

banker

COLLABORATORS

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Contents

1	banker	1
1.1	banker.guide	1
1.2	banker.guide/OVERVIEW	2
1.3	banker.guide/BANKER STATUS	3
1.4	banker.guide/INSTALLING BANKER	3
1.5	banker.guide/THE GRAPHIC INTERFACE	4
1.6	banker.guide/LAUNCHING BANKER	4
1.7	banker.guide/FROM CLI	5
1.8	banker.guide/FROM WORKBENCH	5
1.9	banker.guide/THE MAIN WINDOW	6
1.10	banker.guide/Menus	6
1.11	banker.guide/Buttons	7
1.12	banker.guide/THE LIST WINDOW	8
1.13	banker.guide/THE NEW ENTRY WINDOW	9
1.14	banker.guide/THE AUTOMATIC ENTRY WINDOW	9
1.15	banker.guide/THE CONFIGURATION FILE	10
1.16	banker.guide/Output formats	10
1.17	banker.guide/Date formats	11
1.18	banker.guide/Windows open	11
1.19	banker.guide/Autosave	12
1.20	banker.guide/NOTES FOR 2.1 USERS	12
1.21	banker.guide/FUTURE ENHANCEMENTS	12
1.22	banker.guide/INDEX	12

Chapter 1

banker

1.1 banker.guide

Welcome to Banker!!!

Overview

What is Banker?

Banker status

The legal status for Banker

Installing banker

What you must do to install banker

The graphic interface

The bases of Amiga's graphic interface

Launching banker

From Workbench or CLI

The main window

How to select your action

The list window

Display your account

The New Entry window

Enter a new entry

The Automatic Entry window

Enter a new automatic entry

The configuration file

How to customize Banker

Notes for 2.1 users

Special information for 2.1 users

1.3 banker.guide/BANKER STATUS

Banker's legal status

This program is shareware and (C)1992 by Cédric BEUST. You may redistribute it freely provided :

1. No benefits are made on it, and that the price asked doesn't exceed the price of shipping and handling plus the one of the supporting media.
2. The distribution is given with every single file present and unaltered. See the file Banker/FILES for a list of these files. My name and copyright notices must remain intact.
3. If you find this program useful and have been using it for more than a month, you are morally forced (we know what this means...) to send me a reasonable amount of money (\$10 seems fine to me, but if you send more you will enter my "privileged users" list). Please send dollars or French francs unless you really can't do otherwise. I can be reached to the following address :

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1.4 banker.guide/INSTALLING BANKER

Installing Banker

The operations needed to install Banker are very simple :

- * From CLI : Copy the files Banker and Banker.info into your favorite directory, and copy the configuration file in your `s:` directory :

```
1> copy Banker <dest>
1> copy Banker.info <dest>
1> copy s/.bankerconfig s:
```

- * From Workbench : Simply drag the Banker icon into your favorite directory. For the configuration file, it's hardly trickier :

1. Select Window/Show all files from the Workbench menu
2. Open the 's' drawer
3. Double-click on the file '.bankerconfig' and replace '.bankerconfig' with 'copy .bankerconfig S:'

1.5 banker.guide/THE GRAPHIC INTERFACE

The graphic interface

Banker uses MUI, the Magic User Interface by Stefan Stuntz for its interface. Thus, you must have the MUI package in order to be able to use Banker. It can be retrieved on aminet, or directly from the author if you have no net access. Read the file "Readme.mui" for more information on MUI.

All you have to know of *gadtools* and *MUI* in order to use Banker is the following :

- * In string gadgets, all the characters are allowed. Hitting *RETURN* will deactivate the string gadgets. Then you can use the shortcuts if any are present (see below)
- * When you are in a string gadget, hit *TAB* to take the cursor to the following string gadget (*Shift-TAB* will take you to the previous one). When you reach the last one in the window, you are taken back to the first (respectively the first to the last).
- * When all the gadgets are deactivated (i.e. the cursor doesn't appear in any string gadgets), you are free to use the mouse or the shortcuts. They are indicated by a word with a letter underlined. You can press the underlined letter to obtain the same result as if you had pressed the gadget with the mouse.
- * In every window, there are shortcuts that are always valid, even though not clearly indicated. These are
 - * *ESC* will make the window disappear (same as selecting the gadget *Cancel* (NB : the name will be different if you chose to use another language)

1.6 banker.guide/LAUNCHING BANKER

Launching Banker

You can execute Banker either from CLI or from the Workbench. You

have the possibility in either case to give arguments that give Banker different directives.

From CLI
 Launching from CLI

From Workbench
 Launching from Workbench

1.7 banker.guide/FROM CLI

From Cli

=====

If you launch Banker with a single quotation mark as argument, you will have the following template :

```
1> banker ?
Language/K,File/K,OptionsFile/K:
```

The meaning of these options is :

- * LANGUAGE : Specify the language you wish to use, in case it is different from the default locale. Note : this option will only work if you're running Workbench 2.1 or higher (see

Notes for 2.1 users
).

- * FILE : Specify the file you want to load initially in Banker.

- * OPTIONSFILE : Specify an alternate name for the default configuration file (default is 's:.bankerconfig')

For example, you might call Banker from CLI with the following syntax :

```
1> banker FILE account.bank LANGUAGE italiano
```

or

```
1> banker OPTIONSFILE CFG:Banker.cfg
```

1.8 banker.guide/FROM WORKBENCH

From Workbench

=====

Specifying arguments for Banker in the Workbench is accomplished through the 'info' file. Click once on the Banker icon in order to activate it and then select Icon/Information from the menu (or press Right-Amiga I). A list of tooltypes appears. To add one, simply click on *Add* and type it in the activated string gadget. To modify an existing one, select it and do the same. See your Workbench Manual for more details.

The tooltypes understood by Banker are the following :

- * LANGUAGE=<name> Specify the language you wish to use, in case it is different from the default locale. Note : this option will only work if you're running Workbench 2.1 or higher (see

Notes for 2.1 users
) .

- * FILE=<path> Specify the file you want to load initially in Banker.

- * OPTIONSFIL= <path> Specify an alternate name for the default configuration file (default is 's:.bankerconfig')

1.9 banker.guide/THE MAIN WINDOW

The main window

This is the window that allows you to choose among the several features of Banker. It has menus and buttons.

Menus
Using the menus

Buttons
Using the buttons

1.10 banker.guide/Menus

Menus

=====

The menus are the following

1. The File menu

- * Open Open a new file. Its name will be indicated in

the title bar of the main window. If there is already a file present in memory and if it has been modified, Banker will issue a warning telling you you're about to lose data. If it's not your intention, cancel the Open order, save your file and then you can Open safely.

* Save Save current file to disk. If no name had been given yet, a file requester appears.

* Save as Save the current file under a name queried through the file requester.

* Print Print the current file through a file requester (suggesting 'PRT:' by default) using the format specified in the *PrintFormat* variable (see

The Configuration File
) .

* Export Export the current database to a format specified in the *ExportFormat* variable (see

The Configuration File
) .

* Quit Quit Banker. If there is already a file present in memory and if it has been modified, Banker will issue a warning telling you you're about to lose data. If it's not your intention, cancel the Quit order, save your file and then you can Quit safely.

2. The Preferences menu

* Save Will allow you to save the current settings to the configuration file (see

The Configuration File
) , mainly

the positions of all the windows. Next time Banker is started, the windows will be automatically positioned at the place where you last moved them.

1.11 banker.guide/Buttons

Buttons

=====

The buttons perform the following actions :

* New Entry If you wish to add an entry to the current database, select this button (see

The New Entry Window
) .

* List Entries Will take you to the List window in order to see

the contents of the current database, or to edit it (see

The List Window
).

- * Automatic credit/debit If you wish to add a new Automatic entry (that is : an entry that will be entered repeatedly and automatically in the database), select this button (see

The Automatic Entry Window
).

- * Clear File Will clear the current file, in order to start a new one.

1.12 banker.guide/THE LIST WINDOW

The List window

This window gives you the full listing of your account until today.

The list
=====

The appearance of what you see will depend on the variable *DisplayFormat* (see The Configuration File). The only constant thing is the character displayed on the first column, which is one of :

- * '+' Indicate a line that was generated by an automatic entry (see The Automatic Entry window).
- * '*' Indicate an entry that has not been validated by your bank.
- * ' ' When no character is present, this entry was validated by the bank

Validate/Edit/Delete
=====

The cycle gadget at the bottom of the window can alternate between three states. Depending on its value, clicking on one of the displayed lines will have a different behavior :

- * Validate Validate this entry. The 'Validated total' gadget at the bottom will be updated accordingly immediately.
- * Edit Edit this entry. If you click on a regular entry, you

will be taken to the window editing a new entry (see

The New Entry Window
) but if this entry was generated by an
automatic entry, you are actually asking to edit the automatic
entry (see
 The Automatic Entry Window
).

- * Delete Delete this entry. A warning will appear so you can confirm your action. If you select an automatic entry, you're actually asking the automatic entry to be removed, and therefore all the generated entries. Use this option with great care!

The total
=====

Down on the right are two figures that represent the state of your account.

- * Validated All the entries that were validated by your bank. After you correctly updated these entries, the figure indicated must match the one your bank is giving you.
- * Total This is the actual total of what your account is (that is, the validated total plus the new entries that were not validated yet)

1.13 banker.guide/THE NEW ENTRY WINDOW

The New Entry window

This window allows you to enter a new entry. Its use is rather straightforward. The only mandatory fields are "Date" and "Amount". You can fill in the other fields depending on the value of your format variables (see

The Configuration File
).

To specify a debit in your account, enter a negative figure in the "Amount" gadget.

1.14 banker.guide/THE AUTOMATIC ENTRY WINDOW

The New Automatic Entry window

This window allows you to enter a new automatic entry. Automatic entries are used when an amount is regularly credited (or debited) to your account. In this window, you can specify :

- * The amount (may be negative to specify a debit)
- * The delay between two entries
- * The fields defining the Reason and the Imputation of the generated entry. You're free not to fill these fields.

These automatic entries will generate entries that will be signaled by a '+' in the List Window (see
The list window
).

1.15 banker.guide/THE CONFIGURATION FILE

The configuration file

Banker can be customized in a simple yet flexible way.

Output formats

How to change the representation of what you see and get

Date formats

To choose between several representations of dates

Windows open

Indicate which windows you want to be open on start

Autosave

Set the autosave interval

1.16 banker.guide/Output formats

Output formats

There are three output formats controlled by three variables :

- * listformat Control the entries displayed in the List Window
(see
THE LIST WINDOW
)

- * `printformat` Control how the entries are printed (see Menus)
- * `exportformat` Control how the entries are exported (see Menus)

These three variables must respect a certain syntax. Each string that you wish to include as is must be enclosed in quotation marks ("). Any words not enclosed in quotation marks must be one of the following :

- * Date, Imputation, Reason, Amount, Transaction
- * Any valid escape sequence from MUI's font engine

In order to have the list of these sequences, read the file `font_engine.doc` in the `Docs/` directory.

Example :

```
displayformat "<ESC>b" date "<ESC>n | $" amount " | " reason
```

will display the date in bold, followed by a vertical bar, then a dollar, the amount, another bar and the reason field.

NOTE: <ESC> must be replaced with a **real** ESC character

1.17 banker.guide/Date formats

Date formats

You can ask Banker to display dates in many different formats. Depending on your Workbench version, not all the formats will be available.

- * Workbench 2.0
- * Workbench 2.1 and 3.0

1.18 banker.guide/Windows open

Windows open

Here you specify which windows you want to find open when you start Banker. For example :

```
mainwindow 1
automatic 1
list 1
getEntry 0
will display all the windows except the one where you enter a new entry.
```

1.19 banker.guide/Autosave

```
Autosave
*****
```

Set the autosave interval in minutes. For example :

```
autosave 2
```

1.20 banker.guide/NOTES FOR 2.1 USERS

```
Notes for 2.1 users
*****
```

1.21 banker.guide/FUTURE ENHANCEMENTS

```
Future enhancements
*****
```

Whereas primarily written for my own use, Banker quickly appeared as a program that might beneficiate from an intensive work and become a very powerful tool. Depending on the level of interest of this first version, next versions of Banker will incorporate the following features :

1.22 banker.guide/INDEX

```
Index
*****
```

Arguments

LAUNCHING BANKER

Changing the configuration file name
FROM WORKBENCH

Changing the configuration file name
FROM CLI

Export
Menus

File menu
Menus

gadtools
OVERVIEW

gadtools
THE GRAPHIC INTERFACE

Installation
INSTALLING BANKER

Introduction
OVERVIEW

Invisible shortcuts
THE GRAPHIC INTERFACE

Launching from CLI
LAUNCHING BANKER

Launching from Workbench
LAUNCHING BANKER

locale
OVERVIEW

Open
Menus

Overview
OVERVIEW

Print
Menus

Quit
Menus

Save
Menus

Save as
Menus

Shortcuts
THE GRAPHIC INTERFACE

Specifying an initial file
FROM CLI

Specifying the language
FROM CLI

String gadgets

THE GRAPHIC INTERFACE

TAB

THE GRAPHIC INTERFACE

Tooltips

LAUNCHING BANKER
