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Frequently asked questions

Here are your most frequently asked questions

From simple to complex

Home and Business Inventory provides a complete, simple to use program for you to track personal property for both home and business use.

This program will assist anyone in tracking personal property in both personal or business settings.

Introduction

This program uses several different types of Windows controls. If you are an experienced Windows user, you will find them to be familiar. In some cases a few of our controls are special. An explanation of each type of control and how to use it is provided below.

Date time picker

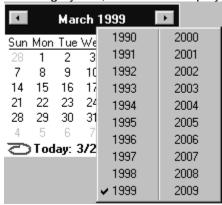
Dates that are entered into this program are entered using a date/time picker. The program will enforce the entry of correct dates! You may simply type in the date. However, if you click on the drop down:

you will activate the date/time picker:



The date time picker shows the current date (as set by your computer's internal clock). You may use the buttons to move between days, or, simply click on a date to set it.

To change years, click on the displayed year, and a drop down list of years will appear:



To change the months, click on the month, and a display of months will be shown:



How dates are handled! Two digit dates are used. The program is configured to be Year 2000 capable. Years below 50 and below are treated as in 2000, dates above 50 are treated as in 1900. For example:

5/1/01: Treated as May 1, 2001 5/1/50: Treated as May 1, 1950

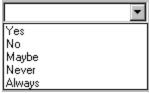
5/1/99: Treated as May 1, 1999 5/1/30: Treated as May 1, 2030 This setting is called the epoch, or date rollover. You may change this setting on the Utility Menu.

Combo box

Combo boxes

Combo boxes

Combo boxes allow you to pick from various values, or to type in your own value. Clicking on the combo box will show the list of choices which you have. Here is a generic example:



If the choices aren't satisfactory, you may type in your own value.

Many of the combo box lookup lists (the items that are shown when you activate the drop down) can be edited by clicking on Edit, Lookups on the main menu:



Check box

Think of a check box as holding the values TRUE or FALSE, or, YES or NO.

If the box is checked:



this means TRUE or YES.

If the box is blank:

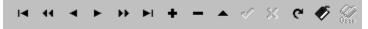


this means FALSE or YES.

In reports you will see True or False when printing out inventory lists.

Navigator

The main menu and the grid view both have Database Navigators:



On the main menu, the navigator is located on the top of the screen. On the grid view, the navigator is located on the bottom of the screen.

Think of the buttons as "VCR" buttons. The buttons are similar to forward, reverse, rewind, record, erase and mark.

Beginning on the left, the return to start button takes you back to the first items:



The left double arrow moves back ten items:



The left single arrow moves back one item:



The right single arrow moves forward one item:



The right double arrow moves forward ten items:



The right return to start button takes you to the last item:



The plus sign inserts a new item; after clicking you will see a blank form to complete:



The minus sign DELETES and removes the current item:



The delta (triangle) allows you to edit the present item:



The check mark posts the current item; if you have made any changes, they are now saved;

The x erases changes, however, once you have posted an item, you cannot use the X to go back to an earlier version:



The curved arrow reloads the current item:



The bookmark sets a bookmark for the current item:



Goto bookmark, the last button on the right, goes to the item currently bookmarked:



Every time you move from one item to another, you post (save to disk) changes made to the present item. In a grid view of data, you post items as you use the scroll bars to navigate from one record to another.

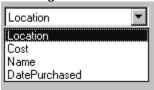
Sort view by

When you begin using the program, the items in your home or business inventory are sorted by location.

The present sort is shown in the bottom right hand corner of the program:



To change how the items are viewed, click on the drop down list and select the sort order you wish to use:



The information stored on your system does NOT change- just the view.

If you need to view the information in an order which is not provided, you may do so by accessing custom reports from the utilities menu.

Images

This program allows you to store images of individual items or rooms. In addition, the free form RTF notes also allow the inclusion of images.

To include an image, click on the Image's frame; after clicking on the frame, a file open dialog will appear:



Click on the image or enter the image name to add it to the database.

The image is then stored.

Please note that if you include many images the size of the database files used by Home and Business Inventory manager will rise substantially. This may also slow viewing items. Images can take multiple megabytes!

RTF (Freeform notes)

This program provides many different opportunities for you to save free form notes.

The display will simply show the information stored.

To access the editing menu, click on the free form notes you wish to edit and then click F2 (function key two, on the very top of the keyboard.)

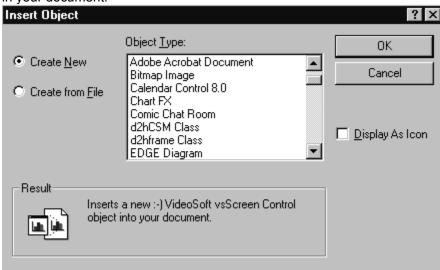
You will then be able to access the full edit menu.

The most important item on the menu is Insert-Object.

Insert-Object allows you to insert virtually any type of windows document in your free form notes, including but not limited to:

- Spreadsheets
- Images
- · Web pages
- Media Clips
- Word processing documents

The Insert-Object menu will check your system and advise you of the different objects that you can insert in your document:



Note: Your display will vary depending on the programs which you have installed on your computer system.

There is no limit to the length of items you insert into the free form note, except for your disk space. Remember, that if you insert graphics or other large size objects this will slow down program performance and may require many disks for backup.

Currency editing

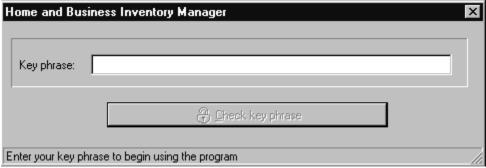
\$111,111.00

Any entry in the program of dollar amounts will be reformatted AFTER the entry is complete. You must enter the information in the correct format- as a number without any other formatting such as dollar signs or commas.

Example # 1:
You need to enter \$40.56. The correct format for the entry is shown below:
Amount: 40.56
After the record is posted, the program will automatically reformat your entry to a dollar amount
Amount: \$40.56
Example # 2:
You need to enter \$111,111.00. The correct format for the entry is either:
Amount: 111111
or
Amount: 111111.00
The entry will then be formatted as follows:
Amount: \$111,111,00

Entry of password

When you begin Home and Business Inventory Manager, you will first have to enter a password or key phrase:



NOTE: When you first install the program, the first password is: start

(This is case sensitive: Start or START are wrong—only all lowercase start is correct.)

You should change the key phrase after your first use of the program.

The most secure key phrase is a short sentence or phrase. Avoid using your name, initials or other commonly known information about you. Your phrase may contain any character and can be of any length.

The program WILL NOT begin unless you enter the exact key phrase or password.

If you forget the passphrase, it IS possible to recover all data.

THEREFORE THIS LOG IN PROCEDURE IS NOT SECURE AND SHOULD NOT BE CONSIDERED AS SUFFICIENT TO DETER ALL BUT CASUAL SNOOPS.

If you would like to keep your data truly secure you should take steps such as using a secure cryptography system (like Complete Internet Suite from Cosmi) or physically controlling access to the computer on which the data is stored. Cosmi provides free military strength encryption software on the web (for residents of the US and Canada only):

www.stealthencrypt.com

Here's how the log in system works:

The key phrase is converted into a "hash," or digital fingerprint. This program uses <u>SHA</u>, the secure hash algorithm, and converts your pass phrase into a 160 bit "fingerprint." Therefore, your pass phrase is NOT stored on your computer system.

The fingerprint is stored on disk. When you enter your key phrase, the key phrase is also converted into a 160 bit digital fingerprint. If the fingerprints match, then the program loads. If it does not, you will be advised that the pass phrase does not match, and will be given another chance to enter the correct pass phrase.

Recovering data if you forget your pass phrase:

First, back up the data! You can do this manually by copying all of the following files to a disk or a different folder:

category.db

home.db

location.db

purchased.db
category.px
home.px
location.px
purchased.px
home.xg0
home.xg1
home.xg2
home.xg3
home.mb
location.mb

purchased.mb

If you have backed up the data using the backup utility provided with this program, you do not need to follow this step. This is an excellent reason to make multiple backups of your data.

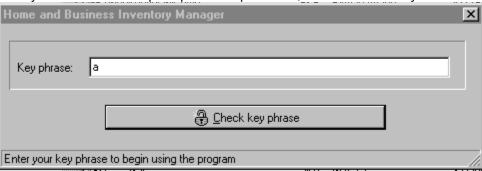
Then verify that you have backed up your data!

After verification, uninstall Home and Business Inventory Manager (from the CONTROL PANEL). Then reinstall the program. Finally, copy the data you backed up back into the folder where you installed Home and Business Inventory Manager.

The passphrase to enter the program is now reset to start and you can use the program. Change your passphrase after the first use of the program.

Checking password or pass phrase

After you have entered a pass phrase or password, click on Check Key Phrase:



If your key phrase is correct, the main menu will then load. If it is not, you will be given another chance to enter the key phrase. Remember that key phrases are case sensitive.

The first time that the program is used, the key phrase is start

File menu functions

The file menu provides access to utilities and return to Windows.

See

File, utility

File, exit

File, utility

Launches the utility menu.

File, exit

Closes the program and returns to Windows.

Lookups

The edit menu provides access to editing the lookup items used in the program:

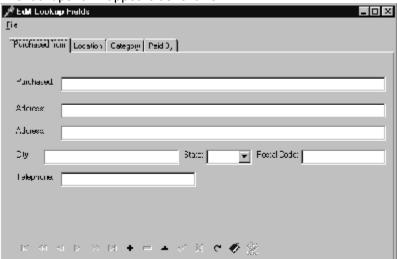


The items which use editable lookups are:

- Depreciation
- Paid By
- Category
- Purchased from

Lookups Form

The lookups form appears as follows:



Lookups Form

The lookups form, like the main form is a tabbed notebook. Click on the appropriate tab to edit each look up.

Purchased from

The information in the purchased from lookup provides address and other information on vendors. A report of this information is available from the reports menu.

Locations

You may add, edit or delete locations. In addition, you may add images of locations and notes.



Image

You may wish to keep an image of a specific location. To include an image, click on the Image's frame; after clicking on the frame, a file open dialog will appear:



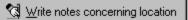
Click on the image or enter the image name to add it to the database.

The image is then stored.

Please note that if you include many images the size of the database files used by Home and Business Inventory manager will rise substantially. This may also slow viewing items. Images can take multiple megabytes!

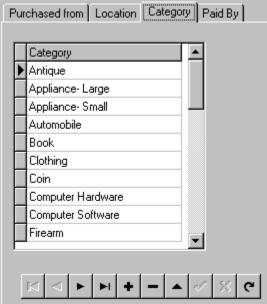
Notes

Click on the notes button to add free form notes on the location:



Category

The category grid allows you to add, delete or edit categories:



Paid By

You may add, delete or edit forms of payment:



Paid by

To save your changes, click on Save List.

Year 2000 Rollover

How dates are handled! Two digit dates are used. The program is configured to be Year 2000 capable.

Years below 50 and below are treated as in 2000, dates above 50 are treated as in 1900.

For example:

5/1/01: Treated as May 1, 2001

5/1/50: Treated as May 1, 1950

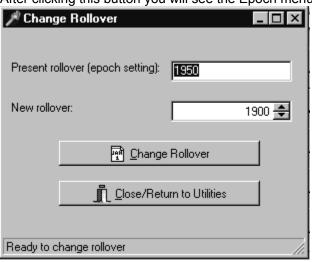
5/1/99: Treated as May 1, 1999

5/1/30: Treated as May 1, 2030

To change this setting click on Change Epoch

Change Epoch (Year Rollover)

After clicking this button you will see the Epoch menu:



New Rollover

You may either type in the date when you wish to rollover, or use the spinner. The year selected must be in the range of 1900 to 1999.

Change Rollover

Clicking this button changes the rollover within the program. This setting will become effective the NEXT TIME the program is used.

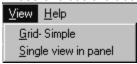
Close to utilities

Clicking this button returns you to the Utilities menu.

Different views

You may choose from three different ways of viewing the data in this program. You may view the data in a tabbed notebook, in a grid or in a panel.

These choices are accessed from the View menu:



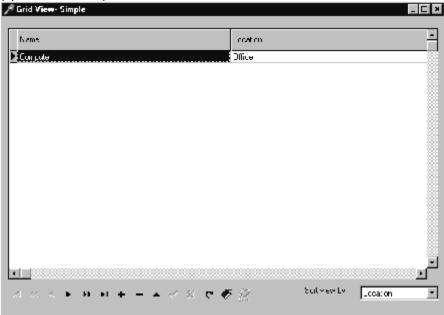
See

Grid view

Panel View Form

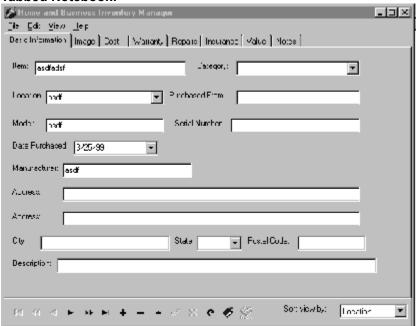
Grid view

The first, "simple view" allows you to see most information concerning your property in a grid (spreadsheet-like) view.



The second, "notebook" view, allows you to enter or to view all information on an item, but, you must "tab between different pages of the "notebook."

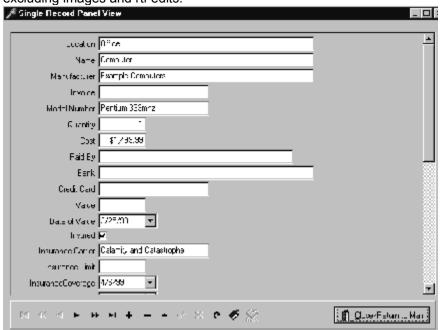
Tabbed Notebook:



Tabbed notebook

Panel View Form

The final view is the Panel view. This shows all of the information concerning a single item at a time, excluding images and rtf edits:



Grid view

To view your items in a simple, grid view, select \underline{V} iew, \underline{G} rid-Simple.



The simple view may be all that you need in most instances, particularly if you are using this for your home only.

Panel view

To view your items in a panel, select <u>V</u>iew, <u>P</u>anel:

Search menu

The search menu provides single item lookup and filters.



Filter

Filters are an extremely powerful feature that allow you to limit the data that is shown.

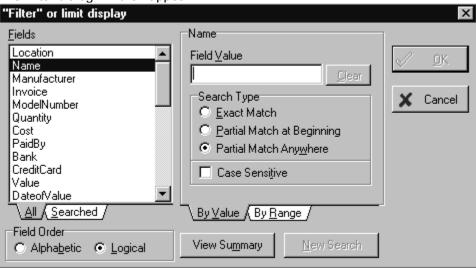
You can filter both by RANGE and by VALUE.

Range means that you want to see items that fit between two numbers. A good example of a filter by range is that you want to see the items that cost between \$50 and \$1,000.

To set a filter, click on Search, Filter:



The Filter dialog will then appear:



Filter dialog

There are a few settings which you need to consider.

Since we are going by Range, we must click the By Range tab:



the display will then change to the Range tab:



The top of the Range Tab shows the <u>field</u> that you have presently picked, in this case, since we are searching by purchase price, we have selected the field purchase price.

Then we simply click in our values for the start and end, and the filter is then ready to be applied to our information.



You may use advanced filtering conditions such as:

AND

OR

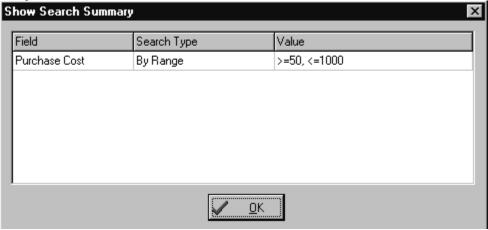
NOT

which provide you with the ability to create complex searches, including being able to filter on multiple conditions within the same field.

If you would like, you can see a summary of the filter that you have created. Click on Summary:

View Summary

and you will then see the filter conditions:



After clicking OK on the filter dialog, the view will only show the items that fit the filter.

You must reset and clear the filters to see all items again!

If you are looking for only one item, use LOCATE. Filter is used to locate items sharing a common characteristic.

Locate

Filters allow you to limit your view by imposing conditions on the display of items. Locate is used to find a specific item in your inventory.

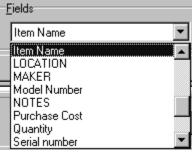
To locate an item, click on Search, Locate:



The locate dialog will then be displayed:



In order to locate an item, you must first select the <u>field</u> name that you wish to use to locate an item or items. This is accessed by the <u>Fields</u> drop down:



After you have selected the correct field, you must decide how to perform the search. There are three choices and one setting:



See

Case sensitive

Exact match

Partial match at beginning

Partial Match Anywhere
Starting the search
Ending the search

Case sensitive

Check this box if you want the search to only find records that match the case (capitalization) as entered into the <u>Field</u> Value.

Exact match

This requires a perfect match.

Partial match at beginning

This only checks the beginning of the item for a match.

Example: Field value Tr

Will match any item that has Tr at the beginning such as:

Trouble

True

Triple

Partial Match Anywhere

This checks the entire item and will mate	n if the pattern is	found anyw	here in the !	<u>field</u> .
---	---------------------	------------	---------------	----------------

Example: Field value Tr

Will match:

Trouble

Broiled Trout

Starting the search

After you have checked that you have set all of your options correctly, click on FIRST to find the first occurrence of files which match your search criteria. If you find an item which matches your search criteria, you may press NEXT to see if there are any other matching items.



If there are no items that match, you will see the following:



If there is a matching item, and you press <u>Next</u>, the program will go to the next match until it is out of matches. If there are no more matching items, you will see the following display:



Ending the search

Click on CLEAR to end the search.



Starting view

To switch between the pages, click on the appropriate page.

Basic Information Image Cost Warranty Repairs Insurance Value Note			⊻iew								
	Basi	c Infor	mation	Image	Cost	Warranty	Repairs	Insurance	Value	Notes	

Basic Information Page

The basic information page primarily identifies the item.

See

<u>Item</u>

Category

Purchased from

<u>Model</u>

Serial number

Date purchased

Manufacturer

Manufacturer Address

<u>City</u>

<u>State</u>

Postal code

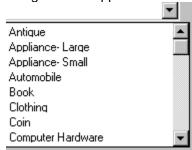
Description

Item

Enter a descriptive name for the item.

Category

Category allows you to separate similar items into categories. When you click on the drop down, a list of categories will appear:



You may either select from the categories which are shown, or enter a category manually. NOTE: You can change ALL of the items in the list, including adding, deleting or modifying all items. Select EDIT LOOKUPS from the main menu to do so:



Purchased from

Please enter the name of the store or other vendor from which this item was purchased. The program DOES NOT assume that you purchase all items. Items which you create or fabricate yourselves can be listed. In this case you may wish to enter your name or the name of the internal unit in your organization which created the product.

Model

Enter the model number or name in this space.

Serial number

Enter the serial number of the item if applicable. This is not limited to "numbers" as it can contain any character.

Date purchased

Enter the date purchased. This is a date time picker control.

Manufacturer

Enter the name of the manufacturer.

Manufacturer Address

Two lines are provided for the address of the manufacturer.

City

Enter the city where the manufacturer is located.

State

A drop down list of US postal abbreviations is provided. If you don't recognize some of the abbreviations these are APO or US possessions.

Postal code

Enter the zip code for the manufacturer.

Description

You may, if you desire, enter a short description of the item.

Warranty Page

The warranty page provides information concerning warranties and extended warranties on your property.

See

Warranty Expires

Extended Warranty

Extended Warranty Notes

Warranty Expires

This is a shake time a	والمنامانين مناسميا منامنا					
This is a date time	Dicker in which	vou enter the date	when the warrant	/ on the	product it anv	/ expires
Time to a date time	prontor in minori	you onto the dute	minori and manana	, 0	p	, capiloc.

Extended Warranty

		4.41			
This chackbay is use	ad to indicate whether	r ar nat thara ic an	OVIONADA Warrantu	annicable to the	nraduat
11119 CHECVOOX 19 096	ed to indicate whether		EXICHUCU WALIALIIV	annicante in the	DIOUIGI.
					p

Extended Warranty Notes

Enter free form notes concerning the extended warranty.

Insurance page

This page covers insurance coverage on each item.

See

<u>Insured</u>

<u>Carrier</u>

Coverage expires

<u>Limits</u>

Insurance notes

Insured

This check box is used to indicate whether or not the item is covered by insurance.

Carrier

Enter the name of the insurance carrier/policy number or description.

Coverage expires

This date time picker is used to store the date when insurance coverage expires.

Limits

If there is a specific limit on the coverage for this item enter it here.

Insurance notes

Enter any free form notes which you need to concerning insurance coverage.

Cost page

The cost page allows you to store information concerning property which is leased, purchases which are subject to rebates as well as the cost of the item.

See

Price

Quantity

Paid by

Leased

Lease information

<u>Rebate</u>

Rebate received

Rebate information

Price

Enter the price.

Quantity

Enter the quantity purchased.

Paid by

Select how the purchase was paid for. The items in the lookup can be changed from the lookup menu.

Leased

This check box allows you to track items which are leased rather than purchased. A report listing all leased items is available from the Custom Reports menu.

Lease information

You may enter free form notes concerning the lease.

Rebate

This check box allows you track items subject to a rebate. A report listing all items that have a rebate and the rebate has not been received is available from the Custom Reports menu.

Rebate received

This check box allows you to track items that have a rebate due.

Rebate information

Enter free form notes concerning rebates.

Value page

This page is used to store appraisal and depreciation information.

See

Depreciation method

<u>Appraisal</u>

Date of appraisal

Appraisal notes

Depreciation method

Select the depreciation method used. A report (on the Reports menu, custom reports) provides the items that are subject to depreciation.

Appraisal

If the property has been appraised, or if you wish to store a market value rather than its historical cost you can use this <u>field</u>.

Date of appraisal

This is a date-time picker used to store the date of the appraisal or valuation.

Appraisal notes

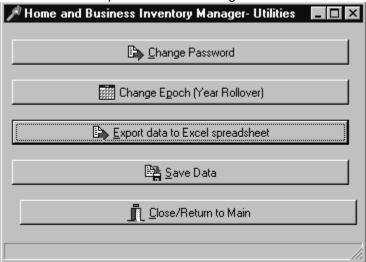
You may wish to enter more information concerning the appraisal including the name of the appraiser or other free form notes.

General notes

In the event there is any other information which you wish to store, you may enter it in this free form note area.

Menu

The utilities menu provides the following functions:



See

Change password or pass phrase

Change epoch

Export data to Excel spreadsheet

Status: Spreadsheet created: D:\perprop.xls

Save Data Return to main

Change password or pass phrase

To change the password or passphrase, go to the Utility Menu and select CHANGE PASSWORD.

You will then see the following dialog:



To change your password or pass phrase, enter it in the edit box, and click <u>C</u>hange password. You must remember your pass phrase or password!

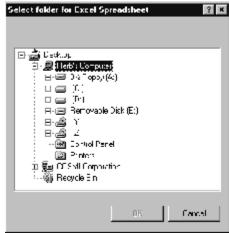
Change epoch

Changes the date rollover.

Export data to Excel spreadsheet

The data in your personal property manager can be exported to a Microsoft Excel spreadsheet. To do so, click on the Export data... button.

You will then see a Drive/Folder selection dialog:



Select folder

Select the folder (which can include floppy drives, removable drives, drives on your network if you are using a network, or read-write CD's) where you would like the spreadsheet to be saved. The spreadsheet will be named perprop.xls.

While the spreadsheet is being prepared, the status bar (bottom of the screen) will indicate export in progress, and once completed will update:

Status: Spreadsheet created: D:\perprop.xls

You may then use Excel to manipulate the data.

Save Data

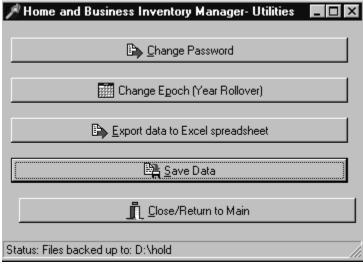
By clicking on save data, you will create a backup of your data. After clicking on save data, you will see a drive/folder selection box:



Select folder- your display may be different due to your version of Windows

Select the folder (which can include floppy drives, removable drives, drives on your network if you are using a network, or read-write CD's) where you would like the data to be saved.

While the data is being saved, the status bar (bottom of the screen) will indicate that a save is in progress, and once completed will update the status display:



Status indicating that the files were saved

You should make a backup of your data regularly. We also recommend that you occasionally make an offsite backup so that a fire or other casualty will not result in the loss of your data.

The files which are backed up are:

- category.db
- home.db
- location.db

- purchased.db
- category.px
- home.px
- location.px
- purchased.px
- home.xg0
- home.xg1
- home.xg2
- home.xg3
- home.mb
- location.mb
- purchased.mb

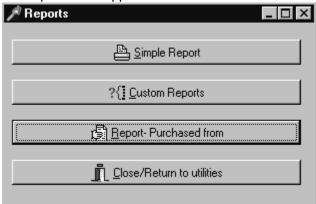
Note that spreadsheets which you have generated from the data in the program are not automatically backed up.

Return to main

Clicking this button closes the present Window and returns to the Main menu (tabbed notebook).

Report menu

The report menu appears as follows:



A report is a written record of all or some of the information in the database.

Simple report

The simple report provides you with a listing the information needed to create a simple inventory or personal property list. In the vast majority of cases, this report will provide you with all the information that you need. However we do provide the ability to create custom reports.

Custom Report

The Custom report accesses the Report Wizard. There is no way to describe this tool except AWESOME. With this tool you can make virtually any type of report needed for either a home or business. Report Wizard allows you to create reports with exactly the correct display, sort and filtering you wish. The Report Wizard also creates labels and reports on user-defined paper sizes.

The reports can be saved for reuse at a later time. Report Wizard has an extensive on line help system which you should use to become familiar with its use.

We have used Report Wizard to create the following reports which you may access or change:

- Depreciation list (sorted by method and sorted by location)
- Rebates (only items with rebates are shown)
- Leased items (only leased items are shown, sorted by location)
- Items sorted by location (All items)
- Insured Items (only items which are insured are included; sorted by location)

If you don't see the exact report that you would like, you can modify the existing reports or create a new report from scratch.

Report- purchased from

This report lists all of the information in the listing of vendors (firms that you purchased from.)

Grid view

The grid view provides a simplified view of the data, omitting items that are not normally found in personal inventories.

Lookups menu

The lookups menu provides access to editing lookup items.

See

Purchased from (lookups)

Purchased from address

Purchased from city

Purchased from state

Purchased from postal code

<u>Telephone</u>

Purchased from (lookups)

Enter the name of the vendor (store, wholesaler or other seller) from whom you purchased an item. You will only need to go through this setup process once. NOTE: The program does NOT assume that all items are purchased. If you fabricate items you may either decide to leave this <u>field</u> blank or enter your own company or a division of it as the seller.

Purchased from address

Two lines are provided for the address.

Purchased from city

Enter the name of the city where the vendor is located.

Purchased from state

Select the name of the state.

Purchased from postal code

Enter the postal code of the vendor.

Telephone

Enter the vendor's telephone number.

Here are your most frequently asked questions

- How many items can this program hold? Answer: The number of items is limited only by your disk space. Above 1,000,000 items you may find performance sluggish. (However, we don't know many folks who have that many items to track!!!)
- 2. Is this program Year 2000 capable? Answer: Yes. Here's how years are handled. The program is set so that two digit years of 50 or above are treated as being in 1900, and two digit years of 49 or below are treated as being in 2000. For example, if you enter: 1/1/58 as a date, that is interpreted as January 1, 1958. If you enter 1/1/03 as a date, that is interpreted as January 1, 2003. THIS SETTING CAN BE CHANGED and is explained in this manual.
- 3. Why is my database so big- it's requiring a great deal of storage? *Answer:* If you load high resolution images into the database the database files can be very large. You may wish to use low resolution (16 bit) images rather than true color (16,000,000 color) images to save space and loading time.
- 4. Do I have to fill out all of the entries for each item? Answer: No! This program does not force or require you to enter a value into any item. In many cases, particularly users who are tracking their own personal property, you may wish to use the simplified entry in the grid form and bypass the tabbed notebook entirely.
- 5. What is a key violation? Answer. The information that is stored in this program is indexed. The display which you see in most views is sorted by the location AND name of the item. You cannot enter two items that have the identical location and name. If you have three identical hammers all kept in the same location, name them differently (hammer1, hammer2, hammer3).

Glossary of Terms

field SHA

field

A single entry into this program, such as the Item's name or purchase price.

SHA

The secure hash algorithm. Developed by the government, this protocol converts text or files into digital fingerprints. SHA is a "one way" hash- you cannot go from the fingerprint to reproduce the original information.