length fields set in the Parts window (to the maximum vertical length), and all other fittings in the Parts window must have their Length fields set to zero or empty.

Note that in the Fittings window (under the Defaults menu), if you have nominated to disassemble goosenecks for the purposes of filtering, those fittings will come through broken down into their constituent parts (see Fittings window) and will not come through the filter as goosenecks.

The **TurnAngle** property is relevant only to a part where the fitting type is “Turn”, “TurnCap” or any type of Gooseneck with a turn. In these cases the TurnAngle refers to the angle of the turn (e.g. “90” for a quarter turn, “135” for a 45 degree landing, and a U-Turn to deemed to be “180”),. To auto-filter based on TurnAngle, these fittings must have the Turn/Plow fields set in the Parts window, and all other fittings in the Parts window must have their Turn/Plow fields set to zero or empty.

##### Newels

The **Flat** property maps to the **Flat** column in the Parts window. It applies only to post-to-post turned newels and is the length of the upper flat of the newel (otherwise is zero).

The **TurnLth** property maps to the **Turn/Plow** column in the Parts window. It applies only to turned newels and is the distance from either the top of the upper flat (PTP newel) or top of the turning (OTP newel) down to the bottom of the turning. NOTE THAT YOU DIDN'T READ THAT WRONG - THE TURN LENGTH IS FROM THE TOP OF THE UPPER FLAT (not the bottom of it, which might appear more logical).

##### Balusters

The **Flat** property maps to the **Flat** column in the Parts window and is the length of the baluster’s LOWER flat (zero if not turned). It is only relevant if, in the Style window for the baluster, **Fixed Lower Flat** is ticked (see Style window – Balusters).

The **TurnLth** property maps to the **Turn/Plow** column in the Parts window and is the length of the baluster’s turning (zero if not turned). It is only relevant if, in the Style window for the baluster, **Fixed Lower Flat** is NOT ticked (see Style window – Balusters).

##### Treads

The **SideNose** (tread return) property maps to the **SideNose** column in the Parts window. It relates to the presence or otherwise of a sidenose at either end of a tread. This allows you to auto-filter treads in a way that distinguishes tread parts purchased with a sidenose already attached.

##### Handrail & Wallrail

The **Radius Type** property maps to the **Radius Type** column in the Parts window. It relates to the presence or otherwise of a 2D or 3D radius associated with the handrail or wallrail. Also see **Curved** in the next paragraph.

The **PlowWidth** property maps to the **Turn/Plow** column in the Parts window. It applies to handrail only (not Wallrail). StairBiz determines that handrail is plowed if it has a square-top baluster associated with it AND there is a PlowDepth value in the handrail’s Style window OR there is a Plow Override value in the Setout window. If you routinely use square-top balusters without a plow then best not to auto-filter based on this property.

If the baluster is set to Round Baluster, the **PlowWidth** and **PlowDepth** properties will always return zero.

##### Curved

This filter property applies to Handrail, Wallrail, Balconyplate, BalconyTrim, Frets, Strings, Walltrim, Fillets, Risers, BullRisers and Skirt. It determines whether any part of the component has a radius (i.e. is curved in any way). It maps to the **Curved** column in the Parts window.

### How to auto-filter dimensions

With things like timber, auto-filtering is easy (for example, either the timber of the item being filtered matches the timber in the Parts window or it doesn’t). With dimensions, it’s a little more tricky (for StairBiz, not for you).

##### Depth

With the exception of newels, StairBiz always looks for an exact match (i.e. the depth of the part in the Parts window must equal the depth of component being filtered).

For all newel categories StairBiz looks in the Parts window for least Depth which is greater than or equal to the depth of the newel. This is useful for half newels – if an appropriate half newel does not exist in the Parts window then StairBiz would (according to the above criteria) find the full newel.

For newels, to know which is the Width and which is the Depth, remember that where the width and depth are not the same the width is always the larger and the depth is always the smaller.

##### Width

With the exception of treads and risers, StairBiz always looks for an exact match (i.e. the width of the part in the Parts window must equal the width of component being filtered).

For treads and risers, StairBiz looks for a tread or riser in the Parts window that has the least width greater than or equal to the actual tread or riser width. This is needed because an actual tread or riser can be ripped down from the full width shown in the Parts window.

##### Length

StairBiz looks for a part in the Parts window that has the least length greater than or equal to the actual component’s length.

Note that it would not make sense to auto filter for length for any part in the Parts window that has a unit of measure (UOM) of “f” (feet) or “m” (metre). These parts are spec’d and costed by StairBiz according to their actual length (as per the current design), and the parts are shown in the Materials window indicating their actual length. Such parts should not have a Length value set in the Parts window, and Length should not be a criteria in the Filter.

The corollary to this is that you should only auto filter for length in those categories in the Parts window that have no UOM column (in which case they are assumed to have a UOM of “e”), or where the category has a UOM column and the parts being filtered for have a UOM of “e” (each).

##### Example:

So let’s imagine that you are auto-filtering treads, and the filtering includes the Timber, Width, Depth and Length properties. Let’s imagine that the tread being filtered has a timber or Oak, width of 10, a depth of 2 and a length of 36.

Firstly, StairBiz will confine its search in the Parts window to Oak treads with a Depth of 2. Within those treads it will find the tread which has the least width which is greater than or equal to 10 and the least length which is greater than or equal to 36.

If it cannot find a tread that matches all this criteria, it will alert you in the Alerts sheet.

### \*Tag – a wild-card auto-filterable property

Up until this point the filter properties which are auto-filterable have been determined by StairBiz (based on whether the property has a corresponding column in the Parts window). There is also a property (called **\*Tag**) available in all categories of the filters window. This property is auto-filterable (it has a corresponding column in the Parts window called **Tag**). The trick is that you set the value of this property, rather than StairBiz supplying the value from the design.

The value can be set to any of the properties of the current category, or you can manually set a value for it based on one or more other properties. This ads a lot of flexibility to the auto-filter capacity of the filters window and is designed to eliminate manual filtering in cases where, but for the provision of one more user-determined auto-filter property, you could auto-filter.

Notes:

The Tag column in the Parts window holds a maximum of 9 characters.

If the ResultTag is a dimension, in the Parts window be sure to enter the dimensions in the Tag column of the Parts window exactly according to your current dimension formatting (i.e. as per the Dimensions tab in the Preferences window). In other words, if you use fractions then enter the dimensions as a fraction; if decimal, then enter as decimal).

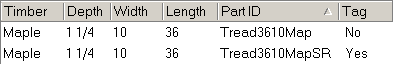
The ResultTag must be set on or before any rows that use the \*Tag property.

When you are testing a filter by clicking the “?” toolbar button in the filter window of a job, and paste the results into Excel, the \*Tag property value will probably show correctly, but may not. This is because Excel shows the properties of the *component* coming through the filter, and \*Tag is *not* a property of the component – it can be reset multiple times in a single filter. The value shown in Excel is the value held at the *first* hit on the \*Tag property.

#### Example 1: Treads with Spayed Rise

Imagine that in your Parts window you have treads for use with a splayed riser, and those without. In the treads category of the Part Filters window there is a property for Splayed Rise, but it is not auto-filterable, normally leading to you have to write a manual filter for treads suitable for a splayed rise.

In the Parts window you could tag the splayed riser treads in the **Tag** column. In this column we use the words “No” and “Yes” because these are the two possible values of the **SplayedRise** property of a tread.



In the Part Filters window, select the **\*Tag** properties, and the **ResultTag** result in the Filter Properties window.

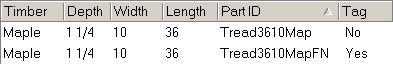


Here we are using all the usual auto-filter properties, plus we are using the **\*Tag** auto-filter property. We set the **ResultTag** field in the same row it which it is being used. The **\*Tag** property will contain “Yes” or “No”, depending on the value of the SplayedRise property.

#### Example 2: Treads with False Nosing

Imagine that in your Parts window you have treads with a false nosing, and those without. This is a very similar example to the one above it, except that here there is no standard tread property for a false nosing, so we can create one in the Custom Tags window (Stair category) and use that (see Custom Tags window).

The Parts window is the same as above, except that now the Tag represents false nosings.



In the Part Filters window, we set the ResultTag to our Custom Tag **+False Nosings**.



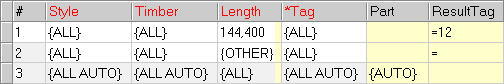
#### Example 3: Handrail PartId based on length

Imagine that in your Parts window you have two PartId’s for each handrail – one for lengths under 12 feet, and one for those over 12 feet (presumably because they have a different price per foot). At the same time these rails have a UOM (unit of measure) of “f” (per foot, not per each).

So we need to tag those that are over 12’, and auto-filter for this tag. It could be done as follows:



In the Part Filters window, we “hard” set the ResultTag to be either “12” (if the length is over 144 inches, or nothing if it is under. Note that in previous examples we set the ResultTag to be the same value as another property, whereas here we are manually setting it (thus we need to use the “=” sign)



Here, if the rail is over 12’, the **\*Tag** property (used in row 2) has the value of “12”, otherwise it has no value.

The **#** column is used to be certain that the two rows in which we set the **ResultTag** value (i.e. row 1 and 2) are processed before the row in which we use that value (in the **\*Tag** property in row 3). By entering the numbers “1”, “2” and 3, we are overriding the StairBiz logical row sort.

#### Note; Tags are global

NOTE: It is important to clear the tag where it’s important that the tag has no value (see row 2 in the above example). The value of a tag is global, meaning that it retains its value until reset, EVEN IF we leave the filter and come back again later, or move between filters. This can be useful where you want one filter (e.g. a branch filter) to set the value and other filters to use that value.

In the above example it’s important that if the length is less than 144, the value of **\*Tag** is nothing (and it may have been set to 12 on a previous visit to the filter).

## Auto-filters – Suggestions for each category

The following shows typical auto-filter setups for each category. These setups would probably form the basis (or the entirety) of your own situation.

Note that filter property columns that are auto-filterable have a red column header label.

Note that for all Property column cells shown below that contain {ALL AUTO} or {OTHER AUTO} it is assumed that you have the relevant values in the corresponding columns of the Parts window. For example, if you have {ALL AUTO} in a Style column for a filter, it is expected that you shown the styles in the Style column for that category in the Parts window (otherwise there is no way style can auto-filter correctly).

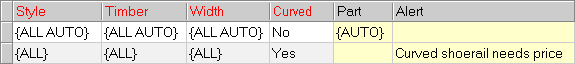
### Balconyplate

These filters assume you only have one depth for Balconyplate – if you have different depths you would need to include the Depth column in both Parts window and Filters.

The following filter assumes have separate Balconyplate in your Parts window for curved and non-curved.



The following filter assumes your Parts window does not contain curved balconyplate.

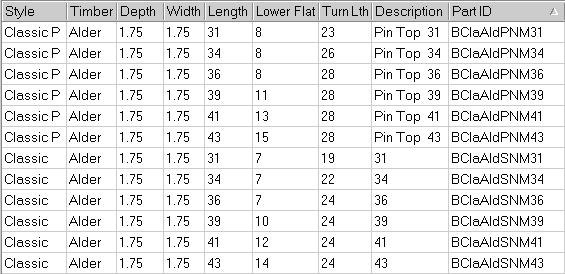


### Balconytrim

Same as for Balconyplate (see above).

### Balusters

##### Parts window



Here we have two Classic balusters – a pin top and a square top. For the sake of the example we’ll look at just one timber (Alder).

Note that either Depth or Width is redundant if we assume that all balusters are square (which they might not be), however, including both is not a problem.

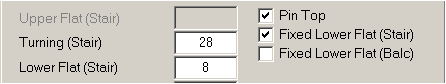
LowerFlat is the length of the lower flat. TurnLth is the length of the turning. For balusters with fixed lower flats (see Style window), TurnLth is redundant. For balusters with fixed turnings, LowerFlat is redundant. However, we may want to switch between fixed flat and fixed turns, so we include both.

Note that in this list (Classic P), rows 1 to 3 share a common flat (8”) and rows 3 to 6 share a common turning (28”), and row 3 belongs to both groups. This is very often the case in parts catalogues.

##### Style window

Following are snippets from the Style window (balusters category).

**Classic P 1.75 baluster (pin-top)**

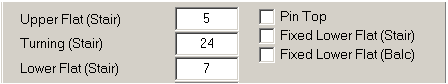


Upper flat is disabled – there is no upper flat for a pin-top baluster.

With Fixed Lower Flat ticked (for no particular reason – it has nothing to do with being pin-top), the lower flat for all balusters stay the same, and the turning changes to suit the baluster length.

Because **Fixed Lower Flat** is ticked, **Turning** is redundant (however, we may tick or un-tick **Fixed Lower Flat** on a job-by-job basis, so we include both dimensions).

**Classic 1.75 baluster (square-top)**



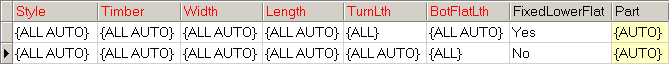
The upper flat is fixed under all circumstances.

With Fixed Lower Flat not ticked (for no particular reason), the turning for all balusters stay the same, and the lower flat changes to suit the baluster length.

Because **Fixed Lower Flat** is not ticked, **Lower Flat** is redundant (however, we may tick or un-tick **Fixed Lower Flat** on a job-by-job basis, so we include both dimensions).

Note that in both these examples, the Lower Flat dimension is the *shared* flat dimension from our Parts window (rows 1 to 3) and the Turning dimension is the *shared* turning dimension from our Parts window (rows 3 to 6). If the reason for this has already occurred to you, you’re going great (but more about that later).

##### Filters window



This is the auto filter.

Note the FixedLowerFlat property. We manually filter by this property. All other properties are auto-filter properties (although TurnLth and BotFlatLth may or may not be used as such).

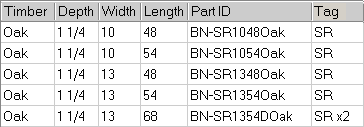
If the baluster has a fixed lower flat (a hit on row 1 but not row 2), we filter based on BotFlatLth, and NOT by TurnLth (so TurnLth has an {ALL} setting). If the baluster has a fixed turning (a hit on row 2 but not row 1), we filter based on TurnLth, and NOT by BotFlatLth (so BotFlatLth has an {ALL} setting).

NOTE:

Whereas a **Length** property performs fuzzy logic (StairBiz will find the first baluster in the Parts window with a length equal to or greater than the length of the baluster that has come to this filter), **TurnLth** and **BotFlatLth** always search for an EXACT match in the parts window. This is not only OK, it is desirable. On the basis that we are filtering one or the other (but almost never both), there SHOULD be the appropriate **TurnLth** or **BotFlatLth** in the Parts window provided the other properties are satisfied. If there is not, fuzzy logic won’t find a part that will satisfy the situation (and we want to be notified in the Alerts window).

### Bullnose Treads

##### Parts window



**Hand column:**

Although not used above, the Hand column is also available and auto-filterable.

**BullName – the Tag column:**

If you want to auto-filter based on the BullName property (i.e. the name or the bullnose template from which the bullnose derived, or as amended by you in the job), you can use the Tag column (see \*Tag – a wild-card auto-filterable property).

**How to format bullnose names for use in the Tag column:**

The tag field has a max of 9 characters. This is too short for many bullnose template names, so if the bullnose name is longer than 9 characters, go to the Design window (Bullnose pane) and suffix the template name with an abbreviation in brackets (right-click the bullnose template and select "Change Name"). For example, "Small Round (SR)". If there are brackets in the name, for the purposes of the parts and Part Filters window StairBiz ignores the name and uses what's between the brackets. In the above example, in the Parts window you would use the "SR" as if it were the bullnose name.

Be sure that you do not use brackets in bullnose template names other than for these abbreviations.

Being the Tags column, StairBiz doesn’t present you with a pull-down list of your bullnose names (the Tags column can be used for anything). To see the list of possibilities, create a dummy bullnose filter and include the BullName column. Create a row and click this field – a list of your bullnose names will pop.

You’ll notice two things about this list:

* + 1. Where you have a bracketed abbreviation suffixed to the bullnose template name, StairBiz uses the abbreviation (not the full name), and
    2. Each BullName has a double (the second suffixed with “x2”). For example “SR” and “SR x2”. This is for a double-ended bullnose (where both ends have the same BullName).

Although they are not included in the pull-down list, you may also manually enter names like “SR/Blunt” (where Small Round is the bullnose name on the left end of the tread and Blunt is the one on the right). Just be mindful that you have a maximum of 9 characters in total.

**What to do is you have jobs saved prior to adding abbreviations to bullnose template names:**

You can create abbreviations for your bullnose templates now, and provided you don’t change the original name (i.e. provided you simply append the bracketed abbreviation) previously saved jobs will automatically update to these abbreviations when you open them. It works as follows: When you open a job with a bullnose, StairBiz checks the job’s bullnose name against your template names as shown in the Bullnose pane of the Design window (ignoring any bracketed abbreviations). If it finds a match, and that bullnose name in the template has an abbreviation, StairBiz will apply that abbreviation to the just-opened job.

##### Filters window



Only include the columns you need to filter by (e.g. if Depth only comes in one size, there would be no need to include it).

In this example we have used the \*Tag and ResultTag columns to auto-filter based on the BullName property (i.e. the name or the bullnose template from which the bullnose derived). This is because the Parts window does not have a column for BullName.

If Timber or Depth or Width or Length only come in one possibility, then there is no need to set values for that column (in the filters there is no need to filter by that column).

### Cove

Same as for Balconyplate (see above).

### Fillets

Same as for Balconyplate (see above).

### Frets

Same as for Balconyplate (see above). You may not need Width or Depth (your frets are probably one-size-fits-all).

### Handrail

In this filter the PlowWidth is the width of the baluster plow. This property of handrail coming through the filter will be zero for pin top balusters and will be zero if there are no fillets selected in the Components window or if the Plow Depth in the rail’s Style window is zero.

If in your Parts window none of the rails have a plow, you can leave this column out.

If in your Parts window you have different rails in a single style that have different widths and/or depths you will need to include those relevant columns in your filter.

If in your Parts window you do not include bending rail then there is no need for the Curved column (unless you wish to add a row to the filter to show an Alert for such – see Balconyplate category above).

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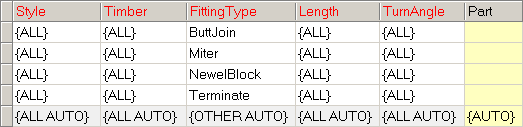
### Handrail Fittings

The FittingType column filters certain fitting types (these items do not have a corresponding part and are labour filter only, or used to spec hardware).

The Length column is used to vet the length of verticals in goosenecks (from the top of the horizontal to the bottom of the vertical). If you disassemble your goosenecks you do not need this column in either the filter or the Parts window (goosenecks will never come through the filter as goosenecks).

TurnAngle is the angle of a Turn or any goosenecks that have a turn (normal is 90, a 45 degree landing is a 135 turn). Note that if you only have 90 degree turns in your parts window you should still use this column to generate the automatic Alert when the 90 turn is not found.

This filter assumes that Width and Depth are not relevant – if you have more than one size for a particular rail style then you will need one or both of these properties.



### Landing Treads

There are two special auto-filter properties which make landing treads easy to auto-filter. These two properties need to be set in the appropriate columns in your Parts window:

**Hand**; This indicates the hand of the landing – “Left”, “Right”, and for a single tread landing, possibly “Both” (depending on your “Hand Property – allow ‘Both’” ~141 setting in the treads category of the Setout window).

**TreadType**; A two digit number (usually). The first digit is the position of the tread in the unit (numbered 1, 2, 3 etc from the bottom up). The second digit is number of treads in the landing. For example, the second tread of a three tread landing would have a value of “23”.

Also, the **Width** and **Length** values in the Parts window can show either:

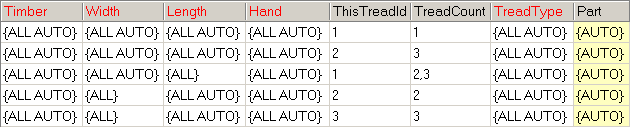
* + 1. the width and length of the entire landing, in which case the width is in the direction of the bottom tread nosing and the length is in the direction of the riser above the landing, or
    2. the width and depth of each tread as shown in the Treads sheet (View menu), in which case the length is in the direction of that tread’s nosing and the width is perpendicular to the nosing up to the back-most point of the tread.

Which dimensions you use depends on your “Landing tread Wth/Lth override” setting (~140) in the Treads category of the Setout window (see that window for more information). Where set to False, a typical auto-filter for landing treads would be as follows:



You would need to have the corresponding columns of the Parts window set. Note that Depth is the thickness of the landing material.

Where “Landing tread Wth/Lth override” is set to True, a typical auto-filter would be as follows (also include the Depth column if your treads are different thicknesses):



In this filter, if the Length is not relevant (row 3; tread 1/2 or 1/3), we do not auto-filter by it. If the Width is not relevant (rows 4 and 5; tread 2/2 and tread 3/3) we do not auto-filter by it. Otherwise both are relevant (tread 1/1 and 2/3)

Note that TreadType is ThisTreadId and TreadCount joined together in a single number. Obviously it’s not possible to manually vet by TreadType and ALSO auto-filter by it, which is why we’ve used the ThisTreadId and TreadCount properties. (In situations where you MUST manually vet and auto-filter by the same property or properties, you would need to use a branch filter.)

When auto-filtering by Width and/or Length, StairBiz will find the part from your Parts window that has the smallest Width and/or Length that at least satisfies the width and/or length properties of the tread.

### Newels All

All newels come through the Newels All filter, then each newel ALSO goes through its own category filter.

The absence of a Depth column assumes that all newels in your Parts window are square. If this is not the case (e.g. half newels etc.) then include the Depth field.

The FlatLength property is the length of the upper flat (in the case of pin-top newels of non-turned newels this should be zero in the Parts window).

In the case of non-turned newels the TurnLth should be zero in the Parts window.

The IsVoluteNwl property is used to filter out all volute newels. In this example it’s done this way because in the Parts window we have put all volute newels (and only volute newels) in the Newel Bottom category, and ALL other newels in the Newels All category. This is because some volute newels can have properties that are identical to normal newels, except that they might be round or some other minor variation that can’t be picked up by the properties we are vetting.



#### Detached Base

When a newel has a detached base (set in the newel’s Style window), StairBiz generates the newel as two separate items:

1) a regular newel with a FlatLength, a TurnLength, and a Length which is reduced by the amount of the base;

2) a base with a Length of zero and a FlatLength equal to its actual length.

Both items go into your Parts window separately, and the both items can be manually or automatically filtered in the Filters window, as follows:

**Parts window:**

In the Parts window, include the upper part of the newel, but with the Length property measured only to the bottom of the turning (do not include the length of the lower pin – it is irrelevant).

As separate items (Newels All category only), add the detached bases. They must have a Length = zero (this is important – it tells StairBiz that the part is a detached base) and FlatLength set to the length of the base. Style is probably irrelevant, as is TurnLength.

**Parts Filters window:**

Note that the detached base part of a newel only goes through the “Newels All” filter (not through the specific newel filters).

You would need two filters – a main, and a branch (named “Blocks” in the following sample).

Filters can easily identify detached bases – it is any newel coming to the filter with Length = zero.

We use the “#” property to override the auto-sort (so that the row where Length = {OTHER AUTO} goes after the row where Length = “0”).

The first row in the following “Main” filter detects a detached base (Length = zero) and shunts it off to the “Blocks” filter. This separate filter is needed so that we don’t auto-filter based on the Style property (style would be irrelevant for detached bases, as is TurnLth). The second row in this filter only gets a hit if Length > zero (because of OTHER AUTO) and therefore only processes normal newels or the upper part of a newel with a detached base.



The “Blocks” filter would look as follows:



We use a separate branch filter for bases only because for bases we do not want to filter for Style (the Style of a base coming through the filter is the same as the style for the associated newel, just in case you have some reason to want to filter it, but in most cases bases are generic - only the timber, width and length are relevant).

Note that we MUST filter for Length (even though we know StairBiz has set the length of bases to zero) because in your Parts window all detached base items have a length of zero, and StairBiz must only look in your Parts window for “newels” with a length of zero.

### Newel Bottom

Volute newels were not processed in the Newels All category, so must be processed here. See the IsVoluteNwl property in this filter, and also see the notes in Newels All (above).



#### Other Categories

Coming soon

## Branch Filters

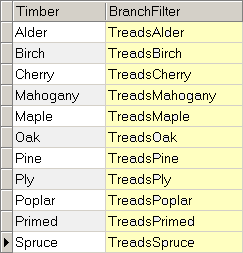
One of the “Results” of a filter is “Branch Filter”. This allows you to instruct StairBiz to branch off to an alternative filter under certain circumstances.

#### Why use branch filters

There are three reasons why you might use a Branch Filter.

1. Lengthy filters can become difficult to manage. Breaking a lengthy filter down into smaller sub filters helps you to manage the logic more easily. Note that the Duplicate Filter button on the tool bar is an easy way to create branch filters.
2. Different situations may require different Properties. For example, let’s imagine that Birch and Mahogany only come in one thickness, whereas the others come in two different thicknesses. You could create branch filters for Birch and Mahogany that do not have a Depth column, whereas all the others do.
3. You might want to send components in one category’s filter to a filter in a different category (see **Cross-category branches** below).

#### Example of branch filters



In the above illustration (of a Treads filter, but it could be anything), if the tread is Alder, StairBiz will send the tread to the filter called “TreadsAlder”, and so on. After the TreadsAlder filter in executed, StairBiz will continue processing the above filter (in the above example we would get no further hits, but there’s nothing to say that this would always be the case).

The branch filters need to be created before they can be included in the parent filter.

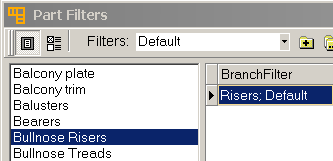
Branch filters can be hidden from the Components window and Labour window by ticking the **Hidden** check-box in the Filter Properties window of the filter. Filter which are hidden show in the Branch Filter list prefixed with an underscore (for example “\_TreadsAlder”).

Naturally the branch filter “TreadsAlder” in the above example would not need to include a “Timber” column (because only treads of Alder would ever arrive at the TreadsAlder filter, etc.).

Note that branch filters can have branch filters, and so on.

#### Cross-category branches

You can send components in one category’s filter to a filter in a different category. For example, you may wish to send components coming to the BullRisers filter to the Risers filter to be processed there. To do this, enter the name of the other category, followed by a semi-colon, followed by the filter name. For example “Risers; MyRiserFilter”.



#### Properties in a cross-category Branch filter

Let's say in the Strings filter you send the strings to a Treads filter.

The Treads filter is then used by the string as if it were a Strings filter. In other words, if the Treads Filter checks for Timber, the Timber returned will be that of the string (not a tread).

However, if this tread filter sends the string to the Parts window (i.e. Part = {Auto}), the string is sent to the Treads category of the Parts window, so need to exist there with the appropriate properties.

In the Treads filter there is no point vetting for a property which does not have a exactly corresponding property in the Strings filter (the property would return nothing and the vet would fail). For example, there no point vetting for SideNoseCount in the Treads filter because a strings filter does not have that property.

#### Testing branch filters

You can view the currently selected filter by clicking the square button adjacent to the selected filter in the Components window or Labour Cost window. When a filter contains a branch filter, you may wish to jump to it to see what’s happening. The following toolbar buttons (shown only when viewing the filter within a job) are useful.

##### Jump to branch filter

To jump to a branch filter, select the row that contains the branch filter you wish to view, and click this button. The current filter will close and the branch filter will open

##### Return to parent filter

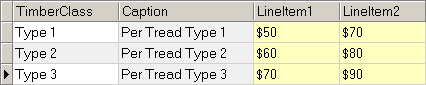
This button closes the branch filter and returns you to the parent filter.

## Line items:

A line item is a non-part item you want StairBiz to specify in the Materials list. It is similar to a part but differs in that the item does not need to be listed in the Parts window.

For example, you could specify a tread/rise/string combination as a line item (useful if you price stairs on a per-tread basis, which includes the tread, riser and one tread’s worth of string). Such a line item could (but doesn’t have to) include both materials and labour all represented in a single item. In the Materials list, the PartId column would contain any text you entered into a Caption field in the same row of the filter. LineItem1 would normally (but not necessarily) be the Buy price of this line item. LineItem2 would normally (but not necessarily) be the sell price.

You can toggle between the two prices (i.e. tell StairBiz which one to use) in the Materials window of a job.



Don't use a LineItem row to spec anything other than a LineItem (i.e. don't also try and spec a Part on that same row).

## Result Type in Filter Properties window:

In the Filter Properties window, there is a setting for **Result Type** (Stair or Balustrade).

When you use the Split Quote feature (split into stair and balustrade separately - see Process window), StairBiz needs to know which components are stair and which are balustrade. In many cases this is obvious (e.g. treads, strings etc.). In some cases it is not obvious.

For the purposes of the Cutting List view window, such non-obvious cases are determined by the **Is This Balustrade** settings in the Miscellaneous Defaults window.

For the purposes of the Bill of Materials and Materials Cost view windows, the **Is This Balustrade** settings apply only for components that are not parts from a filter. For parts from a filter, the **Result Type** in the **Filter Properties window** is used.

For Job, Stair and Unit categories of the filter, **Result Type** still applies. In the case of a **Split Quote** (see Process window), if you want to generate items for either Stair or Balustrade or both, use the SplitQuote property to re-direct (using Branch Filters) to two separate filters; one with Result Type set to 'Stair' and the other set to 'Balustrade'.

## Unit of Measure:

The default UOM for line items and labour items is “each”. To force it to be per foot or metre append the cost with “ /f” or “ /m”. For example, “$3.20 /f”



## Overriding Quantity and Length:

##### Quantity Override

Normally the quantity specified by a hit on a row is one for each component that hits on that row. You can override this quantity if necessary using the ResultQty result column, in two ways as follows:

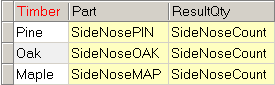
##### Override quantity with a number

The following is a Treads filter used to spec wedges. Here we have entered a number into the ResultQty field. For each tread that is not an open rise, 3 wedges will be spec’d. In this example the ResultQty field is set in the Row to which it applies.



##### Override quantity with a filter property (integer)

You can also override the quantity based on the value of a filter property (of type = integer). The following Treads filter spec’s sidenosings for each tread based on the SideNoseCount property. In this example the ResultQty field is set in the Row to which it applies. You cannot override quantity with a length field.



##### Override quantity with a filter property (dimension)

You can also override the quantity based on the value of a filter property (of type = dimension). This might be useful where the dimension you want to base the cost on is not the length (otherwise see second illustration below). The following Landing filter spec’s preparation labour based on its width. If your measurement system is metric, the ResultQty will return the quantity in decimetres (tenths of a metre) , otherwise it will return the quantity in quarters of a foot.



Note that where the cost is based on the Length property, the following would be a more simple way of doing this.



##### Override quantity with a variable

You can also override the quantity based on a variable that you set earlier in the filter (or even earlier in a branch filter of the same category).

The following (in the first 5 rows) uses the **ThisTreadId** and **IsTopTread** properties to determine which tread coming through the filter is the top tread of the unit, so that we know how many treads are in the unit (here we only allowed for up to five treads, but obviously there would normally be more). Based on this we set a **ResultQty** result with a quantity using the syntax “#=2”, #=3” etc. (in this case we are setting the variable to equal the number of risers in the unit). These five rows do nothing other than set this variable.

Note that we have used the **#** property for the first column. This is a “row sequence” property and does nothing more than ensure that the rows that set the variable are processed prior to the rows that use it (see Overriding row sequence).

After we set the variable (i.e. starting at row 6) we can use the “**#**” variable (which now represents a number) to set the ResultQty for any or all other rows of the filter, in this case to specify the quantity for labour contract rates for assembly.

The lower part of this filter could be quite involved, vetting for all sorts of different permutations of TimberClass and SawtoothLeft (and SawtoothRight etc, which we haven’t shown in this example). The quantity variable means that within all these complex permutations we don’t need to be concerned with the quantity – it has already been established.



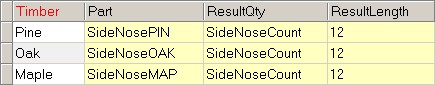
##### Length Override;

You can override the Length of something coming through a filter using the ResultLength field. The length of the item specified by the filter (and shown in materials and labour) will be as overridden by this field. When using the Length property in {AUTO} filters, the Length searched for in the Parts window will be as set by the ResultLength field.

The ResultLength field must be set in the Row to which it applies.

##### Override length with a number;

Imagine that your sidenosing came in random lengths, so in your Parts window had a UOM of “f” (feet). The following treads filter would spec 12” for each side nose.



##### Override length with a filter property; landing support posts

The following shows a landing treads filter used to spec support posts. It only specs them if the tread coming through this filter is the top tread in the unit (in case the landing has more than one tread). The ResultQty uses a Custom Tag called “Support Posts” (created as a “Number” tag in Custom Tags window and set by right-clicking the landing when support posts are required). The “+” indicates that it is a Custom Tag. The length of the posts are determined by the LandingHeight property in the ResultLength column.



##### Testing ResultLength

Note that when using ResultLength, when you are testing a filter by clicking the “?” toolbar button in the filter window of a job (see Testing Filters), and paste the results into Excel, the Length property value will show the original length of the component (not the overridden length). This is because Excel shows the properties of the *component* as it first enters the filter; ResultLength can be reset multiple times in a single filter, and may not necessarily even relate to the component coming through the filter.

## Overriding row sequence:

Rows are processed in their logical sequence. StairBiz sets this logical sequence automatically prior to the execution of a filter

To see this logical sequence click the  button – it may help you to understand the logic of your filter better

There may be times (rarely) when you want to override the StairBiz logical row sequence. It can be done with the **#** property (which is not a property of a component). In the **#** property column you can enter numbers – StairBiz will sort the rows based on the sequence of these numbers.

See the example in Overriding Quantity and Length (above).

## Overriding price:

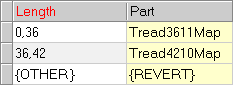
Sometimes a user wants to spec a part from the part list (to get a PartID for accounting and a description for custom sheets), but with a price that is determined by the filter rather than by the Parts window. To do this have a Part column, and one or both LineItem columns. In the Part cell put the PartId (as per the Parts window), but prefix it with a tilde (~).

So “~MKK-5015” in the Part cell would pull in the MKK-5015 part but use LineItem1 and LineItem2 for the prices.

## Revert and Auto Revert

In the Style window, you may set the type to Part From Filter. Sometimes you might like to filter for the part within certain limits, and, if those limits are exceeded, generate the item as a blank item. To do this you can use the {REVERT} and {AUTO REVERT} result.

For example,



In this example, if the part “{REVERT}” gets a hit, StairBiz adds the blank item to the BOM regardless of any Part From Filter setting.

Another example for auto filters:



Here the part is exactly the same as {AUTO}, except that if there is no auto hit, the effect is the same as a {REVERT}. No alert will be generated in the Alerts window if the part is not found in the Parts window.

Even though a style type might be “Part From Filter”, StairBiz holds a memory of the settings for the style the last time the style type was one of the three blank settings, and applies that in the event of a revert (see Style Defaults window).

## User Notes in BOM

You can create notes to yourself in the Filters window that show up in any BOM list

The trick is to enter (type) the note directly into the Part field of the Filter window, and prefix it with “##”. For example …



If you have text into the Caption field in the filter, in the BOM it will display as the Description for this “part”.

For example …



This “part” should not be included in your Parts window (it is not really a part, and will not be processed as such).

This “part” has no cost, but will be included in BOM lists even if you have specified that zero $ items are not to be processed.

## First item through filter

There is a property called “FirstItem” in all component categories.

For each separate category, the first time a row containing the FirstItem property gets a hit, FirstItem returns True. The property is then set to False, and will return False thereafter for all subsequent rows and for all subsequent filters within that category (including branch filters).

This property is useful for things like spec’ing a setup cost for machining etc. (e.g. you could test for the first handrail to come through the filter and spec a single general setup or tooling cost for machining all handrail in the job).

Notes:

1. The property does not distinguish between a Parts filter or a Labour filter – it can get set in either, so best to not use this property in both parts and labour filters for any one category.
2. The property gets set to False after the first row hit containing the property, even if that row is testing for “No”, so if there is also a row testing for “Yes” in the filter be sure that this row is above the row testing for “No” (use the # property – see Overriding row sequence).
3. If you want to spec multiple items when FirstItem = “Yes”, you must use a branch filter. If you have more than one row testing for “Yes”, then only the first such row will get a hit. So only ever use one row testing for “Yes” in any particular category, and have that row trigger a branch filter that specs the multiple items.
4. The Quantity for a FirstItem = “Yes” hit is always “1”, however the Quantity for a FirstItem = “No” hit will always be the original quantity (not deducting the first item). For example, if you have 5 treads, the Quantity for a FirstItem = “Yes” hit is “1”, and the Quantity for a FirstItem = “No” hit will be “5”.

## Testing Filters

StairBiz has some built-in functionality to help you test and refine your filters. If a filter doesn’t appear to be working, follow these steps:

1. Check that the component you think you are filtering is shown in the Cutting List sheet (View menu). Remember that the Cutting List completely ignores filters and its items are derived directly from the stair as designed. If the component is not shown in the Cutting List, there is no way it can be going through a filter (with the exception of the Unit and Stair categories). Check that there is a valid style selected in the Components window (i.e. not “None”).
2. Check that the filter is selected in the Filters tab of Components window or Labour window of the job. Just because you create a filter in the Part Filters window or Labour Filters window doesn’t mean that StairBiz knows you wish to use it for the current job. You may wish to include a particular filter in the default Selection Template so that it is automatically selected for each new job.
3. Open the filter from within the job: There is a small square button adjacent to each filter selection in the Components window and Labour window (filters tabs). Click this button to open the currently selected filter.
4. Use the toolbar buttons shown below to test for “hits” in the filter.
5. Note that when a filter is being viewed from within a job, you can still edit that filter (just as if you had opened it from the Defaults menu). Changes you make are not confined to the current job – you are actually changing the filter held in your defaults. Remember that filters are not saved with a job – only the selected filter names are saved with the job.

##### Show filter hits for this job

When you click this button, all rows in the filter that have a “hit” will turn red (i.e. the text in every cell of that row will be red). Red means that a component from the stair has satisfied every property for that row and has made it to the “results” side of the filter, and those results are being executed and should show up in the materials and labour windows and sheets, or the alerts sheet.

If an Auto filter row has a hit, and StairBiz was not able to find a compatible part in the Parts window, StairBiz will automatically alert you in the Alerts sheet (View menu).

If a row you think should be getting a hit is not getting a hit, one-by-one change each cell in the row to {ALL} so that you can be sure that this cell is getting a hit. By a process of elimination you can determine which cell is not getting the hit you think it should be getting.

After clicking this button, if you hover your cursor over a row in the filter some text will appear under your cursor showing the number of hits that this row has received.

When you click this button, StairBiz collects the values of the relevant properties (according to the property columns shown) for each component of the current design that has passed through this filter, and opens a small window which shows these. It also places these properties on the clipboard so that you can paste them into Excel (or even a word processing program like Notepad) in case you want to save it for some reason. This is a powerful way to check that the properties of a component are what you think they should be.

Note that the \*Tag property value will probably show correctly in Excel, but may not. This is because Excel shows the properties of the component coming through the filter, and \*Tag is not a property of the component – it can be reset multiple times in a single filter. The value shown in Excel is the value held at the first hit on the \*Tag property.

Note that when using ResultLength, the Length property value in Excel will show the original length of the component (not the overridden length). This is because Excel shows the properties of the component as it first enters the filter; ResultLength can be reset multiple times in a single filter, and may not necessarily even relate to the component coming through the filter.

##### Jump to branch filter

If the selected row in the filter contains a branch filter (see below) this button opens the branch filter. The “Show filter hits for this job” button (described above) can then be applied to the branch filter.

##### Return to parent filter

If you have jumped to a branch filter this button closes the branch filter and returns you to the parent filter.

## Filters – Properties and Results

The Filters window shows a list. This list is divided vertically – there may be one or more Property columns on the left, and one or more Result columns on the right. You choose the appropriate columns when you create a new filter, and you may change them by clicking the “Properties” button. Results are distinguished from Properties by being all grey in the list.

A **Property** is a bit of information about the component being run through the filter. For example, if you create a Baluster filter, and select it in the Components window for the job, each baluster in the design runs through this filter and brings with it certain properties (e.g. Style, Timber, Width, Depth, Length etc.). The filter compares the properties of the baluster with the properties you specify in the filter. If there is a match of properties, you have what we call a “hit”, and any cells on the **Result** side of the list are executed (just for the row of the hit).

Because the **result** is the ultimate aim of the filter, we will discuss them first, and then turn our attention to **properties**.

### Result Columns:

What is specified by a hit will depend on which result columns you selected for the filter, and what you have put in those columns.

Following is a list of the result columns.

Result Options Explanation

Part *ListParts* Specifies a part id

Alert *User text* Specifies any alert text

Caption *User text* Specifies a caption for parts or labour

Ref *Integer* Specifies a reference number for part or labour

TimePrepare *Integer* Specifies the labour time to prepare this item

TimeAssemble *Integer* Specifies the labour time to assemble this item

TimeDeliver *Integer* Specifies the labour time to deliver this item

TimeInstall *Integer* Specifies the labour time to install this item

ContractPrepare *Currency* Specifies the contract rate to prepare this item

ContractAssemble *Currency* Specifies the contract rate to assemble this item

ContractDeliver *Currency* Specifies the contract rate to deliver this item

ContractInstall *Currency* Specifies the contract rate to install this item

CostMethod *ListLaborCostMethod*   
Can override the default cost method for this item

LineItem1 *Currency* Specifies the contract amount for a line item (see later). It would normally represent a buy price

LineItem2 *Currency* Specifies the contract amount for a line item (see later). It would normally represent a sell price

BranchFilter *FilterList* Specifies a different filter to branch to.

ResultQty *PropertyList* Allows Qty to be overridden by a number or a specified property column. See Overriding Quantity and Length (above).

ResultLength *PropertyList* Allows Length to be overridden by a number or a specified property column. See Overriding Quantity and Length (above).

ResultTag Allows you to set the value of the \*Tag property. See above: Auto-Filters/ \*Tag – a wild-card auto-filterable property

### Result Options:

Following is an explanation of the options (i.e. what can you enter into the cells of the above Result columns).

Options Explanation

*ListParts* Shows a list of parts from your Parts window, from which you can select. Only parts with the same category as the current filter will be shown, plus any parts in the General category.

*User text* Any text you type into the cell

*Integer* Any number you type into the cell (must be less than 32000).

*Currency* Any currency amount you type into the cell. It can be in full currency format (e.g. “$12.60”) or short format (e.g. “12.60” or 12.6”.

*ListLaborCostMethod* Shows a list of labour cost methods, as follows:

*TimeRate*

Only times (minutes) shown in the TimePrepare, TimeAssemble, TimeDeliver and TimeInstall columns will be used for this hit. They will be multiplied by the Rate for these categories as shown in the Rates list at the top of the Labour window for the job.

*Contract*

Only currency amounts shown in the ContractPrepare, ContractAssemble, ContractDeliver and ContractInstall columns will be used for this hit. If times (minutes) are shown in the TimePrepare, TimeAssemble, TimeDeliver and TimeInstall columns, they will not be used to cost the labour but will still be used to allocate durations for the job (used by the Schedule window).

*Default*

For this hit StairBiz will use the labour cost method indicated at the top of the Labour window for the job. If the “Contract” button is selected, then Contract will apply (see above), otherwise TimeRate will apply (see above).

*FilterList* Shows a list of previously created filters in the same category as the current filter. The current filter can branch to the selected filter if it gets a hit.

*PropertyList* Shows a list of currently included properties.

### Results in more detail:

Following is more detail on the result columns. Note that you do not need to have text in every cell of every column. Only cells with content are processed during a hit, otherwise they are ignored.

Result Explanation

Part This result may be used to specify a part. For example, if the category is “Balusters”, and a baluster in the job has a hit on this row, then the part shown in this field will be specified for the job.

Clicking in this cell will show a list of Part Ids from your Parts window. You may optionally type in a part Id (rather than select from the list). Normally the PartId’s in this list include a suffix showing the Style and Description from your Parts window. If your descriptions are long this can be unwieldy. To turn off these suffixes, open the Miscellaneous Defaults window (Filters category) and set “Suffix PartId with description” to “No”.

If there is a hit on this row, the part will be specified in the Materials window of the job (see Show; Parts From Filter), the cost of the part (as shown in the Parts window) will be added to the materials cost for the job, and any labour for the part (as shown in the Parts window) will be specified in the Labour window for the job (if the Include Parts Labour button is selected in that window).

Alert You can type any text you like in this cell. If there is a hit for this row, this text will be shown in the Alerts sheet (under the View menu).

Alerts may be used for anything, but the most likely use is to alert the user if the hit falls outside the normal scope of things. For example, if the user has specified a Colonial baluster in Ash, and Colonial balusters do not come in Ash, the filter can trap that situation and alert the user.

If alerts are current for a job the **Alerts Current** field of the Job Directory will indicate such.

Caption When there is a hit, and a part and/or labour is specified as a result, that part and/or labour will show up in the Materials window and/or Labour window of the job. If there is text in a Caption cell for that hit, this text will show in the Description column for that part/labour in those windows.

Ref When there is a hit, and a part is specified as a result, that part will show up in the Materials window of the job (Show = Parts From Filter). If there is a number in a Ref cell for that hit, this number will show in the Ref column for that part in that window.

When there is a hit, labour is specified as a result, that labour will show up in the Labour window of the job. If there is a number in a Ref cell for that hit, this number will show in the Ref column for that labour item in that window.

When there is a hit, and an alert is specified as a result, that alert will show up in the Alerts sheet of the job. If there is a number in a Ref cell for that hit, this number will show in the Ref column for that alert in that window.

This is useful for tracking where in your filters the part, labour or alert has been specified and may be useful for de-bugging.

TimePrepare If there is a hit on this cell, the number of minutes specified in this cell (multiplied by the quantity for the component) will be added to the total time for Preparation for the job. This time will be fed into the Schedule window for the job. StairBiz will also multiply this time by the Rate for Preparation as shown in the Rates list at the top of the Labour window for the job and add it to the labour cost for the job, provided that:

The CostMethod column is included, and …

TimeRate is selected, or Default is selected and the “Contract” button at the top of the Labour window for the job is not selected , or …

the CostMethod column is NOT included, and …

the “Contract” button at the top of the Labour window for the job is not selected.

If the time refers to per metre, type a “ /M” after the setting. For example … 5 /M

If the time refers to per foot, type a “ /F” after the setting. For example … 5 /F

If the time refers to per each (i.e. per baluster, per string, etc.) don’t type anything after the setting. For example … 5

TimeAssemble See TimePrepare (above), but apply it to Assembly.

TimeDeliver See TimePrepare (above), but apply it to Delivery.

TimeInstall See TimePrepare (above), but apply it to Installation.

TimeCNC See TimePrepare (above), but apply it to CNC (time one the CNC bed).

ContractPrepare If there is a hit on this cell, the currency amount specified in this cell (multiplied by the quantity for the component) will be added to the Preparation labour for the job, provided that:

The CostMethod column is included and …

Contract is selected, or Default is selected and the “Contract” button at the top of the Labour window for the job is selected, or

The CostMethod column is NOT included and …

the “Contract” button at the top of the Labour window for the job is selected.

If the contract amount refers to per metre, type a “ /M” after the setting. For example … $1.32 /M

If the contract amount refers to per foot, type a “ /F” after the setting. For example … $1.32 /F

If the time or contract amount refers to per each (i.e. per baluster, per string, etc.) don’t type anything after the setting. For example … $1.32

If you want to include a quantity, you can type “4@” before the rate (e.g. “[4@$3.00](mailto:4@$3.00)”). This has the effect of multiplying the quantity calculated by StairBiz by the quantity you specify. For example, imagine you are using the labour filter to specify and cost the number of connections for each handrail fitting that passes through the filter. If a “GNeckBlock” goes through the filter and you want the filter to specify and cost 3 connections for this fitting, you could type “[3@$7.00](mailto:3@$7.00)”. If StairBiz sends through two of these fittings, in your Labour window you would see a quantity of 6 (2 x 3).

ContractAssemble See ContractPrepare (above), but apply it to Assembly.

ContractDeliver See ContractPrepare (above), but apply it to Delivery.

ContractInstall See ContractPrepare (above), but apply it to Installation.

CostMethod This provides a way to override (just for this one hit) the default cost method for labour for the job (as shown by the Contract buttons at the top of the Labour Cost window for the job). For example, if this column if included, and TimeRate is selected, then even if you have all the Contract buttons selected in the Labour Cost window, this one hit will apply the minutes in the TimePrepare, TimeAssemble, TimeDeliver and TimeInstall cells to the labour costing for the job (in this case any currency amounts you might have in ContractPrepare, ContractAssemble, ContractDeliver and ContractInstall are redundant).

LineItem1/2 A line item is a non-part item you want StairBiz to specify in the Materials list. It is similar to a part but differs in that the item does not need to be listed in the Parts window. For example, you could specify a tread/rise/string combination as a line item (useful if you price stairs on a per-tread basis, which includes the tread, riser and one tread’s worth of string). Such a line item could (but doesn’t have to) include both materials and labour all represented in a single item. In the Materials list, the PartId column would contain any text you entered into a Caption field in the same row of the filter. LineItem1 would normally (but not necessarily) be the Buy price of this line item. LineItem2 would normally (but not necessarily) be the sell price. You can toggle between the two prices (i.e. tell StairBiz which one to use) in the Materials window of a job.

BranchFilter A filter can have sub-filters (called Branch Filters). StairBiz will branch to the filter shown in this cell when it gets a hit on this cell. Branch filters are useful when you want to break a long filter down into smaller filters to make them easier to work with. They can also be useful when the “logic” of an AutoFilter requires it. For more, see Branch Filters and Auto-Filters (below).

ResultQty See Overriding Quantity and Length (above).

ResultLength See Overriding Quantity and Length (above).

ResultTag Allows you to set the value of the \*Tag property. See above: Auto-Filters/ \*Tag – a wild-card auto-filterable property

#### Switching between labour cost methods

By including both a Time result and a Contract result for each labour item, you can switch between cost methods for any labour stage of an entire job just by clicking the relevant **Contract** button in the Labour window for the job.

For example, you have two people who build stairs. One is staff, the other is contract.

In your labour cost filter (for example, **Treads** category, which is for straight flights only), you might have something like …

TimeAssemble = 20

ContractAssemble = $16

If the **Contract** button in the Labour window is ticked, only the ContractAssemble transaction is considered. If you un-tick this button, only the TimeAssemble transaction is considered. Note that the item in the filter can override this Contract button by using the CostMethod field and selecting something other than “Default”.

Also note that even if you only use Contract, if you don’t include a Time then StairBiz can’t work out how long the job will take (for the Schedule window).

### Property Columns

The property columns are the columns on the left side of the filter. These are the criteria each component must satisfy before a hit is declared (and the results are executed).

In the following …

CATEGORY is the filter’s component category (shown in panel on left)

OPTIONS are the choices you get for each property (i.e. what can go in the cell). There are four broad types:

* List… (i.e. an option that starts with the word “List…”

Means that when you place you cursor in this cell, you get a pop-up list from which you can select the required property. Note that even when you get a pop-up list, you may simply type in the text (if you a familiar with the options). Be careful if you type in a value rather than select from the list - if you type in something that is not in the pop-up list, you obviously would never get a hit on this cell.

A full explanation of all Lists are included further down in this discussion - one list may apply to many properties, so this avoids duplicate explanations.

* TrueFalse

You get a pop-up giving you the choice of True or False (or you can simply type “True” or “False”)

* Dimension

You can enter a dimension in whatever dimension system is currently selected in the Preferences window.

You can also specify a dimension range - to enter a range, type in the two dimensions separated by a comma (e.g. “800, 900”.

When you enter a range, the first dimension is assumed to be “>=” and the second is “<”. In other words “800, 900” would get a hit if the dimension property being filtered was greater than or equal to 800 and less than 900.

* Integer

You can enter a number between 0 and 32000.

You can also enter a range of numbers – see Dimension (above)

* (Auto-filter)

This indicated that the property can be used to auto-filter the Parts window. See Auto-filters.

Note that some of the properties lend themselves more to specifying labour, and some lend themselves more to specifying parts.

There is a “hit” when the property option selected or entered into the cell in the filter matches the corresponding property of the component sent to the filter.

PROPERTY OPTIONS / EXPLANATION

Balconyplate

Also see PropertyNamesStylesAll under the Common Properties heading (below).

SituationStart ListRailEnd

The situation at the start of the balconyplate

SituationEnd ListRailEnd

The situation at the end of the balconyplate

Curved TrueFalse (Auto-filter)

Is the section curved

PlowWidth Dimension

The width of the plow (for the balusters). Note that for all *dimension* properties you can also specify a range of dimensions (see Dimension, above).

If the baluster is set to Round Baluster, the PlowWidth property will always return zero.

StyleBaluster ListStyles

The style of the baluster (from the Components window)

StyleClassBaluster ListStyleClass

The Style Class of the baluster (from the Components window)

Balconytrim

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Curved TrueFalse (Auto-filter)

Is the section curved

Balusters

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each baluster, both stair and balcony, runs through this filter.

IsBalcony TrueFalse

Is the baluster part of a balcony (as opposed to the stair)

IsSawTooth TrueFalse

Is the baluster part of a sawtooth string (as opposed to a box string)

TurnLth Dimension

The length of the turning (zero if none)

BotFlatLth Dimension

The length of the lower flat (zero if no turning)

FixedLowerFlat TrueFalse

Does the baluster have a fixed lower flat (i.e. variable turning).

SawToothPosition Integer

The position of this baluster on the tread (1, 2, 3 etc). Only applies if sawtooth string. Note that for all *integer* properties you can also specify a range of numbers (see Integer, above).

RadiusType ListRadiusType1

Is the handrail straight or curved

BalIsPinTop TrueFalse

Is this baluster a pin top

VoluteType ListVoluteType

Is the baluster associated with a Volute, Turnout or TurnoutSmall, or none of these.

BalBotType ListBalBotType

The situation at the bottom of the baluster.

IsLanding TrueFalse

Is this baluster associated with a landing (as opposed to a straight flight or balcony)

IsPlatform TrueFalse

Is this baluster associated with a platform (as opposed to a normal landing, straight flight or balcony)

IsFullPanel TrueFalse

Is this “baluster” a full panel (e.g. a glass panel)

StyleBalconyNwl ListStyles

The style of the currently selected balcony newel. This could be useful in, for example, spec'ing hardware for cable or panel balustrade.

The balcony newel was chosen to represent all newels, whether or not it actually does.

Bearers

Also see PropertyNamesStylesAll under the Common Properties heading (below).

LandingType ListLandingType

The type of landing

TreadCount Integer

Total treads in landing

ThisTreadId Integer

The tread id within this landing (from the bottom)

Bullnose Treads, Bullnose Risers

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each tread with a bullnose on at least one side runs through the Bullnose Treads filter.

Each riser with a bullnose on at least one side runs through the Bullnose Risers filter.

BullName ListBullNames (Auto-filter via Tag field)

The name of the bullnose template from which this bullnose came. It is possible to auto-filterable this property indirectly – see Chapter 15 : Parts and Labour Filters/ Auto-filters – Suggestions for each category/ Bullnose Treads.

ClassBull ListBullClasses

The class of the bullnose (as shown when you right-click either the bullnose template or the bullnose on the stair)

Hand ListHandOrBoth

Is there a bullnose on the left of the tread, the right of the tread, or both.

BullTreadId Integer

The ID of this bullnose tread. The highest bullnose tread has a BullTreadId = 1. Any bullnose treads below this will have BullTreadId = 2, 3, 4 etc. down to the bottom bullnose tread. Therefore the maximum BullTreadId will equal BullCount (see below).

BullCount Integer

Total number of bullnose treads (a bullnose on the left, right or both). For example if there is a single bullnose on either the left, right or both, this would be 1; if there was a double bullnose on one side and a single or no bullnose on the other, this would be 2.

BullCountSide Integer

Total number of bullnose treads on the same side as the current bullnose.

This is only useful if the bullnoses go through the filter one side at a time (i.e. if 'Labour Cost; Separate Tread Sides' is True in the Setout window, Bullnose category). If this is False, then BullCountSide will be the same as BullCount (see above).

BullSides Integer

1 if one side of tread is bullnose, 2 if both sides (this is similar to HandOrBoth, except that it makes no reference to the hand)

NoseType ListRadiusType2

Is the nosing of the bullnose tread straight, curved or angled

IsOpenRise TrueFalse

Does the bullnose have a riser.

TreadProtection TrueFalse

Is the Tread Protection checkbox in the Job Details window ticked (does not apply to Bullnose Risers).

RiserTimber ListTimbers

The timber of the bullnose riser (does not apply to Bullnose treads).

StringTimber ListTimbers

The timber of the string associated with this bullnose.

UnitWidth Dimension

The width of the bottom of the straight flight (from outside string to outside string).

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

Fillets

Also see PropertyNamesStylesAll under the Common Properties heading (below).

All fillets (handrail, shoerail and balconyplate) run through this filter.

Fillets come through as a total length for each section of handrail, shoerail and balconyplate (not as individual fillet pieces) and the Length property (see PropertyNamesStylesAll) will indicate this total length, however, the Quantity property (see PropertyNamesStylesAll) will indicate the number of fillet pieces in each section.

FilletType ListFilletType

Is the fillet for handrail, shoerail or balconyplate.

RadiusType ListRadiusType1

Is the handrail straight or curved

IsRaked TrueFalse

True if walltrim is raked (otherwise walltrim is level)

IsBalcony TrueFalse

True if handrail is part of balcony (otherwise is part of stair)

Frets

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each fret runs through this filter

Hand ListHand

Left of stair (going up), or right

Curved TrueFalse (Auto-filter)

Is this fret part of a curved string

IsLanding TrueFalse

Is this fret part of a landing (otherwise is part of straight fight)

TreadsInLanding Integer

If corner unit, how many treads in the unit

LandingTreadId Integer

If corner unit, which tread in corner unit is this

Fittings

A “nominal” newel refers to a position in the stair or balcony where a newel could be (regardless of whether or not a newel is actually selected at that location). Each nominal newel passes through this filter provided that there is rail on the high side, low side, or both sides of the nominal newel.

Style ListStyles (Auto-filter)

Lists all styles of handrail

StyleClass ListStyleClass

Lists all style classes

Timber ListTimbers (Auto-filter)

Lists all timbers (handrail)

TimbClass ListTimbClass

Lists all timber classes (handrail)

Width Dimension (Auto-filter)

The width of the handrail

Depth Dimension (Auto-filter)

The depth of the handrail

FittingType ListFittingTypes (Auto-filter)

Lists all possible fitting types as seen in the Elevations mode of the Design window

NewelType ListNewelTypes

Whether the nominal newel is OTP, PTP or no newel

Joins Integer

How many joins relate to this nominal newel. A join may be between a fitting and a handrail, a fitting and a newel block, a fitting and a fitting, or a handrail and a newel block.

RailCuts Integer

How many cuts must an installer make to handrail at the location of this nominal newel. This does not include cuts to fittings (see FittingCuts). Invariably if there is handrail on the high side OR the low side, there will be one RailCut, otherwise if there is handrail on both sides, there will be two RailCuts.

FittingCuts Integer

How many cuts must an installer make to fittings at the location of this nominal newel. This does not include cuts to handrail (see RailCuts).

For example, if a straight rail terminates at a rosette, this would be no FittingCuts (although there would be one RailCut). On the other hand if a straight rail goes up to a rosette via an overease, there would be one FittingCut (i.e. at one end of the overease to create the exact angle – the other end is assumed to already be cut). In a gooseneck, the join between the vertical and the horizontal is not considered a cut (a gooseneck is assumed to already consist of a vertical mitre-joined to a horizontal), however there would always be a cut at the bottom of the vertical and one at the end of the horizontal, plus the lo-side upease would have one cut, and if there is a high-side upease this would also have a cut.

TurnAngle Integer (Auto-filter)

Applies only to turns or fittings that include turns. It is the angle of the turn (always the acute angle, so may need to be used in conjunction with Hand). For example, “90” would be a standard quarter turn.

Length Dimension (Auto-filter)

Applies only to verticals, and goosenecks (which contain a vertical).

It is the vertical distance from the underside of the horizontal part of the gooseneck down to the top of the upease.

Note that this distance may be negative (i.e. the top of the upease may be above the bottom of the horizontal part of the gooseneck). The gooseneck can be assembled or disassembled.

UShapeGap Dimension

Applies only to a Ushape stair - the gap between the outside faces of the upper and lower tenon strings (in plan view).

IsWallrail TrueFalse

It is rail associated with this fitting wallrail (as opposed to handrail). Note that in rare cases where there might be handrail on one side and wallrail on the other this property has a 50% of being correct.

PlowWidth Dimension

If the rail is handrail, and the balusters are square top, this returns the depth of the balusters. Note that normally PlowWidth is auto-filterable, but in this category it is not (there is no PlowWidth column in the Parts window).

If the baluster is set to Round Baluster, the PlowWidth property will always return zero.

Handrail

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each section of handrail, both stair and balcony, runs through this filter.

SituationStart ListRailEnd

The situation at the start of the handrail

SituationEnd ListRailEnd

The situation at the end of the handrail

RadiusType ListRadiusType1 (Auto-filter)

Is the handrail straight or curved

IsRaked TrueFalse

True if handrail is raked (otherwise handrail is level)

IsBalcony TrueFalse

True if handrail is part of balcony (otherwise is part of stair)

BalIsPinTop TrueFalse

True if baluster is pin top

PlowWidth Dimension

The width of the plow (zero if no balusters or pin-top or round balusters)

Curved TrueFalse

Is the handrail curved (2D or 3D)

BalWidth Dimension

The width of the baluster (zero if no balusters)

BalDepth Dimension

The depth of the baluster (zero if no balusters)

BalTimber ListTimber

The timber of the baluster (empty if no balusters)

StyleBaluster ListStyles

The style of the baluster (from the Components window)

StyleClassBaluster ListStyleClass

The Style Class of the baluster (from the Components window)

IsWallrail TrueFalse

True if this rail is in fact wallrail (branched to the handrail filter by the wallrail filter)

RailHeight Dimension

The height of the handrail (from the Setout window)

CeilingRail TrueFalse

True if this rail runs horizontally under the ceiling.

Goings Integer

How many goings (tantamount to ‘treads’ for a straight unit) in the horizontal length of this handrail. Applies to handrail on the stair only (otherwise returns zero). It takes the horizontal length of the section and divides it by the default going for the stair (rounded to the NEAREST integer).

StyleBalconyNewel ListStyles

The style of the balcony newel (from the Components window). Shows "[None]" if a style is not selected.  
Whether or not there is any newel selected at the relevant handrail is not considered.

Job

The job (as a whole) runs through this filter.

Dispatch ListDispatchMode

How the job will be dispatched - Pickup, Deliver or Install (as shown in the Details window)

StairCount Integer

How many stairs in the job’s design

IsBalcony TrueFalse

Is there any balcony balustrade in the job’s design

SplitQuote TrueFalse

Is the quote split into Stair and Balustrade (according to the Process window)

ActiveStair TrueFalse

Is the stair active as per check-box in Process window

ActiveBalustrade TrueFalse

Is the balcony active as per check-box in Process window

ActiveBalustrade TrueFalse

Is the balcony active as per check-box in Process window

The following may be useful in vetting timber/style combinations

StyleBalconyNwl ListStyles

StyleTopNwl ListStyles

StyleBaluster ListStyles

StyleHandrail ListStyles

TimberBalconyNwl ListTimbers

TimberTopNwl ListTimbers

TimberBaluster ListTimbers

TimberHandrail ListTimbers

The following all come from the Job Details window and may be useful in spec’ing labour

QuoteFromPlan TrueFalse

JobBriefing TrueFalse

Remeasure TrueFalse

NoSitePower TrueFalse

TrimUpperFloor TrueFalse

TrimCentreWall TrueFalse

The following all come from the Site window

NewHome TrueFalse

Landing Treads

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each landing tread (i.e. treads in a corner unit) run through this filter.

Hand ListHandOrBoth (Auto-filter)

The hand of the landing - Left if the landing turns left (going up), otherwise Right. If the landing is a single tread landing, and you allow the “Both” value (see Setout window, Treads category, Hand Property – allow ‘Both’), then this value can be “Both”.

ThisTreadId Integer

The id of this tread within the single corner unit (going up). The lowest landing tread = 1.

ThisTreadId2 Integer

The id of this tread within a contiguous run of corner units (going up). In this case a UShape 6-tread landing (for example) is treated as a single unit and its top tread has an ID of 6 (whereas for the previous property [ThisTreadId] it is treated as two 3-tread corner units).

If there is only a single corner unit this property returns the same as ThisTreadId.

TreadCount Integer

Total treads in this corner unit

TreadCount2 Integer

Total treads within a contiguous run of corner units. A contiguous run includes one or more landings. In this case a UShape 6-tread landing (for example) is treated as a single unit and would return "6" (whereas for the previous property [TreadCount] it is treated as two 3-tread corner units and would return "3"). This property can be used in conjunction with the UShapeLanding property if necessary.

TreadNum Integer

The id of this tread within the entire stair (going up or going down, depending on your “Tread Numbers Top Down” setting in the Preferences window).

TreadType Integer (Auto-filter)

A two digit number (usually). The first digit is ThisTreadId (see above). The second digit is TreadCount (see above). For example, the second tread of a three tread landing would have a value of “23”.

RiserCount Integer

Total risers in this corner unit (always one more than the TreadCount)

SawtoothInside ListSawtoothType

The type of sawtooth (if any) in the inside (tenonside) end.

SawtoothOutside ListSawtoothType

The type of sawtooth (if any) in the outside (wallside) end.

SawtoothSides Integer

No sawtooth = 0; sawtooth one side = 1; sawtooth both sides = 2.

IsRadiusInside TrueFalse

Is the inside (tenonside) of the tread a radius

IsRadiusOutside TrueFalse

Is the outside (wallside) of the tread a radius

IsSliceOutside TrueFalse

Is the outside (wallside) of the tread sliced

IsOpenRise TrueFalse

True if this tread is open rise (otherwise is closed rise)

SideNoseCount Integer

If there is a sawtooth with side nosing on one end, this equals 1. If there is a sawtooth with side nosing on both ends, this equals 2 .

SideNose ListSideNose (Auto-filter)

None, Left, Right, Both.

TreadProtection TrueFalse

True if "Tread Protection" is ticked in the Details window.

BottomTread TrueFalse

True if this tread is the bottom tread in the single corner unit.

TopTread TrueFalse

True if this tread is the top tread in the single corner unit.

SplayedRise TrueFalse

True if this tread has a spayed (leaning) riser below it.

SafBarRise TrueFalse

True if this tread has a safetybar riser.

LongestSide Dimension

The longest side (width or depth) of the single corner unit.

HasCurve TrueFalse

Is there a curved string in contact with this tread.

LandingHeight Dimension

Height of the top of this tread from the floor.

MembersLth Dimension

N/A.

SheetFraction Dimension

The approximate percentage of a 2400 x 1200 sheet needed by this tread. Use with caution.

IsHalfLanding TrueFalse

Is this tread the single tread in a half-space (UShape) landing.

NoseToRiser Dimension

The tread nosing overhang, as shown in the Setout window for this job.

RiserTimber ListTimbers

The timber of the tread’s riser.

StringTimber ListTimbers

The timber of the wall-side strings.

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

UShapeLanding TrueFalse

Does the corner unit of this tread have a corner unit above or below it (e.g. a UShape landing).

Lining

Also see PropertyNamesStylesAll under the Common Properties heading (below).

UnitType ListUnitType

Corner, straight or in-line landing

TreadCount Integer

The total treads within the unit

RiserCount Integer

Total risers in this corner unit (always one more than the TreadCount)

IsHalfLanding TrueFalse

Is this landing part of a half-space landing

ClassUnit ListUnitClasses

The class of this unit (as shown by right-clicking a unit template, or an actual unit in a stair, both in the Stair Design mode of the Design window).

RadiusTypeInside ListRadiusType2

Is any inside (tenonside) string of the unit Curved or Angled

RadiusTypeOutside ListRadiusType2

Is any outside (wallside) string of the unit Curved or Angled

IsDogLegInside TrueFalse

Does the inside have a dogleg; applies only to straight

IsDogLegOutside TrueFalse

Does the outside have a dogleg; applies only to straight

DoglegOffset Dimension

The distance between the two main strings (i.e. the length of the dogleg). Zero if no dogleg. If dogleg both sides, returns the offset for the tenonside only.

DoglegOffset Dimension

The distance between the two main strings (i.e. the length of the dogleg). Zero if no dogleg. If dogleg both sides, returns the offset for the tenonside only.

UnitCurveType ListUnitCurveType

The curve type of the unit (No Curve, Circular L, Circular R etc.).

Newel Acorn

Each newel runs through this filter, provided that an acorn is selected in the Acorns list in the Components window and an acorn is not specified in the Styles window for the newel.

Style ListStyles (Auto-filter)

The style of the acorn

Timber ListTimbers (Auto-filter)

The timber of the acorn

TimbClass ListTimbClass

Lists all timber classes (handrail)

IsMDF TrueFalse

Is the timber MDF

Width Dimension (Auto-filter)

The width of the acorn

Depth Dimension (Auto-filter)

The depth of the acorn

Length Dimension (Auto-filter)

The height of the acorn

NewelStyle ListStyles

The style of the associated newel

NewelTimber ListTimbers

The timber of the associated newel

Newel Balcony

Also see PropertyNamesNewelAll under the Common Properties heading (below).

Only balcony newels pass through this filter

BelowFloor TrueFalse

True if this balcony newel extends below the upper floor (otherwise bottom is at or above floor level)

HeightUpTo ListNwlRUpTo

The options for height of the top of this newel (as selected by right-clicking the newel)

HeightDownTo ListNwlRDownTo

The options for height of the bottom of this newel (as selected by right-clicking the newel)

Newel Bottom

Also see PropertyNamesNewelAll under the Common Properties heading (below).

Only the bottom newels of a stair pass through this filter (both corner and straight unit)

ClassBull ListBullClasses

The class of the bullnose

BullCount Integer

How many bullnoses are there.

IsStraightFlight TrueFalse

Is this newel part of a straight flight (not corner)

StartType ListNwBotStartType

The handrail fitting at the bottom newel

HeightUpTo ListNwlSUpTo

The options for height of the top of this newel (as selected by right-clicking the newel)

HeightDownTo ListNwlSDownTo

The options for height of the bottom of this newel (as selected by right-clicking the newel)

Floats TrueFalse

Is the newel a floating newel (as opposed to a newel integrated with the stair)

Newel Top

Also see PropertyNamesNewelAll under the Common Properties heading (below).

Only the top newels of a stair pass through this filter (both corner and straight unit)

IsStraightFlight TrueFalse

True of at top of a straight flight (otherwise is top of corner unit)

IsStairRail TrueFalse

True if has stair handrail attached (otherwise has only balcony rail or no rail attached)

IsBalconyRail TrueFalse

True if has balcony rail attached (otherwise has only stair rail or no rail attached)

HeightUpTo ListNwlSUpTo

The options for height of the top of this newel (as selected by right-clicking the newel)

HeightDownTo ListNwlSDownTo

The options for height of the bottom of this newel (as selected by right-clicking the newel)

Floats TrueFalse

Is the newel a floating newel

Newel Inside Landing

Also see PropertyNamesNewelAll under the Common Properties heading (below).

Only the inside landing (i.e. tenonside) newels of a corner unit pass through this filter (provided they are not the top or bottom newel of the stair)

NewelPosition ListNwlPosNotTopBot

The position of this mid newel

Situation ListNwlSituationNotTopBot

What the rail does at this mid newel

TreadCount Integer

The number of treads in the corner unit

UnitAboveIs ListUnitTypeOrNone

What type of unit is above this newel

TreadsAbove Integer

The number of treads in the unit above this one

IsPlatform TrueFalse

Is the landing a platform (i.e. an existing landing)

HeightUpTo ListNwlSUpTo

The options for height of the top of this newel (as selected by right-clicking the newel)

HeightDownTo ListNwlSDownTo

The options for height of the bottom of this newel (as selected by right-clicking the newel)

Floats TrueFalse

Is the newel a floating newel (as opposed to a newel integrated with the stair)

Newel Outside Landing

Also see PropertyNamesNewelAll under the Common Properties heading (below).

Only the outside landing (i.e. wallside) newels of a corner unit pass through this filter (provided they are not the top or bottom newel of the stair)

NewelPosition ListNwlPosNotTopBot

The position of this mid newel

Situation ListNwlSituationNotTopBot

What the rail does at this mid newel

IsPlatform TrueFalse

If the landing a platform (i.e. an existing landing)

HeightUpTo ListNwlSUpTo

The options for height of the top of this newel (as selected by right-clicking the newel)

HeightDownTo ListNwlSDownTo

The options for height of the bottom of this newel (as selected by right-clicking the newel)

Floats TrueFalse

Is the newel a floating newel (as opposed to a newel integrated with the stair)

Newels All

Also see PropertyNamesNewelAll under the Common Properties heading (below).

All newels pass through this filter

IsStairNwl TrueFalse

True if the newel is part of the stair (as opposed to the balcony)

IsStairNwlCntr TrueFalse

True if an inside corner newel of stair

IsVoluteNwl TrueFalse

True if the newel is part of the stair (as opposed to the balcony)

IsMidNwl TrueFalse

True if the newel is along a string (as opposed to the ends of a string)

IsBottomNwl TrueFalse

True if the newel is at the very bottom of the stair.

IsTopNwl TrueFalse

True if the newel is part of the stair and at the top of the stair where it meets the balcony.

Risers

Also see PropertyNamesStylesAll under the Common Properties heading (below).

SawtoothInside ListSawtoothType

The type of sawtooth (if any) in the inside (tenonside) end.

SawtoothOutside ListSawtoothType

The type of sawtooth (if any) in the outside (wallside) end.

NoseType ListRadiusType2

Straight, Curved or Angled

IsWinder TrueFalse

Is this riser part of a winder tread

BullSides Integer

1 if one side of riser is bullnose, 2 if both sides

CarpetWedges TrueFalse

True if this riser has a carpet wedge

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

TreadCount Integer

Total treads in the unit

ThisTreadId Integer

The tread id within this unit (from the bottom)

Shoerail

Also see PropertyNamesStylesAll under the Common Properties heading (below).

SituationStart ListRailEnd

The situation at the start of the wallrail/shoerail

SituationEnd ListRailEnd

The situation at the end of the wallrail/shoerail

RadiusType ListRadiusType1 (Auto-filter)

Is the wallrail/shoerail straight or curved

IsRaked TrueFalse

True if wallrail/shoerail is raked (otherwise wallrail/shoerail is level)

PlowWidth Dimension

The width of the plow (zero if no balusters or pin-top or round balusters). Applies only to ShoeRail.

IsPlatform TrueFalse

True if there is shoerail sitting on a platform (without skirt). It may be useful to branch the shoerail off to a Balconyplate filter, etc.

Goings Integer

How many goings (tantamount to ‘treads’ for a straight unit) in the horizontal length of this shoerail. See Handrail.

StyleBaluster ListStyles

The style of the baluster (from the Components window)

StyleClassBaluster ListStyleClass

The Style Class of the baluster (from the Components window)

IsSawtoothShoerail TrueFalse

True if the shoerail has ‘Sawtooth’ ticked in the Style window (the shoerail mitres down each tread and riser of a sawtooth string).

Sidenoses

Each sidenose in the job’s design runs through this filter.

Note that sidenoses do not have their own category in the Components window (except for filters). They are turned on with the “Sidenoses” checkbox next to the treads category. They take their Timber, Style and Depth from the treads selection.

Filtering for sidenoses may be done in their own filter, or may be done in the Treads and Landings filters (there is generally enough information about sidenoses to do so).

Hand ListHand

Whether the side nose is on the left or right of the stair (going up)

RadiusType ListRadiusType2

The type of radius on the side nose (Straight, Curved or Angled)

NoseType ListRadiusType2

The type of radius on the nose of the tread (Straight, Curved or Angled)

Run Integer

Only applies to straight flight treads (winders will return zero).

ThisTreadId Integer

The id of this tread within the unit (going up).

TreadNum Integer

The id of this tread within the entire stair (going up or going down, depending on your “Tread Numbers Top Down” setting in the Preferences window).

HasCurve TrueFalse

Does this sidenose have a curve.

UnitCurveType ListUnitCurveType

The curve type of the unit (No Curve, Circular L, Circular R etc.).

Outstep TrueFalse

Does this sidenose belong to an Outstep.

DoglegCount Integer

If there is a dogleg in this sidenose, returns 1, otherwise returns zero.

Irregular TrueFalse

Returns False if the sidenose is straight (no curve) and is 90 degrees to the nosing, otherwise returns True

IsTread TrueFalse

Returns True for straight unit treads and outsteps. Returns False for a winder tread

Stair

Each stair in the job’s design runs through this filter.

Dispatch ListDispatchMode

How the job will be dispatched - Pickup, Deliver or Install (as shown in the Details window)

ClassStair ListStairClasses

The class of the stair (as shown by right-clicking a stair template in the Stair Templates mode of the Design window, or the job’s stair in the Stair Design mode of the Design window).

UnitCount Integer

How many units in the stair

RiserCount Integer

How many risers in the stair

TreadCount Integer

How many treads in the stair (not including the outstep).

StringTimberClass ListTimbClass

The string timber class (from the Timbers window) associated with the timber as shown in the Components window. Applies to the tenon string only.

TreadTimberClass ListTimbClass

The tread timber class (from the Timbers window) associated with the timber as shown in the Components window

SplitQuote TrueFalse

Is the quote split into Stair and Balustrade (according to the Process window)

ActiveStair TrueFalse

Is the stair active as per check-box in Process window

ActiveBalustrade TrueFalse

Is the balcony active as per check-box in Process window

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

Strings

Also see PropertyNamesStylesAll under the Common Properties heading (below).

StringType ListStringType

Type of string (tenon, skirt only etc.)

SandString TrueFalse

Is the string sanded (as selected by right-clicking the string)

RadiusType ListRadiusType2

Is the string Straight, Curved or Angled

TreadCount Integer

The number of straight-flight treads on this string (landing treads are deliberately ignored and should be dealt with separately). Note that the TreadCount in a Strings filter includes partial treads (e.g. a partial tread at a dog-leg) so use with caution in this category.

RiserCount Integer

Total risers in this string (always one more than the TreadCount).

IsOpenRise TrueFalse

Are the treads open rise

IsSawTooth TrueFalse

Is the string sawtooth

HiJoinIsHockey TrueFalse

Doe the high end of this string form a hockey string join with the string above it

SelfSupport TrueFalse

True if this string is self supporting

Curved TrueFalse

True if any part of the string is curved

CarriageString TrueFalse

True if the string is a Carriage string (centre supporting string)

DoglegOffset Dimension

The distance between the two main strings (i.e. the length of the dogleg). For strings, this property is non-zero only for the string below a dogleg – all other strings will return zero for this property.

UnitType ListUnitType

The type of unit - corner, straight or in-line landing

IsStringNewel TrueFalse

If there is a U-Shape stair with a short landing string between the tenonside straight-flight strings, and you have selected “String Newel” for this string, this returns True, otherwise returns False.

FirstBoard TrueFalse

If a string is made up of multiple boards (because of glue-up), each board goes through the filter. Only the first board of a string will have this property = True. This allows you to intercept just once for each string.

Side TenonSide/WallSide

The theoretical side of the stair.

CornToStrait TrueFalse

Is this a corner unit string (not skirting) joined to a straight unit string (above or below) but not as a hockey join.

Treads

Also see PropertyNamesStylesAll under the Common Properties heading (below).

Each tread in a straight unit runs through this filter.

SawtoothInside ListSawtoothType

The type of sawtooth (if any) on the inside (tenonside) end.

SawtoothOutside ListSawtoothType

The type of sawtooth (if any) on the outside (wallside) end.

SawtoothLeft ListSawtoothType

The type of sawtooth (if any) on the left end of the tread (going up).

SawtoothRight ListSawtoothType

The type of sawtooth (if any) on the right end of the tread (going up).

SawtoothSides Integer

No sawtooth = 0; sawtooth one side = 1; sawtooth both sides = 2.

SawtoothSidesDesc ListSawtoothSidesDesc

None, Left, Right or Both

RadiusTypeInside ListRadiusType2

Is the inside (tenonside) of the string straight, curved or angled

RadiusTypeOutside ListRadiusType2

Is the outside (wallside) of the string straight, curved or angled

NoseType ListRadiusType2

Are the tread nosings in contact with the string straight, curved or angled

IsOpenRise TrueFalse

Are the treads in contact with the string open rise (otherwise closed rise)

SideNoseCount Integer

If there is a sawtooth with side nosing on one end, this equals 1. If there is a sawtooth with side nosing on both ends, this equals 2 .

SideNose ListSideNose (Auto-filter)

None, Left, Right, Both.

TreadProtection TrueFalse

Is the Tread Protection checkbox in the Job Details window ticked.

RiserTimber ListTimbers

The timber of the riser associated with this tread.

StringTimber ListTimbers

The timber of the string associated with this tread.

BullSides Integer

How many ends of this tread has a bullnose (0,1 or 2).

Run Dimension

The going of the tread at the walkline.

TreadNum Integer

The id of this tread within the entire stair (going up or going down, depending on your “Tread Numbers Top Down” setting in the Preferences window).

ThisTreadId Integer

The id of this tread within the straight unit (going up).

IsBottomTread ListTrueFalse

True if the tread is the bottom tread in the unit (not necessarily the stair).

IsTopTread ListTrueFalse

True if the tread is the top tread in the unit (not necessarily the stair).

SplayedRise ListTrueFalse

True if the riser is splayed.

SafeBarRiser ListTrueFalse

True if the riser is a SafetyBar in an open riser stair.

UnitType ListUnitType

The type of unit - corner, straight or in-line landing

CurvedString ListTrueFalse

True if the tread nose intersects a curved part of a string on either side.

StgAngleIS Integer

The angle of the tenonside string (expressed as an integer) relative to the zero angle of the UNIT (not the stair).

StgAngleOS Integer

The angle of the wallside string (expressed as an integer) relative to the zero angle of the UNIT (not the stair).

UnitCurveType ListUnitCurveType

The curve type of the unit (No Curve, Circular L, Circular R etc.).

IsTread ListTrueFalse

True if the item going through the filter is a Tread, BullTread or Outstep. Useful when you branch other items to the Treads filter.

DoglegCount Integer

How many cranks in the ends of this tread (i.e. when the tread end is not a single straight line or arc). Notching for newels does not qualify as a crank.

Irregular ListTrueFalse

True if this tread is anything other than a right-angled rectangle (a regular dog-leg does not qualify as irregular)

IsOutstep ListTrueFalse

True if the item going through the filter is an Outstep. Useful when you branch Outsteps to the Treads filter.

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

Unit

Each unit of each stair in the job’s design runs through this filter.

Dispatch ListDispatchMode

How the job will be dispatched - Pickup, Deliver or Install (as shown in the Details window)

ClassUnit ListUnitClasses

The class of this unit (as shown by right-clicking a unit template, or an actual unit in a stair, both in the Stair Design mode of the Design window).

UnitType ListUnitType

The type of unit - corner, straight or in-line landing

TreadCount Integer

How many treads in this unit

RiserCount Integer

Total risers in this corner unit (always one more than the TreadCount).

IsMDF TrueFalse

Are the treads in this unit MDF

SawtoothInside ListSawtoothType

The type of sawtooth (if any) in the inside (tenonside).

SawtoothOutside ListSawtoothType

The type of sawtooth (if any) in the outside (wallside).

IsOpenRise TrueFalse

Is the rise open (is the riser board excluded)

RadiusTypeInside ListRadiusType2

Is any inside (tenonside) string of the unit Curved or Angled

RadiusTypeOutside ListRadiusType2

Is any outside (wallside) string of the unit Curved or Angled

NoseType ListRadiusType2

Is any tread of the unit Curved or Angled

IsHalfLanding TrueFalse

Is this unit part of a half landing (i.e. is there another corner unit above or below this corner unit and total treads for both units = 1)

IsDogLegInside TrueFalse

Does the inside have a dogleg; applies only to straight

IsDogLegOutside TrueFalse

Does the outside have a dogleg; applies only to straight

DoglegOffset Dimension

The distance between the two main strings (i.e. the length of the dogleg). Zero if no dogleg. If dogleg both sides, returns the offset for the tenonside only.

DoglegOffset Dimension

The distance between the two main strings (i.e. the length of the dogleg). Zero if no dogleg. If dogleg both sides, returns the offset for the tenonside only.

SplitQuote TrueFalse

Is the quote split into Stair and Balustrade (according to the Process window)

ActiveStair TrueFalse

Is the stair active as per check-box in Process window

ActiveBalustrade TrueFalse

Is the balcony active as per check-box in Process window

RiserTimber ListTimbers

The riser timber as shown in the Components window

StringTimber ListTimbers

The string timber as shown in the Components window. Applies to the tenon string only.

TreadTimber ListTimbers

The tread timber as shown in the Components window

StringTimberClass ListTimbClass

The string timber class (from the Timbers window) associated with the timber as shown in the Components window. Applies to the tenon string only.

TreadTimberClass ListTimbClass

The tread timber class (from the Timbers window) associated with the timber as shown in the Components window

StringStyle ListStyles

The style name of the TENON strings as shown in the Components window.

Wallbrackets

Each wallbracket runs through this filter.

Style ListStyles (Auto-filter)

The style of the wallbracket

RailStyle ListStyles

The style of the handrail

Wallrail

Also see PropertyNamesStylesAll under the Common Properties heading (below).

SituationStart ListRailEnd

The situation at the start of the wallrail/shoerail

SituationEnd ListRailEnd

The situation at the end of the wallrail/shoerail

RadiusType ListRadiusType1 (Auto-filter)

Is the wallrail/shoerail straight or curved

IsRaked TrueFalse

True if wallrail/shoerail is raked (otherwise wallrail/shoerail is level)

PlowWidth Dimension

The width of the plow (zero if no balusters or pin-top or round balusters). Applies only to ShoeRail.

Goings Integer

How many goings (tantamount to ‘treads’ for a straight unit) in the horizontal length of this wallrail. See Handrail.

Walltrim

Also see PropertyNamesStylesAll under the Common Properties heading (below).

RadiusType ListRadiusType1

Is the walltrim straight or curved

IsRaked TrueFalse

True if walltrim is raked (otherwise walltrim is level)

Goings Integer

How many goings (tantamount to ‘treads’ for a straight unit) in the horizontal length of this walltrim. See Handrail.

### Common Properties

All categories

# Integer

Enter a number in each row of this column to override the StairBiz logical row sequence – StairBiz will sort the rows based on the sequence of these numbers. See Overriding Logical Row Sequence.

FirstItem See First item through filter.

\*Tag Anything (max 9 chars)

This property holds whatever value you set for it using the ResultTag result. See above: Auto-Filters/ \*Tag – a wild-card auto-filterable property

\*SiteZip The zip code of the site as shown in the Site window.

\*ClientIsOwner “Yes” or “No” depending on the Client Is Owner checkbox in the Client window.

%Anything A property prefixed with a “%” means that it is one of the fields you have created in the MyData window. The value of the property is however you have set it. All MyData fields are available to all categories of the filters.

+Anything A property prefixed with a “+” means that it is one of the tags you have created in the Custom Tags window. The value of the property is however you have set it. All Custom Tags are available to all categories of the filters.

PropertyNamesNewelAll

In addition to the properties for newel categories shown above, all newel categories share the following properties.

Style ListStyles (Auto-filter)

The style of this newel

StyleClass ListStyleClass

The StyleClass for this item (see Styles window)

Timber ListTimbers (Auto-filter)

The timber of this newel

TimbClass ListTimbClass

The class of the timber of this newel (see Timber Class in the Timbers window)

IsMDF TrueFalse

Is the newel timber MDF

IsOTP TrueFalse

Is the newel a pin-top (through fittings)

Width Dimension (Auto-filter)

The width of the newel

Depth Dimension (Auto-filter)

The depth of the newel

Length Dimension (Auto-filter)

The length of the newel

FlatLength Dimension (Auto-filter)

The length of the upper flat (zero if none)

TurnLth Dimension (Auto-filter)

For an OTP newel, the length of the main turning. For a PTP newel, the distance from the TOP of the upper flat to the bottom of the main turning (zero if no turning). Note that we work from the top of the flat rather than the bottom because it aids in auto-filtering.

BotFlatLth Dimension

The distance from the bottom of the main turning to the bottom of the newel (zero if no turning)

TreadContacts Integer

How many treads are in contact with this newel such that the newel requires the tread to be notched (applies only if the newel does not float and is not balcony). Also see NosesAtNewel.

NosesAtNewel Integer

How many tread nosings are in contact with this newel (applies only if the newel does not float and is not balcony). The minimum count for a stair newel is one (there are times when a tread passes straight through a newel, with no nose exactly at the newel – this will return “1” none-the-less). A top newel will generally be “1” (because there is one nosing – the landing nosing), whereas the TreadContacts property would have returned “2” here.

AcornStyle ListStyles

The style of the acorn, provided that an acorn is selected in the Acorns list in the Components window and an acorn is not specified in the Styles window for the newel.

RailAtNewel

Describes what the handrail is doing at each newel. Options are:

RailEnd rail on one side only

RailThru rail on both side

RailNone no rail

Also see next heading.

RailAtNewel2

Describes what the handrail is doing at each newel. Options are:

LevelEnd level rail, one side only

LevelThru level rail, both sides, in-line

Level90 level rail, both sides of corner

RakeEnd raked rail, one side only

RakeThru raked rail, both sides, in-line

Rake90 raked rail, both sides of corner

RailCombo level on one side and rake on the other; angle is not considered

RailNone no rail

RailAtNewel3

This is the same as RailAtNewel2 (above) except that LevelEnd and RakeEnd are divided up into LevelStart/LevelEnd or RakeStart/RakeEnd. This can be useful for allocating fittings which might be only on the start of a handrail, only on the end of a handrail or only on throughs (e.g. cable tensioners, end studs and grommets).

StyleBaluster ListStyles

The style of the baluster (from the Components window). Shows "[None]" if a baluster style is not selected.

StyleHandrail ListStyles

The style of the handrail (from the Components window). Shows "[None]" if a handrail style is not selected.  
Whether or not there is any handrail selected above or below the relevant newel is not considered.

PropertyNamesStylesAll

In addition to the properties for style categories shown above, all style categories share the following properties.

IsPart TrueFalse

Is this component a Part, as indicated in the Style window. If it is not a Blank, IsPart = True.

Note: for Auto filters, to distinguish between a part that is “Part from Filter” and “PartIs” (see the Style window), you can do something like not indicate the Style of that part in the Parts window. Thus if a “PartIs” component comes through the filter (which it may) and the filter sends it on to the Parts window for auto filtering, it simply won’t be found.

Style ListStyles (Auto-filter)

The style of this component

StyleClass ListStyleClass

The StyleClass for this item (see Styles window)

Timber ListTimbers (Auto-filter)

The timber of this component

TimbClass ListTimbClass

The class of the timber of this component (see Timber Class in the Timbers window)

IsMDF TrueFalse

Is the component’s timber MDF

Width Dimension (Auto-filter)

The width of the newel

Depth Dimension (Auto-filter)

The depth of the newel

Length Dimension (Auto-filter)

The length of the newel

### Lists

The following is further explanation of the lists referred to above (i.e. options that begin with the word “List …”).

ListBullClasses

Lists all bullnose classes in Bullnose Templates

ListDispatchMode

PickUp The client will pick the stair up from the shop

Deliver We deliver the stair to the client, but do not install

Install We deliver and install the stair

ListFittingTypes

See the Fitting Types heading under Handrail Fittings for a full discussion. They are the same as the fitting options selectable in the Elevations pane of the Design window of a job.

ListFilletType

ForHandRail The fillets are for handrail

ForBalconyPlate The fillets are for balconyplate

ForShoeRail The fillets are for shoerail

ListHand When walking up the stair

Left Turns left, or is on the left

Right Turns right, or is on the right

ListHandOrBoth When walking up the stair

Left Is on the left

Right Is on the right

Both Is on the left and right

ListLandingType

Corner A corner unit

MidLanding A straight unit (used as an in-line landing)

ListNewelTypes

None There is no selected newel at this junction

OTPNwl The newel is over the post

PTPNwl The newel is post to post

ListNwlBotStartType

The handrail fitting at the bottom newel (See definitions in “ListFittingTypes”)

BullTurn

BullTurnUpEase

NewelBlock

OpeningCap

ReturnEnd

StartEase

StartEaseCap

Terminate

Turnout

UpEase

Volute

ListNwlPosNotTopBot

The position of the mid newel (any newel not top, bottom or balcony

CornerLo T1 or W1 when not top or bottom

CornerHi T4 or W8 when not top or bottom

CornerCorner T2 when not top or bottom; W2 or W3

UserMid a user mid newel

StaightJoin a newel between 2 straight flights

ListNwlSituationNotTopBot

What the rail does at the mid newel (any newel not top, bottom or balcony

RailThrough Handrail on both sides of the newel

RailHiTerminate Hi-side handrail terminates (there is no lo-side handrail)

RailLoTerminate Lo-side handrail terminates (there is no hi-side handrail)

RailNone No handrail either side

ListNwlSizeType

Full The newel is a full newel

ThreeQuarter The newel is a 3/4 newel

Half The newel is a half newel

Special The newel is none of the above

ListNwlSUpTo

The options for height of the top of a stair newel (right-click the newel)

NormalHeight The height of the newel is normal

UpToCeiling The newel goes up to the ceiling below the upper floor level

UpToFloor The newel goes up to the upper floor level

UpToStringTop The newel goes up to the top of the string

UpToUnderLNose The newel goes up to the underside of the OutStep (top newel only)

UpToInput The newel goes up to some user-specified dimension

ListNwlSDownTo

The options for height of the bottom of a stair newel (right-click the newel)

DownToFloor The newel goes down to the floor

DownToStgBottom The newel goes down to the bottom of the string

DownToLandingTop The newel goes down to the top of the landing (landing newels only)

DownToInput The newel goes down to some user-specified dimension below the lowest string

ListNwlRUpTo

The options for height of the top of a balcony newel (right-click the newel)

NormalHeight The height of the newel is normal

UpToInput The newel goes up to some user-specified dimension

ListNwlRDownTo

The options for height of the bottom of a balcony newel (right-click the newel)

DefaultBottom The newel goes down to floor, or below floor, whichever is the default

DownToFloor The newel goes down to floor

DownToCeiling The newel goes down to ceiling below the floor

DownToPlate The newel goes down to the top of the balcony plate

DownToInput The newel goes down to some user-specified dimension

ListRailEnd

What the handrail does at this location

Fitting The handrail runs into a fitting

Newel The handrail runs into a PTP newel

Mitre The handrail runs into an adjacent handrail using a mitre

Nothing The handrail simply terminates

ListRadiusType1

Curve3D A curve (plan view) and a rake (elevation view)

Curve2D A curve (plan view), but no rake (elevation view)

Straight No curve

ListRadiusType2

Straight Straight, and angled at 0, 90, 180 or 270 degrees

Angled Straight, and angled at other than 0, 90, 180 or 270 degrees

Curved Curved

ListSawtoothType

NotSawtooth This end of the tread/rise is not sawtooth

SawtoothMitreFret Sawtooth and the riser mitres a fret

SawtoothMitreStg Sawtooth and the riser mitres the string

SawtoothNoMitre Sawtooth and the riser is cut square

ListSituationRNwl

Applies to balcony newels

RailThrough There is balcony handrail on both sides of this newel

TerminateStair There is balcony handrail on one side of this newel, and the stair is on the other side.

TerminateWall There is balcony handrail on one side of this newel, and nothing on the other side.

ListStairClasses

Lists all stair classes in Stair Templates

ListStringType

The side of the stair of this string

Straight A straight flight string

Corner A corner unit string

SkirtOnly No string, but skirt in its place

SkirtBearerOnly No string, but skirt and bearer in its place

ListStyles

Lists the relevant styles from the Style Defaults window

ListTimbClass

Lists all timber classes from the Timbers window

ListStyleClass

Lists all style classes from the Styles window

ListTimbers

Lists the relevant timbers from the Timbers window

ListUnitClasses

Lists all unit classes in Unit Templates

ListUnitTypeOrNone

None The unit referred to does not exist (e.g. no unit above this unit)

Corner The unit referred to is a corner unit

Straight The unit referred to is a straight unit

MidLanding The unit referred to is a straight unit (used as an in-line landing)

ListUnitType

Corner A corner unit

Straight A straight unit

MidLanding A straight unit (used as an in-line landing)

## Are filters saved with each job?

All defaults used to create and process a job are saved with that job, EXCEPT for the Parts and Labour filters. This is because the filters are too bulky to save with every job.

When you open a job, StairBiz checks to see if the filters used at the time the job was saved exist in the Defaults database of the computer opening the job. If not, it may cause StairBiz to calculate the parts and labour for the job being opened differently to how it was calculated at the time the job was last saved. This is one reason why locking a final Quote is critical.

On opening the job, if there are any differences, StairBiz will alert you with the following message:

*The following filters were valid when the job was saved.  
 They no longer exist in your Defaults database  
 They are suffixed with an asterisk in the relevant window.*

This is an alert - it is not necessarily an error.

This can happen if all computers on your StairBiz network are not using the same Defaults database.

It can also happen if you delete filters, then open a job which used those filters.

If you get this message, if the message is unexpected and if the job is active it may be prudent to investigate.

Note that StairBiz does not compare the contents of filters when determining if they are the same as when saved - it first looks for the filter's ID (a special identification number) and if no such filter is found it can then search by Filter Name (within that category).

You can turn off the alert (you always lock your quote, right!). Go to:

Defaults menu > Miscellaneous > Alerts category > When opening job check filters

# Chapter 16 : Updating StairBiz

## Overview

From time to time we release a newer version of the StairBiz application containing additional features and bug fixes. These updates are available to clients who are within the “free update” period of their End User License Agreement, or those who subscribe to the Continuous Update program.

There are two ways to receive and install your updates, as follows:

## Auto-Update

Auto-Update is a system built in to StairBiz to facilitate updating StairBiz on either a single computer or an entire network.

NOTE: If you are connected to a StairBiz network, Auto-Update is only suitable where the StairBiz server application exists on a computer which is NOT also a client computer (i.e. is not running StairBiz). If a StairBiz license is used on the server computer, you will need to do all updates manually – see **Manual Update** below.

NOTE: You will need to be connected to the internet to perform any kind of update.

#### Auto-update on a network

##### Designating the Auto-Update computer

Only one client computer can be responsible for auto updates. The permission for this is set as follows: You must be logged in with Admin privileges. Go to the Users and Networking window (Defaults menu). Select the user you want to be responsible for Auto Updates. Click the **Permissions** button to open the User Permissions window. Select the **Permissions** tab. Tick the **Auto Update** checkbox (the first item in the list at the top of the window).

If the Auto-Update option is disabled, either you’re not logged in as an administrator, or some other user has been designated as the Auto-Update user (in which case you will need to unselect that user first – only one user can be designated).

##### Quit StairBiz on all OTHER client computers

Before doing an auto update, quit StairBiz on all computers connected to the StairBiz server EXCEPT for your own computer. For this reason it’s perhaps best to do auto updates before the others arrive at work, or after they leave work.

If a client computer (other than the one performing the auto-update) stays connected to the StairBiz server while an auto-update is under way, they will be warned that StairBiz is about to disconnect them. They should then quit StairBiz and re-launch after the auto-update is completed.

##### Auto-Update Now

Go to the Users and Networking window (Defaults menu) and select the **Auto-Update** tab. Click the **Check Now** button.

If the **Auto Update** button/pull down are disabled, and you have just ticked the Auto-Update option in the **Permissions** tab, try closing the Users & Networking window, re-log on (in the **About StairBiz** window from the **Help** menu), and try again. If it is still disabled, read **Designating the Auto-Update computer** (above).

##### Auto-Update Periodically

Go to the Users and Networking window (Defaults menu) and select the **Auto-Update** tab. Set the period for check for new updates.

##### What happens during an auto-update

First StairBiz automatically connects to the StairBiz web server (you will need to have an active internet connection). If you have a firewall, you may be asked if you want to allow StairBiz.exe to connect to a DNS Server – allow the connection. (If you have difficulty connecting, it may be because your firewall is blocking the connection – check with your firewall application that this connection is permissible.)

StairBiz checks the StairBiz web server for the latest available update version, and compares that to your current version. If your current version is older, StairBiz will advise you, then downloads the update program (StairBizAutoUpdate.exe, which is stored in C:\StairBiz Program\AutoUpdate, although you don’t need to know this).

StairBiz advises that it needs to restart. Click **Yes**.

You will get a “Please Wait” message while StairBiz quits, then installs your computer’s new copy of StairBiz.exe. At the same time StairBiz quits your StairBiz server application, installs your new one (the server application must ALWAYS be the same version as the StairBiz.exe programs that use it), then re-launches the server. A copy of the update is also sent to the StairBiz Server computer.

Your computer’s copy of StairBiz in then re-launched. Enter your password and resume working in StairBiz.

The next time any other client computer connects to the StairBiz server, the server will recognize that they are running an outdated copy of StairBiz and will prompt them to update. Click Yes (the client computer’s version of StairBiz must always match the version of the StairBiz Server).

#### Auto-update NOT on a network

If you are running a single license for StairBiz (i.e. a single computer, and are not networking), follow exactly the same steps as above (the procedure is identical) – simply ignore any references to the StairBiz server and other client computers.

## Version Compatibility & Updates

We are constantly updating for the benefit of all and try hard to maintain version compatibility (so you can open old jobs and templates in new versions). The downside to this is that it makes our code more difficult to maintain and de-bug. To keep our code as clean as is reasonable under the circumstances, our policy is as follows:

Critical job and template compatibility will be maintained for at least 3 years (meaning that if a job or template has not been last-saved within 3 years we don’t guarantee you’ll be able to open it).

Non-critical job and template compatibility will be maintained for at least 18 months (meaning that if a job or template has not been last-saved within 18 months you will be able to open it but the design may not be exactly as you left it, although you should be able to rectify this).

We consider these times to be reasonable considering the life expectancy of the average job (note that the above times relate to “last save” dates, not “created” dates). We generally maintain old versions at our office, so in a rare emergency we should be able to help out.

Note that these time limits do not apply to viewing jobs (and the hundreds of viewable fields relating to each job) in the Job Directory window. Our intention is that you will able to view all Directory window fields for all jobs regardless of their last-saved date. This would generally satisfy requirements for maintaining appropriate job records indefinitely.

Note also that job pricing never moves if you “lock” it in the Quote Calculation window (always recommended).

# Chapter 17 : Networking - Basics

## Overview

See Quick guide to setting up a network (below), but be sure to read the following first.

In addition to running as a stand-alone application, StairBiz can operate in a networked environment to allow multiple users on multiple computers to share access to the same information.

##### How a StairBiz network works

StairBiz has three databases – the Jobs database (which includes jobs and clients), the Defaults database (which includes all defaults, including stair templates), and the Language database (which allows you to customise all words, phrases and sentences used throughout StairBiz, including menus, buttons and labels).

The Language database is always local (after you customize it, usually a one-off, simply redistribute it to the other client computers).

The Jobs database is held both locally and on the server. When not connected to the StairBiz network, you are using your local database. When you reconnect, StairBiz checks to see if you have added or amended any jobs while offline, and suggests you check them in to the server. In other words, StairBiz semi-automatically synchronizes your jobs (it’s automatic, but you have control of it). Once connected, you are using the server’s database and everyone is on the same page.

The Defaults database is held both locally and on the server, however you are always connected only to the local copy. A person with appropriate permissions can post their local copy to the server (thus updating the server’s copy). When any other local computer connects to the server, StairBiz recognizes that the server has an updated copy and will prompt the user to update (a click of the button and StairBiz does it automatically). StairBiz employs this “pseudo networking” of the Defaults database for its speed, efficiency and flexibility.

##### Networking Requirements

To run StairBiz in a network environment requires that each computer be a part of a TCP/IP based network. This can be accomplished using Microsoft networking on a LAN (Local Area Network) or over the internet through a dial-up account. This is all fairly standard stuff for 99% of computer networks.

One computer must be set up as a Server and running a copy of StairBiz Server. When a user logs into StairBiz, they can have their copy of StairBiz configured to connect to the network so that all Jobs are loaded and saved through the network to the StairBiz Server program.

Note: To use StairBiz networking over the internet, you will need to have a high-speed account (i.e. DSL, T1, ISDN or Cable Modem) with a **Static IP** to place your StairBiz server on. This connection of the server to the internet must always be on to allow access at any time by a dial-up or high-speed internet user.

## Database specifications (for techies only)

The StairBiz databases are Microsoft Jet (the same as used by Microsoft Access, so is 100% compatible with Access). We use ODBC and our own Client/Server protocol to ensure that there is only one managed connection to the database (i.e. our server is the only application with a connection to the database and it relays all of the data requests from the client).

## StairBiz Client

See also Chapter 2 : Installing StairBiz.

The StairBiz Client is the normal StairBiz software that you use to design and quote stairs (sometimes called your "local" StairBiz. When StairBiz runs in a stand-alone environment (i.e. no networking), it saves all of its jobs and defaults information to database files on the same computer. When it is connected to the StairBiz Server (described below), it is thought of as a client, and instead makes requests to the server for its jobs. Default information is stored on the server and updates local defaults as required.

## StairBiz Server

See also Chapter 2 : Installing StairBiz.

See also Quick guide to setting up a network (below), but be sure to read the following first.

In setting up your network, you should select a computer that is suitable to act as a Server. Typically this computer should not be one that is used heavily for desktop activities. This suggestion is more relevant with a larger network where there will be many users, but in an environment where only 2 or 3 people may be sharing jobs, an exception can be made and the server can be run on a normal desktop workstation.

Next, run the StairBiz installation on the computer you wish to install the server onto. During the installation, it is only necessary to select the option which will install the StairBiz Server. If the computer that is running the server will not be running the StairBiz client program, there is no need to install it.

Once the StairBiz Server has been installed, it can be started from the Start menu by selecting **StairBiz Server** under the **StairBiz** program folder. In a subsequent release, StairBiz server will give you the option to run each time Windows starts, but at this point you must start it yourself, or place a copy of the shortcut in the **Startup** folder (in XP this is normally in C:\Documents and Settings\All Users\Start Menu\Programs).

After starting **StairBiz Server**, an icon will appear in your system tray (the area on your windows taskbar next to the clock).



This icon indicates that the StairBiz server is running and also gives you a way to view its current activity or edit some of its settings. If the StairBiz server is not running on the network, users on other computers will not have access to the networked system.

To view the StairBiz Server window, simply double click this icon and the Server will be displayed.



This window simply displays the current activity of the StairBiz server. Generally it is not necessary to view this window unless performing Administrative troubleshooting. The top half of the window shows who is currently connected to the server, and the bottom half displays an activity log of all requests made from the **StairBiz Client** to the server program.

In the title bar of the window you will find the **IP Address** of the computer running the server. This piece of information is required by any of the **StairBiz Client** applications in order to be able to find and connect to the server. It is a good idea to write this number down to aid in setting up the remote client workstations.

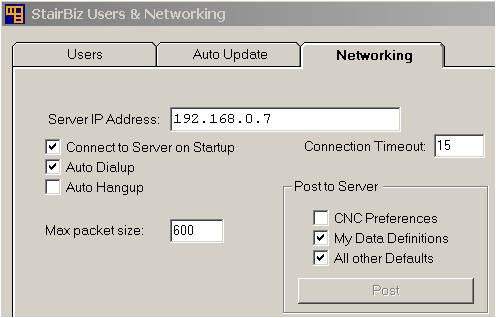
**Caution:** When you are finished viewing this window, do not click on the **X** in the upper right hand corner, as this will completely stop the Server from operating and make network access impossible. Instead, click on the **Minimize** icon so that the server will continue to run, but without being displayed on your screen. In a future version we will make this behaviour more obvious.

## Network Settings in StairBiz

Before a computer running StairBiz can connect to the StairBiz server it will first be necessary to edit a few settings in the StairBiz client. The StairBiz client will also need to be a part of the same Local Area Network as the StairBiz server or have access to it through a dial-up internet account.

The first step is to obtain the **IP Address** of the computer running the server (see section above for instructions on doing this).

Next go to the remote computer you wish to connect to the server with, and start the StairBiz client (The main StairBiz program). From Defaults menu ; **Users & Networking** menu-item.



##### Server IP Address

Here is where you would put the **IP Address** of the computer running the server (obtained from the StairBiz Server section above).

##### Connection Timeout

This value determines how long StairBiz will wait (in seconds) before determining that the server is not available. In a dial-up network, this may take longer and a setting of around 30-45 seconds would be advised. In a high-speed or LAN environment, 15 should be adequate.

##### Connect to Server on Startup

Selecting this option causes StairBiz to attempt to find the server every time you start the program. You would only want to use this setting if you were on a Local Area Network.

If you want to launch StairBiz and bypass the automatic connected, after entering your password in the Passwords window, hold the SHIFT key down while you press the “OK” button (ignore any messages you might get).

##### Auto Dialup

Use this setting if you will be accessing the server from a remote computer over the internet. If you are using a dialup account, this will aid you by using your default Windows Internet Dialler to establish an internet connection prior to connecting to the server.

##### Auto Hang-up

This setting will disconnect you from the internet when you close StairBiz or request a disconnect from the server.

##### Max Packet Size

This relates to the sending of large images (saved with the job) over the network. The value relates to bytes x 1000 (i.e. “600” means “600K”). When image size exceed this value, the image is split into chunks (packets) and sent separately. This reduces the possibility of “time-out” errors on slower or busy networks, where a very large packet doesn’t report back its success “in time”.

##### Post to Server

The CNC preferences, MyData definitions, Custom sheets and all other defaults are always held by your local computer (its faster, and you may want to disconnect from the network to go on site). However, an administrator may want to amend these on his own local computer, and then have everyone else updated with these changes.

He can tick the checkboxes as required, and click the **Post** button to update the server. When others on the network next connect to server, the server will notice that they have outdated files and prompt to download the later ones.

See Chapter 17 : Networking - Basics/ Defaults Networking/ Post to Server.

See Chapter 17 : Networking - Basics/ Defaults Networking/ Post to Server – MyData Definitions

## Connecting to the Network

After following the above instructions to configure StairBiz for network use, and after ensuring that the StairBiz server is running correctly you can attempt a connection to the server by returning to the **Process** window.

If you’ve just added the **Server Address** setting to your Users & Networking window you will now find that there are two new items in your Process window.

**

This new button (Connect or Disconnect) will allow you to connect to the server and the text message (green or red) will display your current connection status. If everything is set up correctly, you should now be able to click **Connect** to establish a server connection. If you connect successfully, the red text which will read **Not Connected** will change to a green **Connected** message. If you are using StairBiz on a Local Area Network, you should set your preferences to **Connect to Server on Startup**, which will cause you to be connected every time you use StairBiz.

If you are now connected to the StairBiz Server, you will be able to Open, Save and Close jobs over the network. Other connected StairBiz client users will also be able to interact with these same Jobs and Clients.

## Network Users

When you attempt to connect to the server, you must be logged in with a **User Account** that the server recognizes (See **How to Login a User** in the **Users Window** chapter). If the account you are using is not recognized by the server, your connection request will be refused.

Whenever you make a successful connection with the server, the **Users List** on your local computer will be synchronized with the **Users List** on the server. Any new users that have been added on the local computer will be uploaded, and any new users that were created elsewhere in the network will be downloaded to your local computer.

If you are trying to connect to the server and you are logged in with a User Account that is not yet on the server, you will not be able to connect. The solution to this is to log in using the **\_Admin** system account (which will always be recognized by the server), then connect to the server. This will cause the User Accounts to be synchronized, allowing you to connect with the previous User Account next time around.

See Users Window.

## Network Troubleshooting

#### Version Errors:

If you update the version of any StairBiz on the network, or the server, you must update all of them. All copies of StairBiz, and the StairBiz server program, must be running the same version.

#### Running CLIENT StairBiz on the server computer:

If you run a CLIENT copy of StairBiz on the server computer, you cannot do auto-updates. You must do a manual update on the server and on each other client computer.

#### Error Messages:

**"Error connecting to server, Invalid user name"**

The user account for this user is in the Jobs database on the local computer (probably because it was created there while not connected to the server), but it is not in the server’s Jobs database. Log into StairBiz on the local computer using either the admin password (the registration password that comes with the license) or a user password that has admin privileges known to work. Then connect to the server and StairBiz will synchronize the user accounts. After that you will be able to connect to the server when logged in to StairBiz using your own user account password.

**“Error connecting to server. Server not found”**

If you are set to auto-connect on start of StairBiz, and StairBiz can’t find or connect to the server, StairBiz will alert you and automatically connect you to your local databases.

#### Other problems connecting to the server:

There is a difference between a "connection" problem and a "database" problem. However, sometimes they can have the same symptoms.

For database problems, see Chapter 21: Database Problems and Repairs

For connection problems, see the following.

If you are not able to connect to the server from your client copy of StairBiz, please run through each item in the following check-list before contacting support. One of more of these items might solve the problem. One of more of these items might indicate to you or to support where to look further for the resolution. In almost all cases these a simply the steps that we would suggest to you if you contacted support:

**Valid IP address**

On the server computer, open the StairBiz Server program (C:\StairBiz Program\Server\StairBizServer.exe) and make a note of the IP address shown in the title bar at the top of the window.

On your client StairBiz, from the Defaults menu open the Users and Networking window (**Networking** tab) and be sure that the IP address shown is the same.

**Reboot**

Re-boot both the local computer and the server computer. Don't forget to re-launch the StairBiz Server program at ...

C:\StairBiz Program\Server\StairBizServer.exe

and be sure there is only ONE StairBizServer.exe program running.

**Reinstall**

Reinstall the full StairBiz (File #1 from the downloads page of our web site) on both the client computer and the server computer. This should not overwrite your databases or defaults, but make a back-up just in case.

#### Defaults are not updating on a workstation:

See Quick Guide to setting up a StairBiz network / Before you start.

If everything there is OK, quit StairBiz, then trash (delete) the following file (but read the note below first):

StairBiz Program\Defaults\StairBiz Defaults.INF

NOTE: Be sure you trash only the .INI file. If file extensions are not shown in this folder for any or all files, it’s best to set Explorer to show the file extensions (Tool menu/ Folder Options/ View tab/ UNTICK "Hide extensions for known file types". Note also that this .INI file is only 1K in size.

Re-launch StairBiz.

## Defaults Networking

Defaults are always held by your local computer (its faster, and you may want to disconnect from the network to go on site). However, an administrator may want to amend these on his own local computer, and then have everyone else updated with these changes. The following discussed how this is done.

#### Where are the defaults held

Most of your default settings are held in the Defaults database. This file is usually found at:

C:\StairBiz Program\Defaults\StairBiz Defaults.mdb

The defaults database is always held locally (on the client computer), but a copy of the most recent valid version can be maintained on the StairBiz server.

The same applies to Custom sheets - they are held locally in the folder at:

C:\StairBiz Program\Custom Sheets

When a client computer connects to the network, StairBiz does a check to see if the defaults and custom sheets on the server are more recent than those on the local computer. If it is, StairBiz asks if you wish to update your local copies from the copies on the server (the answer is “Yes”).

#### Post to Server

For the server to hold the most recent defaults, someone has to put the most recent defaults onto the server. This is normally done by only one person with StairBiz administrative privileges (i.e. the person usually making the changes to the defaults).

If changes have been made to the defaults, go to the Users & Networking window (Networking tab), tick the defaults categories you wish to network, and click the **Post to Server** button.

If the **Post** button is not active, it means either you are not connected to the network, or you do not have permission for this (in which case you need Administrative privileges and the appropriate buttons set in the Permissions tab of the User Permissions window for your account in the Users & Networking window).

We recommend that only one person in your organization has permission to update the server’s defaults (this is not a rule, but to have more than one person doing this requires care that good defaults are not overridden by bad defaults).

Note that when you post defaults to the server, all existing defaults in the server (i.e. StairBiz Defaults database and all Custom sheets) are deleted prior to the new defaults and custom sheets being posted to the server.

When you post to the server, all Custom sheets in the local Custom Sheets folder are uploaded to the server, whether or not they are included in the Custom Menus window.

Note that there is a file in the Server folder called 'StairBiz Defaults.INF'. It holds the date and time of the last post of defaults to the server. StairBiz relies on this file to determine whether or not a local computer requires a download of defaults and Custom sheets from the server. So if you manually put a new Custom sheet into the server's Custom Sheets folder, the client computers will not detect it because the date in 'StairBiz Defaults.INF' was not adjusted accordingly.

Also see Chapter 22 : Miscellaneous topics; Export/ Import of Design Templates.

#### Post to Server – MyData Definitions

The fields you create for MyData definitions were once stored in the Defaults database, but these days they are stored in the Jobs Database. You might (rarely) use this to merge MyData definitions FOR THE CURRENT JOB into the server’s jobs database (there may be times – rarely – that the MyData definitions for the current job are not identical to those in the server job’s database).

#### Download from Server

When StairBiz on a local computer connects to the StairBiz server, it checks to see if there is a more recent copy of the defaults residing on the server. If there is, you will be asked if you want to download them (and usually the answer is yes).

The way StairBiz determines if the server's defaults are more recent than your local defaults is by setting or reading a date/time stamp in a file called StairBiz Defaults.INF (this file opens in Notepad, so feel free to open it and see what's there).

There is such a file on each client computer, at:

C:\StairBiz Program\Defaults\

There is the same file on the server computer, at:

C:\StairBiz Program\Server\

When an administrator posts the defaults to the server, StairBiz time-stamps this file on both the server and his local. When any other client computer connects to the server, StairBiz compares the local's time stamp with the server's time stamp. If the server's is more recent, it will ask if you want to download the defaults.

#### CNC Preferences

Applies only to the CNC modules. CNC Preferences are the settings you hold in your CNC Preferences window, and the settings in the CNC Bed window the last time you closed it.

These settings are actually held in the StairBiz Jobs database.

Ticking this option will send your local CNC Preferences settings to the StairBiz Jobs database on the server. This way other client computers have immediate access to the changes (i.e. they don't have to wait until the next time they launch StairBiz and get a defaults update).

#### MyData Definitions

Applies only if you are using the MyData window. MyData settings are actually held in the StairBiz Jobs database. Ticking this option will send your local MyData default settings to the StairBiz Jobs database on the server.

#### All Other Defaults

CNC Preferences and MyData definitions are held in your job database (see above).

Your client list (see the **Update Server** button in the Client List window) are also held in the Jobs Database.

Your Custom Sheets are held in separate files in the Custom Sheets folder.

All other defaults are held in your Defaults database.

With the **All Other Defaults** checkbox ticked, all other defaults are posted to the server. This includes your Custom Sheets (see below).

#### Custom Sheets:

Custom sheets are networked in the same way as the Defaults database. When you post the defaults to the server, all the custom sheets currently on the server are first killed. All local custom sheets are then uploaded to the server. StairBiz does *not* check to see if existing files might be identical (in order to expedite the transfer).

When a client computer thereafter launches StairBiz and is invited to download the latest defaults from the server, the local Custom Sheets folder becomes an exact copy of the server's Custom Sheets folder (i.e. nothing more or less). StairBiz *does* check to see if existing files might be identical (identical files are not downloaded in order to expedite the transfer).

If this doesn’t appear to be working, consider the following:

First, it is assumed you have added the new Custom Sheet to your menu (Custom Menu window from the Defaults menu).

When you add the sheet to the menu, this setting is held in your Defaults database. Because this database is always local, this setting for others in the network would not automatically update.

For others in the network to have the sheet added to their menu you need to either post your defaults to the server (and they would need to update upon launching StairBiz), or they would need to add it their own menu locally (using their own Custom Menus window).

Having done the above, if they still can’t access the custom sheet go into the Users & Network window, select their account, open the Permissions window for this account, select the Custom Sheets tab, and check that they have permission to see this custom sheet.

## Jobs Networking

#### Sending local jobs to the server:

The Jobs database is held both locally and on the server. When NOT connected to the StairBiz network, you are using your local database. When you reconnect, StairBiz checks to see if you have added or amended any jobs while offline, and (if any) gives the following message:

*You have offline jobs that you may wish to check-in to the server.  
Go to the Directory window when you are ready to do this.  
Offline Jobs: [Shows number of offline jobs]*

To see these jobs, in the Directory window click the **View Offline Jobs** toolbar button.

The number of “off-line” jobs is always the total number of jobs in your local jobs database. These will consist of two types of jobs:

1. Jobs that have been created off-line and probably need to be checked in to the server.
2. Jobs that have been “acquired” from the server (and locked on the server so that nobody else can modify them while ever you have control of them).

To send any or all jobs to the server, simply select the jobs (for multiple jobs you can use the CONTROL or SHIFT keys when selecting) and click the **Check in Job(s)** button. They will disappear from the current (local) Directory window.

#### Acquiring server jobs to your local workstation:

If you want to go off-line, and you want to take some server jobs with you to work on while not connected to the network, before disconnecting from the server select those jobs in the Directory window then click the **Acquire Job to Local** toolbar button. The jobs will stay in the server database (so will still be listed in the Directory window) but are sent to your local jobs database (you will see them if you click the **View Offline Jobs** toolbar button).

Such “acquired” jobs are “locked” in the server’s jobs database. They can be opened and viewed (you will be alerted that the job is locked and by whom and when). If you have the appropriate permissions (see Permissions window) you can change and save these jobs (you will again be alerted). If the user who acquired the job tries to check his job back in, he will be alerted that the job has been changed since he acquired it. It he has the appropriate permissions he can override this warning, otherwise he will not be allowed to check the job back in.

There is an exception to the above, in that if the local job is changed in one aspect (say the Design), and the server job is changed in a completely different aspect (say the Client window or Details window), then StairBiz will allow the check-in without complaining.

#### Locked server jobs:

As indicated above, server jobs that are acquired by a local computer are “locked”. If for some reason you want to unlock a job (perhaps for whatever reason the computer that acquired the job can’t check the job back in), select the job(s) in the directory window (on-line) and click the **Unlock Job** toolbar button. You will need appropriate permissions to do this.

#### Server jobs can be “local”:

When you open a server job, it loads that job into your local database. You work and save it in “local” mode (this speeds up the whole networking efficiency). Even if you save and close the job (at which time the server is updated), it is still “local” in that a copy of it is held on your local computer. If you re-open the job, it checks if there is a local copy and, if so, if that local copy is more recent than the server copy (it does some other fancy checks to see if anyone else has used the job since you first opened it). If there is no conflicts by other users, and your local copy is more recent, it will simply open the local copy for you to work on.

This can be a little confusing in that if you work on an acquired job in local mode, and do not check the job back in to the server, if you go “on-line” and open the job, it actually opens the local copy (because it’s the more recent of the two copies and the server copy has not been compromised by other users).

#### How to tell if a server job is locked:

You can tell if a server job is locked (i.e. acquired) other than by trying to open the job. Simply include the **Date Locked** column in your Directory window – if the job is locked it will show a date. There is also a **Locked By** column which can show you who acquired the job.

#### How to tell if a local job needs to be checked in:

As mentioned above, there will normally just be two types of jobs in your local jobs database

1. Jobs that have been created off-line.
2. Jobs that have been “acquired”.

Once again, use the **Date Locked** and/or **Locked By** columns in your Directory window to tell the difference (if there’s a date, the job is acquired, otherwise it was created off-line and has never been checked in). Jobs created off-line probably need to be checked in. Jobs that have been acquired will need to be checked back in if you have finished doing what you needed to do to them while off-line.

# Chapter 18 : Networking - Installations

The following regards installing, un-installing and moving StairBiz licenses on server and client computers that are networked. For more information on installing, un-installing etc. see Chapter 2.

## Setting up a StairBiz network

The following is a quick guide to setting up a StairBiz network.

Note that to run StairBiz on a network your server needs a **Static IP address** (not a Dynamic IP address). This is the internet address of the computer, and your network must be set up so that this address remains constant. If in doubt, check with the person who set up the network.

#### Terminology:

**Workstation:** One or more computers on which you do your work, and which, when networked, may access the common files, databases and applications on the server computer.

**Server computer:** The single computer set up as your server to hold files, databases and applications used by the workstations. This computer may or may not ALSO be a workstation (depending on the way it’s set up).

**Dedicated server computer:** A server computer which does NOT also act as a workstation (it is dedicated to only serve). In other words, you will not be sitting at this computer using StairBiz.

**StairBiz client application:** An application called ‘StairBiz.exe’ which runs StairBiz on the workstations or on stand-alone computers (and may also be run on the server computer, although more likely not). This is the same program whether or not you are networked (i.e. the standard StairBiz program).

**StairBiz server application:** An application on the server computer called ‘StairBiz Server.exe’. It manages how StairBiz Client Applications on workstations access StairBiz databases on the server computer.

#### Before you start:

On the server computer and on each workstation, do steps 1 and 2 from Chapter 2; Installing StairBiz for the first time.

#### Setting up the server computer:

**1.** Do a backup of your most current valid Defaults folder (usually ‘C:\StairBiz Program\Defaults’).

**2.** Download the latest full StairBiz installation program (File #1) from the Downloads page of our web site. The downloaded file name will start with ‘StairBizSetup’ - place it anywhere on the server computer.

**3.** If you have a dedicated server computer, read 3(A) and skip 3(B). If your server is also a workstation (running StairBiz) read 3(B) and skip 3(A).

**3(A).** Run this installation program on the server computer. During the installation, when you get to the ‘Select Components’ page, tick “StairBiz Server” and untick ‘StairBiz Client Program’.

**3(B).** Run this installation program on the server computer. During the installation, when you get to the ‘Select Components’ page, tick both ‘StairBiz Client Program’ and ‘StairBiz Server’. If you have already installed StairBiz on this computer (i.e. the StairBiz client application), don’t worry – the installation will not overwrite your existing defaults, and besides, you have a BACKUP, right? Also don’t worry if the current StairBiz version is more recent than the current full installation – we will be updating it shortly.

**4.** After the installation is complete, run the StairBiz server application by double-clicking the file ‘C:\StairBiz Program\Server\StairBiz Server.exe’.

You do not need a license or password to use the StairBiz server application.

No window will open, but the StairBiz server icon will appear in your task tray (bottom-right of your screen).

**5.** Double-click this icon – the StairBiz Server window opens.

Make a note of the IP address shown in the title bar of this window (a series of numbers with some decimal marks interspersed between them). You’ll need this address a little later.

When you’re done, shut down the StairBiz server application by clicking the ‘Close’ box at the top right. You will be asked if you’re sure you want to close it – click ‘Yes’.

**6.** Download the latest StairBiz update program (File #4) from the Downloads page of our web site. The downloaded file name will start with ‘StairBizUpdate’. Run this update on the server. Do not trash this update program (we use it later on the workstations).

**7.**  After the update is complete, re-launch the StairBiz server application on the server computer by double-clicking the file ‘C:\StairBiz Program\Server\StairBiz Server.exe’.

#### Setting up the workstations:

On EACH workstation running StairBiz (including the server if it is also used as a workstation for StairBiz), do as follows:

NOTE: Start with the MAIN workstation (the one with the most current valid StairBiz defaults database).

**1.** Shut down StairBiz if it is running.

**2.** Using the abovementioned StairBiz Update program (File #4 from the Downloads page of our web site), update StairBiz. We do this because the server and all workstations must have the same version installed. If you are also running the server computer as a workstation for StairBiz, you have already done this update on the server computer (see above) – there is no need to do it again on the server computer.

**3.** Launch StairBiz. Do not use your personal password – instead use the System password we provided for that computer (this is a once only thing – after the first connect to the server, which synchronizes the workstation’s current User Account(s) with the server, you can return to using your personal password). NOTE that an alternative to entering the System password on every workstation is to enter it on the first workstation and then set up the User Accounts for every other workstation on that computer.

**4.** From the Defaults menu, open the Users & Networking window (Networking tab).

**5.** Next to **Server IP Address**, enter the IP address of your server (you made a note of this address – see above).

**6.** Tick **Connect to Server on Startup** and untick the other two.

**7.** In the Process window, click the **Connect** button (bottom/left of the window). If you get the error message **"Error connecting to server, Invalid user name"**, see step 3 (above).

**8.** Open the Directory window and click **View Offline Jobs**.

Select all jobs (select the first row, hold down Shift key and select last row).

Click **Check in Job**.

Un-select **View Offline Jobs** to see all jobs on the server.

**9.** If this is the (first) MAIN workstation (the one with the most current valid StairBiz defaults database), before setting up the other workstations, go now to the next heading (Post defaults to the server)

#### Launching the server on start-up:

If you want the StairBiz Server.exe program to automatically launch when you start the server computer, put a shortcut to it in the Startup folder. On an XP this folder is usually located at:

C:\Documents and Settings\All Users\Start Menu\Programs\Startup

#### Post defaults to the server:

On your main workstation computer (the one with the most current valid StairBiz defaults database), and while connected, do as follows:

**1.** From the Defaults menu, open the Users & Networking window (Networking tab).

Tick all three options in the “Post to Server” frame, and click the ‘Post’ button to send a copy of all your defaults to the server. You will need to do this each time you change your local defaults and want to update the other workstations.

**2.** Open the Client List window.

Click the “Update Server” button

After doing the above, when each other workstation connects to the server, they will be alerted that there are newer defaults on the server and will be given the opportunity to download them (unlike the Jobs database, the Defaults database is always held locally – the local database is simply kept current by the server).

See Chapter 17 : Networking - Basics/ Defaults Networking/ Post to Server

See Chapter 17 : Networking - Basics/ Defaults Networking/ Post to Server – MyData Definitions

#### Auto Updates:

Note that if you do NOT have a dedicated server (i.e. if you also run the StairBiz client application on the server) you will not be able to use the StairBiz Auto Update feature – you will need to update manually. When you do so, you must always update the server and all client applications at the same time.

If you have a dedicated server, do as follows:

**1.** On the main (administrator’s) computer, open the Users & Networking window (Defaults menu), select your account, click the ‘Permissions’ button, select the ‘Permissions’ tab, scroll to the top of the list, and tick ‘Auto Update’.

This tells your computer that it can do Auto Updates. If anyone else had this permission, StairBiz will turn off their permission (it can only be done by one computer).

**2.** Click OK to close this window then back in the StairBiz Users window select the ‘Auto Update’ tab.

**3.** If the ‘Check for a new version …” pull-down list is disabled, StairBiz hasn’t had a chance to reconcile with the other users yet – quit out of StairBiz then come back to here.

**4.** Now set your auto-update preferences.

Also see Chapter 16 : Updating StairBiz/ Auto Updates

## Adding a new computer to a StairBiz network

This assumes the new computer is on a Windows network - if it is not, go to the section **New computer (not on a network)**. This also assumes that the new computer is not replacing an existing one – if it is go to **Replacing existing computer (on a network)**.

Otherwise …

If you acquire a new license for a new computer, to set up this workstation for connecting to an existing StairBiz network, see **Before you Start** (in ‘Setting up a StairBiz network’, above) and then do as follows:

**1.** On an existing StairBiz computer with admin privileges (and connected to the StairBiz network), set up a user account (including a personal password) for the new user. When the new computer connects to the StairBiz server (see below) it will get this information from the server.

**2.** Install StairBiz on the new computer using the full installation (File #1 from our downloads page).

**3.** The server and all workstations must have the same version installed. If the full installation has a lower version than you are currently running on the other computers, first launch StairBiz, then quit – this registers the new installation. Then download and run the StairBiz Update program (File #4 from the Downloads page of our web site).

**4.** Launch StairBiz. If you have a Registration password (i.e. the one that we send you), use that to log in rather than any personal password you may have created.

**5.** Open the Directory window and delete any existing sample jobs (the StairBiz installation comes with a few sample jobs which you won’t need). If you’ve already created some of your own jobs on this computer, you can leave them there (you can check them in to the server later if you like).

**6.** From the Defaults menu, open the Users & Networking window (Networking tab).

**7.** Next to ‘Server Address’, enter the IP address of your server (if you don’t know it, check it on any other StairBiz computer already set up for networking, or open the StairBiz Server program on the server computer and see it shown at the top of the window).

**8.** Tick “Connect to Server on Startup” and untick the other two.

**9.** Close the Preferences window. Click the ‘Connect’ button in the Process window. StairBiz will connect to the server and may prompt you to download newer defaults. If asked, answer yes. If this happens, StairBiz will restart and you will need to use your registration password (the one that we send you) one more time.

**10.** Quit StairBiz.

**11.** Re-launch StairBiz and enter your personal password (created in step 1 above).

You should be connected to the server and up and running.

## Re-installing StairBiz after computer crash (client only)

This assumes the computer is currently on a Windows network - if it is not, see Chapter 2; Re-installing StairBiz after computer crash. Otherwise …

This assumes the computer is only being used as a client - if it is being used as both a client and a server, see the next section; Re-installing StairBiz after computer crash (client and server).

If your C drive has crashed and you have re-built it (i.e. re-installed the Windows operating system), and you now need to reinstate StairBiz to its original condition, do as follows:

1. Install StairBiz as if for the first time (see Installing StairBiz for the first time).
2. The server and all workstations must have the same version installed. If the full installation has a lower version than you are currently running on the other computers, first launch StairBiz, then quit – this registers the new installation. Then download and run the StairBiz Update program (File #4 from the Downloads page of our web site).
3. Copy the following folders from you back-up (if you don’t have a back-up, read on) and place them in the StairBiz Program folder (overwriting the existing files):  
    Defaults  
    Custom Sheets  
    Jobs (if relevant – this folder only contains jobs that you have exported)  
    CNC Files (if relevant)

If you do not have a back-up, don’t be too concerned – the most important defaults database is stored on the StairBiz server and will be downloaded when you connect. Alternatively you could grab a Defaults folder from some other client computer and use it to replace your existing.

1. Launch StairBiz
2. From the Defaults menu, open the Users & Networking window (Networking tab).
3. Next to ‘Server Address’, enter the IP address of your server (if you don’t know it, check it on any other StairBiz computer already set up for networking, or open the StairBiz Server program on the server computer and see it shown at the top of the window).
4. Tick “Connect to Server on Startup” and untick the other two.
5. Close the Preferences window. Click the ‘Connect’ button in the Process window. StairBiz will connect to the server and may prompt you to download newer defaults. If asked, answer yes. If this happens, StairBiz will restart.
6. Contact StairBiz for a replacement password (you will need to provide your current Software Code). As it is normally not possible to un-register your previous license, We will un-register it programmatically within StairBiz.

You should be connected to the server and up and running.

## Re-installing StairBiz after computer crash (client and server)

This assumes the computer is currently on a Windows network.

The following applies to a computer which is both a StairBiz client computer and the StairBiz Server computer (i.e. you are using a licensed copy of StairBiz on the server computer).

If your C drive has crashed and you have re-built it (i.e. re-installed the Windows operating system), and you now need to reinstate StairBiz and the StairBiz server to its original condition, do as follows:

1. Download the latest full StairBiz installation program (File #1) from the Downloads page of our web site. The downloaded file name will start with ‘StairBizSetup’ - place it anywhere on the server computer.
2. Run this installation program on the server computer. During the installation, when you get to the ‘Select Components’ page, tick both ‘StairBiz Client Program’ and ‘StairBiz Server’.
3. If you have a recent back-up of your entire ‘C:\StairBiz Program\Server’ folder, replace the existing folder with that from your back-up (i.e. copy the entire back-up ‘Server’ folder to your clip-board and paste it into the C:\StairBiz Program folder, replacing the existing).

If you do NOT have a back-up of this entire folder, get a copy of the most recent of the following files:

StairBiz Jobs.mdb  
 StairBiz Defaults.mdb

and a copy of the most recent of the following folders:

Custom Sheets  
 Job Archive

and place or paste them into the ‘C:\StairBiz Program\Server’ folder (replacing any existing – there may or may not be any existing).

1. If you have a recent back-up of your entire ‘C:\StairBiz Program\Defaults’ folder, replace the existing folder with that from your back-up (i.e. copy the entire back-up ‘Defaults’ folder to your clip-board and paste it into the C:\StairBiz Program folder, replacing the existing).

If you do not have a back-up of this folder, don’t worry – the most important files are now in the Server folder and StairBiz will use those.

1. The server and all workstations must have the same version installed. If the full installation has a lower version than you are currently running on the other computers, first launch StairBiz, then quit – this registers the new installation. Then download and run the StairBiz Update program (File #4 from the Downloads page of our web site).
2. Run the StairBiz server application by double-clicking the file ‘C:\StairBiz Program\Server\StairBiz Server.exe’. No window will open, but the StairBiz server icon will appear in your task tray (bottom-right of your screen).
3. Double-click this icon – the StairBiz Server window opens. Make a note of the IP address shown in the title bar of this window (a series of numbers with some decimal marks interspersed between them). You’ll need this address a little later.
4. Launch StairBiz (usually by double-clicking the ‘StairBiz’ shortcut on your desktop).
5. From the Defaults menu, open the Users & Networking window (Networking tab).
6. Next to ‘Server Address’, enter the IP address of your server (if you don’t know it, check it on any other StairBiz computer already set up for networking, or open the StairBiz Server program on the server computer and see it shown at the top of the window).
7. Tick “Connect to Server on Startup” and untick the other two.
8. Close the Preferences window. Click the ‘Connect’ button in the Process window. StairBiz will connect to the server and may prompt you to download newer defaults. If asked, answer yes. If this happens, StairBiz will restart.
9. Contact StairBiz for a replacement password (you will need to provide your current Software Code). As it is normally not possible to un-register your previous license, We will un-register it programmatically within StairBiz.
10. If the IP address of this server computer has changed from what it was before the crash (which is quite likely), repeat steps 9 & 10 on each of the other StairBiz client computers – they will need to know the new IP address in order to network to this new server.

You should now be up and running.

## Replacing existing server computer

The following shows how to change your server computer (e.g. you have just purchased a new computer to replace your current server computer).

#### Before you start:

On the server computer, check that the Time/Date setting is correct - see this same heading in **Quick guide to setting up a StairBiz network** (above).

#### Setting up the server computer:

**1.**  From the OLD server computer, get a copy of the following folder:

**C:\StairBiz Program**

Put this folder on the C drive of the new server computer.

**2.** Download the latest full StairBiz installation program (File #1) from the Downloads page of our web site. The downloaded file name will start with ‘StairBizSetup’ - place it anywhere on the server computer.

**3.** If the new computer is to be a dedicated server computer, read 3(A) and skip 3(B). If it is also a workstation (running StairBiz) read 3(B) and skip 3(A).

Note that the following installation will not overwrite your existing defaults (from step #1 above). Also don’t worry if the current StairBiz version is more recent than the current full installation – we will be updating it shortly.

**3(A).** Run this installation program on the server computer. During the installation, when you get to the ‘Select Components’ page, tick “StairBiz Server” and untick ‘StairBiz Client Program’.

**3(B).** Run this installation program on the server computer. During the installation, when you get to the ‘Select Components’ page, tick both ‘StairBiz Client Program’ and ‘StairBiz Server’.

**4.** After the installation is complete, run the StairBiz server application by double-clicking the file ‘C:\StairBiz Program\Server\StairBiz Server.exe’.

You do not need a license or password to use the StairBiz server application.

No window will open, but the StairBiz server icon will appear in your task tray (bottom-right of your screen).

**5.** Double-click this icon – the StairBiz Server window opens.

Make a note of the IP address shown in the title bar of this window (a series of numbers with some decimal marks interspersed between them). You’ll need this address a little later.

When you’re done, shut down the StairBiz server application by clicking the ‘Close’ box at the top right. You will be asked if you’re sure you want to close it – click ‘Yes’.

**6.** Check to see if File #4 (StairBiz update program) from our web site is more recent than the File #1 (StairBizSetup) which you used above. If it is, download it. The downloaded file name will start with ‘StairBizUpdate’. Run this update on the server. Do not trash this update program (we may use it later on the workstations).

**7.**  After the update is complete, re-launch the StairBiz server application on the server computer by double-clicking the file ‘C:\StairBiz Program\Server\StairBiz Server.exe’.

#### The workstations:

On EACH workstation running StairBiz (including the server if it is also used as a workstation for StairBiz), do as follows:

**1.** This first step only needs to be done if the StairBiz Update program (File #4 from the Downloads page of our web site) is a more recent version than is currently installed on this computer. If in doubt, do it anyway.

Shut down StairBiz if it is running (don’t shut down the server application).

Using the abovementioned StairBiz Update program (File #4), update StairBiz. We do this because the server and all workstations must have the same version installed. If you are also running the server computer as a workstation for StairBiz, you have already done this update on the server computer (see above) – there is no need to do it again on the server computer.

**2.** Launch StairBiz. If StairBiz is set to automatically connect on launch, you may get a message saying that the connection could not be made (your server computer now has a different IP address)

**3.** From the Defaults menu, open the Users & Networking window (Networking tab).

**4.** Next to ‘Server Address’, enter the IP address of your server (you made a note of this address – see above).

**5.** In the Process window, click the “Connect” button (bottom/left of the window).

## Replacing existing client computer

This assumes the new computer is on a network.

If you are also installing a new server computer, do that computer first (see **New Server Computer** above).

Do not uninstall StairBiz from the old computer until you have done all as follows:

It’s best to print the following steps, then tick them off as you go. Every step is important.

1. On the old computer (if it still works), check in any offline jobs you may have.
2. If you have already installed StairBiz on the new computer, just pretend that you have not, and do the following steps anyway.
3. Copy the ENTIRE 'StairBiz Program' folder from the C drive of the old computer to the C drive of the new computer. If the old computer has crashed, grab a copy from some other local computer.
4. Install the latest (most recent version) full StairBiz installation on the new computer - i.e. download and run File #1 from our <http://www.stair.biz/downloads.asp> page). You are installing over the top of the existing StairBiz Program folder (see the previous paragraph), but the installation won't overwrite the databases.
5. All computers, including the server, must be running the same version. You can download and run the Update (File #4) from our <http://www.stair.biz/downloads.asp> page.
6. Launch StairBiz.
7. You have one week to get a new password from us (see below). In the mean time you should be able to use your existing User password (you copied across your existing defaults, so this should be still valid).
8. If you are set to automatically connect to the server, you may get a message that the connection failed – that’s OK for now - see the next step.
9. Open the Users & Networking window and enter the IP address for your server. If you don’t know it, open the StairBiz Server window on the server computer – it’s shown up the top.
10. Connect to the server (click the **Connect** button in the Process window).

**TO REGISTER YOUR NEW STAIRBIZ:**

1. On the new computer, launch StairBiz and in the Passwords window, click the "Passwords" button, and note the Software Code shown.
2. Do either 12A or 12B or 12C (i.e. only one of them) ...

1. **Do this if you want to expedite the whole process over the phone (and you know John is available):**

* In the OLD StairBiz, enter "UNREG" as your password. StairBiz will give you an un-registration verification code. Write it down.
* Email me both the Software Code and the un-registration verification code, then phone me.

Or ...

1. **Do this if you need to use the old computer between now and when you get the new password:**

* Send me the Software Code mentioned in (3). Use normal email. I will send you a new temporary registration password. Enter this into the Password window on your new computer.
* In the OLD StairBiz, enter "UNREG" as your password. StairBiz will give you an un-registration verification code. Write it down.
* In the NEW Passwords window, click the "Passwords" button and email me the Software Code shown there (it will be slightly different to previously), and also the un-registration verification code mentioned above. I will email back a new permanent password.

Or ...

1. **Do this if you do NOT need to use the old computer between now and when you get the new password:**

* In the OLD StairBiz, enter "UNREG" as your password. StairBiz will give you an un-registration verification code. Write it down.
* Email me the Software Code mentioned in (3), and also the un-registration verification code mentioned above. I will email back a new permanent password.

# 

# Chapter 19 : The StairBiz Folder

## Overview

Items on your disc can be loosely put under three categories: **Folders**, which simply act as a container for other things; **Applications** (sometimes called executables – thus the .exe file extension) which are the programs you use to so things; **Files** which (loosely speaking) are things that an application creates and stores on disc.

StairBiz folders, applications and files are organized as follows:

### StairBiz folder

The **StairBiz folder** contains all the applications, documents and files related to the StairBiz program, as follows:

**StairBiz.exe** application  
The application that processes each individual job. Double-click it to launch the application.

**INSTALL.LOG** file  
A file relating to the installation of StairBiz which lists files installed and their dependencies. It is not for use by the user, and should not be moved or deleted.

**UNWISE.EXE** file  
A file relating to the un-installation of StairBiz. It is called when you uninstall StairBiz from Add/Remove Programs in your systems Control Panel.

**End User License Agreement.rtf**

A file which can be opened by MS Word and various other word-processing applications containing the terms and conditions which you must agree to before using StairBiz. If you do not have this file, or cannot open it, please contact support. This file can also be viewed from the Help menu in StairBiz.

**ReadMe.txt**

A file which can be opened by any word-processing application containing text shown in the ReadMe section of the StairBiz installation.

**Users Manual.doc**

A file which can be opened by MS Word containing the full StairBiz documentation. It may be more recent than the on-screen help. It is also useful for printing and customizing for your own terminology.

**Users Manual CNC.doc**

Documentation pertaining to CNC is not in the User's Manual – it is here.

**Custom Editor Help.doc**

Documentation pertaining to Custom Editor is not in the User's Manual – it is here.

**Install Icon.ico**

A file that the installation uses – not used by the user.

**Version.ini**

A file used by StairBiz to track versions – not used by the user.

**CurrentDefaults.INI**

A file used by StairBiz to track versions – not used by the user.

**StairBizLaunchAgent.exe**

A file used by StairBiz to do auto updates – not used by the user.

**Defaults** folder (see below)

**CNC Files** folder (see below)

**Custom Sheets** folder (see below)

**Jobs** folder (see below)

**Server** folder (only if this computer is a StairBiz server; see below)

### Defaults folder

Holds various files that relate to the StairBiz application (they cannot be opened directly, and none should ever be deleted) as follows:

* **StairBiz Jobs.mdb**The database file which holds all jobs and your client list.
* **StairBiz Defaults.mdb**The database file which holds all defaults, preferences, templates etc.
* **lingo.mdb**A database file which holds all terminology and language translations made in the Language window.
* **othername.mdb**StairBiz assumes any mdb file other than the three above is a jobs archive file.
* **Lingo.cfg**A file which holds data needed by the Language window.
* **StairBiz 3DTextures.inc**A file which holds data needed to render textures in the 3D window.
* **steps.tb** and **UserTools.tb**Files which hold your latest position and contents for the StairBiz tool bar (normally shown at the very left of your screen). Steps.tb holds the default settings and is only used when you click "reset" in the toolbar.
* **Pss.rtf** and **WelBiz.rtf**Files which hold the text for various messages shown in StairBiz.
* **Images** folder  
  Holds some image files used by the application.
* **DirectoryWinCfg.DAT**Holds your local Directory window Views (your shared Views are held in the Defaults database).

### CNC Files folder

The default folder where CNC files created in the CNC Bed window are exported to.

### Custom Sheets folder

The folder where the Custom sheet files created in the Custom Editor window are kept.

### Jobs folder

The default folder for jobs which are exported from StairBiz as individual files (i.e. not stored in the database as usual).

### Server

Exists only if you installed the StairBiz server. Note that not all the following files will be shown when you first install the server – some are added when you first run the server, and some are added which you first post defaults to the server.

* **StairBizLaunchAgent.exe**A program used by StairBiz for auto updates – not used by the user.
* **StairBizServer.exe**The StairBiz server program. It needs to be launched before client computers can connect to the StairBiz network. It doesn’t normally open any window, but the icon sits in the application tray at the bottom of your screen – to open the window, double-click this icon. To quit the server, click the close button at the top-right of the window.
* **StairBiz Jobs.mdb**The database file which holds your jobs, client list and CNC Preferences. All server computers connect to this database in real time.
* **StairBiz Defaults.mdb**The database file which holds all defaults, preferences, templates etc. This file is created/updated when the user clicks the **Update Defaults** button in the Preferences window on local computers. It is not used directly by the client computers, but client computers upload this file if their local copy is older.
* **AutoUpdate**A folder used by StairBiz to do auto-updates – not used by the user.
* **Custom Sheets**A folder for storing Custom sheets for sharing with everyone on the network. This folder is created/updated when the user clicks the **Update Defaults** button in the Preferences window on local computers. It is not used directly by the client computers, but client computers upload these Custom sheets if their local copies are older.
* **Job Archive**A folder containing any archive files you create on your local computer.
* **Old Logs**A folder used to store logs (server activity reports) previous to the current one.
* **SBServer.log**The most recent server log (server activity report).
* **SBSFault.log**A file which holds a record of errors occurring in server/client transactions.

## Backing up your files

See Chapter 22: Backing up your files

## Different copies of the same file

There is nothing to stop you maintaining different copies of a file. For example, you could have different copies of the **StairBiz Defaults.mdb** file containing different settings. To switch to an alternative file, remove the existing file from the folder, and then move the alternative file to the folder (or you can do it by changing file names).

Note that the **StairBiz Defaults.mdb** file and the **StairBiz Jobs.mdb** files work completely independently of each other. They do not need to stay synchronized.

Swapping files can get rather confusing (and necessary only in very unusual circumstances) so be careful. Be sure that StairBiz is not running when you do this.

# Chapter 20 : What to do if there’s a problem

Also see Chapter 13; Email Support window.

Bugs are a normal part of using computers, however, that does NOT make them ordinarily acceptable. StairBiz Support wants to know about ALL of them. If anything happens which doesn't seem right/accurate/normal, or if something happens which is just plain irritating, please notify us.

The thing about a program bug is that if you fix it, it's fixed for all, and it's fixed forever (usually!!). See Contacting Support.

Note that we usually cannot fix a problem if you don’t supply accurate details of the problem.

## Contacting Support

### When to contact Support

Contact Support if:

* StairBiz crashes and you are able to explain the circumstances.
* You get an error message and you are able to explain the circumstances or supply the job file.
* There is a question about the operation or performance of the program and

1. the question does not relate to the workings of your computer hardware, the operating system, or 3rd party software programs
2. the answer to this question is not covered in any of the StairBiz documentation, or is covered but is ambiguous

Note that it is up to you to familiarize yourself with the StairBiz documentation. StairBiz Support is not an alternative to being trained or training yourself in the use of the program.

### Who should contact support?

It is a condition of your Software Agreement that there should be one key person in your organization through whom all problems and questions are directed. It is unrealistic that many different people in your organization should be contacting Support.

### Will I be charged for support?

Where StairBiz is misbehaving and the user is operating the program according to the documentation (i.e. the program needs fixing), obviously there is no charge for support.

However, note that we interpret “misbehaving” loosely. Many of our users can get StairBiz to do useful things that we never anticipated. So we had the choice between allowing it, or allowing only those things that we anticipate and can totally control. We have opted for the former, in your interests, and so you may occasionally get “bad behaviour” which is, on the whole, on average, ultimately in your interests and needs your understanding and forgiveness. The same applies with features which may appear to be “half-baked”. Often we get requests for features that we can perhaps (because of other time or resource priorities) provide quickly in basic form, without being tested in every possible scenario (or sometimes without being tested at all). Again we do it only in your interests and we need your patience with such things.

For other circumstances refer to your Software Agreement and/or your StairBiz representative for charge rates.

### How to contact Support

Ninety five percent of the time the most appropriate method for contact is via email:

For the first email for any single issue/topic, you must use the Email Support window (from the Help menu) - see Chapter 13. Thereafter, for that particular issue/topic, you can (and should) reply to our reply using your normal email browser. This way there is the full record of all previous emails relevant to this topic contained in each email.

If email is absolutely not appropriate, contact support by telephone. See the Contacts page on our web site, which also shows where in the world the support staff are at any particular time and the appropriate times to call considering time zones.

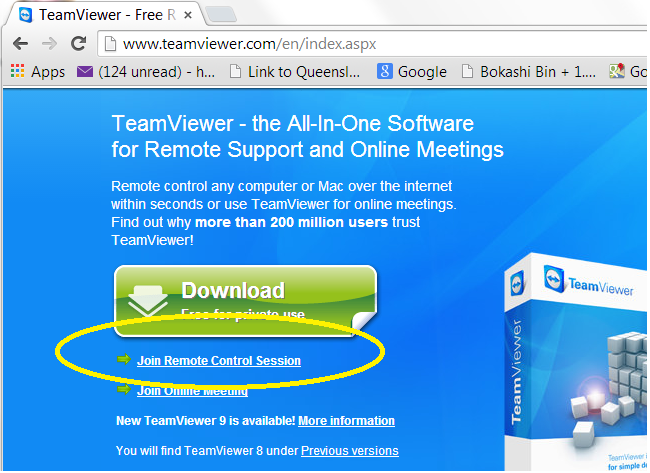
### TeamViewer

TeamViewer© is a third party program we can use where necessary to troubleshoot some problem in your StairBiz or on your computer. It’s safe and secure – we must have your permissions to use it on each and every occasion (otherwise it’s simply not possible), you can see exactly what we are doing, and in almost all cases we are concurrently talking to you on the phone. TeamViewer is probably the most widely used tool in the world for such purpose.

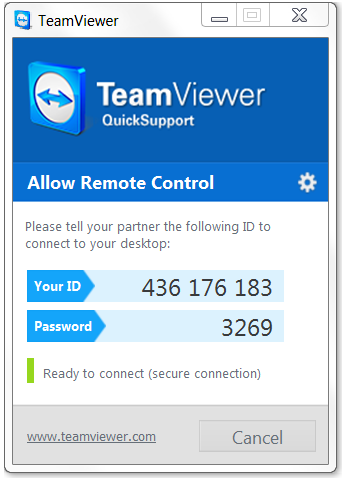
We will give you instructions at the appropriate time, along the following lines:

Open your web browser and go to [www.teamviewer.com](http://www.teamviewer.com).

Do NOT click the large green button on the left of the window, however, just UNDER that button is says **Join Remote Control Session** – click that one.



You will be prompted to download or run an installation program called TeamViewerQS-en.exe). It’s small and quick. You will need to Run (or Save and run) this installation program. Eventually a window opens which gives you an ID and a password to give to your support person.



A small tab opens at the bottom-right corner of your screen – this tells you that support has connected with you and can see what’s on your screen.

## If you get an error message

If you get an error message that appears to be serious, do the following:

1. The Email Support window memorizes your last error message, so normally it’s not necessary to remember it. Otherwise you can down exactly what the error message says, or hold the Control key down when you click OK to the message and the message will be saved to the Windows clip-board.
2. Try to remember exactly what you were doing immediately prior to the alert. Which window was active (the Email Support window memorizes your last open window, so normally it’s not necessary to remember it)?
3. Open the Email Support window and for the Support Type select **Bug Notification** or **Bug Fix Required**.
4. If the problem relates to a job, attach it (tick the appropriate **Attach** checkbox).

Sometimes the error alert won’t affect your job - you can continue to work on it as if nothing happened. Other times your job will be affected.

## If StairBiz freezes

A freeze in StairBiz is extremely rare, however, if you get one there’s a 99% chance that you won’t be able to recover. Any work not saved will most likely be lost (one reason for doing regular saves).

To resolve a freeze, do as follows:

* Press CTRL+ALT+DEL (at the same time) and select StairBiz from the list. Click the End Task button.

If that doesn't work, re-boot the computer

It would be rare for a problem to actually damage the StairBiz application or one of your files.

See if you can re-produce the freeze (by re-doing whatever you were doing at the time). Advise StairBiz Software that you got a freeze, what you were doing at the time, and whether you were able to reproduce it.

## Design error prevents opening job

It's rare, but it has happened that a corruption in the design of a job prevents the job being opened. In this case, in the 'Design' category of the Miscellaneous Defaults window set **Don't load the design in next job open** to true, and StairBiz will skip the loading of the design from the database.

This setting lasts for one job only (then resets itself to False)

## Referring to a dimension

If you need to refer to a particular dimension in the Design window, you can get a reference number for that dimension by holding down the SHIFT key while clicking the **Directory** toolbar icon (the one at the very top/left of your screen). Do the same again to get rid of the reference numbers and return to normal dimensions. Refer to that number in your report to us.

## Sending us your defaults

Most of our clients allow us to keep a recent copy of their Defaults folder. When trouble shooting a problem, it helps us enormously if we can use your defaults. Your defaults are treated with the utmost respect and security.

The easiest way to send us your defaults is by clicking the **Defaults Database** check-box in the **Attachments** frame in the Email Support window. If for some reason this is not appropriate, do as follows:

The location of your local defaults folder is …

C:\StairBiz Program\Defaults

In other words, this folder in the StairBiz Program folder.

If you are connected to the StairBiz server, and the problem you are experiencing relates to a job(s) on the server or if you are having a problem with opening/saving jobs, you should send us the following folder from your server computer:

C:\StairBiz Program\Server

First it’s best to do a Database Compact (this removes any “trash” from the database file) – select “Compact Database” from the project menu.

Second, you must “zip” the folder – don’t sent us an unzipped folder or file (it simply won’t arrive). Do not open the folder – simply right-click it and select **Send To** and then select **Compressed (Zipped) Folder**.

This will create a file (in the StairBiz Program folder) called “Defaults.zip” (it will show a zipper down the left hand edge of the folder).

Next, right-click this “Defaults.zip” file, select **Send To** and then select **Mail Recipient**.

This will place the file as an attachment in an email message. Address the email and send it.

## Sending us a Screen Capture

If you email us with a problem, and you can see the problem on your screen, send us a screen capture showing (only) the problem.

There is an F3 key screen capture in the Design, Custom, View and CNC windows. You can also initiate screen capture using this Help menu-item (Screen Capture), so that you can use this utility at any time in any window. After you select this menu-item, your cursor changes to a cross-hair – click-drag a rectangle to place the bit-map contents of the rectangle onto the Window clipboard.

You can paste into most applications that allow images (e.g. a Paint or Word document). You can also paste it into the body of an email in the Email Support window.

Otherwise, if you are using Outlook you can paste directly into the body of your email. If you are using Outlook Express you may need to paste directly into a Word document and then send us the Word document as an attachment).

Please do not send us a full-screen capture (e.g. using the full-screen capture key on your key-board) unless there is no alternative.

## Sending us a job you can open

The easiest way to send us a job is by clicking the **Job (current)** check-box in the **Attachments** frame in the Email Support window. If for some reason this is not appropriate, do as follows:

Open the job, then from the Project menu select Export Job. Name the file. This exports the job into the Jobs folder in the StairBiz Program folder on your C drive.

If you use Outlook (not Outlook Express), go to this folder and right-click on the file. You can select “Send To” and select “Email Recipient” to create a new email message with the file already attached

If the use Outlook (not Outlook Express), the alternative method is to manually create a new message, then go to this folder and right-click on the file. Select “Copy”, then and right-click in the body of the message and select “Paste” to paste the attachment into the email.

If you are using Outlook Express you will need to create a new message, click on “Attach File” button, browse to the Jobs folder and select the file for attachment.

## Sending us a job you can’t open

If you need to send us a job, but can’t open that job, you can send us the one job or a whole project in its own database file.

The easiest way to do this is by clicking the **Job I can’t open** check-box in the **Attachments** frame in the Email Support window. If for some reason this is not appropriate, do as follows:

In the Directory window, select the job. If the issue relates to multiple jobs in a project then select all jobs for the project (they will save to the archive as a project, rather than as individual jobs).

Click  (forth toolbar button from the left).

Click the **New Archive** button and give the archive a name.

Untick **Delete selected jobs after archive**

Click the **Archive** button.

You’ll find the archive folder in C:\StairBiz Program\Defaults\Job Archive

Be sure to ZIP the archive file (otherwise we don’t get the attachment).

## Sending us a photograph

Photos can have a very large file size. Do not use the Email Support window to send us a photo. There is only one way to send us a photo, as follows:

Open the photo in Microsoft Paint (or similar). Using the selection tool select only the area of the photo pertinent to the problem and copy it to the clipboard.

**If you can paste images into the body of your email:**

Create a new email in your usual email program (not the StairBiz Email Support window) and paste the photo (from the clipboard) into the body of the email.

**If you can’t paste images into the body of your email:**

Paste the photo (from the clipboard) into the body of a Microsoft Word document and attach this document to your email.

The above procedure has two effects: Firstly it allows you to send only that part of the photo that is relevant. Secondly, pasting it into Outlook or Word compresses the photo. We’ve seen this method reduce the email file size from 10MB to 50K.

# Chapter 21 : Stair Components quick reference

## Balconyplate

### Marrying Balconyplate with Outstep

You have the option to marry balconyplate sections adjacent to a stair to the outstep of the stair (i.e. to create a single piece). In the Components window, select "Use Balconyplate" for your outstep, and select a Balconyplate with "Marry with Outstep" ticked in the Style window. StairBiz automatically aligns the nosing of adjacent balconyplate with the nosing of the outstep. Note that the balconyplate and outstep are still drawn as separate pieces (because StairBiz has no way of knowing whether the stair is being drawn together with the balcony balustrade), but they are spec’d in the materials as being a single piece of Balconyplate (the original outstep is deleted).

## Balconytrim

Coming soon.

## Balusters

Coming soon.

## Bearers

Coming soon.

## Wallbrackets

Coming soon.

## Frets

Coming soon.

## Handrail

Coming soon.

## Lining

To specify lining right-click the relevant unit(s) in the Stair Setout pane of the Design window and select "Lining Under". Also select a style in the Components window (Miscellaneous tab).

## Newels

Coming soon.

### Bottom newels

### Mid newels

### Top newels

### Balcony newels

## Outstep

#### The dimensions of the outstep

The dimensions for outstep (face of trimmer to riser/nosing) for a stair in the Design window can be derived in a three main ways:

1. If your outstep comes from a blank: In the Components window select an Outstep style with the **Dims from Design** check-box ticked; The outstep dimension is as amended in the Design window and the rebate (tongue) width comes from the Details window (or as amended in the Design window). The total width of the outstep is the sum of these two dimensions.
2. If your outstep comes from a part: In the Components window select an Outstep style with the **Dims from Design** check-box not ticked; If the **Overhang** dimension (Style window) is non-zero, the outstep dimension is as per this dimension (always to the nosing of the outstep). This dimension is shown in the Design window but is not amendable there. If the **Overhang** dimension is zero, the outstep dimension is as amended in the Design window. The total width of the outstep is the width shown in the Style window. The rebate (tongue) width is the difference between the total width and the outstep dimension and is not amendable in the Design window.
3. If your outstep comes from balcony plate: In the Components window select **Use Balcony Plate**. If the **Overhang Outstep** dimension (Style window for Balconyplate) is non-zero, the outstep dimension is as per this dimension (always to the nosing of the outstep). This dimension is shown in the Design window but is not amendable there. If the **Overhang Outstep** dimension is zero, the outstep dimension is as amended in the Design window. The total width of the outstep is the width shown in the Style window for Balconyplate. The rebate (tongue) width is the difference between the total width and the outstep dimension and is not amendable in the Design window.

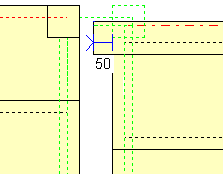
#### Marrying Balconyplate to Outstep

See Balconyplate/ Marrying Balconyplate with Outstep in this chapter.

#### Extending the Outstep

##### At a platform:

Where a straight flight goes up to a platform of a UShape stair and the top of the straight flight on the tenonside has no newel or a floating newel, you have the option to extend the outstep (for example, to the face of the adjacent string of the upper straight flight). In the Design window (Stair Setout pane, Tread Setout mode) there is the appropriate dimension.



##### At Top Newel in corner unit:

Where the top unit is a corner and the top newel is set to not extend above the floor level (e.g. a string newel), the Outstep will now extend over the newel and (in Tread Setout mode) there is a dimension where you can set an extension to the length of the Outstep (i.e. to perhaps extend it beyond the newel or stop it at the face of the newel).

## Skirting

Coming soon.

## Shoerail

Coming soon.

## Sidenoses

Side noses do not have their own category in the Components window (except for filters). They are turned on with the “Sidenoses” checkbox next to the treads category. They take their Timber, Style and Depth from the treads selection.

They also take their Blank/Part settings from the treads selection. If a Blank, cost is pro-rata that of treads. If part from filter, and filer reverts the part to a blank, then also reverts sidenoses.

Filtering for sidenoses may be done in the Treads and Landings filters (there is generally enough information about sidenoses to do so), however they also have their own filters for parts and labour.

## Strings

### Carriage Strings

You specify a carriage string by right-clicking the relevant unit in the Stair Setout pane of the Design window. There is a separate category for carriage string in the Components window.

### String Faces

StairBiz calculates two main string faces:

* **Inside**; the outline of the string face closest to the centre of the flight.
* **Outside**; the outline of the string face furthest from the centre of the flight

It also calculates the …

* **Centre Rail**; the outline along the line of the centre of the balustrade (not really a face as such, but useful in seeing what the string is doing relative to the balustrade).

It also calculates the …

* **Blank**; the outline based on the “important” face (see below) with any **Extend Hi** and **Extend Lo** added (see String Setout window).

The first three faces can be seen in the **Elevations** pane of the Design window. All faces can be seen in the String Setout window.

The **active** face (the face selected for **Show** – see option buttons in the String Setout window or right-click menu-items in the Elevations pane of the Design window) is drawn in black (with fill colour). If the **Blank** is not the active face, is it shown in a green outline (if there are no end extensions this outline might be hidden behind other outlines). All other non-active faces are shown in a cyan (bluey-green) outline.

##### The ‘important’ face:

The important face is the most useful face (visually, and in terms of setting out the string). For sawtooth string this is the OUTSIDE face. For box strings this is the INSIDE face.

##### The Blank face:

The **blank** face is what you see in the Strings View window and what goes to the CNC bed if the string is not made up of laminated layers.

The blank is initially a clone of the **important** face (see above). If you have set end extensions in the String Setout window, they are then added to the relevant ends. If there are no extensions, StairBiz will look at the end of the non-important face and, if they are longer than the important face, will add them to the relevant ends. Thus you end up with a string outline that accurately represents the minimum required to create the finished string (based on the “Kerf-Cut” principle – see below).

##### The Kerf-Cut principle:

The following applies to the blank face of curved strings. The following does not apply to string laminations put on the CNC bed.

The “kerf-cut” principal means that we assume that the **important** face stays the same, and the opposite face is kerf-cut (whether or not is actually is). The kerf-cut face opens up or closes in to accommodate the greater or lesser travel of the opposite face due to the curve.

##### Laminated strings for CNC:

If the string is laminated, each lamination placed on the CNC bed is individually calculated according to its position within the string.

##### String Lengths in Cutting List and BOM:

For non-laminated strings, string lengths shown in the BOM and Cutting List reflect the length of the **blank** (we assume the kerf-cut principle)

For laminated strings, string lengths shown will accommodate the longest lamination.

For hockey string glue-ups where ‘Method 2’ is not used, StairBiz adds a nominal 100mm (4") for each hockey join to the length of the string.

### Treads at strings

Both the String Setout window and the Elevations pane of the Design window show tread outlines.

For sawtooth strings these treads are always shown at the **centre rail** face.

For box strings these treads are always shown at the **inside** face.

If the **active** face is the face at which the treads are drawn, they will be draw with a solid green line, otherwise they will be drawn with a dotted green line.

## Strings: Sawtooth

#### In-line adjacent strings

Strings that join in a straight line must have the same sawtooth setting (both sawtooth or both not), unless there is a selected fixed (i.e. non-floating) newel between the two strings. StairBiz applies this automatically.

Note that is the sawtooth settings in such a situation are not the same between the strings, and there is balustrade on both strings, you cannot have different offsets for the balustrade (again StairBiz applies this automatically).

## Strings at a landing

### Cranks

You can level the ends of a limited range of strings (e.g. at an outside corner) using the standard options menus in the String Setout window. However, there are other strings that can have levels, or changes in rake other than a level (including vertical drops), and can have these levels and cranks even when there is a fixed newel. We call these **cranks**.

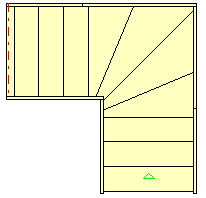
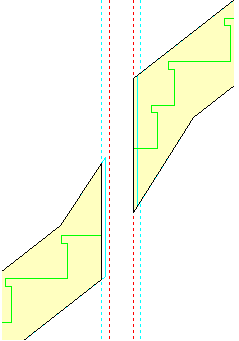
In the String Setout window set the Edit Mode to ‘Cranks’ – if any string end can take a crank the string options menus at the top left and/or top right of the drawing will show the crank options (otherwise, in Crank edit mode, there will be no options menu). Select the crank type and edit the dimensions. To add curves to the crank point select the ‘Curves’ Edit Mode.

The Crank feature is available at most corners (specifically the following join types; CornOutsideKite, CornerRakeU2Rake, CornStraitU2Rake, CornRakeU2Strait, CornerLShape1, CornerLShape23, and Bottom under some circumstances). You can see the join types by selecting “Show Join Types” in the Elevations window.

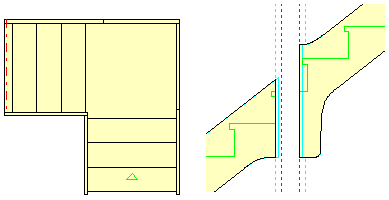
In most instances these crank points can take a Bezier curve or radius.

Following are some examples of the use of cranks:

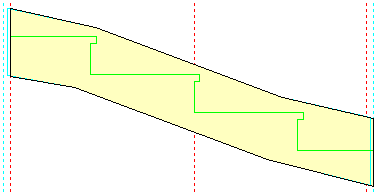
1) Where straight strings meet at a landing inside corner, and there are winder treads extending horizontally onto these strings, but some of these winders extend vertically above or below the standard string. This feature will allow you to crank the string such that all winders remain within the string. Especially applicable to the UK market.

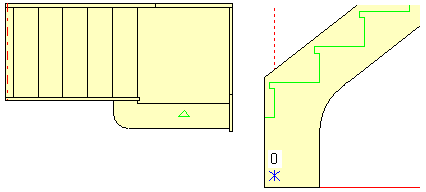
2) Where straight strings meet at a landing inside corner, and there is either no newel or a floating newel, and you want the strings to marry gracefully at the corner. This feature will allow you to create a “heel” (vertical drop) in the upper string, and optionally create a levelling of the lower string to meet this heel horizontally. Especially applicable to the U.S. market.



3) Where you have a U-shape stair with multiple treads in the landing, and you need to crank the back string in ways that previously StairBiz could not accommodate. This feature will allow you to create extra crank points along the string and set different rakes from those points. Especially applicable to the UK market.



4) Where you have an L-shape stair, and all treads in the lower flight are bullnose treads which extend back and terminate in line with the upper-flight string, and you want a “heel” at the bottom of the upper-flight string such that the bullnose treads terminate into this heel.



## String Glue-ups

### What determines if a string gets a glue-up?

Generally speaking, if a string (hockey or not) is rotated level (i.e. by minus it’s rake angle), and the overall difference between the top-most part and the bottom-most part is wider than the width of the string blank as shown in the Components window, StairBiz will do a glue-up.

This can be caused by wings (e.g. a levelling of the top edge of the string at the bottom end), a hockey string situation, or can simply be a perfectly straight string that has had its width overridden in the String Setout window.

If you don’t want a glue-up, and you don’t want to select a wider string in the Components window (because there are other strings of the same category that you don’t want to be this wide), rather than override the string width in the String Setout window, override the style/size of this one string using the **Style Override** components window (see Chapter 13, Components window | Style Override).

IN SUMMARY:

StairBiz will do a glue-up if the total width of the string (including wings etc) is wider than the blank size shown in the Components window.

If you don’t want a glue-up, set the blank size in the Components window to something wider.

If the blank size in the Components window applies to other strings that you don’t want to be wider, you can use the Components Override window for the wider string.

The ‘fact’ that the string has an override saves in the unit templates, but not the Components Override window itself.

## Wallrail

Coming soon.

## Walltrim

Coming soon.

# Chapter 22 : Miscellaneous topics

## Add a Job to a Project

### Adding foreign jobs to a project

Any job in your Directory window (job template or otherwise) can be added to any project.

With the project open, and the Directory window active, double-click on the job in the Directory window while holding the SHIFT key down. It will be added to the current project.

The Client window is always "shared" between jobs in a project. Some other windows are normally shared between jobs in a project (depending on whether the "Shared" button in that window is ticked) - Site, Details, Setout, MyData, Letters, Contact and LabourCost windows. However, foreign jobs added to a project will always have these windows NOT shared - if you want them shared then untick the Shared buttons in the relevant windows.

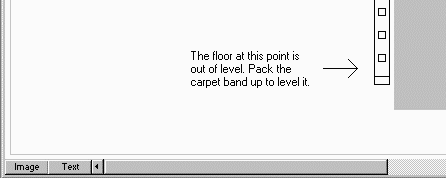
### Add Foreign Scenario to Current Job

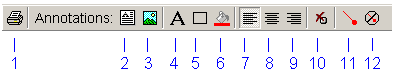
Any job in the Directory window (job template or otherwise) can be added to any job as a new scenario.

With the job open, and the Directory window active, double-click on the job in the Directory window while holding the ALT key down. It will be added to the current job as a new scenario.

## Annotation

You are able to insert your own text or graphics anywhere you like on any Job sheet or Custom sheet. This is called **annotation**.





* 1. Print the current sheet
  2. Create text annotation
  3. Create image annotation; any image currently on the clipboard is inserted
  4. Set font for currently selected text annotation
  5. Set border around currently selected annotation
  6. Set background colour for currently selected text annotation
  7. Left align currently selected text annotation
  8. Centre align currently selected text annotation
  9. Right align currently selected text annotation
  10. Delete currently selected annotation
  11. Create arrow for currently selected annotation
  12. Delete arrow for currently selected annotation

Selected annotations can be dragged around by click-dragging the blue drag region at the top of a selected annotation.

Selected annotations can be resized by click-dragging the blue square at the bottom/right of a selected annotation. If you hold down the SHIFT key while resizing, StairBiz will maintain the aspect ratio (ratio of width to height) during a resize drag.

You cannot change the image on an annotation once it’s created (simply delete and re-create a new one).

Also see Managing Images.

## Archiving Jobs

To send a job to an archive database, close the job, open the Directory window, select the job, and click the  toolbar button. You will have the option to create a new archive file or select and existing archive file. You will also have the option to delete the archived job from the current jobs database.

To open an archived job, select Archive Job from the Project menu. You will be presented with a list of previously created job archive files. Selecting an archive file makes that file the current job database file, and all jobs shown in the Directory window, Open Job dialog box or anywhere else you are shown a list of projects or jobs will be from the selected Archive file.

To close that archive file and return to the normal jobs database, select Close Archive from the Project menu.

## Backing up your files

### Manual Back-up

#### Introduction

A backup copy of all relevant StairBiz files should be kept on a disc, CD, tape drive or memory stick other than the hard drive on your computer. Your copies would be best kept at a location different to that of your computer (in case of fire, theft etc.).

A backup should be done at the end of EVERY DAY.

If you do not have a profession back-up system in place, we recommend using a USB memory stick. A 1GB stick would be more than enough for small companies, and up to 4GB for large companies).

Ideally, you would have two backup discs (or memory sticks), and alternate them. For example, let’s say you have two backup discs - Disc #1 and Disc #2. You would back up onto Disc #1 on Monday, Wednesday and Friday. You would back up onto Disc #2 on Tuesday, Thursday and Saturday.

You would keep both discs at home or in the car, and bring in to the office each morning only the disc for that day. This way you always have a backup AWAY from the office which is no more than one day old. It also means that if you back up a corrupted file, you can access the back-up PRIOR to that backup.

#### What files do I need to back up?

##### Server computer

Back up the following folder:

C:\StairBiz Program\Server

##### Client or stand-alone computer

If you are networked to a StairBiz server, a back-up of the client computer is less critical – almost all important files are saved on the server. However, there can be exceptions, so it’s still good to do this back-up occasionally.

Back up the following folders (they are in your C:\StairBiz Program folder):

Defaults  
Custom Sheets (if you have changed them since the last time)  
Jobs (if you are saving individual exported job files to this folder)  
CNC Files (if you are saving g-code files to this folder)

##### How to do the back-up

There are two main ways to back up a folder or files. In each case you would select the folder/files by right-clicking them (use the Control key to select multiple files/folder), then either:

* 1. Select Copy from the menu. Go to the folder where you want to store the copy, right-click either on the folder or on a white space within the folder, and select “Paste”.
  2. If the back-up is being put directly onto a memory key or other disc, select “Send To” - the drives should then be listed – select the appropriate drive.

#### What files do I need to re-instate?

If you need to re-install StairBiz over the top of an existing StairBiz (for example because of a corruption to any of the StairBiz exe components), and the working files (databases, custom sheets etc.) are still present and likely to be OK, when you reinstall StairBiz the installer tries to not overwrite your existing working files (this might not always work out, so it’s still important to have a back-up). In this case there is a good chance that you don’t need to re-instate your back-up files.

If you need to re-install StairBiz fresh (disc crash or new computer), after the installation (and after updating the installation, and all other computers on the StairBiz network, to the latest update version if it is not already so), do as follows:

##### Server computer

From the C:\StairBiz Program\Server folder that you backed up, re-instate ONLY the following files/folders to the new C:\StairBiz Program\Server folder (overwriting any existing ones):

Custom Sheets (folder)  
Job Archive (folder; if it exists in your backup)  
StairBiz Jobs.mdb (file)  
StairBiz Defaults.mdb (file; if it exists in your backup)

##### Client or stand-alone computer

Re-instate the four folders that you backed up. They go into the C:\StairBiz Program folder (overwriting any existing ones). They are as follows:

Defaults  
Custom Sheets  
Jobs (if it exists in your backup)  
CNC Files (if it exists in your backup)

#### Archive database files

If you create archive databases (to store old jobs) they are normally saved to the Archive folder. If these files are large or many, you may choose to not include the older ones in your regular daily backup. The easiest way to do this is to remove them from the Archive folder and place them somewhere else on your disc (e.g. you could create a “Old Archives” folder directly in the Steps Program folder and keep them there – thus avoiding the backup). Be sure THEY are backed up somewhere.

#### Special Note

Too many computer users do not follow a systematic backup routine. We have known some users of StairBiz to go more than 12 months without doing a backup.

The issue is this: If you wake up tomorrow morning and your hard drive has gone AWOL, where does it leave you? This will happen to EVERYONE at some stage - the only question is when.

### Auto Back-up

#### Preview

In the Preferences window there are some settings to control an automatic backup of important files on quitting StairBiz. For example, you could have an automatic back-up to a memory stick every time you quit StairBiz (local and server). There is also an automatic restore feature (see next heading).

Following are buttons in the Preferences window.

##### Back-up Alert on Quit

If ticked, when you quit StairBiz you will be alerted to manually back up changed files.

StairBiz tells you which databases need backing up.

StairBiz will NOT automatically back up these files.

##### Back-up on Quit

If ticked, when you quit, StairBiz will automatically back up changed files.

##### Prompt for back-up

If ticked, and **Back-up on Quit** is also ticked, StairBiz will ask before doing an auto back-up.

##### Prompt for back-up folder

Before doing an auto back-up, StairBiz will ask you to choose a backup folder.

##### Back-up server if connected

When doing an auto back-up, StairBiz will also attempt to back-up the jobs database on the server computer. This is not always successful (Microsoft databases can be finicky when you try to copy them when they think they are still being used).

##### Back-up folder

This is the default folder for auto backups.

Note that somewhere in the path to the back-up folder must be at least the words “**StairBiz Backup**”. For example: “D:\StairBiz Backup” is OK; “D:\Gary StairBiz Backup 2” is OK “D:\My Backups\StairBiz Backup” is OK; “D:” is not OK; “D:\My backups” is not OK.

##### Notes

Archive databases from the server are not backed up.

The 'Support' folder is not backed up

The 'CNC GT Editor' folder is not backed up

The 'Server/Old Logs' folder is not backed up

Custom sheets from the server are not backed up (we assume your local ones, which would be backed up, would be up to date).

The Defaults database from the server is not backed up (we assume your local one, which would be backed up, would be up to date).

StairBiz does not check to see if the back-up device has enough capacity (and this can cause problems).

If you wish to store other files or folders in your StairBiz Backup folder, you may do so, but do NOT put them into folders that StairBiz has created in this folder (they will be deleted).

You probably only need one person backing up the server.

Note that at some time you WILL have a hard-drive crash (we have reports on this from our clients almost every week), in which case you will lose all data. Have a back-up plan, and use it daily.

##### Warning

We didn't spend a million dollars writing this back-up feature. It is in most part intended to be a quick and easy restoration in the case of a hard-drive crash, rather than a rock-solid back-up program. We do not guarantee its reliability. You are advised to watch it carefully to be sure it's doing what you need (particularly with regard to networked server files). You are also advised to periodically do back-ups not using this feature. Note in particular that if a Jobs or Defaults database file has not shut down properly (we try to shut them down, but for various reasons they can sometimes stay locked) it will not back up.

Do not back up to the same hard-drive used for the StairBiz program or StairBiz Server program - it kind of defeats the purpose.

### Auto Restore

If you do your back-ups using the back-up feature mentioned above, and you have a hard-drive crash (so that you lose StairBiz and its data and have to re-install it), after reinstalling our standard installation (from our web site) you can quickly and easily restore your back-up files to the new installation, as follows:

Connect your back-up drive or memory stick to the computer, or otherwise copy the StairBiz back-up folder to the new computer.

Launch your new StairBiz. Do not connect to the StairBiz network, and if you network and the server computer is the affected computer be sure that the StairBiz Server program is shut down.

Select **Restore from Backup** from the Project menu in StairBiz. You will be prompted for the location of your backup folder. StairBiz will restore your files and will then quit. Re-launch StairBiz and you should be up and running.

If you network and the server computer is the affected computer, StairBiz will also restore the Server data files. Note that StairBiz does not back-up your server’s copy of the Defaults database and Custom sheets (it assumes your local ones are up to date), however StairBiz will restore your local backup of these files to your Server folder.

If your hard-drive has crashed you will probably need a new password (send us your current Software Code).

If your Server computer crashed, and does not run a copy of StairBiz, you will need to manually copy the StairBiz Jobs.mdb database file from the Server folder in your backup and paste it into the new Server folder in your installation.

## Cable Balustrade

There was a time when you created "wire" balustrade using settings in the Handrail style window. Now you create "cable" balustrade in the Balustrade style window (allowing you to independently choose between different handrails in the Components window).

In the Balusters category of the Styles window, tick the 'Cable' checkbox.

The Width field is the diameter of the cable. The Depth field may be different to the Width field (creating 'rectangular' cable, which is not really cable but can behave similarly).

If the "Use Max Between" checkbox is ticked, only the 'Max Space Between' field needs a value, being the maximum perpendicular spacing between cables - StairBiz will fill the space will cables to suit.

If the 'Use Max Between' checkbox is NOT ticked, the 'Space Between' field needs a value, being the actual perpendicular spacing between cables. The number of cables is determined by the 'Qty Cables (Rake)' and 'Qty Cables (Level)' fields.

It may be more convenient to use "Part Is ..." and set the specific Part ID in the Style window. However, technically the cable can be treated as a "timber" and be set as a Blank in the Style window and priced from the Timbers window.

There are two new properties in the Balusters category of the Filters window:

IsCable - 'Yes' if the balusters is cable.

CableTotLth - whereas the 'Length' field gives the length of each cable in a section (and the Qty property will show the count), 'CableTotLth' gives the sum of all cables in the section.

If, with cable, you use mid-string newels, it's common to use a pin-top newel, and (in the Elevations window) set the "fitting" to be "Continuous" so that the handrail is continuous across the top of the newel. As such, the cable will also be continuous (i.e. not break at the newel).

At this stage, cable is not calculating correctly for a reducing balustrade - extra cable will need to be added as a Loose Item in the Labour window of the job.

## Changing a StairBiz drawing

Also see: Copy/Paste in the Design window, Copying a drawing to the clipboard, Processing non-standard stairs

To change any drawing that StairBiz has generated automatically, first you need to put that drawing into a Draw window (or other paint program), as follows:

1. Open the window containing the drawing you wish to modify. It must be the Design window, a Job sheet or Custom sheet, and the window must be active.
2. Copy the drawing to the clipboard as follows:  
   Press the **F3** key (the function key), or alternatively select the Screen Capture menu-item from the Help menu. The cursor changes to a cross-hair. Click-drag the cursor to create a selection rectangle around the drawing (or part of the drawing) you wish to copy. When you release the mouse button, the selection is automatically copied to the clipboard. Note that this process can be used to copy anything you see on your monitor at the time - it is not confined to the currently active window. Note that you can copy the entire contents of your screen to the clipboard using the **Print Screen** key.
3. Open a Draw window (or any paint program) and paste the contents from the clipboard.
4. Modify the drawing as required.

After the drawing is modified, you can either:

1. Print the Draw window as normal (see Print Page and Print Job window).
2. Select and copy the modified drawing to the clipboard for overriding a drawing in a Custom sheet.
3. Select and copy the modified drawing to the clipboard for insertion into a Pict Annotation field in any sheet (see Annotation).

Also see Managing Images.

## Constant rake wreaths (and other wreaths)

### Constant Rake Wreaths

A ‘constant rake wreath’ can be described as follows: For the sake of the exercise, imagine that the handrail or wallrail has a round (mop-stick) profile (although this is not mandatory, it would more commonly be the case). This fitting is a raked bend that transitions a corner such that if you were to lay the finished wreath fitting on the floor it would have a single constant radius and would (if mop-stick) lay completely flat on the floor. For a 90 degree corner running from rake to rake, the sweep angle of the fitting would be larger than 90 degrees (StairBiz will spec the exact sweep angle – see new Angles view window below). Note that ‘constant rake’ does not mean that the rail rake either side of the wreath has to be the same – simply that the centre-line of the wreath is a simple, constant, flat radius (for non mop-stick profiles the profile would twist around this simple radius as it progresses through the transition). StairBiz can now calculate these fittings for a landing inside corner and landing outside corner, as described in the next two headings:

### Constant Rake Wreath – Landing inside corner

A constant rake wreath at a landing inside corner requires that the centerline of the tops of the upper and lower rails intersect at exactly the same height. For this reason it can only apply to a quarter-space (i.e. one tread) landing. Also for this reason StairBiz has to specifically calculate and set one or both of the dimensions that offset the bottom nosing of the upper flight and the top nosing of the lower flight from the corner. For the purposes of this discussion, the dimension that offsets the bottom nosing of the upper flight from the corner is called the “Nose-Hi” dimension, and the dimension that offsets the top nosing of the lower flight from the corner is called the “Nose-Lo” dimension.

With an L-Shape stair, single-tread landing with either no corner newel or a pin-top corner newel, in the Stair Setout pane of the Design window right-click on the Nose-Hi dimension and select the tag ‘A: Align Rail Heights At Corner’. Depending on the offset of the rail, and the existing Nose-Lo dimension, StairBiz will calculate the Nose-Hi dimension to give the required rail intersection height. Alternatively you could leave the Nose-Hi dimension as is and select this tag for the Nose-Lo dimension. Alternatively you can (and probably would) select this tag for both dimensions and StairBiz will balance the two to give you the required rail intersection height.

Having done that, you now have the option (in the Elevations pane) to select ‘Wreath’ for the fitting type.

The centerline radius of the wreath can be set in the Fittings window (Defaults menu), Corner Wreath category.

### Constant Rake Wreath – Landing outside corner

A constant rake wreath at a landing outside corner requires that the rails on the high-side and low-side of the corner intersect at the corner at exactly the same height (at the centerline of the rails). Because rails always follow the rake of the string, this requires that StairBiz auto-calculate the height of one or both of these rails, as follows:

In the Elevations pane of the Design window, right-click and select ‘Show Rail Heights’. You can right-click the rail height dimension for the rail on the high-side, low-side, or both sides of the corner and select ‘Align Heights at Corner’. Depending on the offset of the rails and their rakes, StairBiz will calculate the required height. If you set this tag for both rails, StairBiz will balance the change (i.e. one up, one down, by the same amount).

Having done that, you now have the option (in the Elevations pane) to select ‘Wreath’ for the fitting type.

The centerline radius of the wreath can be set in the Fittings window (Defaults menu), Corner Wreath category.

### Constant Rake Mitres

You can also have a constant rake mitre rail transition at the inside and outside landing corners. This also requires that the centerlines of the tops of the two rails must intersect at exactly the same height. Constant rake mitres would only be suitable for mop-stick rail. For mop-stick rail, the two rail sections, mitred together, would sit flat on a floor with a perfect (although not 90 degree) mitre.

For inside corners, see the discussion for wreaths (above). Select ‘A: Align Rail Heights At Corner’ for the Nose-Hi and/or Nose-Lo dimension tags, and set ‘Mitre3D’ for the fitting type. For outside corners, see the discussion for wreaths (above) but select ‘Mitre3D’ for the fitting type.

### Constant Rake Wreaths – Disclaimer

Every care has been taken to get these wreaths right, but until they are properly tested in the field in the myriad of situations that are out there, we can’t guarantee that we got it right in every case. We do promise to fix any miscalculation upon you advising us.

### Vertical Wreath

A vertical wreath would (as is the case with constant rake wreaths) more commonly be used with a mop-stick profile rail. It is used at landing inside corners where there is more than one landing tread (and therefore excludes a constant rake wreath). The high-end of the lower-flight rail transitions into an upease and vertical (similarly to a gooseneck), then an overease that runs from the vertical directly into the upper-flight rail. Thus the vertical is directly aligned with the intersection of the upper and lower rails.

With a landing of more than one tread, and no corner newel or a pin-top corner newel, select ‘Vertical Wreath’ for the fitting type.

If this fitting were used with other than mop-stick or perfectly square rail, the twist would probably be entirely within the vertical (so that the upease and overease would remain simple).

## Custom tags and part labels in drawings

There is already the option to show custom tags and parts lists as labels in drawings in the Design window and in Custom sheets. In the Design window (Stair Setout, Stair Balustrade and Balc Balustrade panes only) right-click a white space and select “Show Custom Tags” and/or “Show Parts”.

#### Manually positioning the labels

The positioning of some of these labels could interfere with other items in the drawing (and is impossible for StairBiz to resolve adequately). You have the option to drag these labels to better locations. Such moves are reflected in Custom sheets. Such moves also save with the job and save in stair and unit templates.

In the Design window (Stair Setout, Stair Balustrade and Balc Balustrade panes only) , select “Show Custom Tags” and/or “Show Parts” from the relevant menus. Drag the captions as needed.

#### Label text font

By default, the font used for these labels is your default font and size, plus bold/italic. If you don’t like this you can override it as follows:

In the Miscellaneous Defaults window (View Sheets category) see “Custom tags font”. The value can be as follows:

Normal font; 1=Plain, 2=Italic, 3=Bold, 4=BoldItalic

To override the standard font with ‘Courier New’, use the following:

5=Plain, 6=Italic, 7=Bold, 8=BoldItalic

To override the standard font size, append the above number with the font size. For example, ‘79’ would give you Courier bold 9 point.

## Copying a drawing to the clipboard

Also seer: Changing a StairBiz drawing, Copy/Paste in the Design window, Processing non-standard stairs

To copy a StairBiz drawing to the clipboard, do as follows:

1. Open the window containing the drawing you wish to copy (i.e. the Design window, a Job sheet or a Custom sheet.
2. Press **F3** key, or alternatively select the Screen Capture menu-item from the Help menu (the cursor will change to a cross-hair)
3. Click-drag a rectangle around the boundary of the drawing.
4. Release the mouse button – the contents of the rectangle are now on the clipboard, ready for pasting.

**To copy a graphic from a Draw window to the clipboard, do as follows:**

1. Click the **Selection** tool
2. Click-drag a rectangle around the boundary of the drawing. Try not to include a lot of white space around the edge of the drawing.
3. Release the mouse button
4. Click the **Copy** tool, or press **Control+C** - the contents of the rectangle are now on the clipboard, ready for pasting.

Also see Managing Images.

## Editing

### Lists

Many of the StairBiz windows contain lists. Two examples are the Component Defaults window and the Directory window.

To edit a value in a list, double-click the value.

If the text is editable, a blinking I-beam cursor will display within the text.

After you have finished editing, press the ENTER key or simply click somewhere else.

### Text boxes

Many of the StairBiz windows contain text boxes (an area of the window, often with a border, containing text which is editable).

To edit text in a text box, click somewhere on the text (or within the border if there is no text).

If the text is editable, a blinking I-beam cursor will display within the text.

### Changing any text or value

To select an entire word, double-click it.

To select more than one word, click-drag across the words.

You can simply type over a selection (i.e. the selection will be replaced by your typing – there is no need to use the Delete key).

You can move the cursor forward and backwards along the text by using the Left and Right arrow keys.

You can delete the character immediately before your cursor by pressing the back-space key (hold the key down to automatically continue the back-spacing).

### Editing Currency

StairBiz can work with whatever currency your country uses. In the following examples, we will use $.

You do not need to include the “$” sign (although you can if you wish).

You do not need to include the cents if there are none (i.e. “10” will be interpreted as $10.00 and 3.5 will be interpreted as $3.50).

You do not need to include the dollars if there are none, but you will need to use the decimal point (i.e. “.4” will be interpreted as $0.40).

### Editing Dimensions

Dimensions are entered in whatever measurement system you choose in the Preferences window.

The most convenient systems are either metric or metric inches, because they take up less room, take less time to type in, and are less prone to typing errors.

For Inches, Fractions, you do not need to type the inches if there are none (e.g. “9/16” does not need to be input as “0 9/16”

For Feet, Inches, Fractions, typing 4 is seen as 4 inches. If you want 4 feet you must type 4 0 or 4’.

Just because you set your preferences to a particular kind of imperial measurement doesn’t mean you can enter dimensions in another imperial system. For example, if you are working in metric inches, you can still enter a dimension as 4’ 6 ½ (and vice versa).

**Decimal Inches**

If you are working in decimal inches, you may notice that StairBiz will display these dimensions to the nearest 1/64 inch. This is because StairBiz will only display up to 4 decimal places, and some fractions are more than 4 decimals (e.g. 3/64 = 0.046875).

For more discussion, see Preferences window / Dimensions.

**Dimension Calculations**

Anywhere in StairBiz where you enter a dimension, you can enter a calculation (plus or minus only). For example, if you have a dimension as 36.7 and you want to add 4.4 to it, you can set the dimension as *37.7 + 4.4*. On committing the dimension, StairBiz will do the calculation and post the result. This can be done in any measurement system.

**Converting an imperial to a metric**

If you are in metric mode, but want to enter an imperial dimension, to save you having to get out your calculator you can simply prefix the imperial dimension with a “!” (exclamation mark). For example, “!2 ¾” will instantly convert to 69.85.

### Editing Dates

Dates may be entered in whatever format is normal in your country.

For example, 5th August in the US would be entered as “8/5”, whereas in UK it would be entered as “5/8”.

Dates may be entered in any format which is remotely intelligible. For example, StairBiz would read “aug 5” as 5th August.

All dates entered without a year assume the current year. For example, StairBiz would read “aug 5” as 5th August, 2002 (or whatever the current year is).

### Vetting by StairBiz

Vetting user input is always a tricky topic for programmers. On one hand you want to pick up on typing errors by the user and make sure that input is workable. On the other hand you don’t want to interfere with a user’s intentions. StairBiz takes the approach that a user’s input in the user’s business, however, if something looks seriously wrong, you will be notified and given the opportunity to abort the input.

If, for example, you input a baluster width of 400mm (or the imperial equivalent), and, when StairBiz questions this, you instruct StairBiz to proceed with this dimension, obviously the consequences are entirely unpredictable.

StairBiz does not always vet your edit. If you want to charge $2367 per metre instead of $23.67 then that’s OK with StairBiz).

## Emailing a quote (or any sheet)

We have on our list to be able to email a quote directly from StairBiz.

In the meantime, if you have a PDF writer you can use that.

If you don’t have a PDF writer you can download a free one as follows (you need to download both files):

http://www.cutepdf.com/Products/CutePDF/writer.asp

After it’s installed, select the PDF printer shown in your Print dialog window when you print the Custom sheet (or View sheet) – this will print the sheet to a PDF file which can be sent as an email attachment.

## Export/ Import of Design Templates

Design templates include stair, unit, well and bullnose templates.

You may have created a new design template which you want everyone on the network to have, but if you don’t have the appropriate permissions you will not be able to post your defaults to the server.

Two possible solutions are as follows:

For both solutions, create a temporary job that includes only that stair, unit, well or bullnose (in the main design). Then, either …

1. 1) Notify your administrator, who can then access this job (via the network) and create the template from that element (e.g. right-click/ Send to Unit Templates), then delete the job, or
2. 2) Export the job to a file, and email the file to the administrator. On the other end the administrator can import the job, then create the template from that element (e.g. right-click/ Send to Unit Templates).

The administrator can then post his defaults to the server where the new template will be available for all.

## Filter check on opening job

Parts and labour filters used in a job are not saved with that job. Only the names of the currently selected filters are saved with the job. When you re-open the job, StairBiz looks in the defaults database for those filter names and loads them if it can find them.

If it can't find one or more ...

1. StairBiz will alert you, showing a list of the filters it could not find. This gives less room for the situation to slip past unnoticed.
2. StairBiz shows the filter name in the filter tab of the Components or Labour Cost window suffixed with an asterisk.

Note that the fact that filters can be changed or deleted between saving a job and re-opening it is perhaps the main reason why you need to lock your quote (in the Quote Calculation window).

Note: When a job is saved, the currently active filters are saved with the job by category, key and name (the key is the unique identifying number of the filter). When you re-open that job, StairBiz tries to locate those filters in your Defaults database by category and key. If the key no longer exists (i.e. the filter was deleted), it then looks by category and name. If the name exists, it will use it (i.e. StairBiz assumes that although the original filter was deleted, it was replaced by another with the same name). Note that this process assumes that the computer opening the job has the same defaults (i.e. filters) as the computer that saved the defaults, which it should if you post new or changed defaults to the StairBiz server as necessary.

Note that the fact that filters can be changed or deleted between saving a job and re-opening it is perhaps the main reason why you need to lock your quote (in the Quote Calculation window).

## Fonts

You can select a default font and font size for the screen and printer in the Preferences window. There fonts only apply to Job sheets (all those sheets under the View menu), plus when printing windows such as Defaults windows.

StairBiz may automatically increase or decrease the size of these fonts when used in some situations (e.g. headings).

Changing the font and size can be useful for a few reasons:

1. You may have a personal preference for a particular font and size
2. Some fonts work better than others for printing, depending on the type of printer you use and the fonts available.
3. Some fonts of a particular size are larger or smaller than other fonts of the same size.

A few tips:

* The default font used by StairBiz for both screen and printing is Arial, 10pt.
* StairBiz has been tested using only Arial. Other fonts may give unpredictable results.
* If a selected font is larger than Arial 10pt there is always the possibility that a piece of text will be longer than the text box designed to accommodate it. Under these circumstances some words might “wrap” to the next line (which may not be visible to the user). Even a single word entry can wrap if it’s too big for the length of the text box, causing the word to “disappear”. Be careful when using fonts or sizes larger than Arial 10pt.

## Glass Panels

To draw and spec glass panel balustrading, do as follows:

In the Style window (Balusters category) create a baluster (e.g. “Glass”). Tick “Full Panel”. Set Depth as the thickness of the glass. Set Width as per the discussion below. Set the margins for top, bottom and ends.

In the Timbers window, create a “timber” for glass (e.g. “Glass”).

In the 3D window, open the Textures window; in the “Defaults” section assign the “Glass” texture to the “Glass” timber.

In a job, select the Glass baluster and the Glass timber.

For the purposes of designing the panel StairBiz ignores the Width specified in the Style window and uses the margins (mentioned above) to calculate the actual width of the panel.

The width as shown in the Cutting List and Materials Cost comes directly from the design and is (for balcony) the vertical height of the panel and (for stair) the vertical height of the panel after it’s been rotated (in elevation) by minus the rake (i.e. it’s been laid flat).

The length as shown in the Cutting List and Materials Cost comes directly from the design and is (for balcony) the horizontal length of the panel and (for stair) the horizontal length of the panel (from minimum X to maximum X) after it’s been rotated (in elevation) by minus the rake (i.e. it’s been laid flat).

If you treat glass panel as a Part, then the Width as specified in the Style window is irrelevant (the design width goes to the filter). If you treat glass panel as a Blank, and in the Style window **Price by Area** and **Price Pro-rata Width** are not ticked (see Chapter 22; Sheet Material), StairBiz uses the Width shown in the Style window for costing purposes, so if your glass panels come in (say) 900 wide sheets then set the Style's width as 900 and if the actual width as per the design is less than this, the excess is treated as wastage.

There is a filter property for Balusters called “IsFullPanel”.

Note that StairBiz assumes there are newels separating each section of the balustrading.

Glass panels are drawn and dimensioned in the **Balustrade Panels** View sheet (under the “Stair” sub-menu, although this sheet is used for both stair and balcony panels).

Glass panels can be put on the CNC bed (e.g. for the purposes of cutting templates). When (and only when) you are using glass panels, there is a “Balusters” category in the CNC Component list.

## Import Job from Text

### Introduction

You can set job fields in a text file, then import that text file into StairBiz, thereby creating that job. You can do the same with clients. This may be useful where you have your own computer application or user interface for creating jobs, and wish to use that to load those jobs into StairBiz.

To import a single file, select the menu "Project/Import Job from Text" - a dialog window will open allowing you to select the single file.

To import all files in a folder, hold the CONTROL key down while selecting the menu - a dialog window will open allowing you to select the folder.

The text file is simply a file with a ".txt" extension. The contents of the file is in plain text and defines up to 130 different job fields in (for example) the following format:

Project.Folder = Ferris

Job.JobDate = 16/11/2011

Job.JobName = Ferris Unit 27

Job.JobNumber = QS1882

Job.JobStatus = Measure

Client.ClientName = Clevis & Co

Client.Status = Permanent

Site.Street = 16 Jenson Ave

Site.Suburb = BAYVIEW

Detail.DisposeMode = Deliver

Detail.RequiresCNC = Yes

Detail.ScheduleCNC = 12/12/2011

Detail.ScheduleInstall = 13/12/2011

Quote.Discount = 5

The order does not matter.

A file with either Job.JobName or Project.ProjectName fields set will create a job.

If neither are set, but Client.ClientName is set, a client (and optionally a contact) will be created in the Client List window.

If the job already exist, it will not be created - StairBiz will not modify an existing job of the same name. You will be alerted

If a client already exists in the Client List window (and the file sets Client.Status = Permanent), that client will be updated with any set fields (fields that are not set will not be disturbed).

Each attempted import will be logged in a file at: \StairBiz Folder\UserImport.LOG

If there is a problem with the import, the log will explain it.

If the import is aborted, the log will explain it.

If you are importing a single job, and the import is aborted, you will also be alerted instantly.

Fields take the form "Table.Field = Value" (e.g. "Project.Folder = Main").

### Some comment on various fields:

Colour: One of *Red/ Orange/ Yellow/ Green/ Blue/ Purple*

User Name: e.g. *Fred*; must currently exist in the Users & Networking window

Date: In the form "*10/10/2011*"

Status *Temporary* or *Permanent*; applies to Client and Contact tables; *Temporary* means that this Client or Contact relates only to this job; *Permanent* means this client or contact is in the Client List (client database), or if not, create it in the Client List.

Text (30) Means the Value is text up to 30 characters long

Text Means the Value is text with unlimited characters

"JobNote1 = " If a value is not set, the field will be ignored. To specifically set nothing (i.e. to clear the field) set the value to "[Clear]", e.g. " JobNote1 = [Clear]"

Job.JobName and Project.ProjectName can both be set, however, if only one is set, the other is automatically set to the same.

### All supported fields:

'------------------------------------------------

Project

Folder An existing project folder name

ProjectName Text (30)

'------------------------------------------------

Job

CreatedBy User Name

JobNote1 Text (30)

JobNote2 Text

FlagColor Colour

FlagDate Date

FlagNotes Text

FlagUser User Name

JobColor Colour

JobDate Date

JobName Text (30)

JobNumber Text (20)

JobStatus A status as shown in the Process window

PurchaseOrder Text (20)

QuoteNumber Text (20)

SalesPerson User Name

ScenarioName Text (30)

'------------------------------------------------

Client

City Text (20)

ClientName Text (30)

ClientNote Text

CompanyNumber Text (20)

ContactName Text (30)

CriticalNote Text (50)

CustId Text (15)

DefContact A default contact; A name from the contacts for this client.

Discount Number (Decimal)

Email Text (40)

Fax Text (21)

IsOwner Yes/No

Mobile Text (21)

Pay1Percent Number (Integer) Percentage deposit

Pay2Percent Number (Integer) Percentage interim payment

Pay2Days Number (Integer) Number of days; See Terms2

Pay3Days Number (Integer) Number of days; See Terms3

Terms2 BeforeStart/AfterStart/BeforeEnd/AfterEnd

Terms3 BeforeStart/AfterStart/BeforeEnd/AfterEnd

Phone Text (21)

ReferredBy Text (20)

Salutation Text (30)

SchedColors Text (3)

ShowCritical Yes/No Show the critical note

State Text (10)

Status Temporary/Permanent; See notes

Street Text (30)

Suburb Text (25)

Tag Text (8)

Zip Text (12)

'------------------------------------------------

Contact

ContactName Text (30)

ContactNote Text

DefContact Yes/No

Email Text (40)

Fax Text (21)

Mobile Text (21)

Phone Text (21)

Role Text (30)

Salutation Text (30)

Status Temporary/Permanent; See notes

Tag Text (8)

UserField Text (30)

'------------------------------------------------

Site

City Text (20)

CrossStreet Text (25)

IsNewHome Yes/No

MapRef Text (8)

MeasureDate DateTime

Mobile Text (21)

Phone Text (21)

SiteContact Text (30)

SiteNote1 Text

SiteNote2 Text

State Text (10)

Street Text (35)

Suburb Text (20)

Zip Text (8)

'------------------------------------------------

Detail

BrickLower Yes/No

BrickUpper Yes/No

Briefing Yes/No

CNCDone Yes/No

DetailsNote Text

DisposeDate Date

DisposeMode PickUp/ Deliver/ Install

FromPlan Yes/No

LowerFloor Tile/ T&G/ Sheet/ Concrete

PowerOn Yes/No

ReMeasure Yes/No

RequiresCNC Yes/No

ScheduleCNC Date

ScheduleProduction Date

ScheduleInstall Date

ShowCriticalNote Yes/No

Stain Yes/No

TravelDollars Currency

TravelDollarsB Currency

TravelMinutes Number (Integer)

TravelMinutesB Number (Integer)

TreadProtect Yes/No

UpperFloor Tile/ T&G/ Sheet/ Concrete

WeCutFloor Yes/No

WeCutWall Yes/No

WePaint Yes/No

'------------------------------------------------

Quote

Discount Number (Decimal)

ProfitPercent Number (Decimal)

TaxPercent1 Number (Decimal)

TaxPercent2 Number (Decimal)

'------------------------------------------------

Payments

PaidAmt1 Currency

PaidAmt2 Currency

PaidAmt3 Currency

PaidDate1 Date

PaidDate2 Date

PaidDate3 Date

PayDetail1 Text (30)

PayDetail2 Text (30)

PayDetail3 Text (30)

PayNotes Text

PayType1 Text (15)

PayType2 Text (15)

PayType3 Text (15)

'------------------------------------------------

In the Miscellaneous Defaults window, there is a new heading, "IMPORT JOB FROM TEXT":

"Default Folder for Jobs" allows you to (optionally) set a default folder to contain such text files. If none is specified the "Jobs" folder is assumed.

"Kill file after import"; if "Yes" or "True" then after the job is successfully imported the text file will be deleted from the folder. Thus any text files remaining after a batch import have been unsuccessful (read the log file).

## In-line Landing

If you have only a single tread in a straight flight, and make the going of that tread more than 400mm (300mm if merged with the outstep), StairBiz will treat that unit as an in-line landing (i.e. a landing which starts and ends in the same direction).

So to create a straight flight down to an in-line landing down to a straight flight (all in a single line), bring in three straight flights (in a row), change the mid flight to a single tread, then set the going of the single tread to more than 400mm.

## Dogleg strings

Regarding the straight-flight string above a dog-leg, there is a dimension tag to extend the low end through to the back of the riser below the dog-leg, as follows:

In the String Setout window for the string above the dog-leg;

For a sawtooth string, select "Lower butts" for the low-end type, or

For a box string, select "Upper hooks under" for the low-end type, then

right-click the extension dimension.

Note that this will only be accurate for normal stairs (i.e. without angled strings or treads).

## Duplicate a Job

There are various cases where you duplicate an existing job; from the Jobs menu, from the Scenarios menu, from "Save As" in the Project menu, and from "Insert Job into Project" from the Directory window.

Following are some notes:

For "Insert Job into Project", the "Shared" checkboxes in the relevant windows (Site, Details etc.) are UN-TICKED. In other words, by default they are not shared. You can tick to share them as required. For all other methods of duplicating a job, the shared status of those windows is also duplicated.

All field overrides (in Custom sheets) are cleared.

All Done buttons are cleared.

All Payments (in the Payments window) as cleared.

All Schedule dates are cleared.

Apart from the above, the duplicated job should be identical.

## Job templates

Imagine that you have a client who is a project home builder. There is a particular stair you build for this client which is always the same, except for a few minor variations (e.g. floor to floor, or widths). One way to handle this kind of situation is to create a **job template** which becomes the starting point for each new project for that client for that stair.

A **job template** is a normal job in every respect, except that it can only be opened from the **Open Job Template** menu-item under the **Project menu**, and when it opens you are given two choices:

1. Open the job as new project (in which case all information about the job is preserved except that the Project Name and Job Name are empty)
2. Open the job as a template (in which case you can make changes to the template and re-save it as a template)

To make any job a template, with that job open select the **Template** button in the Process window.

Note that the Project Folders feature is useful for project builders (each builder can have his own folder).

Job templates are categorized in project folders (just like jobs are). The project folder current (i.e. the one selected at the top of the Process window) at the time the job is saved as a template is the folder the template is stored in. When opening a job template (see above) you can select a specific folder from which to choose the required template.

Note that an alternative to using **Job Templates** is to use the Project feature in StairBiz.

## Manually modifying a StairBiz drawing

Some (very few) stairs you need to process might have features unavailable in StairBiz (see Processing non-standard stairs).

Part of the solution involves replacing StairBiz drawings with manually modified ones.

* This can be done in Job sheets using annotation.
* This can be done in Custom sheets using the Draw Override feature.

Either way, do as follows:

1. Open the window containing the drawing that you wish to modify.
2. Copy the drawing to the clipboard (see Copying a drawing to the clipboard).
3. Paste the drawing into a Draw window (If you need more sophisticated paint features than StairBiz can offer, open any other paint program and paste into that);
4. Open a Draw window (or create a new one)
5. Click the **Paste** tool, or press **Control+V**.
6. Modify the drawing as required
7. Copy the modified drawing back to the clipboard (select it with the **Selection** tool then click the **Copy** tool - see Copying a drawing to the clipboard).

To override a drawing in a Custom Sheet:

1. Open the Custom sheet where you want the modified drawing to go, and right-click on the current drawing.
2. Select the **Override with Clipboard** menu-item (the **Revert** menu-item will be gray if the drawing is not already overridden).

To override a drawing in a Job Sheet:

1. Open the Job sheet where you want the modified drawing to go.
2. Click the **Pict** button at the bottom left of the window – the drawing on the clipboard will automatically paste into it (see Annotation).
3. Re-size and position the annotation appropriately on the page.

Also see Managing Images.

## Materials: Batching & Descriptions

### Materials Batching

Batching in this context relates to materials in the Cutting List and Materials window, plus non-part items in the BOM. In the following we refer to all as the “Materials List”.

Batching means combining two or more identical items into a single entry, and adjusting the quantity accordingly.

Batching is done according to the following ‘batch’ properties of a component: Category, StyleName, Timber, Width, Depth and Length. If all these properties are identical for two or more components, then those components have the possibility to be batched.

### Material Description

Following are symbols used in the description of materials (depending on the settings below), and their meaning:

For example; “S2) U3 #7”

S1), S2), S3) the ID of the stair (used if more than one stair)

B1), B2), B3) the ID of the balcony (used if more than one balcony)

U1, U2, U3 the ID of the Unit (used where necessary or where settings dictate)

#1, #2, #3 the ID of a tread (applies to all components associated with a tread)

T1, T2, T3 the ID of a tenon string (applies to all components associated with a string)

W1, W2, W3 the ID of a wall string (applies to all components associated with a string)

^1, ^2, ^3 the ID of a balcony section (applies to all components associated with a section)

L/R left/right

The number used for the ID can be relative to an entire stair, or to its unit (depending on the settings discussed below). It can also be from the bottom up or top down (depending on the ‘Treads from Top Down’ setting in the Preferences window).

### Batched Items – the Material Description

If two or more items are batched into a single item, the description shown in the Materials List etc. (which generally indicates an item ID) is that of the first item found. To indicate that this item is batched with others of the same batch properties there is a “~” suffix (plus of course the Qty will be more than 1).

One example; “#7~” means ‘Tread 7 AND OTHERS”.

Another example; “S2) U3 #7~” means ‘Stair 2, Unit 3, Tread 7 AND OTHERS’ where ‘others’ may be in other units or other stairs (depending on your ‘Batch By’ settings – see below).

In other words, wherever an item description has a “~” suffix you know that the description is valid for ONE of the items included in this item’s quantity, but (usually) is not valid for ALL items included in this item’s quantity.

### Batch settings in the Miscellaneous window

Materials are batched according to the following settings in the **Batching Materials** category of the Miscellaneous window.:

#### Batch By (Stair)

Enter ‘Unit’, ‘Stair’ or ‘Job’ (just the first character is sufficient).

**Unit**: means batching is done on a unit-by-unit basis. For example, all risers with the same batch properties within a unit would be combined, but if there were risers with the same batch properties in different units they would be listed separately.

**Stair**: means batching is done on a stair-by-stair basis. For example, all risers with the same batch properties within a stair would be combined, but if there were risers with the same batch properties in different stairs they would be listed separately.

**Job**: means batching is done on a whole-job basis. For example, regardless of the number of stairs or units, all risers with the same batch properties would be combined.

#### Batch By (Stair Balustrade)

Same setting as above, but applies to Stair Balustrade.

#### Batch By (Balcony Balustrade)

Enter ‘Well’ or ‘Job’ (just the first character is sufficient).

**Well**: means batching is done on a well-by-well basis.

**Job**: means batching is done on a whole-job basis.

#### Batch Newel Cats

When set to True, StairBiz ignores the category of the newel (Top, Bottom etc.) when comparing their batch properties (for example, a top and bottom newel of the same size, length, style etc. would be batched).

#### Batch String Cats

When set to True, StairBiz omits the sub-category of the string (Tenon, Wall, Landing) as a batch property, so that tenon, wall and landing strings may be combined (if all other batch properties are identical).

#### Batch Fillet Cats

When set to True, StairBiz omits the sub-category of the fillets (Handrail, Shoerail, Balconyplate) as a batch property, so that handrail, shoerail and balcony plate fillets may be combined (if all other batch properties are identical).

Note – fillets are in materials as a total length (quantity = 1), so when fillets are batched their quantity stays at ‘1’ and the LENGTHS are combined.

#### Batch Frets L/R

When set to True, StairBiz omits the hand of the fret (L/R) as a batch property, so that left and right hand may be combined.

#### Batch Sidenoses L/R

When set to True, StairBiz omits the hand of the sidenose (L/R) as a batch property, so that left and right hand may be combined.

#### Combine String Lengths

When set to True, StairBiz combines string lengths within the batch, so that you end up with a single string with the sum of the lengths.

#### List Each Rail/Plate Length

Applies to Handrail, ShoeRail, WallTrim, BalconyPlate and BalconyTrim.

With this set to True, within the above batching StairBiz will not batch (combine) items of the same length (and therefore each item will have a Qty = 1).

This can be useful in Custom sheets where you don’t want to use the quantity field (i.e. you would rather StairBiz lists each individual item separately, even when the same length).

#### Show Tread ID by Unit:

Normally tread ID’s (shown in the description for components such as treads, risers, sidenoses, frets etc., and also shown on the stair drawings) show the ID of the tread within the entire stair. To show it relative to its own unit, set this to True.

This might be useful if you effectively treat a multi-unit stair as multiple ‘stairs’.

When set to True, for such components the ‘Show Unit ID’ setting (see below) will be ignored (the Unit ID will always be shown).

#### Show String ID by Unit:

Normally string ID’s (shown in the description for strings) show the ID of the string within the entire stair. To show it relative to its own unit, set this to True.

This might be useful if you effectively treat a multi-unit stair as multiple ‘stairs’.

When set to True, for strings the ‘Show Unit ID’ setting (see below) will be ignored (the Unit ID will always be shown).

#### Show Newel ID by Unit:

Normally newel ID’s (shown in the description for newels) show the ID of the newel within the entire stair. To show it relative to its own, set this to True.

This might be useful if you effectively treat a multi-unit stair as multiple ‘stairs’.

When set to True, for newels the ‘Show Unit ID’ setting (see below) will be ignored (the Unit ID will always be shown).

#### Show Rail ID by Unit:

Normally rail ID’s (shown as the related string ID in the description for components such as handrail, wallrail, shoerail etc.) show the ID of the string within the entire stair. To show it relative to its own unit, set this to True.

This might be useful if you effectively treat a multi-unit stair as multiple ‘stairs’.

When set to True, for such components the ‘Show Unit ID’ setting (see below) will be ignored (the Unit ID will always be shown).

#### Show Unit ID:

Where Unit ID’s really must be shown in an item’s description (e.g. where any of the above ‘Show ID by Unit’ are set to True) StairBiz ALWAYS shows the Unit ID. Otherwise generally the Unit ID is not needed.

If you want to show Unit ID’s under all circumstances, set this to True.

Unit ID’s do not apply to balusters or fillets (which are never batched by unit).

#### Newel - indicate position:

When set to True the newel description will indicate the position of the newel (e.g. ‘Top’, ‘Bottom’, ‘Balc’ etc.). If there are two bottom newels and they are different it will indicate ‘L’ or ‘R’ for each.

#### Newel - indicate if standard turning:

When set to True and a newel has turning, the newel description will indicate whether the turning is standard according to your Style window settings. ‘(Std)’ means standard turning. "(Std L=1/2/3)" means standard turning for an inside landing newel according to the special settings for 1/2/3 tread landings in your Style window. ‘(Special)’ means the turning has been overridden in the Elevations window (either manually or automatically).

### ID’s Top to Bottom

In the Preferences window you have the option to show tread ID’s from top to bottom. With this True, StairBiz shows unit ID’s, string ID’s and newel ID’s from top to bottom (rather than the more usual bottom to top).

### Zones in Custom Sheets:

If you use zones in Custom sheets to separate stairs/units etc., be sure to set batch options considering these zones. For example, if your zones separate units and you set batch options to batch by stair or job, it will confuse StairBiz (this applies only to blank materials – parts from Part Filters would still be OK).

### Part Filters

Batching does not affect component properties in the Parts and Labour filters (components go to these filters prior to any batching).

### Parts in the BOM

Parts in the BOM are batched according to PartId and are not otherwise affected by batch settings (although non-part items in the BOM are).

## Passwords

**Passwords** allow you to determine who is allowed access to StairBiz and what they’re allowed to see or change.

**Passwords** also provide some protection in the event of theft of the computer and/or StairBiz software.

### Permissions

There is the possibility that people other than the proprietor have access to a computer running StairBiz. There is also the possibility that the proprietor doesn’t want some or all of the information contained in StairBiz to be accessible to those people. So StairBiz allows you to create user accounts and assign specific permissions to each account.

The **permissions** allowed to a user depends on the password typed into the Password window at the time StairBiz is launched.

The **permissions** can be changed in the Users Window at any time.

To learn more about User Accounts and User Permissions, please see the Users Window section.

### Setting Passwords

#### Registration Password

From the very first time you launch StairBiz you are given a grace period where you do not need to use a password. Before that grace period expires you should contact us and provide us with the **Software Code** (shown when you click the **Passwords?** button in the Password window). We then give you a **Registration Password** which you can enter into the Password window to register your copy of StairBiz on that particular computer. A Registration Password can be for a full license or can be for an extended evaluation.

Note that the **Software Code** is different for each computer, and the last two characters of the software code (i.e. following the period) change each time you enter a new (different) registration password. So each time you request a new or different registration password from us (for a different type of license or to extend your evaluation period) you must send us the current software code.

The registration password will always allow you **Administrator** access to StairBiz, and should not be disclosed to anyone except the proprietors of the business (other users can be given administration status without them needing the registration password).

#### User Passwords

The **Registration Password** will always allow you **Administrator** access to StairBiz. Therefore, it will allow you access to the permissions section of the Users window.

In the Users window, you can create an alternative **Administrator** account with an easier to remember password, plus you can create additional accounts (each with their own password) with fewer permissions. It is best not to do this if you are accessing StairBiz under the grace period (i.e. if you don't require a password) - do it after you first register StairBiz using a registration password.

**User passwords** can be changed at any time (by a person with **Administrator** access), or by the owner of the User Account.

### Entering Passwords

If you think you may have typed in an incorrect password (and before you click the **OK** button), you can backspace, or delete, and re-enter.

For registration passwords, if you’re unsure whether a character is the letter “O” or a zero, it doesn’t matter – StairBiz will accept either interchangeably.

You get two tries at entering a correct password before you have to quit and start again. This is to prevent an un-authorized person repeatedly trying to “guess” your password.

If you are working in StairBiz and need to leave the computer, you may not want staff accessing StairBiz at the current permission level. Rather than quit StairBiz, you can select the **About StairBiz** menu-item in the Help menu. This will open the Pass Protect window which will not allow further access to StairBiz without a new password. The account belonging to the password entered will determine the user permissions from that point on.

In the same way, to change the user account without quitting StairBiz, simply open the Pass Protect window and enter the password for the different user account.

#### My user passwords don’t work anymore?

If you replace your Defaults database for some reason, your user passwords will no longer work. You will need to enter StairBiz using your Registration Password and then reset them.

#### Un-registering

Under the terms of your StairBiz Software License Agreement, your company is responsible for each computer registered for StairBiz under your company’s name. If a staff with a copy of StairBiz on his personal laptop leaves your employ, or you are selling a computer, it is essential that you un-register StairBiz for that computer. See Un-installing.

## Quote and job numbers

A **Quote number** gives a unique identification to each new quote. On acceptance of the quote by the client, it would be usual to assign the job a **Job number**.

Both take the form of a **Prefix** (optional), followed by a number.

A **Prefix** for both **Job numbers** and **Quote numbers** (if required) can be set in the Preferences window (maximum 8 characters). Quote and job number prefixes are saved for each different user, so regardless of which computer is being used, the prefixes are specific to the password of that user.

The next-in-sequence number for both **Job numbers** and **Quote numbers** are set in the Job Numbers window, and are incremented automatically by StairBiz each time they are used.

If you have the **Auto Increment Quote Num** button selected in the Preferences window, the quote number will increment on each new job. To manually generate the next-in-sequence **Quote number**, open the Process window and double-click on the **Quote#** label at the left of the relevant field (or press the **Alt-Q** keys).

To automatically insert the next-in-sequence **Job number**, open the Process window and double-click on the **Job#** label at the left of the relevant field (or press the **Alt-J** keys).

Alternatively, you can manually type in your own numbers, or manually edit existing numbers.

To see how StairBiz can handle incrementing of quote and job numbers in different on-line/off-line scenarios, see Chapter 13: Preferences window/ QUOTE/JOB NUMBERS

The **Job Number** is automatically printed on all Job sheets. Both Quote and Job Numbers can be incorporated into any Custom sheet.

## Sheet Material

#### Overview

Sheet material is what you would traditionally think of as (for example) "MDF 2400 x 1200 x 25" sheet, etc.

To achieve 100% accuracy pricing jobs using sheet material, you would theoretically need to specify sheet sizes and prices, then (manually or quasi automatically) arrange each of the relevant components on the relevant sheets for the best optimization of the sheet, then designate sheet wastage areas in each case. On a job-by-job basis this is tedious, time consuming, and would achieve only marginally more accurate results than the much faster and easier methods StairBiz uses, as follows:

You cannot set "sheet" sizes in the Timbers window in the way you might typically imagine - all sizes in the Timbers window show a width and thickness, and are considered infinitely long. See Sheets in the Timbers window (below)

You can set cost methods in the Timbers window to price by area. Note that this if for pricing the timber (not the component).

You can also get StairBiz to price certain categories of components by the surface area of the component's polygon or minimum bounding rectangle (see Price by Area and Area is Bounding Rectangle (below), or alternatively you can get StairBiz to apply "pro-rata" costing where the component's design width (as set in the Design window) is less than the blank width (as selected in the Components window) - see Manual Pro-rata Method (below).

These methods allow you to specify sheet widths and depths in the Style windows of the relevant components (even though the components might be way smaller than the sheets), and have StairBiz price those components out of those sheets in a way that gives a reasonably good estimation of the actual material cost in zero time and without any intervention by the user on a job-by-job basis.

#### Sheets in the Timbers window

For StairBiz, nothing is really "sheet" (except for the purposes of CNC). In the Timbers window, all timbers have a width and a depth (as seen in the list on the right), and are deemed to be infinitely long. The width might be 90mm or might be 1200mm - StairBiz will process both in the same way. Each can be costed per lineal metre or lineal foot or square metre etc. etc. Each are treated as if they are infinitely long.

In the Timbers window you can use whatever cost method you want for any timber you want. For example, if you have an "MDF" timber, you would probably use a lineal cost method (Lineal Metre or Lineal Foot) or an area cost method (Square Metre or Square Foot). Either way, all sizes of all styles in your Styles window will be listed on the right. You will need to include a price for any of the sizes you actually use in MDF (assuming you don't treat it as a part). If you use an area cost method, the price for each size of the same thickness would probably be the same (although perhaps the wastage would be different). If you use a lineal cost method you would need to calculate the lineal cost for each different size (which is why it might be more convenient to use an area cost method in these cases).

The bottom line: You cannot enter a sheet size (width x depth x length) in the Timbers window and set a price for that sheet. Theoretically this might be possible if, firstly, there were nesting features in StairBiz (which there are not because we've never seen one for stair components that works well enough to be more useful than it is irritating) and, secondly, because you wouldn't be able to set different wastages for different usages of that sheet.

#### Sheets in the Components window

Having said that the Timbers window doesn't really recognize "sheet" as such, there are some circumstances where it makes sense to think in terms of sheets. For example, if (in the Components window) you select a landing of 1200 x 32, it would make sense to imagine that the landing in your design is coming out of 1200x32 sheet. If, on the other hand, you select a landing of 275 x 32, it makes sense to imagine that the landing in your design requires a glue-up of several laminations of this 275 (in other words, it is not "sheet").

So we may think "sheet" where the width selected in the Components window is MORE than the width of the component in your design, and as such can only apply to the following categories:

* Outstep
* Treads (including bullnose treads)
* Landings
* Risers (including bullnose risers)
* Lining
* Balusters (full panel only)

For example, a landing can show 1200x32 in the Components window but be only 880 wide in the design; a tread can be 290 in the Components window but be only 275 wide in the design.

Note: A tread can be 275 in the Components window but be 290 in the design, in which case StairBiz needs to do a glue-up of a 290mm plus a 15mm, so this cannot be considered "sheet".

Strings cannot be included in the above categories because the width selected in the Components window sets the exact width of the string (unless overridden). It's also much less likely to come out of sheet.

#### Orientation of Components on Sheet

If the LENGTH of the component (as per the design) can fit within the WIDTH of the blank (as per the Components window), StairBiz may turn the component 90 degrees so that you get better optimization of the sheet for pricing purposes.

For example, if the Components window shows 1200x32 MDF for Landings, and a kite is 900 long and 400 wide, StairBiz will swap these dimensions (only for the purposes of costing) such that the kite is now 400 long and 900 wide. Thus you will be priced on 400mm of your 1200 wide sheet (instead of 900mm of your 1200 wide sheet).

Orientation adjustment can only apply to non-grained material (as set in the Timbers window) because orientation has to respect grain direction.

Orientation adjustment does not apply if pricing is **Price per Area** (see next heading), because it would make no difference to the price.

#### Price by Area

**In the Timbers window you can price timber by area (using the Square Metre or Square Foot cost methods), but** **that's not the same thing as pricing a component by area.** Just because a timber is priced by square metre doesn't mean that a kite that uses that timber is priced based on the surface area of the kite.

However, components in the following categories *can* be priced by area:

* Outstep (if it are based on tread timber)
* Treads (including bullnose treads)
* Landings
* Risers (including bullnose risers)
* Lining
* Balusters (full panel only)

In the Style window of these component categories there is a **Price by Area** check-box. With this ticked ...

* If the item is not a part, and
* If the design width (as per the Design window) is less than or equal to the blank width shown in the Components window (i.e. there are no glue-ups required), then

1) StairBiz will calculate the surface area of the component (two methods - see below).

2) If the Cost Method of the selected timber if not based on area (e.g. not Square Metres), then StairBiz will convert whatever Cost Method is used into an area cost (e.g. convert a lineal metre cost to a square metre cost)

3) StairBiz will then apply that cost to the surface area of the component.

Wastage as shown in the Timbers window is applied.

Extra Lengths (as per the Extra Lengths window) are applied to the cutting list and BOM, but obviously cannot be applied to the costing (it is recommended that you apply a wastage instead).

Pricing lists will indicate that the pricing method is based on area by adding a "2" (i.e. squared) suffix to the UOM (e.g. "m2" for square metres or "f2" for square feet). The unit price shown will be the (perhaps converted) price per square metre or square foot (regardless of the cost method set in the Timbers window).

**Price by Area** facilitates more accurate sheet costing, and would generally be used only for sheet material. It allows you to use sheet sizes (e.g. 900 x 25) as the sizes shown in the Style window, even when the actual size in the design may be much less than this.

The success of **Price by Area** rests on the accuracy of your percentage wastage factor (in the Timbers window or the Extra Lengths window).

##### Area is Bounding Rect

If you tick the **Price by Area** checkbox (in the Style window), there is an option for **Area is Bounding Rect**. With this ticked, StairBiz will use the area of the smallest bounding rectangle (rather than the area of the actual polygon outline).

#### Price by Length

If you are NOT using **Price by Area**, the following applies:

If the DESIGN WIDTH (as set in the Design window) is the same as the BLANK WIDTH (as selected in the Components window), StairBiz will price the component according to the prices shown in the Timbers window (and is not relevant to this discussion of "sheet"). Otherwise, the following applies:

There are two methods for pricing by length, each involving some level of pro-rata pricing.

##### Definition of "Pro-rata"

Pro-rata pricing MAY be used where the DESIGN WIDTH (as set in the Design window) is not the same as the BLANK WIDTH (as selected in the Components window). It may also be used where the DESIGN DEPTH (as set in the Design window) is not the same as the BLANK DEPTH (as selected in the Components window), but this can only apply to newels (because it's the only component where you can change the depth in the Design window).

A **pro-rata** price means that the blank price (as set in the Timbers window) is adjusted by the ratio of the design width to the blank width.

For example (where the design width is LESS than the blank width):

If a 90mm outstep comes out of a 275mm blank (e.g. it comes out of tread material), it is priced at the cost of the blank times 90/275 (i.e. times 0.327). If the blank is $10/m, the price for the outstep is $3.27/m.

For example (where the design width is MORE than the blank width):

If a 290mm tread comes out of a 275mm blank, it is priced at the cost of the blank times 290/275 (i.e. times 1.074) . If the blank is $10/m, the price for the tread is $10.74/m.

Pro-rata pricing can only apply to blanks (not parts).

Pro-rata pricing only affects the *price* of the material.

The pro-rata method used by StairBiz depends on whether or not the **Price Pro-rata Width** check-box (in the Style window for that component) is ticked. If it is ticked, we apply the ***Manual*** pro-rata method. If it not ticked, we apply the ***Auto*** pro-rata method.

##### Manual Pro-rata Method

StairBiz will use pro-rata pricing where:

* In the Style window, the **Price Pro-rata Width** checkbox is ticked (which is cannot be if **Price by Area** is ticked).
* The component is a blank (not a part)
* The design width (set in the Design window) is LESS than the blank width (selected in the Components window); By this definition, glue-ups are excluded.

It applies only to those component categories where the design width *can* be less than the blank width, as follows:

* Outstep (where 'Dims from Design' is not ticked)
* Treads (including bullnose treads)
* Landings
* Risers (including bullnose risers)
* Lining
* Balusters (full panel only)

We call this the ***manual*** pro-rata method because it's set by you, the user, rather than being applied automatically by StairBiz.

Unlike with the auto pro-rata method, StairBiz does NOT apply any nominal wastage to this manual pro-rata method (it is assumed that you have waste set in the Timbers window or the Extra Lengths window).

This pro-rata method is an alternative to **Price by Area** and similarly facilitates more accurate pricing of sheet material. Similarly it allows you to use sheet sizes (e.g. 900 x 25) as the sizes shown in the Style window, even when the actual size in the design may be much less than this.

The success of the **Manual Pro-rata** method rests on the accuracy of your percentage wastage factor (in the Timbers window or the Extra Lengths window).

##### Auto Pro-rata Method

The auto pro-rata method is the default method for pricing materials. It applies where both **Price by Area** and **Price Pro-rata Width** checkboxes are NOT ticked.

This method assumes that, whereas you might be using sheet, you are PRE-CUTTING the sheet to stock sizes of the various components, and storing those in your timber rack ready for most situations.

Under this method StairBiz may still apply pro-rata pricing in limited cases (typically to more accurately price components which are *obviously* smaller than the blanks they are coming out of (e.g. outsteps which come out of tread material).

We'll call this the ***auto*** pro-rata method because it's applied by StairBiz automatically, as follows:

Where the design WIDTH (set in the Design window) is MORE than the blank width (selected in the Components window), StairBiz will add a pro-rata cost for the extra width.

Where the design WIDTH is LESS than **70%** of the blank width, StairBiz calculates a pro-rata cost for the following items:

* Outsteps (presumably coming out of tread material)
* Skirts (presumably coming out of string material)
* Treads, Bullnose treads, Landings and Strings (presumably the item that is the less-than-full-width lamination in a glue-up)
* Sidenoses (presumably coming out of tread material)
* Newels (presumably a half newel or similar).

Note that glass panels are not included in the above list (and excess is wastage).

Where the design DEPTH is less than 70% of the style depth, StairBiz calculates a pro-rata price (this can only apply to newels - it's the only component where you can change the depth in the Design window).

***In all the above auto pro-rata cases StairBiz will add a nominal 20% wastage to the pro-rata amount.***

Unlike with **Price by Area** or the **Manual Pro-rata** methods, with the auto-pro-rata method you should not use sheet sizes in the Style window (with the exception of perhaps Landings and Lining, for obvious reasons). If you want to use sheet sizes, it's better to use the **Manual Pro-rata** method (mainly because you have more control over the wastage).

EXAMPLES:

**Using sheet for Treads**

In the Style window, set tread dimensions as if they were pre-cut from sheet and held in stock to suit a variety of goings.

For example, you might set three sizes; 250x25, 275x25, 300x25. You would then select the appropriate size for the job in the Components window.

In the job, StairBiz calculates the smallest bounding rectangle within which each tread can fit - this becomes the tread's design size (the exception to this is circular treads, where StairBiz will use the Component window size regardless, because it assumes that what a tread loses from the thick end glues onto the thin end, for zero wastage).

If you (hypothetically) select 250x25 for treads in the Components window, StairBiz will price each tread as per the 250x25 in the Timbers window. If the actual tread is more than 250mm wide (e.g. 275mm), StairBiz will assume a glue-up and price the extra piece as a pro-rata amount, adding a nominal 20% wastage on the extra amount.

In this example, imagine the price for your selected size of 250x25 is $10/m.

If the design size is 275mm, StairBiz will price the 250x25 at $10/m. Then it will add 25/250 of this material (10% extra = $1) plus a wastage of 20% of the extra ($0.20) for a total tread material price of $11.20/m

**Using sheet for Risers**

In the Style window, set riser dimensions as if they were pre-cut from sheet and held in stock to suit a variety of riser heights.

In this case (unlike for treads) StairBiz does NOT add a pro-rata amount for actual risers that are wider than the size specified in the Components window. This is because an actual riser component can be less wide than the riser height and still be used as is.

**Using sheet for Landings**

In the job, StairBiz calculates the smallest bounding rectangle within which each landing tread can fit - this becomes the tread's design size.

If the design width is MORE than the blank width (shown in the Components window), StairBiz calculates a glue-up schedule and prices the full-width laminations normally, plus an auto pro-rata on the less-than-full-width lamination.

If the design width is LESS than 70% of the blank width, an auto pro-rata applies, otherwise any excess is wastage.

Note that for non-grained sheet StairBiz may rotate the component 90 degrees (see Orientation of Components on Sheet).

**Using sheet for Lining**

If the lining width is LESS than the width shown in the Components window, any excess is wastage.

If the lining width is MORE than the width shown in the Components window, an auto pro-rata applies to the excess.

## Speed Search Lists

Many lists (i.e. list of clients in Client List window, pull-down lists in Components window, Styles window, Folders window etc) can be speed searched. This means you can navigate to the item in the list you are looking for other than by scrolling through the list until you find what you’re looking for.

To speed search for an item in the list, select any item in the list (to make the list the active object in the window) then type the first character of the item you are looking for – this will take you to the first item starting with that character. To loop through all items starting with that character, keep pressing that key until you get to the one you want.

You can also use the Up/Down arrow keys to navigate up or down in the list.

With the item you want highlighted, you can press Enter to select that item.

## Split Quote (and Active)

Split Quote (see the checkbox in the Process window) allows a full-featured division between stair and balustrade within a single job for the purposes of Quoting. With the Split Quote check-box ticked …

There are two Quote Calc windows which behave totally independently of each other. There are two Payments windows which behave totally independently of each other. Buttons at the top of each window toggle the window between stair and balustrade.

**Active:** The “Active” buttons (Process window) determine output to Materials and Labour windows, and the Cutting List, BOM, MatCost and LaborCost sheets. However, regardless of your “Active” settings, the Job, Project and QuoteCalc sheets will show independent values for both stair and balustrade.

**Custom sheets:** All fields relating to the Quote, Payments, BOM and Labour field categories have a subcategory setting (at the bottom-left of the Field Definitions window) to indicate whether the field is for “Active”, “Stair”, “Balustrade” or “Both”. “Active” means to show for whichever is set to Active in the Process window (if both stair and balustrade are active, numeric fields will show the sum of both); “Stair” means only for the stair; “Balust” means only for the balustrade; “Both” means the sum of both stair and balustrade. By default, all fields are set to “Active”.

**Custom Editor:** In the Custom Editor it is possible to change the subcategory (Active, Stair, Balustrade or Both) of multiple fields in one hit – select all relevant fields and then choose “Convert Quote Fields” from the Arrange menu. The selected fields may include fields and graphic objects that are not relevant to the Quote, Payments, BOM and Labour categories – they will be ignored. This way you can quickly create custom sheets specifically for stair, balustrade or both – simply save the existing custom sheet as a different sheet and do a “Convert Quote Fields”.

**Zones in Custom Sheets:** For BOM and Labour list fields, if you currently use zones to limit the categories shown in these lists, the behaviour of these zones remains unchanged. However, the custom field subcategory (Active, Stair, Balust and Both) will also apply. This way you can create lists of stair and/or balustrade items (BOM or Labour) without the use of zones (provided you don’t need different lists for different categories within the stair/balustrade subcategories).

**Formulas:** In Custom Sheets, if the quote is split, formulas that contain Quote or Payment fields will return the amounts for the “Active” setting. I’m not sure at this stage whether this needs to be addressed – I imagine that the split quote feature renders most formulas redundant.

**Directory window:** If the quote is split, the quote and payments columns of the Directory window will reflect the 'Active' setting (Stair or Balustrade or the sum of both).

**Minimum Install:** Minimum Install charge (shown in the list at the top-left of the Labour Filters window and Labour window) is divided into Stair, Balustrade and Both. Stair applies to a split quote stair installation, Balustrade applies to a split quote balustrade installation, and Both applies where the quote is not split.

**Travel charges:** If the quote is split, Travel charges (Details window) are separated into stair and balustrade.

Also see “Is this balustrade” in the Miscellaneous Defaults window.

The Split Quote check-box (Process window) can be set by default for all new jobs. See Miscellaneous window (Defaults menu), Quote Calc category.

## Waste, Extra Length and Rounding Up

StairBiz has great flexibility in applying waste, extra lengths and rounding up to the length of components as specified. Before we discuss how to achieve this, we need to define each:

##### Extra Length

Extra Length is set in the Extra Lengths window. For default extra lengths, see the Extra Lengths window under the Defaults menu. To edit these for a single job, see the Extra Lengths button in the job's Components window.

Extra length is a additional length added to the exact calculated length of a component.

For example, a 2” extra length on a piece of handrail works as follows:

Everywhere the length of the handrail is specified includes the extra 2”. The price of the handrail includes the price of the extra length. The Length field of the StairBiz Inventory includes the extra length.

Note that there are settings in the “GLUE-UPS” category of the Setout window that affect how extra lengths are applied to glue-ups for strings, treads and landings.

##### Waste (Percentage)

Wastage can be set on a timber basis (in the Timbers window), on a Part basis (in the Parts window) or on a category basis (in the Extra Lengths window).

Percentage wastage never affects a component's length - it only affects the material price.

Waste is a percentage of the length of a component. For example, a 10% wastage on a piece of handrail works as follows:

The length of the handrail is NEVER adjusted by the wastage. In this case the 10% is added to the price of the handrail. The “10%” is indicated in the Waste column of the Materials window and the Materials Cost sheet, and is posted to the Waste field of the StairBiz Inventory.

Note that StairBiz can automatically apply a 20% wastage in some pro-rata situations - see Sheet Material/ Price by Length/ Manual Pro-rata Method.

Percentage wastage applies to both **Price By Area** (both methods) and **Price By Length** (both methods).

##### Round-up

Round-up can be set (INSTEAD of a percentage wastage) on a timber basis (in the Timbers window), on a Part basis (in the Parts window) or on a category basis (in the Extra Lengths window).

Round-up rounds the length of a component to a specified multiple. For example, a 6” round-up on a piece of handrail works as follows:

If the length of a rail is a whole multiple of the roundup (e.g. a 30” length of rail is exactly 5 multiples of 6”), the length is not affected. If the length of a rail is a not whole multiple of the roundup (e.g. a 31” length of rail is 5 multiples of 6” plus 1” remainder), the length is incremented to the next whole multiple (e.g. the 31” piece of rail becomes 36”).

Everywhere the length of the handrail is specified includes the round-up. The price of the handrail includes the round-up. The Length field of the StairBiz Inventory includes the round-up.

EXCEPTIONS:

Round-up does not affect pricing if using the **Price By Area** methods.

Round-up ONLY applies to pricing if the **Roundup only for pricing** checkbox in the Materials Cost window of the job (the default setting is in the **Quote Calc** category of the Miscellaneous Defaults window ('Use roundup only for pricing').

##### Combinations of Extra Length and Waste/Round-up

In each of the three windows where you can set a wastage or a roundup, you can set one or the other (but not both), on the basis that they try, more or less, to achieve the same thing.

You can have extra length (from the Extra Lengths window) *plus* either wastage or round-up. In this case the wastage or round-up is applied AFTER the extra length is added.

Wastage in the Parts window applies only to parts.

Wastage in the Timbers window and wastage in the Extra Lengths window applies only to blank items. Where there is a percentage wastage in both windows, they will be added together. If one window has a percentage wastage and the other has a round-up, the round-up will apply AFTER the percentage wastage is applied [check this??]. If both windows have a round-up, only the round-up from the Timbers window will apply.

##### Where are they set

**Waste/Roundup:**

Waste or roundup can be set for any single timber/size combination (in the **Waste** column of the Timbers window). Wherever that timber in that size is used, StairBiz will apply the specified waste/roundup.

Waste or roundup can be set for any particular part (in the **Waste** column of the Parts window) provided that the part has a length UOM (i.e. not “per each”). Wherever that part is used, StairBiz will apply the specified waste/roundup.

Waste or roundup can be set for any *category* of components (in the **Waste** column of the Extra Lengths window). Wherever a component of that category (e.g. handrail) is used, StairBiz will apply the specified waste/roundup.

To set a waste, in the Waste column of any of the above three window enter the wastage as a number (e.g. “10”, or “10%”). Alternatively, to set a round-up, enter a dimension enclosed in brackets (e.g. “(3)” or “6 ¾)”.

**Extra Lengths:**

Extra length is specified in the Extra Lengths window – enter a dimension in the Length column.

##### Lengths for Labour Costing

Waste never applies to the lengths of components for the purposes of costing labour in the labour filters (because waste never impacts the length as specified – see above).

Whether extra length or roundup applies depends on a couple of things.

1. If the Include Extra Length checkbox in the Labour window (which also applies to round-up) is not ticked, lengths for the purposes of labour costing will never include an extra length or a roundup.
2. If the Include Extra Length checkbox in the Labour window is ticked, lengths for the purposes of labour costing will include an extra length or a roundup as follows:

If the labour is directly associated with a part (i.e. is labour for installation specified in the Parts window, or labour specified in the same filter line as a part is specified) then StairBiz will apply that part’s roundup to the labour.

If there is round-up specified in the Extra Length window, and there is no part round-up, StairBiz will apply the round-up in the Extra Length window.  
If there is extra length specified in the Extra Lengths window, StairBiz will apply that extra length.

##### Round-up in Cuttings Lists

Any round-up that comes from the Parts window will be included in lengths shown in the BOM sheet, but are not included in the Cutting List. This is because the cutting list (deliberately) knows nothing about the Parts window or Part filters.

Any round-up and extra length that comes from the Extra Lengths window will be included in lengths shown both the BOM sheet and Cutting List sheet.

## Weights and Volumes

There is a View Sheet called "Weights". It shows weights and volumes for each Timber, Stair and Unit in the job, plus for the entire job.

Weights are entered in the Timbers window (kg per m3).

A job will only calculate weights if the "Weights" check-box in the job's Details window is ticked (you can set it by default in Job Details under the Defaults menu; however, if you do not need weights, or need them only rarely, it is recommended that you do not set this as your default).

You can limit the sheet display as follows: In the Miscellaneous Defaults window, in the View Sheets category, the "Weights" setting takes up to "JTSUBA", where J=Job, T=Timbers, S=Stairs, U=Units, B=Balustrade and A=include the volume for assembled units. Add or removed the appropriate letters to limit what is displayed.

For Assembled Unit Volume, whereas it might not be entirely useful in all circumstances StairBiz calculates the smallest box which will contain the entire unit. In the case of straight flights, the flight is laid down horizontally (i.e. rotated by negative the rake of the treads). In the case of a landing unit, the unit remains in its native orientation (i.e. as you see it in the stair).

In the case of components where the Style window is set to "Part"; If "Part From Filter" then all parts are ignored and the component weight/volume is based on the selected timber and original component as shown in the Cutting List. In the case of "Part Is", the component is simply ignored (as too complicated for the time being, although in most cases this would only apply to things like wallrail brackets).

It is appreciated that some users might not want any parts to be included in the Timbers list (for chain of custody purposes or for the purposes of estimating stock based on used weight) - please liaise with John if this is the case.

Note that weights of strings include the entire glue-up boards (i.e. weight of material used rather than final weight), whereas weights of treads include the finished tread only (not glue-up boards) - this is an inconsistency for now.

Handrail fittings are not included in weights.

You can export this sheet to Excel (see the button at the bottom/left of the View Sheet).

For now there are Custom Sheet fields for the Entire Job, Stairs, and Balustrade. Newels will fall in to either Stairs or Balustrade depending on your “Is This Balustrade” setting in the Miscellaneous window.

# Chapter 23 : Database Problems and Repairs

There is a difference between a "connection" problem and a "database" problem. However, sometimes they can have the same symptoms.

For connection problems, see Chapter 17 : Networking - Basics/ Network Troubleshooting.

For database problems, see the following.

## Database Corruptions

It's possible (very rare, but possible) for a database to become corrupted.

Where a corruption causes StairBiz to completely cease functioning, you will need to contact support for the solution. Before calling support, run through the following possible resolutions:

(Before you do any of the following, grab a copy of your databases, just in case something goes wrong.)

NOTE:  
Your server's jobs database is located on your server computer at ...  
 C:\StairBiz Program\Server\StairBiz Jobs.mdb  
Your local jobs database is located on your own computer at ...  
 C:\StairBiz Program\Defaults\StairBiz Jobs.mdb

**Server or Local**

Establish whether the problem is with the server or the local. A server problem manifests when you connected to the server (although local database problems can still play a part in this). If the issue only occurs while not connected, it's a local database problem (for local problems, ignore and reference to the server in the following).

**Reboot**

Re-boot both the local computer and the server computer. For the server, don't forget to re-launch the StairBiz Server program at ...

C:\StairBiz Program\Server\StairBizServer.exe

and be sure there is only ONE StairBizServer.exe program running.

**Access Database Repair**

If you have Microsoft Access, do a "Database Repair" from within Access:

Double click the relevant (local, server or both) jobs database to open it in Access.

In Access 2003, go to Tools/ Database Utilities/ Compact and Repair Database. In Access 2007, go to Office Button (at very top/left of the window), then Manage/ Compact and Repair Database.

**Database Repair Utility**

If you do not have Microsoft Access installed on your computer, you can download a free utility called **Jetcomp.exe** which will attempt to repair your database. The link is …

<http://www.accessdatabaserepair.com/jetcomp.htm>

You might refer this to your IT support person. The download file (JetCU40.exe) is an installation file. Run this file to extract JETCOMP.exe (the utility) and JetComp.doc (the instructions).

**Try a different database on the server**

If the problem is with the server jobs database, temporarily replace it with your local jobs database (be sure not to permanently lose your existing one). Are you able to connect and use it?

Alternatively you could open an archive jobs database (if you have one) and see if the problem persists with this archive.

**Try your server jobs database on your local**

If the problem is with the server jobs database, temporarily place your server jobs database on your local computer (be sure not to permanently lose your local one). Are you able to use StairBiz in local mode (i.e. while not connected to the server)?

**Try another local database**

If the problem is with the local jobs database, temporarily place a different local jobs database on your local computer (be sure not to permanently lose your existing one). Did this fix the problem?

**StairBiz Database Repair**

If you suspect the problem is a database corruption, the remainder of this chapter should help.

## The Database Repair window

However, at other times a database can have a corruption but continue to function. It is rare, but when it happens it can manifest in problems such as losing a job, a job losing some of its data, or data entered into one job also showing up in another job.

Such a corruption could occur if a job crashed at a critical point of a load or save, or (less commonly) a database can simply corrupt for no apparent reason. Of more concern is that a corruption in one job can impact other jobs.

We developed the **Database Repair window** to diagnose and repair and such problems. At the time of creating this window, we also took whatever steps seem apparent to limit the effects of such corruptions, and to prevent any such corruption from spreading to other jobs.

Open the **Database Repair window** from the Project menu.

## What does this window do?

This Database Repair window will analyse your jobs database and report and/or repair any problems it finds. On each analysis or repair, if any problems are found a report is created in the DatabaseRepair.LOG located in your StairBiz Program folder. This report is also placed on your clipboard which you can paste it into Excel for easy viewing.

If there are jobs that have been fixed by this window, ***always send the log to StairBiz Support***. This makes it easier for us to get a heads-up on any potential problems, or to be alerted to problems we thought we fixed but apparently did not.

Always following the sequence shown (i.e. do Step 1, then Step 2, etc.). If a problem is found in any one step, always do a 'Repair' of that step before moving on to the next step (a repair of one step may be necessary to accurately analyse the next step).

## Quick Start

1) Read the following explanations.

2) Do a back-up of your server's jobs database.

3) Launch StairBiz (on any computer), connect to the server.

4) Open the "Database Repair" window and go through the steps.

Then, on each local computer ...

5) Do a back-up of the local jobs database.

6) Launch StairBiz and disconnect from the server.

7) Open the "Database Repair" window and go through the steps.

NOTE: If you do a database repair while connected to the StairBiz server, but do NOT do it on all local computers while not connected to the server, chances are it will not solve the problem - you MUST do it on ALL job databases.

If you have several local computers, and they do not hold local jobs (i.e. jobs not checked in to the server), you can save time by running this repair window on ONE local computer and then pasting this jobs database into the other local computers (replacing the existing database).

## Which database is being analysed?

If you are connected to the server, it's your jobs database on the server, located on the server computer at:

C:\StairBiz Program\Server\StairBiz Jobs.mdb

If you are NOT connected to the server, it's your local jobs database on the computer you are currently using, located at:

C:\StairBiz Program\Defaults\StairBiz Jobs.mdb

You will see which is which at the top-left of the Database Repair window.

In either case the LOG file will be created on your LOCAL computer.

NOTE: You MUST use this window on ALL job databases (server while connected, then all local computers while NOT connected).

## Generic explanation of reports:

Note that for the purposes of the exercise, each scenario within a job is treated as if it were a separate job.

For more specific explanation of reports, see below.

There is a header which is more-or-less self explanatory.

Then you'll see columns with the following captions:

**Error Type**: The type of problem (see below).

**Key**: Used only by support.

**Shared Key**: Used only by support.

**Job Key**: Each job/scenario has a unique job key used to uniquely identify that job/scenario (used mainly by support, but you can use it in Excel to definitely sort by job).

**ProjectName**, JobName, ScenarioName, QuoteNumber, JobNumber, JobDate: Can be used by you to locate and open problem jobs.

**OfflineStatus**: In a server database, these should always be zero. In a local database they mean as follows:

0= Job created locally and not checked in to server.

1= Job opened from server, and temporarily held locally while it is being worked on prior to being saved back to server on a job close.

2= In local database and no longer needed (deleted in database compact).

3= In local database because it was acquired from server and to date not checked back in to server.

**Status**: Indicates the nature of any repair to a job by this window.

## Which Modules are Affected:

The reports will indicate which module (window) of which jobs have a problem; In column 1 you'll find indicative words as follows:

*Snaps3D*: The snapshot of the job's 3D window (not the same thing as a "capture" of the 3D window).

*Client*: The job's Client window

*CompWnd*: The job's Components window.

*Contact*: The job's Client Contact window (accessed from the Client window).

*Design*: The job's Design window.

*Detail*: The job's Detail window.

*Done*: The "Done" buttons in various of the job's Process windows.

*LabCost*: The job's Labour Cost window.

*Letter*: The job's Quote, Invoice or Receipt letters accessed from the Process menus of the same names (these are NOT related to your custom sheets).

*Overrides*: Text entered to override fields in a job's Custom sheet (it does not affect image overrides).

*Payments2*: The job's Payments window for balustrades (always a split quote).

*Payments*: The job's Payments window (for Stairs if a split quote).

*Quote*: The job's Quote Calculation window (for Stairs if a split quote).

*Quote2*: The job's Quote Calculation window for balustrades (always a split quote).

*Setout*: The job's Setout window

*Site*: The job's Site window.

## STEP 1: Database Compact:

**BACK-UP:**

You MUST do a manual backup of the database prior to using the Database Repair window. Although we have extensively tested this utility, we haven't tested it on ALL client databases, so there is always a slight possibility for something to go wrong. Date your backup and put it in a safe place separate from your regular back-ups (we don't want your next backup to override this important backup).

**COMPACT:**

A compact deletes a lot of legitimately redundant records that we don't want showing up in the following reports. This compact is important. If you see a "Server Warning" window, just ignore it and be patient (a compact can take up to 5 minutes for a large database). In the unlikely event that your compact fails, progress to the next step anyway.

## STEP 2: Jobs without a Project:

**Manifestation:**

A job without a project "disappears" - it does not show up in any job list (e.g. Directory window or Open Job window).

**How it could happen:**

To our knowledge this can only happen by a corruption (possibly cause be a crash at a critical time). Any such jobs may have existed in your database for a very long time (see the *Job Date* column in the report).

**New code to prevent this in future:**

Not possible, although you now have the tool to detect it.

**Explanation of report:**

The *Project Name* column shows "[None]" or a blank, because no project associated with this job could be found.

**Explanation of fix:**

StairBiz doesn't try and fix this because they are very rare, any such job may be quite old (and therefore redundant), and if the job was important you've probably re-created it already (when you realised it had disappeared). In a repair, StairBiz will simply delete the job.

The *Status* column will show "Job Deleted" in a Repair report.

**What constitutes a "critical" problem:**

In a test database that was very large and extensively used over many years we found just six examples of this problem. In other words, it is very rare. If you feel that your report indicates a more perverse problem than this, please contact support.

## STEP 3: Jobs with no or multiple Active Scenarios:

#### No active scenario:

**Manifestation:**

A job without any active scenarios "disappears" - it does not show up in any job list (e.g. Directory window or Open Job window).

**How it could happen:**

There was a bug which made this possible, fixed in 2009.

**New code to prevent this in future:**

Added in 2009.

**Explanation of report:**

The *Key* column shows the Scenario key, which links scenarios is a job. The items in the report are ordered by this key (which should also reflect groupings of job names - multiple scenarios in a job should share a common Scenario key).

**Explanation of fix:**

You can elect to either Delete the jobs (all of them) or repair then (all of them). If you repaid them, StairBiz will set the first scenario of each job to be Active, and will leave any others in the job as un-active (you can access these from the Scenario menu).

#### Multiple active scenarios:

**Manifestation:**

Multiple scenarios have “Active” ticked in the Process window.

**How it could happen:**

This is very rare. It is not known what might cause it.

**Explanation of fix:**

The “Delete” option does not apply.

StairBiz will leave the first active job, and make the rest inactive.

## STEP 4: Empty Records:

If you had any problem jobs in Step 2, do a Compact before moving on to this step.

**Manifestation:**

In some cases, if there is no data in the module of a job (e.g. a job's Custom Sheet Field Override record) StairBiz will not create a record for it, and instead simply makes a note in the job record that the field is empty. In some cases a bug in StairBiz meant that this wasn't happening (particularly with Override records, so you will probably have many of these show up in the report).

This Empty Record problem is not actually a problem - it has no impact on your jobs; StairBiz will simply clean them up.

**New code to prevent this in future:**

There is new code that should prevent this happening in the future.

## STEP 5: Jobs with Lost Data:

**Manifestation:**

For "Lost: Letter" and "Lost: Snaps3D" items in your report, these modules probably had no data in them in the first place, so it's not a problem. For other modules, the jobs have lost their data in the module (window) indicated in Column 1.

**How it could happen:**

In the case of Letter and Snaps3D, it could happen due to a bug (now fixed).

In other cases this can only occur by a corruption, but a corruption in one job had the potential to spread to other jobs.

**New code to prevent this in future:**

We now have code to prevent the problem with Letter & Snaps3D.

We now have code to intercept corruptions to prevent them spreading to other jobs.

**Explanation of report:**

In the case of "Lost: Letter" and "Lost: Snaps3D" items, because the problem was so wide-spread we simply show a "Count" of the number of jobs affected.

**Explanation of fix:**

The Status column will indicate "Blank Record Created" or "Set Empty", meaning that StairBiz has created a new (empty) record for that module. After a repair, you should check which jobs might need data re-entered.

Note that it's best to do a sort by Column 4 (the Job Key) to group the jobs for easier checking and re-entry of data if necessary.

## STEP 6: Jobs with Shared Data:

**Manifestation:**

Data entered in a module of one job can show up in that same module of other (unrelated) jobs. The following modules could be affected:

Shared:

Detail, CompWnd, Setout, LabCost, Site, MyData, Letters

Not Shared:

Quote, Quote2, Design, Snaps3D, Overrides, Done, Payments, Payments2

**How it could happen:**

In the case of "Done" buttons, a bug meant that if a new job was created using the project's "Save As" or "Open Template" menu, chances are that that the new job was affected.

For modules other than the "Done" buttons, only a corruption can cause this problem.

**New code to prevent this in future:**

In the case of "Done" buttons, new code should prevent it happening again.

For other cases there's not much we can do other than repair it using this Repair Database window.

**Explanation of report:**

In the case of "Done" buttons, because the problem was so wide-spread we simply show a "Count" of the number of jobs affected.

**Explanation of fix:**

Because this problem manifests as two or more jobs pointing to a single module sub-record, one of the jobs has the correct module data and the others do not. StairBiz assumes logically that the most recent job has the correct data (this would be correct if the most recent job was in fact the job most recently saved). On that basis StairBiz leaves the most recent job as is (and reports "Retain Original" in the Status column) and creates a new empty module record for the others (and reports "Blank Record Created" or "Set Empty Key" in the Status column).

You are advised to check all relevant jobs for the correct data in these modules.

Note that it's best to do a sort by Column 4 (the Job Key) to group the jobs for easier checking and re-entry of data if necessary.

## STEP 7: Image and Design Sizes:

See **Managing Images** for why this report might be useful.

Also see; **Save Images to File**.

**Explanation of report:**

This reports on the sizes of image records and design records bigger than a specified size belonging to jobs with a Job Date less than a specified date.

Enter the size and date before running the report. By default, the size is 100K and the date is 90 days prior to the current date.

The reason why we also report on Design records is that annotations are held in the Design record, so if you use large images in annotations the size of the Design record is affected.

**Explanation of Fix:**

If you click the "Delete Images" button, StairBiz will delete all images bigger than the specified size belonging to jobs with a Job Date less than the specified date.

The log items show a status of "Image Deleted".

Design records are NEVER deleted by this action. If you have some very large design records, open the relevant job(s) and delete the relevant annotation.

## STEP 8: Do this on ALL databases:

You MUST use this window on ALL job databases (server while connected, then all local computers while NOT connected).

If you have several local computers, and they do not hold local jobs (i.e. jobs not checked in to the server), you can save time by running this repair window on ONE local computer and then pasting this jobs database into the other local computers (replacing the existing database).

## Managing Images

StairBiz saves images in a job (3D captures from the 3D window, draw field overrides in Custom sheets, Draw windows and picture annotations). In most cases these images are relatively small, and don’t take up too much room in the database (e.g. a stair plan drawing might take about 60K). However … some of our clients are using photos to override Draw fields (these are extremely large – up to 2000K) , and as monitors get larger and have higher resolutions 3D captures are getting larger and larger (up to 1000K). StairBiz was never really designed to handle these very large images, from two points of view: 1) When saving and opening jobs across a network, slower or busy networks can “time-out”, and you could lose the image, and 2) The Microsoft Access database that StairBiz uses was never designed to store lots of large images (it gets bloated rather quickly).

If the Jobs database gets over 1.5 GB (about 20,000 jobs without images) it can start to break.

There are a variety of things you can do. The next topic (after this one) looks at saving images in files (rather than in the database) and would be useful if the following measures were either impractical or insufficient.

For saving images to the database, we recommend that you do not have many images more than 100K. If you have less than 100 images less than 500K, that's probably OK. If you have images larger than 800K, either delete them or see the next heading.

If you have an excessive number of large records see, " Saving Images in a job " in version 9.35 of the Release Notes.

We have coded to try and manage this situation better (see MISCELLANEOUS DEFAULTS window - IMAGE SAVE TO JOB category). These settings relate to Custom Sheet drawing overrides (which includes 3D capture) and Draw windows (under the Draw menu, not including Scrap Pads). They do not apply to images used in annotations – simply try to keep the size of these under control yourself (i.e. use them only for drawings – not photos or 3D captures). It does not apply to Style Photo images (which are never saved with the job).

Following are some tips for good management:

* Alert yourself to your use of large images - see **Alert if image size more than** (Miscellaneous Defaults window).
* Best not to save 3D captures with the job (use the **3D Snapshot** feature instead). See **3D capture Save Type** (Miscellaneous Defaults window). If you want to save a 3D image with the job (perhaps so that staff can see it whenever they open the job), after printing the quote with the full 3D render do a 3D capture using the **Wireframe Opaque** mode – these images are very small in size and for staff purposes are probably just as useful.
* Do not save photos with the job using Draw Override in Custom Sheets (use the **Image from File** feature instead). If you must save a photo, make it very small prior to capturing it – a photo half the height and width is one-quarter the size.
* Do not save job Draw sheets that contain photos (use the **Related Files** feature instead).
* On a database compact, delete images which are no longer useful (see **On Compress delete all images older than (weeks)** and **On Compress delete all images with Job Status set to** (Miscellaneous Defaults window). Job Templates are not affected. Depending on your use of images this can reduce the jobs database size by more than 75%. Note that a typical StairBiz job is around 20K; a hi-resolution 3D capture can bloat this up to 1000K and a large photo can bloat it up to 2000K.

## Saving Images to File

Some images in custom sheets (3D images, photos used in overrides, etc.) can be very large. The Microsoft Access database used by StairBiz was never really designed for such large images (and they weren't so large back when we decided on this database). If the Jobs database gets over 1.5 GB (about 35,000 jobs without images) it can start to break.

See **Image and Design Sizes** (above) to check how much space in your database is being taken up by images (actually, you can almost double the sizes shown due to the inefficiency of this database in saving images).

See **Managing Images** (above) for ways of cutting down on images sizes in the database without resorting to this section.

You can switch StairBiz to save all or some images in a file, rather than to the Jobs database. You can even decided the image size above which StairBiz will automatically save to a file, rather than to the Jobs database (i.e. it can be a duel system).

The effect of saving Images to a file is that the database doesn't get bloated and become inefficient or even dysfunctional. The only real downside is that you must remember to back-up the folder containing those images whenever you back up the jobs database.

To turn image file saving on or off ...

Defaults menu / Miscellaneous Defaults/ Image Save to Job / Save job images to file if more than

Enter a value being the size of the image (in kilobytes) above which StairBiz will save the image to a file rather than to the database. For example, "0" means do not save any images to file, "500" means save any images bigger than 500K, and "1" would mean save all images to file (because they would all be bigger than 1K).

Switching this system on or off only affects future jobs (not current jobs). This is not an issue (StairBiz understands which images are saved in a file and which in the database, and will handle each accordingly).

##### Batch Update

You can convert all or some existing database images to files, as follows:

Project Menu / Database Repair

For this purpose, we hijack STEP 7:

Enter "Where size >" (recommended is "0", so that all images are converted, depending on the severity of your situation).

Note that "and JobDate <" is not applicable.

*While holding down CONTROL and SHIFT keys*, click either of the two buttons as follows ...

**Report** button:

This will generate a report (only a report - it doesn't actually do anything) indicating how many images would be converted and the total size of such images (note that in our tests, the database actually lost about twice the size of this total, due to a variety of factors relating to how a database stores and handles large records).

**Delete Images** button:

Converts the relevant images (not including Annotation images) held in the current Jobs database to files stored on your disc. StairBiz then does a Database Compact (you don't need to do it manually).

##### Where are the images stored

StairBiz will create the appropriate folder(s) if they do not already exist. The folder is called "Job Images" and is located in the same folder as the related Jobs database (this is true for local, server and archive Jobs databases).

Note that when connected to the StairBiz server, images are save on your local computer, then sent to the server when you close the job. They may remain on the local computer until you do a local database compact.

Archive images are stored in a folder call "Job Images [ArchiveName]", where ArchiveName is the name of the relevant archive database file. Thus each different archive has its own folder for images.

StairBiz manages all this invisibly.

##### Deleting Images

StairBiz manages the deletion of images as appropriate. In most cases the relevant images are deleted when the associated job is deleted. Any remaining images files are deleted on a Database Compact if the associated job can't be found in the database.

##### Backing up the Job Images folder

StairBiz does not back up the Job Images folder(s) - you must do it manually as appropriate.

## Accidently deleted a project?

We'll assume you have a back-up of the relevant database which contains the deleted project.

1) From the Project menu, do a Database Compact, first while not connected, and then while connected. This may flush out any remnants of the deleted project which might interfere with the following.

2) Change the name of the backup database, then put it in the following folder:

C:\StairBiz Program\Defaults\Job Archive\

We are now treating this database as an archive.

3) From within StairBiz, open this archive (Project menu).

4) In the Directory window, sort by Project, then select ALL jobs in the relevant project (at the same time), then click the 'Restore Selected Jobs ...' (third toolbar button from the left).

# Glossary of Terms

acorn

A turned portion of the newel above the upper flat (knob, acorn, ball etc.).

adjacent newels

Newels are adjacent when there is a single string between (linking) them, and that string is not continuous (i.e. there is no change of direction).

assembly

The phase of a job involving taking the blank items and parts from the preparation staff and doing exact cutting, trenching and assembling of the straight flights, landing units, stair newels and balustrade sections.

assembly staff

The staff involved in the assembly phase of a job.

active window

The window at the front of your screen, waiting for some input.

active

1. A term given to a button, menu-item or text-field when it is available for a click, selection or input. The button, menu-item or text box is enabled.
2. A term given to a window when it is the front-most window, ready for input. The title bar of the window is not disabled.

alert window

A window that opens just to alert you about something. It usually requires an “OK” to close it. Similar to a dialog window (which usually requires more than an “OK”)

background window

A window that is open on your screen, but is not the active (front-most) window.

bearers

Strengthening elements glued to underside of landings or winder treads. The circumstances under which they are used depends on settings in the Setout Defaults window. On a job-by-job basis they can be excluded by selecting “None” from the Bearers list in the job’s Components window.

blank, blanks

A plain piece of timber, before being worked.

blank cost

The cost per metre/foot of the blank piece of timber, before being worked.

blank item

Refers to a component of the stair or balustrade which has been created from a piece of timber (a blank) that has been pulled from your timber rack. In some cases it is simply cut to length (e.g. strings); in other cases it must be cut and profiled. Every component of a stair can be treated as a blank item (with the exception of wallbrackets, and hardware). The alternative way to treat a component is as a *part*.

blank width, blank widths

The width of the plain piece of timber, before being worked.

brought forward

The act of making a background window the active window. It can be done by clicking any exposed part of the background window , or by using a menu.

bullnose

A bullnose is one or more treads at the bottom of the stair that extend past the line of the string and often have rounded ends.

bullnose template

A bullnose of a stair that has been saved as a bullnose template in the Design; Bullnose window.

button

A square, oval, picture or some other object on the screen that responds to a mouse click. They are more usually a push button, check box or radio button.

check box

A button which can be disabled (not available for a click), enabled and unselected (nothing in the little square), or enabled and selected (a cross in the little square). They are usually used in a yes/no situation.

click

The action of depressing the button on top of the mouse while the cursor is placed over something “clickable” in a window. A double-click involves depressing the mouse button twice in rapid succession.

click-drag

A click-drag involves clicking and, while keeping the mouse button depressed, dragging the cursor across the screen to a desired destination before releasing, usually creating a rectangle.

client

The person (normally the builder, but possibly the owner of the site) who orders the job.

hockey string

Where a wallstring of a straight flight meets the wallstring of a landing containing more than one tread, and the two strings marry to form a continuous string. See also lower hockey string and upper hockey string.

CNC

Computer numeric controlled. Usually relates to computer controlled point-to-point router tables.

CNC file

A file exported from the CNC Bed window which can be imported by a CNC machine (or a CNC post-processor program prior to being sent to a CNC machine). These files contain g-codes. They are normally stored in the CNC Files folder.

current job

The job currently in progress on your screen.

current project

A project is a container for one or more jobs which may share common properties. The current project in the one currently open (i.e. the project that owns the job you are currently working on).

current scenario, active scenario

The scenario currently active.

cursor

A small object (arrow, cross-hair etc.) on the screen which moves correspondingly to movement of the mouse.

cut path

The centre of the CNC path cutting the outline (full depth) of a component

sawtooth

Sometimes called open string or cut string. A string where the treads, rather than house into the string, sit on top of the saw-teeth and either protrude past the outside face of the string or is mitred into it. Frets are often used for appearance). See Sawtooth Stairs.

default

A value or option, usually set in one of the windows under the Defaults menu, which is used by StairBiz to process a job. The user can often change this value or option from within a particular job to only affect that job.

delivery, deliver, delivered

The phase of the job involving delivery of the assembled stair to the site. The stair may or may not be installed, but installation is not part of delivery.

dialog window

A small window that appears on the screen to request something specific from the user. It may be an Yes/No request, an OK (acknowledgment) request, or it may request typed input or a selection from a list. The Dialog window will not go away until it has been dealt with, nor can you resume your work on the program.

dimension tags

A calculated dimension represented by a letter (e.g. “C”) rather than a number. To see its value, click on it. To change it, either edit it directly or select a different tag by right-clicking the dimension.

disabled

A term given to a button, menu-item or text box when it is not available for clicking, selection or input. The button, menu-item or text box is usually grey.

dispatch, dispatched

The method for dispatch of the completed job - the client collects (pickup), you deliver, or you deliver and install (supply & fix).

edit

The act of changing the contents of a text box. See Editing.

file

A “package” of information stored in a folder on your disc under its own name.

fillets

The pieces of material used between balusters in the plow of handrail, shoerail and balconyplate. They are used to space the balusters and tidy up the general appearance.

flat

Those parts of a turned newel which are not turned. The unturned part of a turned newel into which runs the handrail is called the upper flat. The unturned part of a turned newel which makes contact with the floor is called the lower flat.

floating newel

Where a newel is not integrated into the structure of the stair.

fret

Used only on a sawtooth strings, it is a “fret-sawed”, roughly triangular, thin piece of timber fixed under the sidenosing of a tread and mitred into the end of the riser below the tread. It is sometimes called a bracket. It is purely cosmetic.

grain, grained, grained board

Timber which has a grain direction (timber which is not MDF, metal or plastic).

halflanding

A single tread landing which has a width the same as the combined upper and lower flights.

in-house

A task performed by your staff, or by a sub-contractor on an hourly rate of pay.

input

Something you, as the user of the program, does. It could be clicking a button or toggle, selecting from a menu, typing into a text-field, etc.

install, installation, installed

Fitting the finished stair to the building at the site.

installation staff

Staff involved in fitting the finished stair to the building at the site.

job phases

There are up to four phases of a job:

Preparation, Turning, Assembly, Delivery/Installation

job

A stair, balcony, or both, which is being processed by StairBiz and ends up with its own unique file on disc.

job template

A job created in StairBiz that has been saved with the Job Template button selected in the Process window. When a job template is opened, only a copy is opened (so that the original is not changed).

kitelanding

A quarterlanding with 3 treads.

outstep

The top nosing of the stair, which normally rebates over the trimmer and is flush with the upper flooring. Sometimes called an out-step.

Can also refer to a detachable nosing on a mid landing.

lower flat

The unturned part of a turned newel which makes contact with the floor. Also see flat.

lower hockey string

A continuous string where the upper part of the string is associated with the landing. See also hockey string.

profiled

A component which is turned, or worked in some way to give it a profile (e.g. handrail)

machine bed

The bed of the actual CNC machine, as opposed to the emulated bed in the CNC Bed window.

margin

When relating to a quotation, it is the same as profit.

MDF

Medium density fibre-board material. It can be in sheet or board sizes.

MDF board

MDF material that comes in board sizes (rather than sheet sizes)

MDF sheet

Medium density fibre-board sheet material.

menu

The headings across the top of the screen from which you make a selection by clicking and dragging down to a menu-item. See also pop-menu.

menu-item

An item contained within a menu, accessed by clicking the menu heading and dragging down to the desired item. See also pop-menu.

mid newel

A stair newel that is not a bottom newel or top newel.

mid tenonside side newel

A stair newel that is not a bottom newel or top newel and is on the tenonside side of the stair.

mid wallside newel

A stair newel that is not a bottom newel or top newel and is on the wallside side of the stair.

newel

Sometimes called a post or knewel – the vertical square posts used to support handrail.

openrise

A stair without riser boards. To exclude riser boards from a stair, select “None” from the Risers list in the job’s Components window.

part

Refers to a finished component usually purchased from a supplier in its finished state. It may need trimming to length. It has a fixed price. It always has a PartId (SKU), whether this PartId has been assigned by the supplier or by you. Parts are what you enter into the Parts window. The alternative way to treat a component is as a *blank item*.

path pattern

The pattern of the CNC cut and trench paths for the particular circumstance.

pickup

A method of dispatch – the client collects the assembled stair from your factory (no delivery or installation)

pop-menu

A menu located within a window (rather than at the top of the screen) which, upon a click, displays a list of menu-item for selection.

preparation

The preparation stage of a job, usually relating to selecting, sorting, marking, cutting and sanding materials in preparation for turning and assembly. It also includes the machining of styles where necessary (other than the turning of newels and balusters).

preparation staff

Staff involved in the preparation stage of a job, usually relating to selecting, sorting, marking, cutting and sanding materials in preparation for turning and assembly.

Process windows

One of the 15 windows available for input while processing a job. See Process windows.

push button

When you click this button StairBiz does something immediately. When it is disabled it is not available for a click, otherwise it is enabled and available for a click.

quarterlanding

A square shaped single tread landing (like the ones used in an L-Shape stair).

radio button

A button which is always in a group of two or more, only one of which can be selected. Selection of one button unselects the previously selected button.

plow

The groove in handrail, shoerail and balconyplate made specifically for balusters.

balcony

The area around the perimeter of the well cut-out (the hole in the upper floor).

balcony balustrade

The horizontal balustrading (newels, balusters, handrail and base plate) around the well cut-out of the upper floor.

balcony newels

Any newels associated with the area of the well cut-out in the upper floor which are not part of the stair (i.e. part of the horizontal balustrading).

balconyplate

A horizontal piece of timber sitting on the upper floor down into which run the balusters of the balcony balustrade.

saved job

A job that has been started, possibly finished, and saved to the database.

select, selected

A button, text or other object on the screen which is highlighted or otherwise distinguished from its normal state. Usually achieved by clicking or click-dragging the mouse.

1. Text on the screen which is highlighted or otherwise distinguished from its normal state. Select text by double-clicking or click-dragging it. Also see Editing.
2. A radio button which is the one which is marked. Select a radio button by clicking on it.
3. A check box which has a tick. Select a check box by clicking on it once.
4. An item in a list. Select by clicking on the item.
5. Some other object that is highlighted. Select it usually by clicking on it.

Schedule

An optional module for StairBiz that allows you to plan time on an interactive graphical timeline. The **Schedule** is not yet available.

sheet

A page of information which is printable on your printer. It can be viewed on the screen in the relevant Sheet window.

Sheet window

A window in which you can view a sheet.

sidenosing

Used only on sawtooth strings, it is a nosing fixed to the end of the tread to hide the end-grain exposed as a result of the string being cut.

site

The premises where the stair is to be delivered or installed.

skirting

Skirting is used to trim the top wallside edge of a horizontal landing. It sits on top of the landing flush with the wallstrings and is the same width as the wallstrings. It butts into both associated straight-flight strings.

splitlanding

A square landing with 2 treads.

StairBiz

Refers to the StairBiz program. For example, a reference to a StairBiz calculation means that the program has done the calculation, rather than the user.

StairBiz bed

The emulated CNC bed as seen in StairBiz in the CNC Bed window, as opposed to the bed of the actual CNC machine.

stair configuration

A stair’s configuration determines the basic shape of the stair (L-Shape, U-Shape etc.) and some of the stair’s most fundamental attributes (existing landing, non-optional newel inclusions etc.).

The stair configuration is different from the stair setout or stair design.

stair design

A stair’s design determines things like the width of the flights, numbers of treads in flights and landings, optional newel inclusions, riser height and going etc. The design is done in the Design; Stair Design window.

The stair design is different from the stair setout.

stair setout

A stair’s setout determines where components of the stair are placed in relation to each other. Things like where tread nosings enter newels, the height of handrail, the default spacings for balusters, the angles of winders etc. are all part of a stair’s setout.

The stair setout is different from the stair design.

stair template

A stair created in StairBiz and saved as a template in the Design; Stair Templates window. Only data relating to the single stair is saved (nothing about the client, job, well or balcony balustrade).

string

The boards down the side of stair into which are trenched the treads and risers. It is important that finished sizes are set for string widths and thickness – many calculations depend on it. See also tenonstring and wallstring.

style

A style is a name/size combination. For example, “Colonial 40x40” is the style of a baluster. Styles for a job are selected in the Components window.

tenonside

We use “tenon” side and “wall” side to refer to a particular side of the stair.

The tenonside refers to the side which is (under normal circumstances) the open side (as opposed to the wallside side). For example, for a normal stair that goes up and to the left, it would be the left hand side.

tenonstring

A string which is on the tenonside side of the stair.

shoerail

The piece of timber which sits on a string (either tenonside or wallside) down into which runs the stair balusters. Although it would be more usual to have shoerail with a tenonstring, if a wallstring has balustrading, then shoerail would apply.

text box

An area on the screen where you can type or edit text. It normally has a border (a box) around it. If the box is grey, the text box is said to be disabled (you can’t type or edit the text).

toggle

Switching between states or values or incrementing/decrementing a value, usually by clicking the mouse.

tool-bar

A vertical strip down the left hand side of your screen in StairBiz. It contains picture buttons which correspond to certain menu-items, and acts as a shortcut to those items.

When you place your cursor over a button, a “tool-tip” text box appears telling you what this tool does.

trench path

The centre of the CNC path trenching treads and risers on a string

turn, turning

1. The portion of turned newel or baluster between the upper flat and lower flat.
2. The work involved in machining a profile on a newel or baluster.

turned

A newel or baluster that has been profiled in any way.

unit template

Any unit of a stair that has been saved as a unit template in the Design; Stair Design window. Only data relating to the single unit (or landing combination if more than one corner units are joined) is saved.

unselect, unselects, unselected

1. Text on the screen which is not highlighted or otherwise distinguished from its normal state. Unselect text by clicking once somewhere on the text. Also see Editing.
2. A radio button which is not the one which is marked. Unselect a radio button by clicking on another radio button in the group.
3. A check box which does not have a tick. Unselect a check box by clicking on it once.
4. An item in a list. Unselect by clicking on another item.
5. Some other object that is not highlighted. Unselect usually by clicking on it, or clicking somewhere else.

upper flat

The unturned part of a turned newel into which runs the handrail. Also see flat.

upper hockey string

A continuous string where the lower part of the string is associated with the landing.

user

Any person using the StairBiz program.

wallside

We use “tenon” side and “wall” side to refer to a particular side of the stair.

The wallside side refers to the side which is (under normal circumstances) the closed side (as opposed to the open side). For example, for a normal stair that goes up and to the left, it would be the right hand side.

walltrim

The piece of timber which covers the gap between a string and a wall. It can be associated with either a tenonstring or wallstring (but more commonly on the wall-side). StairBiz assumes that there is walltrim associated with every string which does not have balustrading (this includes tenonstrings). If you don’t want walltrim, select “None” in the Components window of the job.

wallstring

A string which is on the wallside side of the stair.

well junction

The intersection of two well sections

well section

A straight line representing the edge of part of the cut-out in the upper floor

well template

A well that has been saved as a well template in the Design; Well Design window.

balconytrim

A moulding which covers the gap between the balconyplate and the inside of the well. StairBiz only accounts for balconytrim along sections of the well where there is balcony balustrade. If you don’t want balconytrim, select “None” in the Components window of the job.