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User Logins

User Id

The HomeFiler login window requires that you identify yourself before continuing. You may enter a (new) user identifier consisting of up to four alphanumeric characters (A-Z, 0-9), or you may select one from the list of known HomeFiler user ids.

Note: Family members' initials often serve well as typical user id's. If two or more family members share the same initials, an additional (4th) character can be used with each to make them unique.

Password

For any given user id, a password of up to eight alphanumeric characters (A-Z, 0-9) may be entered to establish a password the first time you define a new user id. If one was previously established, you are required to enter it before the system will grant access to you.

Note: Entering a password is always optional as long as one has not already been established.

Why User Ids?

HomeFiler manages each user's information independently so that you don't have too! You can think of each user id as defining a separate logical file cabinet within the physical HomeFiler system. In this way each family member can use HomeFiler without worrying about directly affecting the personal information of others, especially if passwords are used.

"SuperUser"

Each HomeFiler system is shipped with a default <u>superuser</u> id, **"SUSR"**, built-in.   There is no initial password. However, the owner (first-time user) of the system can elect to enter a password, thus protecting from general access any special system privileges extended specifically to the superuser id. For example, system level reporting across all user id's, and the privilege of deleting previous user ids from the system.

"DEMO" User Id

The demonstration data supplied with HomeFiler is associated with a user id of "DEMO", and not "SUSR". Therefore you should consider logging in as DEMO when working with the demonstration data. No password is required for the DEMO user id.

Icon Bar

Below the HomeFiler menu bar is an <u>icon bar</u> that provides "fast-path" access to some of the more commonly accessed information areas. By clicking directly on these buttons you can avoid having to navigate through the HomeFiler menu bar to get to them. *(Note: This icon bar is only available to users of Windows 3.1 or later, and is therefore not available under Windows 3.0!)*

The icon bar buttons represent the following:

Genealogy (Family Trees)

Diaries & Journals

Vehicles

Home Inventories

Recipes

Shopping Lists

Address Books

Date Books

Check Books

Savings Registers

Credit Cards

Electric Utilities

Audio & Video Collections

Sports Card Collections

Tool Bar

Below the HomeFiler icon bar is a tool bar:

The tool bar icons are intended to provide quick and convenient access to several system operations. The tool bar icons represent the following:

System Reports

Chart Management

System Settings

Menu Only!

Save Window Text

Clear Window Text!

About HomeFiler

On-Line (F1) Help

Standard Command Buttons

There are several standard "pushbutton" commands used consistently throughout   the HomeFiler system of dialogs.   A brief description of each of these follows:

Add

Invoke this command to add a new record of information to the HomeFiler system.   *Please be sure to verify that you are logged in as the desired user (user id) BEFORE you add new records.   See the HomeFiler User's Guide for more information.*

Change

Invoke this command to change or update information in the current record. This is the record of information displayed in the information component dialog window at the time the change request is made.   Note that you will not be permitted to change records if they belong to another HomeFiler user id that is password-protected.

Delete

Invoke this command to delete or remove the current record of information from the system.   Note that you will not be permitted to delete records if they belong to another HomeFiler user   id that is password-protected.

Retrieve

Invoke this command to retrieve an information component record from a list of those already on file.

Next

Invoke this command to view the record following the one currently displayed in the dialog. HomeFiler will beep and flash the window if no "next" record exists. For your convenience, the right-arrow key can be used as a short-cut.

Previous

Invoke this command to view the record preceding the one currently displayed in the dialog. HomeFiler will beep and flash the window if no "previous" record exists.   For your convenience, the left-arrow key can be used as a short-cut.

Print...

Invoke this command to print the current record of information displayed in the information component dialog.

Report...

Invoke this command to print a report of the information records on file in HomeFiler for the particular information component dialog.

Chart

Invoke this command to get a graphical presentation of the data on file. (This feature is only available for certain information components).

Open...

Invoke this command to "open" the logical "file" of information. For convenience this primary file is generally referred to as an "account" in the following pages. When a particular information account file is opened, one or more separate dialog boxes become available for managing the individual information records belonging to it.   Such records are generally referred to herein as "detail" records belonging to the particular information account file that was opened.

Close...

Invoke this command to close the current dialog window and return to the previous one, if any, belonging to the particular information component.

Quit

Depending on the application context at the time the request is made, this command closes the current dialog window and either returns to the previous dialog in the information component, or closes the information component entirely.   (HomeFiler handles this automatically for you.)

Managing Information in HomeFiler

This section presents the basic concepts necessary for maximizing your effective use of the HomeFiler system.   This includes adding, changing, deleting, retrieving, reporting, and charting information.   The advanced user interface design described in the following pages (believed to be unique to the HomeFiler system) guarantees information reliability and integrity while also maximizing your ability to easily and efficiently maintain your information. To aid in the presentation of these concepts, we will refer to the Genealogy section under Personal & Family.

Primary Dialog Boxes

Each major type of information (such as genealogy, home inventory, and checking accounts) has an associated primary dialog box used for grouping or categorizing such information. The information recorded in the dialog box can be thought of as establishing a logical file within which one or more pieces of information (records) will be kept.   When selected for the very first time, if no information files have yet been established for the given section, a dialog box is presented that is specific to the selected section. The following applies to the Genealogy section:
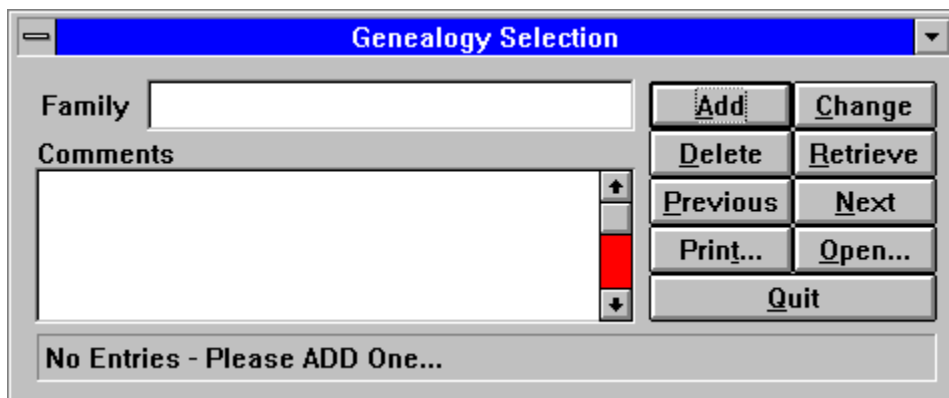
As displayed, the primary Genealogy dialog box has two data fields, Family (a single line text field) and Comments (a scrollable multi-line text field).   It also contains a message status line, in this case with the text "No Entries - Please ADD One..." displayed since the genealogy database is initially empty.   Here you can enter (Add) a name and associated comment(s) and thus establish a   logical file to be used for maintaining genealogy records for any given family. Valid commands are visible on the command buttons pad as Add, Change, Delete, Retrieve, Next, Previous, Print, Open, and Quit.

Command Mode vs. Edit Mode

Information management within the HomeFiler system centers around two separate "modes" of activity, referred to as command mode and edit mode respectively.   As a system user, you are always in either command mode or edit mode for any given information (database) entry/edit dialog at any given time.   (Other non-database dialog boxes conform to the standard Windows™ interface where the <Tab> and <Shift><Tab> keystrokes navigate from one field to the next or previous field, and where any button with an underscored character in its label can be accessed from the keyboard as an <Alt> key combination, such as <Alt><O> for OK.)

In the previous dialog box the current mode is the command mode. This is characterized by the normal appearance of the command buttons displayed on the right side of the dialog box, in this case with the Add button's text outlined, indicating it is the current default

command that will be invoked if the <Enter> key is pressed on the keyboard.

Visual Data Integrity
An important yet not so obvious characteristic of command mode is that the data fields are protected so that visual data integrity is maintained and guaranteed consistent with internal data at any time other than when changes are in progress. Thus, you will find that attempts to interact with the data fields (typically via mouse) while in command mode will have no effect on the contents contained therein.

Note: If you should need to cut and paste to or from specific fields, you should first select either Add or Change, thus switching into edit mode. From there you can access the field(s) as necessary. When finished you should either save (F7) or cancel (ESC) any changes, thus returning to command mode.

Keyboard vs. Mouse
Once presented with an information dialog box, the design of HomeFiler enables you to set the mouse (or other pointing device) aside and easily use the keyboard almost exclusively. You do not have to constantly switch your hands back-and-forth between the keyboard and the mouse. That's right!   The mouse is certainly convenient for selecting from the menu bar, clicking on icons, and certain other tasks, but when you want to quickly enter information, a consistent "hands-on" approach at the keyboard is characteristically more natural.

To begin with, in addition to selecting a button via a standard Windows <Alt> key sequence, such as <Alt><R> to retrieve, you can simply press the key on the keyboard corresponding to the one underlined on the button label of the command you want to invoke, such as **A** to Add, **C** to Change, **D** to Delete, and t to Print.   Use of the <Alt> key in combination is entirely optional!   In addition, the **Up** and **Down Arrow** keys can be used to "roll" forward and backward through the series of command buttons available, while pressing the **<Enter>** key will select the current one (the one with the outlined text).   Also, the **Right** and **Left Arrow** keys can be used as shortcuts for the Next and Previous commands, respectively, while the **<Esc>** key doubles for the Quit command.   When in doubt as to the use of the current command key, just press the **<F1>** function key to get a brief explanation.

Add & Change
Certain commands cause a switch from command mode into edit mode.   The two most common commands that cause the switch are Add and Change.   When this occurs, the command buttons are grayed out (disabled) and the first data field becomes editable.   In edit mode, HomeFiler responds to the standard Windows usage of the <Tab>, <Shift><Tab>, and Arrow keys. The mouse can also be used, with one consideration: *the first click into a text field highlights (selects) the entire body of text, while successive clicks reposition the text cursor thereafter.*   Each time input changes to another data field, the message status line changes to reflect the type of data.

Keyboard Conveniences
In addition, HomeFiler's edit mode provides several convenient extensions.   To begin with, you can freely use the <Enter> key in place of the <Tab> key to move to each successive data field, up to the last one on the dialog box. Pressing <Enter> while on the last data field of a dialog tells HomeFiler that you are finished adding or changing information and want to commit the data, thereby completing (saving) the Add or Change.   You can use <Shift><Enter> in place of <Shift><Tab> to move to the previous data field, which will wrap around from the first data field back to the last, if necessary. Additionally, <Alt><UpArrow> and <Alt><DownArrow> may be used to "roll" backwards and forwards through the data fields if you desire.

Note: Due to HomeFiler's more natural use of the <Enter> key for movement from one data field to the next, a conflict arises when the current data field happens to be a (scrollable) multi-line edit window, such as that used for Comments in the dialog box presented above. Specifically, should <Enter> take you to the next (new) line in the text field, or the next data field in the dialog? For consistency, HomeFiler moves to the next data field in the dialog (or completes the edit if it is the last data field). **To enter a new line into a multi-line text data field, perform a <Ctrl><Enter> keystroke combination from within the data field.**

Special Edit Mode Function Keys

You may have already noticed that the dialog's title bar changed when the switch was made from command mode into edit mode. It indicates (as a reminder) that while in edit mode the <F1>, <F5>, <F7>, and <Esc> keys have special operational functions.

The **<F1>** function key is used to request context-sensitive help about the current field, such as:
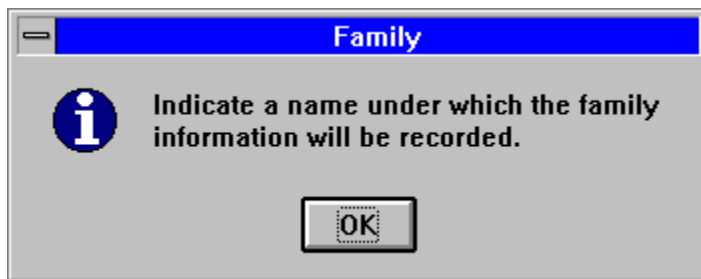
The **<F5>** function key can be used to recall the previous contents (if any) of a field. This can be very useful when entering repetitive data, or after accidentally deleting the contents of a field.

The **<F7>** function key is useful as a shortcut for committing data entry/edit changes without having to perform repeated <Enter> key actions just to get through to the last data field. For example, if you wanted to change only the first five data fields, you could immediately press <F7> after the change, instead of having to press the <Enter> key 5 times!

The **<Esc>** key can be used to "escape" from the edit mode without committing any additions or changes. (Please note that for certain dialogs, pressing <Enter> while the first data field is both current and empty may also have the effect of informing HomeFiler that you are finished performing edits, in effect automatically performing an <Esc> operation.)

Automatic Add Completion

The completion of the Add activity causes a switch from edit mode back into command mode, with the record automatically added to the Genealogy database. This record can be interpreted as a new "file" with the name "SMITH FAMILY". Notice how the message status line no longer indicates "No Records," but instead identifies the current default command, "ADD...".

Change

If you were to press C for Change, you would see the dialog box image change back to edit mode, where the content of the first field is automatically selected (highlighted) for type-over.

Pressing <Esc> would escape from the Change edit mode back to the standard command

mode.

Delete
Pressing D for <u>D</u>elete causes a Yes/No confirmation dialog to be displayed. It indicates that deleting the current group (in this case "SMITH FAMILY") automatically removes all related records stored within it.

Retrieve & Print
Assuming at this point that the SMITH FAMILY record still exists, pressing R for the <u>R</u>etrieve command would invoke HomeFiler's standard retrieval dialog for the genealogy selections, while selecting the Prin<u>t</u> command would likewise invoke HomeFiler's standard print dialog.

Open & Quit
At this point two standard command buttons remain which have not yet been presented: <u>O</u>pen and <u>Q</u>uit. The <u>O</u>pen command "opens" the logical file (in this case SMITH FAMILY) so that specific information can be added to it. The <u>Q</u>uit command exits the information dialog. For your convenience, the <Esc> key also serves this purpose when you are in command mode.

Automatic Retrieval Presentation
At this point it is appropriate to introduce another automatic convenience operation performed by HomeFiler.   Consider that you are now back at the main HomeFiler menu bar, having entered the SMITH FAMILY record per the previous example.   This time when you select Genealogy from the Personal & Family menu, instead of presenting the primary Genealogy dialog, HomeFiler presumes that most of the time you are going to want to enter additional records to one of the selections previously defined. It automatically prepares you for a retrieval with a special version of the Retrieval dialog that, unlike the standard retrieval dialog that has <u>O</u>K and <u>C</u>ancel buttons, instead has an Add/<u>E</u>dit, an <u>O</u>pen, and a <u>C</u>ancel button.

All you need to do is select (highlight) the selection you want to work with and press one of the buttons.   You can make a selection either by directly clicking on one with the mouse pointer, or by scrolling through the list using the up and down arrow keys.

If you want to add a new selection (in this case another family) or perform editing on an existing selection, you can click the Add/<u>E</u>dit button. Selecting <u>C</u>ancel (or <Esc>) will exit the dialog activity.   However, if you double-click an entry, highlight one and click <u>O</u>pen, or just press <Enter>, you will be taken to the appropriate data entry dialog where you can work with information related to the main selection.   The result is the same as when selecting <u>O</u>pen from the primary information dialog box, only with less effort on your part to get there!   In the case of the Genealogy component, the secondary dialog box -- for individuals -- is presented.

Close vs. Quit
Four new command buttons are apparent on the genealogy individuals dialog box: Clo<u>s</u>e, Repor<u>t</u>, C<u>h</u>art, and <u>S</u>pouses.   The Clo<u>s</u>e command reverses the effect of the <u>O</u>pen that was used to get to this dialog box. It closes this dialog box and returns you to the associated primary (or parent) dialog.   On the other hand, <u>Q</u>uit (or <Esc>) closes both this dialog and the information component as a whole, just like it does from the primary dialog.

Report Command
The Repor<u>t</u> command button invokes the print dialog just like the Prin<u>t</u> command mentioned previously. However, instead of printing only the currently displayed record, the Repor<u>t</u> command causes printing of a full report of the records belonging to the currently opened

information dialog, in this case the individual genealogy entries for the SMITH FAMILY.

Chart Command
The Chart command invokes specific charting activity for selected types of information. For some, such as vehicle mileage and electric usage, invoking the chart command immediately causes a chart to be created and displayed. In the case of genealogy, it presents a dialog box from which an ancestry/pedigree chart for the current individual can be generated.

Spouses
The Spouses command button is an example of an additional *dialog-specific* command button, in this case specific to the individual genealogy entries dialog. Selecting Spouses invokes a dialog box used for associating men and women as husbands and wives.

Data Fields
You may notice there are several types of data fields (Windows controls) in these dialog boxes.   Specifically, these are the following:

Single Line Text Fields   (such as Name, When Born, and Where Born)
Multi-Line Text Fields (such as Biographical Data and Information Sources)
Check Boxes   (such as Male and Female)
Combo Boxes   (such as Father, Mother, Husband, and Wife)
Radio Buttons   (such as in Vehicles)
List Boxes   (such as in Shopping Lists)

Text Fields
Both single and multi-line text fields were discussed previously.   Check boxes and radio buttons are used to indicate true/false, on/off, or yes/no conditions through checked/unchecked statuses.   When in edit mode, you can click on either of these types of data fields with the mouse to toggle (change) the value. You can also press the spacebar when positioned on the desired check box field to toggle its value, or radio button field to set its value. Note that use of the <Enter> key will not toggle/set the field's value, but instead moves you to the next data field, as described earlier.

List Box
List box data fields are primarily used in HomeFiler when it is most convenient to represent the field data as a list of entries. A shopping list data field that itself contains items combined with associated   quantities and prices is just one example.

Combo Box
A combo box is a combination single line text field with an attached list box. When used as a data field in HomeFiler, a combo box provides a convenient way of presenting to you a set of standard entries which you may select from the list, thus saving typing.   If the list of items is unlimited, then you are also generally permitted to type in the desired text field data directly, thus ignoring the list contents if you choose.

Additional Details...
For a more in-depth discussion of these fundamental Windows controls, please refer to your Windows documentation.

Window Management Philosophy

HomeFiler has been designed to work <u>with</u> you, and to even "anticipate" some of the more common actions (and responses to them), thereby maximizing overall system efficiency and consistency.   This is perhaps most evident with HomeFiler's management of dialog boxes.

Automatic Dialog Centering

Each time a new information dialog box is initially opened it will be centered on-screen, although you can reposition it.   You are also permitted to have multiple information dialogs active (open) at any given time, and you may switch freely between them.   *(Note, however, that you can only retrieve or print/chart from one selection at a time. This is because the retrieval and printing/charting resources are shared between all information modules.)*

Managing Display Clutter

In many instances, HomeFiler automatically hides or iconizes dialog boxes when they become "unavailable" for interaction, thus significantly reducing visual screen (display) clutter without any extra intervention required on your part.   They are automatically reopened and displayed once they are again available for interaction. For example, when Prin<u>t</u> is selected from the genealogy dialog box, the print dialog box is displayed, but the genealogy dialog box is also iconized, since you are not permitted to interact with it while printing its information. However, as soon as you <u>Q</u>uit the print dialog, it closes (disappears) and the original genealogy dialog box is reopened (redisplayed).

<u>Printing & Reporting</u>

Previously we introduced HomeFiler's component print dialog box, invoked via a Prin<u>t</u> or Repor<u>t</u> command. Since it is <u>not</u> a database information entry/edit dialog, the HomeFiler extensions discussed previously <u>do not</u> apply.   Specifically, this dialog conforms to the standard Windows user interface, where field navigation is performed via <Tab> and <Shift><Tab>, and the <Alt> key must generally be used to select a button command from the keyboard.

Page Width & Length Overrides
In this dialog box, HomeFiler sets <u>suggested</u> page width and length values, as well as default starting and ending page numbers. You are free to change these values. However, *HomeFiler will not allow the page length to be set less than certain minimum values below which printing or reporting would fail to operate properly!*

Output Destinations
Printing can be sent to any of three different outputs: the screen (HomeFiler's main window), a printer (0, 1, or 2), or a disk file.   <u>Printing to the screen is the default</u>. It permits quick review, with both horizontal and vertical scrolling supported, for up to 32K of text.

Print Spooling
If you elect to print to a printer, you can direct output to one of three printers: printer 0, printer 1, or printer 2.   If the **Use Spooler** check box is checked, these all equate to the same single printer that will be used by the Windows print spooler. In fact, that is exactly what "Use Spooler" implies -- to use the Windows print spooler for printing.   However, if the Use Spooler check box is not checked, then the Windows print spooler will be <u>bypassed</u>, and the print output will be sent directly to DOS printer 0, 1, or 2 based on your selection. Realize, however, that although this can yield faster text printing, it can clobber any printing that Windows may be performing in parallel. <u>This is your responsibility to manage when bypassing the spooler!</u>

Disk Files
If you elect to print to a disk file, the default name is **default.rpt**, which you are free to change.   This can be very convenient for proofing large prints before actually sending them to the printer.   Upon completion of the printing, HomeFiler will automatically load the report into either NotePad (if less than 64K in size) or Write for your convenience.   (Please refer to the Windows documentation if you need assistance on using these standard Windows programs.)

Printer Setup Modifications
The **Printer Setup** button invokes the printer device driver used by Windows for printing to the currently active printer. Use this if you want to switch between portrait and landscape print modes, or to change other system-related printing options for your particular printer.

Page Eject & Test
The **<u>Eject Page</u>** button   causes a page eject to be sent to your printer.

The **<u>Test Page</u>** button causes only the first page to be printed. This may be useful for testing page alignment or other settings prior to initiating a complete print.

Printing
The **<u>Print</u>** button initiates printing according to the values and settings indicated in the dialog box.   Once printing begins, a dialog box   indicating "Creating Report - Press Cancel

to Stop!" appears (unless previously iconized). Although this dialog appears in the center of the screen by default, you are free to reposition it elsewhere. Also, if you do not want it visible, you may iconize it by clicking the down arrow in its upper right corner.   If you click the Cancel button, printing will terminate as soon as a suitable stopping point is reached within the reporting process.

Quit

Finally, when you are finished printing, select the Quit button to return to the previous dialog.

System Reports

In addition to printing on a component-by-component basis from a Print or Report command of a given dialog, HomeFiler provides a means for printing system-wide reports from a single location.   Access to this is provided under HomeFiler's Print/View menu item.

Selecting "Reports..." invokes the system reports dialog. This is similar to the print dialog previously discussed, with the addition of a scrollable list of system reports. To select a report you may scroll through the list, click on a report entry to highlight it, and press Print. (Double-clicking on a report entry provides a shortcut.)   All other behavior is the same as previously discussed.

Note: System reports print on the basis of the current HomeFiler user id (displayed in the title bar of the main menu window). If you are signed in as SUSR, then the reports will include information sections for all users (except for sensitive reports, such as diaries & journals, or check books). Otherwise, the reports only print information associated with the current user id.

Charting & Presentation Graphics

Some information components within the HomeFiler system provide a means for generating graphics charts for better visualization of the related data.   For instance, the Electric Utilities component provides a Chart command button for charting the average daily electric usage in kilowatt-hours on a month-by-month basis.

Managing Individual Chart Windows
It is possible to have as many as 5 chart windows open within the HomeFiler system at any given time.   You cannot close the chart windows directly. Instead, select "Charts..." from HomeFiler's Print/View menu to access the chart management dialog box. You will notice any currently displayed charts appear in its list window.   To close a chart window, select (highlight) the chart entry for one of the current charts and select "Close Chart!". To print a selected chart (via the Windows print spooler), select Print.

Color vs. Black & White
By selecting Color or B/W (black & white) you can control how the next chart will be displayed. Of course, color is not a valid choice on a monochrome monitor!

Chart Display Window Reuse
Checking the Reuse Same Window check box will cause HomeFiler to replace the previous chart with the next one you request without opening another new window.

User Profiles & System Settings

HomeFiler permits you to establish several standard system settings to be used during any given session.   Each user's particular settings are maintained separately as part of his or her *user profile*.   To establish these, select "Settings..." from the HomeFiler <u>S</u>ystem menu option.

The User Profile/System Settings dialog box is presented according to the (default) profile settings of the <u>current</u> HomeFiler user.   Also indicated is either **(No Password)** or **(Password Protected)** depending upon whether or not a password is set for the user id. The path to your HomeFiler system directory appears just below the user id.

Warning Bell Audibility

Notice that you may elect to enable or disable the audible warning bell. If the check box is unchecked, the bell will not sound for "low-priority" warnings. However, HomeFiler has been designed to "flash" the window border of the active window whenever a warning bell sounds. This visual feedback can be a useful (silent) indicator. The visual feedback (border flash) <u>will not</u> be disabled -- only the audible portion.

"Menu-Only"

You may also elect to have HomeFiler always start up with the "menu only" state pre-selected. If this option is selected (checked), the next time HomeFiler starts it will immediately reduce its window size.

Datebook Reminder Notices

For datebook appointments (including special dates and events), HomeFiler automatically displays reminder notices similar to the following at the appropriate times:
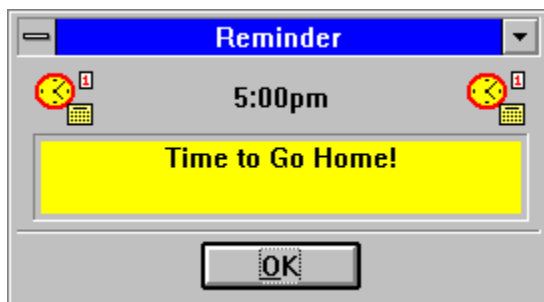
If you should decide you do not want them to popup, you can check the "Suppress Event Notices" box and they will be suppressed. (Of course this means you would not be notified!)

Report Settings

For reports, you can set or change the number of spaces used to establish a left print margin -- the default is 5 spaces. You can also establish a different name to be used as the default output report file, instead of **default.rpt**.   In addition, HomeFiler considers the value 66 to be a standard page length for most printers (see "Printer Lines Per Page" in the dialog).   However,   you may adjust this value to fit your particular printing needs.   If changed from the default value of 66, HomeFiler will automatically use your value for HomeFiler reports designed to use the 66 lines-per-page layout.

Note: Most of the reports have a minimum page length, and this minimum length will be used if you specify a value that turns out to be too low for a given report.

Chart Settings

For charting, you can set whether or not charts should be displayed in black and white, and if you prefer, the same single window can be reused for successive charts, instead of charting in as many as 5 different windows. In addition, you can change the background color used for charting, as well as the intensity (Light) used for the background.   Some experimentation may be required before you are satisfied with a particular selection. Finally, when charting many months worth of data, labels used on the charts may appear crowded.   By default, HomeFiler will only show up to the last 18 months of data.   This means that if you have 24 months (2 years) of data, the chart will only depict the last 18 months. You may change this value up or down to compensate for or balance the amount of data shown versus the crowding of labels.

Pressing Accept saves the settings in the current user's profile and causes any new changes to take effect, while pressing Cancel leaves the profile unchanged.

Managing User Identifiers & Passwords

HomeFiler permits you to switch to a different   user identifier (abbreviated as "user id") <u>during</u> a HomeFiler session, assuming of course that you know the necessary password, if any.   Doing so is like changing from one logical file cabinet to another without ever leaving HomeFiler. Selecting "Change Login..." from the <u>S</u>ystem/User menu invokes the following dialog box :

You can enter or select a user id, provide a password if necessary, and <u>A</u>ccept to switch to another user id.   Select <u>C</u>ancel if you change your mind. It is also possible to add, change, or remove a password for the current user id. Selecting "Change Password..." from the <u>S</u>ystem/User menu invokes a similar dialog box where the user id cannot be modified.

Changing a Password
To change the password, you must first enter the current password (if any) and <u>A</u>ccept.   You are then prompted to enter a new password (which can be blank if you are removing password protection).The new password can have any combination of up to 8 alphanumeric characters, and will be masked from direct view. Once entered, you will be asked to re-enter the new password a second time for confirmation. You may <u>C</u>ancel at any time during the change process. However, if you continue <u>A</u>ccepting and the change is made successfully, you will see the message "Password Changed!".

Now consider that another user id, such as HFW, exists that <u>is password protected</u>, and that you (DEMO) are using the system and want to open one of HFW's private Diaries or Journals. Attempting to <u>O</u>pen this as any user other than HFW yields the message "Password Protected - Only the Owner May Open!".

You <u>are not permitted access</u>, since the owner (user HFW) has elected to use a password. Yet as expected, user HFW <u>would</u> be permitted to access the data.   However, if user HFW <u>did not</u> establish   a password along with the user id, any other user <u>would</u> be able to access HFW's data!   Thus, HomeFiler provides an optional level of security and privacy between its users and their data through the use of passwords.

"SUSR"
Note: You might expect that SUSR (the superuser id) should be able to open anyone's records.   *That is not the position presently taken in HomeFiler*.   In fact, the built-in SUSR user id works just like any other user id, except for its special privilege when printing system reports or when removing user login id's. As previously mentioned, if user SUSR prints a system report (*other than for diaries/journals, checking, savings, credit cards, and loans*) from the scrollable list of reports discussed earlier, the report will automatically include the information <u>for each user</u> of the system instead of just the SUSR user. This can be very convenient for generating complete hard-copies of the information stored within specific HomeFiler information components without having to individually become each and every user in the system!

Removing a User Id

Once in a while you may find it necessary to remove a user id from the system. <u>To do so you must be logged in as SUSR. Otherwise you will not be permitted to perform this function!</u>   If the current HomeFiler user is SUSR, then selecting "Delete Login..." from the <u>S</u>ystem/User menu   invokes the dialog box. By following the directions displayed directly on the dialog window, any user id in the system <u>except SUSR</u> can be removed. Any associated user profile will also be deleted.

<u>Caution:</u> This feature is intended primarily for removing inactive or invalid user identifiers (user id's). A user id is considered active or "in use" if there is any information stored within the system that was stored using that id.   If this is really your intent, and if the user id is password protected, you should consider visiting those areas and deleting the user's data first. Otherwise you will not be able to remove it later without recreating the user id all over again.

Genealogy Reference

Families

Use the *Genealogy Selection* dialog to establish one or more families, generally by surname, for which you intend to record genealogical (family tree) information.

Family
Indicate a name under which the family information will be recorded.

Comments
Indicate any appropriate comments.

_____

Individuals

Use the *Individuals* dialog to establish a record for <u>each</u> person in the family for which you have information. Please note that if you enter ancestors first, their names will become available as prospective fathers and mothers from which you can readily select without having to re-type them.

Name
Enter a family member's name (use the maiden name if female). Consider using a CAPITALIZED last name first, followed by first name and middle name or initial, such as SMITH, Sally Ann.   Since you may encounter relatives that have shared the same name, and since you will want to distinguish between them, consider using one of the following techniques:

1) Follow the person's name with their year of birth enclosed in parentheses:

SMITH, Sally Ann (1992)

2) Assign to each person a unique ID number and follow the person's name with it:

SMITH, Sally Ann (#5)

<u>Important</u>:   HomeFiler provides maximum flexibility for recording names. However, it is your responsibility to ensure that names are in some way unique (using ID tags), and that names used as fathers and mothers match EXACTLY (including any ID tags) with their corresponding individual entry names.   Otherwise HomeFiler may not be able to generate correct ancestry/pedigree charts and spouse (family) reports for you.

Male
If the person is/was known to be a male, you can indicate that by placing an X in the empty check box either by clicking it with the mouse pointer, or by pressing the spacebar when positioned on that field.   Any X present in the *Female* field will be removed automatically.

Female
If the person is/was known to be a female, you can indicate that by placing an X in the empty check box either by clicking it with the mouse pointer, or by pressing the spacebar when positioned on that field. Any X present in the *Male* field will be removed automatically.

When Born
Indicate when the person was born. You may specify this date however you like. Consider placing it in parentheses or square brackets if it is only an approximate date.

Where Born

Where was the person born (if known)?

When Died

Indicate when the person died (if applicable). You may specify this date however you like. Consider placing it in parentheses or square brackets if it is only an approximate date.

Where Died

Where did the person die (if applicable and known)?

Father

What was the <u>biological</u> father's name? Remember, this name should match <u>exactly</u> the way the father's name is/was entered as an individual, including any special identifiers.

Mother

What was the <u>biological</u> mother's (maiden) name? Remember, this name should match <u>exactly</u> the way the mother's name is/was entered as an individual, including any special identifiers.

Occupation

Indicate the occupation(s) or military service of the individual.
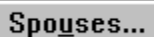
Biographical Data

Enter any special biographical data that may be known and considered noteworthy or of historical significance.
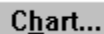
Information Source(s)

Where did the information documented herein come from or how was it obtained?

Comments

Indicate any additional comments or noteworthy information.

Spouses...

Invoke this command to access the *Spouses* dialog (discussed below).

Chart...

Invoke this command to generate an ancestry/pedigree chart of the <u>currently displayed</u> individual.   You will first be presented with a variation of the standard print dialog to indicate where you want to direct the chart output and with which options.

By default, the names of individuals are always presented in the genealogy charts. By selecting one or more of the check boxes in the "include" section of the ancestry/pedigree dialog, you have the option of including the following for each individual on the chart: when born, where born, when died (if applicable), and where died (if applicable).

You can select whether to display the chart in a portrait or landscape page layout. You can also extend or limit the number of generations displayed on a single chart. You can press the <<u>V</u>iew> button at any time to display a chart according to your current settings. Pressing <<u>V</u>iew> successive times causes each current chart to be closed and a new one to be drawn. Only one ancestry/pedigree chart is ever visible at a time. You can also force the current chart to be closed by pressing the <<u>C</u>lose Chart!> button.

Depending upon the amount of information displayed, some experimentation may be

appropriate before deciding on a particular "view" to print. These views print to an 8-1/2" by 11" page in either portrait or landscape mode (depending on the page layout selection). To get the "best fit" of the chart to a printed page, HomeFiler selects the largest text (font) size possible that will not cause the chart to go "off the page."

For Example...
The sample data can be used to display an ancestry/pedigree chart for one Elizabeth Susan Green, born in 1857.   It consists of three generations: herself, her parents, and their parents. If it was displayed with the maximum number of generations limited (set) to 3, then additional ancestors might exist that would not be displayed. To "pick up where we left off" so-to-speak, the recommended step(s) would be to <Quit> the chart dialog, <Retrieve> each right-most ancestor and repeat the <Chart> process for each in turn, in this case for Reuben Green, Elizabeth Balis, Benjamin Toole, and Susanna Heath, respectively. On the other hand you might want to view the "bigger" picture (although in much smaller text) by viewing all generations at once, in other words by not limiting the maximum generations to less than you have recorded! The choices and variations are really up to you!

Printing
Once satisfied with a given view, select the <Print> button to actually print the chart on your printer. If you click the "draw frame" check box, HomeFiler will print a single line border around the chart when printed. You can also specify an extra margin (up to 25 percent) around the printed chart, thereby reducing the final chart in size. This may be appropriate, either with or without including a border, if you print on specialty or designer paper. (Due to minor variations in some printer device drivers, you may find it necessary to always use a 1% or greater margin setting when printing a border. This will be true if you notice that any portion of the border gets "clipped" off when using a 0% setting with your printer.)

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Spouses
Once you have entered the appropriate individual family members into the HomeFiler system using the previous (*Individuals*) dialog, use this *Spouses* dialog to pair up (add or change) husbands and wives as spouses.   It is strongly recommended that you select the names from the husband and wife selection lists, since a typographical error could prevent HomeFiler from finding the individual records needed when generating the spouses report (which includes children).

When a spouses report is printed, any children belonging (biologically) only to the mother will have an **M** (for Maternal) printed to the left of the name, while those belonging only to the father will have a **P** (for Paternal).   The presence of either letter indicates a step-parent/step-child relationship. (You will need to indicate an adopted child in some specific way, such as following the name with **[A]** in its "individuals" dialog entry, if you want to include such children in your records and yet be able to recognize them in the report.)

Husband
　　Indicate the name of a husband.

Wife
　　Indicate the maiden name of the husband's wife.

When Married
　　Indicate when the husband and wife were married. You may specify this date however
　　you like. Consider placing it in parentheses or square brackets if it is only an approximate
　　date.

Where Married
Where were they married (if known).

Comments
Enter any additional comments or noteworthy information.

Diaries & Journals

Use the *Diaries/Journals* dialog to establish each of the different ones you or your family members want to keep on file. You are free to designate them by person, subject, or whatever else may seem appropriate for you.

Diary / Journal
    Indicate the name used to reference the particular diary or journal.

Comments
    Enter any descriptive comments that may be appropriate.

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Daily Entries

Use the *Diary/Journal Entries* dialog to record your desired (confidential) information.   You are free to <u>add</u> several entries within a single (same) day if you want to.

Please note that this information is "protected" from view when saved. As such, only you or someone who knows your password can review what you entered. <u>You must use a password in order to have this protection. Otherwise anyone can look at your diary or journal entries.</u>

Date
    Indicate the date on which the current entry is recorded.

Entry
    Record the information for the current diary or journal entry.

<u>Vehicles</u>

Use this *Vehicles* dialog to establish entries for the various types of family vehicles (cars, trucks, motorcycles, vans, recreational vehicles, boats) or the specific owners, such as an entry for each family member that has one or more vehicles.

Vehicles
You may group vehicles in any number of ways, such as by owner or type (cars, trucks, boats), and refer to each set accordingly.

Comments
Comments may be appropriate to further describe the group or set of vehicles.

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Vehicle Entries
Use this *Vehicle Entries* dialog to establish the descriptive information for each of the vehicles in the group.

Note: To use the Fuel Economy Tracker effectively you <u>must</u> indicate the Fuel Tank Capacity.

Make
Indicate the Make of the vehicle, such as Ford, Chevrolet, or Toyota.

Model
Indicate the particular Model of the vehicle, such as Bronco, Camero, or Supra.

Type
Indicate the Type of model of vehicle, such as 2, 3, or 4-door.

ID #
Indicate the serial or identification number of the vehicle.

Name
Indicate the name of the primary owner of the vehicle.

Address
Provide an address of the primary owner.

License #
Indicate the license number (if applicable) held by the primary owner.

Tag #
Most vehicles are required to display a license tag or decal of some sort, and the number can be recorded in this field.

Expiration
If an applicable license tag or decal has an associated date of expiration, that date can be recorded here.

Date (Last Oil Change)
If applicable, indicate the date when the last oil change was performed on this vehicle.

Mileage (Last Oil Change)
If applicable, indicate the mileage reading of the vehicle on the date of the last oil

change.

Date (Last Tune-Up)
    If applicable, indicate the date when the last tune-up was performed on the vehicle.

Mileage (Last Tune-Up)
    If applicable, indicate the mileage reading of the vehicle on the date the last tune-up was performed.

Fuel Tank Capacity
    If the vehicle has a gas or fuel tank, indicate its capacity in this field.

Gallons
    Select this field if the fuel tank capacity is measured in gallons.

Liters
    Select this field if the fuel tank capacity is measured in liters.

Other Information / Comments
    Enter any addition comments or pertinent information.

_____

Fuel Economy Tracker...
    Invoke this command to access the *Vehicle Mileage* dialog (discussed below) that is used for tracking the vehicle's fuel economy.

Travel Log...
    Invoke this command to access the vehicle *Travel Log* dialog (discussed below).

Service Log...
    Invoke this command to access the vehicle *Service Log* dialog (discussed below).

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Vehicle Mileage
Use the *Vehicle Mileage* dialog (accessed via the Fuel Economy Tracker button of the *Vehicle Entries* dialog) to track the fuel consumption of the vehicle. To ensure proper operation, you should verify that the Fuel Tank Capacity value indicated on the previous (*Vehicle Entries*) dialog is correct and not zero!

To use this dialog effectively, you only need to track the following each time you stop for fuel:

1) how many gallons (or liters) you added,

2) what the vehicle's mileage (odometer) reading is at that time, and

3) once the fuel gauge adjusts to the new fuel level, record how full the tank is...from 0 (empty) thru 0.5 (half) to 1.0 (full). You may prefer to sketch a copy of the fuel gauge and use it to set HomeFiler's fuel gauge to the same (or similar) setting.

Note: You do not have to "fill up" to a full tank every time. HomeFiler is able to figure out the necessary details. However, HomeFiler's calculations will only be as good as the information you provide, and this especially includes how accurately you interpret the new fuel gauge level after the fuel was added.

Date Fuel was Added
　　Enter the date on which the fuel was added.

Amount of Fuel Added
　　The amount (gallons or liters) of fuel added goes in this field.

Cost of Fuel ($)
　　The (dollar) amount paid goes in this field.

Fraction of Full Tank
　　Indicate (or give a best estimate) of the fraction of the fuel tank that is full after you have added the additional fuel.

Mileage Reading
　　Indicate the mileage reading (from the odometer if available) at the time the fuel is added.

Comments
　　Indicate any particular notes or comments that may be helpful to remember.

Interactive Fuel Gauge

If you have ever tried to track your vehicle's fuel economy (such as miles-per-gallon) you know that the mathematics can be very difficult unless you fill up the fuel tank completely each time. By doing so, you know between fill-ups "exactly" how much fuel was used (the amount added as shown on the pump) and how much distance was traveled (the difference in the two odometer readings for the vehicle). Unfortunately, it is not always convenient, practical, or desirable to completely fill up each time you stop for more. Yet if you do not fill up completely each time, it becomes very difficult to accurately determine just how much fuel was actually used over the given distance traveled since the last time. Under such typical circumstances it quickly becomes difficult to manually track a vehicle's fuel economy. With HomeFiler this problem goes away!

HomeFiler's *Vehicle Mileage* dialog is equipped with an interactive fuel gauge (in the upper right corner of the dialog) which you can use to represent the setting on your own vehicle's fuel gauge <u>after</u> you add any fuel. When adding or changing information in this dialog (via the <u>A</u>dd or <u>C</u>hange command), you are expected to indicate this level in the "fraction of full tank" field. The required fraction is expected to range from 0.000 for an empty tank, through 0.500 for a half full tank, to 1.000 for a completely filled tank.

Since it is not always obvious what fraction is appropriate to use, HomeFiler provides the fuel gauge and an associated horizontal scroll bar used to change its face value (reading). By manipulating the scroll bar you can change the gauge's value until the "needle" points in the correct direction. Meanwhile, if you are in edit mode, HomeFiler calculates the fraction for you! Thus you may find it convenient to sketch your vehicle's fuel gauge setting when adding fuel so that you can later match it up visually with this one in HomeFiler. Doing so can significantly reduce any guesswork that might be involved in estimating the proper fractional value manually.

For example...
Assume the dialog shows an entry that has been added for January 6, 1994 and that 6.50 gallons were added at a cost of $7.80. Immediately afterwards the fuel gauge settled at a new level of three-quarters of a full tank. The needle on the dialog's gauge represents this fact visually. It was positioned by interacting with the horizontal scroll bar. While in the edit

mode HomeFiler automatically adjusts the "fraction of full tank" value to 0.750. The corresponding amount of fuel is shown as 9.00 gallons (based on a 12-gallon tank as specified in the *Vehicle Entries* dialog for this vehicle). An odometer (mileage) reading of 73526 was also recorded.

Using the vehicle mileage information, HomeFiler is able to compute the fuel economy values (mpg) for you on an on-going basis! They appear on the associated vehicle mileage report.

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Travel Log
Use the *Travel Log* dialog (accessed via the Travel Log button of the *Vehicle Entries* dialog) to track your (business) travels in the vehicle.

Date of Travel
    Indicate the date on which this travel (trip) occurred.

Purpose of Trip
    Indicate the purpose of the travel.

Starting Mileage
    Enter the mileage reading (from the gauge if available) when the travel began.

Ending Mileage
    Enter the mileage reading (from the gauge if available) when the travel ended.

Start Time (hh:mm)
    Indicate the time the travel started. Use hours and minutes from 1:00 to 12:59 and check either the AM or PM radio button associated with it.

End Time (hh:mm)
    Indicate the time the travel ended. Use hours and minutes from 1:00 to 12:59 and check either the AM or PM radio button associated with it.

Comments
    Additional notes or comments can be recorded in this field.

———————————————

Service Log
Use the *Vehicle Service* dialog (accessed via the Service Log button of the *Vehicle Entries* dialog) to track the various (repair/maintenance) services performed on the vehicle.

Date of Service
    Indicate the date the service was performed.

Total Service Cost
    Indicate the total cost incurred for the servicing.

Service Company
    Indicate the individual or company that performed the servicing.

Description of Problem
    Provide a description of the problem(s) that led to the need for servicing.

Service Performed

Indicate what actual service work was performed.

Comments
Additional information, such as notes or warranty details, may be entered in this field.

Home Inventory

Use the *Inventories* dialog to establish various types of inventories you want to maintain in the HomeFiler system.

Inventory
Several different inventories may be maintained, each referenced by its name.

Comments
Use this area to briefly describe what the inventory is.

Inventory Items

Use this *Inventory Items* dialog to record the various items belonging to the particular inventory.

Inventory Item
What is the item being inventoried?

Type or Model #
What specific type is this item, or what is its model number, if any?

Serial #
If the item has a specific serial number, record it in this field.

Location
Where can the item usually be found?

Date of Purchase
When was the item first purchased or obtained?

Place of Purchase
Where was the item purchased or obtained?

Purchase Price
What was the purchase price or cost of the item when first obtained?

Cost to Replace
What is the (estimated) replacement cost or value of the item?

Comments
Enter any additional descriptive or informative details.

Recipes

Use the *Recipe Sets* dialog to establish the various types of recipes you want to keep on file.

Recipes
You may find it convenient to group or categorize your recipes and refer to them accordingly. For example, you might establish individual recipe sets for cakes, casseroles, and vegetarian dishes.

Comments
Comments describing the recipes contained within this group or category.

_____

Individual Recipes
Use this *Recipes* dialog to record the specific recipe details (instructions) of each of the recipes you want to have on file within the current recipe set.

Recipe Name
Enter the name by which you will generally refer to this recipe.

Ingredients (per Batch)
This "field" appears as a scrollable list when you are in command mode. When you select <<u>A</u>dd> or <<u>C</u>hange> to switch into edit mode, the list becomes a scrollable 3-column table (discussed below) into which you can type directly.

While in edit mode you can enter and scroll through up to 50 recipe ingredients, one per row, by filling in the corresponding quantity, unit of measure (optional), and description fields. You <u>must</u> include a non-blank <u>description</u> for an ingredient to be accepted. If you enter a description without a quantity, a zero value will be assumed. Although you can enter ingredients into any of the available rows, HomeFiler always consolidates them by dropping empty rows when the recipe is saved!

Once you complete your additions or changes for the recipe, save or cancel it, and return to command mode, the ingredients "table" reverts back to a scrollable list.

Note: The quantities entered must represent valid numerical (<u>strictly fractional or decimal</u>) values in order for the recipe batching logic to interpret them properly. Mathematical expressions are not interpreted and all non-zero values should be greater than zero. The following are examples of valid (proper) quantities:

0.5   1/2   2.5   2-1/2 1 3/8 5/8   .75

Notice that fractions may include a <u>space</u> or <u>dash</u> separator. The following <u>are not</u> acceptable, legal representations:

-0.5   -1/2   2 5   2+1/2 5-8   1.5-1/2   1/2.5

Note: <u>Illegal values are "interpreted" and forced to valid values which may not always reflect your intentions.</u> If this occurs, you will need to edit (change) the corresponding quantity value(s) in the recipe to conform with the accepted format(s).

Preparation, Instructions
Indicate what the instructions are for preparing the recipe.

Comments
     Enter any additional comments, details, or other information.

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Additional Notes & Comments

As previously mentioned, when you select <<u>A</u>dd> or <<u>C</u>hange>, HomeFiler switches into edit mode and the recipes dialog displays a 3-column table (instead of a listbox) in which you can type directly for setting the recipe ingredients. As indicated, the three columns represent quantity, measure (such as pounds, ounces, or cups), and description of the ingredient.   You can press <Tab>, <Shift><Tab>, <Enter>, and <Shift><Enter> to navigate between cells, or even use the mouse.

Note: Since the <Enter> key is used for convenient navigation between the table cells, it will not position you to the "Preparation, Instructions" field unless you are positioned on the last table cell (bottom right of the table). Nor will <Shift><Enter> position you to the "Recipe" field unless you are on the first table cell (top left of the table). Once satisfied with the list of ingredients, <u>you may want to use the mouse to "click" in the "Preparation, Instructions" or "Recipe" field</u>, thereby repositioning quickly. Of course, you can still press <F7> to save changes or <ESC> to cancel changes at any time.

When manipulating the ingredients list (quantities, measures, and descriptions), HomeFiler provides both a way to insert (open) a blank new row and to remove (delete) an existing row.

<u>Row Insertion:</u> To insert a blank new row, position the text cursor (I-beam) to one of the cells in the row where you want a new one to be opened. Then press the **<F4>** function key. The existing row and all rows after it will be "pushed down" by one, and an empty new row will appear.

<u>Row Removal:</u> To remove an existing row, position the text cursor (I-beam) to one of the cells in the row you want to remove. Then press the **<F10>** function key. The existing row will be removed and all rows following it will be "drawn up" by one, thus "filling in" the vacancy.

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Recipe Scaling: Computing Multiple Batches

HomeFiler is able to compute the amount of ingredients required to produce more than one batch of a given recipe. It does this by multiplying each ingredient quantity by the number of batches you specify (see *Recipe Batching* dialog above) when requesting a <Prin<u>t</u>...> of a given   recipe. The default is one (1). HomeFiler assumes that all recipe quantities reflect amounts necessary for single "batches". When you see the dialog below, just fill in the number of batches (if more than 1) and then press <<u>P</u>roceed>. The printed recipe will show the ingredients list scaled accordingly.

Shopping Items

Shopping Item Categories
Use the *Shopping Categories* dialog to establish the various types of shopping or even places where you or other family members shop. These may even include specific grocery stores, hardware stores, and plant nurseries. These categories are made available for access in the *Shopping List Entries* dialog.

Category
> You may want to group items by type, by store, by use, or perhaps some other means.

Comments
> Use this space to briefly describe what kinds of items belong to this group or category.

_____

Shopping Items
Use the *Shopping Category Items* dialog to record the most common items for which you shop in the current category. These items are made available in the *Shopping List Entries* dialog when the respective categories are selected for access.

Item
> What is the name of the item, or how is it referred to?

Pkg
> How is the item sold or packaged for sale. Make separate entries for the same item if it has more than one package that you require.

Aisle
> Use this field to remind yourself where to find the item.

Cost
> Indicate the cost of this item. It will be used to estimate the total cost of a given shopping list.

Have Coupon(s)
> Check this box if you have a discount coupon for the item.

Expiration Date(s)
> Indicate the date(s) on which the coupon becomes void.   You can enter the date in a variety of ways, including mm/dd/yy format or even spelled out. We recommend using a format such as **Sep. 30, 1992** followed by a <Ctrl><Enter> to force a new line between successive entries. In this way the expiration dates will conveniently appear in a list format in the window.
>
> Note that when you assemble a shopping list, HomeFiler will pull the first expiration date in the "list" (up to about 16 characters) to use for the item if it has a coupon.   Also note that, when printing the shopping items report, multiple expiration dates will appear one right after the other. If you like, follow each with a space and a vertical bar "|" before the <Ctrl><Enter>, such as **Sep. 30, 1992 |**, to make it easier to distinguish them in the printed report.   HomeFiler knows how to "strip" the vertical bar away when assembling a shopping list with items having coupons.
>
> HomeFiler cannot know when coupons have actually been used by you. You must revisit the shopping items from time-to-time to change or update the list of expiration dates

associated with items having coupons. Use the **Change** command to edit the records.

Comments
Enter any additional information desired regarding this item.

Shopping Lists

Use the *Shopping Lists* dialog to establish the various types of shopping lists you want to maintain within the HomeFiler system.

List
You may have several different shopping lists if desired, each with its own particular name.

Comments
Use this area to briefly describe the shopping list and its purpose.

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Shopping List Entries
Use the *Shopping List Entries* dialog to construct specific shopping lists from the various shopping items on file. Note that you may even choose to have multiple shopping lists for the same date if desired.

Date
Indicate the date to which the shopping list applies.

Title
Enter a title if you want one printed at the top of the list.

Shopping List
The window contains a list of the items that will appear if the shopping list is printed.

Notes
Enter any additional notes or things to remember.

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Additional Command Features

Active Shopping Items Group
Use this combo box list to change the selection of shopping items available for inclusion in your shopping list. **The available selections are those established previously by you in the *Shopping Items* dialog window (see previous section).**

Add to List >>
Use this to add a highlighted (selected) shopping item to the shopping list.

Shortcut: Double-click the shopping item from the main list to add the quantity of it to the shopping list.

Remove from List!
Use this to remove a highlighted (selected) shopping item from the shopping list.

Shortcut: Double-click an item in the shopping list to remove it from your list.

New!
Use this to remove all items from the shopping list.

Sort by Item!

Once you have established your shopping list, you can use this command (while in edit mode) to sort the list alphabetically by item.

Sort by Aisle!

Once you have established your shopping list, you can use this command (while in edit mode) to sort the list alphabetically by aisle.

Address Books

Use the *Address Book Selection* dialog to establish the various address books that will be maintained by the HomeFiler system.

Address Book
   You may have several separate and distinct address books, each one referenced by its own name, indicated here.

Comments
   It may be helpful to describe or detail certain information regarding the address book.

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Address Book Entries

Use the *Address Book Entries* dialog to record the various names, addresses, and phone numbers associated with the currently open address book.

Last Name
   Enter the person's last name in this field. You may also want to include a subtitle, such as Jr., Sr., or III following the last name when appropriate.

First (Name)
   Enter the person's first name (and middle initial or name) in this field. You may also want to consider including a courtesy title, such as Mr., Mrs., or Miss when appropriate.

Title
   If the person holds a particular business position, record the position's title here.

Org.
   Use this field to record the name of the person's business organization or place of employment.

Address (line 1)
   Mailing address (the first line).

Address (line 2)
   Mailing address (an optional second line).

City
   What is the city of residence?

State
   What is the state of residence?

Zipcode
   What is the zipcode for mail?

Country
   In what country does the addressee reside in?

Phone 1 (and Ext)
   Primary telephone number for contact. If the number has an extension associated with it, record the extension number in the Ext field to the right of the Phone 1 field.

Phone 2 (and Ext)
Secondary (optional) phone number.   If the number has an extension associated with it, record the extension number in the Ext field to the right of the Phone 2 field.

Tag for Holidays!
Place an X (check the box) if you plan to send a holiday greeting or Christmas card.   This field is specifically used as one of the potential selection ranges that can be specified when printing labels (see below).

Comments
Any additional miscellaneous information, notes, or comments to remember.

Additional Command Features

Index Pad

The index pad presents the digits 1-9 and the characters A-Z.   If one or more entries exist under a given index (1-9, A-Z) the corresponding key (button) will be available; otherwise it will be grayed-out. By single-clicking on those that are available, you can position yourself to the first entry in the corresponding section without having to issue successive next or previous requests.   Double-clicking will position you just as single-clicking will, <u>and</u> it will also issue a retrieve request for you, thus presenting the retrieval dialog with that same entry highlighted as the current one.

AutoDial...
If you have a Hayes-compatible modem installed in your computer, HomeFiler can be used to dial the phone for you. Select this command button to access the *Dial Phone Number* dialog (discussed below).

Labels, etc...
HomeFiler can be used to print mail labels, Rolodex cards, and envelopes for the names and addresses on file. Select this command button to access the *Labels* dialog (discussed below).

DateBook
This command button provides convenient "fast path" access to HomeFiler's Date Book module.

Contact...
HomeFiler enables you to maintain contact histories (logs) for each name and address entry on file. Select this command button to access the contact history database for a

given address book entry (discussed below).

Phone Number Dialer

The *Dial Phone Number (a.k.a. AutoDial)* dialog enables you to use your computer and Hayes-compatible modem to automatically dial a phone number.   You can easily select either <u>Phone 1</u>, <u>Phone 2</u>, <u>Fax</u>, or some <u>Other</u> phone number (which you key in to the "Number to Dial" and "Extension" fields directly) to be dialed by HomeFiler.

There are several options and settings which influence the way in which a number is dialed. For instance, the "Use" section is intended for specifying whether a local prefix (such as dialing 9 from a business to get an outside line), a long distance prefix (such as a local prefix plus a 1), or no prefix at all should be included when dialing the selected phone number.

When dialing local numbers that were originally entered with an area code, it is generally <u>not</u> desirable to have the area code itself dialed. To suppress it, make sure the "Suppress Local Area Code" check box is checked. You will also need to specify your local area code in the "Settings" section of the dialog (see below) for HomeFiler to be able to recognize which area code (pattern) is appropriate to suppress.

Settings...

Press this button to change specific settings used in the autodial process. It will cause   the dialog box to expand so that the (normally hidden) "settings" section becomes visible. In the "settings" section you can set or change the following:

Local Prefix
This field is used to specify any particular number(s) to dial before the actual phone number when using the "Local Prefix" dialing option. A common situation is when it is necessary to dial a 9 to get an outside line (in some businesses) before the number can be dialed.

Note: One or more commas can be included to force pauses (2 seconds each) when dialing. For example, specifying 9,, causes the number 9 to be dialed, followed by a total pause of 4 seconds, before the actual phone number is dialed.

Long Distance Prefix
This field is used to specify any particular number(s) to dial before the actual phone number when using the "Long Distance Prefix" dialing option. A common situation is when it is necessary to dial a 9 to get an outside line (in some businesses) followed by a 1 before the number can be dialed.

Note: One or more commas can be included to force pauses (2 seconds each) when dialing. For example, specifying 9,,1 causes the number 9 to be dialed, followed by a total pause of 4 seconds, and then a 1, before the actual phone number is dialed.

Local Area Code
This field is used to specify your own local area code (pattern). When the "Suppress Local Area Code" option is selected, HomeFiler suppresses the dialing of this particular area code pattern if it appears in the number being dialed.

Note: This field is intentionally limited to five characters. The expected format is (###) where the series of three #'s represents a particular 3-digit area code.

COM Port

The communications (COM) port setting should correspond with the port being used by your modem for telecommunications. HomeFiler supports the use of port values COM1 thru COM4.

Baud Rate

It is generally quite sufficient to dial at a baud rate setting of 300. However, if your modem does not support this rate, or if you just want to use a higher setting, then change the baud rate value by making an alternate selection from the list provided.

Note: Your modem must support the particular baud rate setting you select. If it does not, HomeFiler will be unable to dial out.

Pulse or Tone

Many phone lines in use today support "touch tone" dialing. If the one your modem is connected to supports this, then select Tone. If your phone line (service) only supports rotary dial phones, then select Pulse.

Note: You can specify Pulse even if your phone line supports Tone. Phone numbers will still be dialed, although the dialing process will take longer to complete.

Prefix Pause

This setting determines the number of seconds to pause between dialing the prefix (if any) and the phone number itself. It has the effect of automatically introducing additional commas (2 second pauses) into the dialing process.

Extension Pause

This setting determines the number of seconds to pause between dialing the phone number itself and any associated extension. It has the effect of automatically introducing additional commas (2 second pauses) into the dialing process.

[Hide Settings!]

Once satisfied with the particular settings, pressing this button will "collapse" the autodial dialog back to its original size, thereby removing the setting values from direct view.

[Dial #]

Selecting this button causes HomeFiler to dial the selected phone number according to the settings in effect at that time. Once the number is dialed and the phone at the other end begins ringing, you can pick up your own phone to proceed with conversation.

[Talk (HangUp)]

You will notice that the <Dial #> button becomes a <Talk (HangUp)> button once dialing is initiated. After you have picked up the handset of your own phone, or if the call did not go thru as expected, press it and HomeFiler will cause the modem to hang up its phone connection.

Note: Once dialing is initiated, the elapsed time appears at the top of the dialog window (just below the window title). The elapsed time interval counter continues to increment once each second until either another call is initiated or the autodial dialog is closed. The elapsed time is presented in the following format:

[Elapsed Time: hh:mm:ss]

where *hh* represents hours, *mm* represents minutes, and *ss* represents seconds, respectively. For example,

[Elapsed Time: 00:04:25]

Close

Pressing this button causes the autodial dialog to be closed. You are then returned to the *Address Book Entries* dialog.

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Labels

The *Labels* dialog enables you to print address labels, Rolodex cards, and envelopes from your currently open address book. A list of supported formats is present in the upper left of the dialog from which you can make a selection. A number of options are also provided to give you flexible control:

Order/Sort by

You can specify the order in which the data is printed. Supported printing orders include the following: by last name, by state, or by zipcode.

Selection Range

You can limit the set of address entries that are printed by specifying a selection range. The default is ALL. However, you can choose instead to print for the current address entry (Current Address!), or for those tagged for holiday remembrance (Remember for Holidays). You can limit the printing to a specified zipcode range. You can even limit printing to entries that correspond to a specific state.

Capitalize

Regardless of how the information is stored in your address book database, you can have the name, organization, or both capitalized when printed. You can even specify that all lines should be capitalized, or that all lines should be left alone and printed as they were originally recorded.

Number of Labels Across

You can change the value in this field to influence the number of labels that should be printed horizontally across the page. (The format selections available in the list have default settings for this value which should be appropriate in general.)

Number of Copies Each

Change this value if you want to have more than one copy of a given name and address entry printed at a time.

The following six settings are preset to values that are generally appropriate to the selected print format and should not have to be changed. However, due to slight variations among different types of printers and their page alignments, you may find it desirable in some circumstances to adjust one or more of these values to obtain the best results with your particular printer:

Left Margin (spaces)

Changing this value influences the horizontal positioning (alignment) of the printing.

Top Margin (lines)

Changing this value influences the vertical positioning (alignment) of the printing.

Label Width (spaces)
   Changing this value influences the horizontal width of the printed information.

Label Height (lines)
   Changing this value influences the vertical height of the printed information.

Horizontal Spacing (spaces)
   Changing this value influences the horizontal gap between adjacent labels.

Vertical Spacing (lines)
   Changing this value influences the vertical gap between adjacent labels.

It is also possible for you to introduce a special notice as the first line of each address label. For example, you might want to include "Seasons Greetings!" at the top of each label (or letter) printed under the "Remember for Holidays" selection range. To do so, simply check the "Insert Notice" check box and type "Seasons Greetings!" into the text field to its right.

The remaining portion of the Labels dialog and its usage corresponds to the standard HomeFiler Print dialog. As such, you can direct the output to the screen display, a printer, or a disk file, just like you can with any of the HomeFiler reports. Thus you can experiment with different arrangements before printing a final result.

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Contact History
The *Contact History* dialog can be used to maintain and track various notes and topics of discussion concerning the particular individual.

Date (Last Contact)
   This field contains the date associated with the contact information.

Topic of Discussion
   Use this field to briefly identify the contact information recorded in this record.

Memo, Notes
   Use this field to record detailed information for the particular contact on the given date.

Date Books

Use the *Date Books* dialog to establish one or more logical date books of appointments, to-do lists, special dates and events.

DateBook
You may desire to have several different date books, each referred to by its own name.

Comments
Comments may be appropriate to describe the type of date book and its intended use.

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Date Book Entries
Use the *Date Book Entries* dialog to schedule daily appointments, manage to-do lists, and record special dates and events.

(Appointments)
The appointments list window appears in the upper left of the dialog and is where scheduled appointments appear. The day and date to which the appointments, to-do list, and notes apply is shown across the top of the appointments list window.

To-Do:
This list window displays any "to-do" tasks that have been established for the day.

Notes:
Use this field to record any special notes associated with the date book record.

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Using the Date Book

Add/Revise
The appointment schedule and to-do list for a given daily entry are managed by selecting the <Add/Revise> command, and then interacting with the <Add...>, <Revise...>, <Remove!>, and <Completed!> buttons that appear between the appointments and to-do list windows. They become available (ungrayed) when you are in edit mode.

Add...
Select this command to add a new appointment or to-do entry in the appropriate list. The *Schedule Event* dialog will be displayed for your interaction (see below).

Revise...
Select this command to revise (change or update) an appointment or to-do entry already recorded in the appropriate list. To do this, highlight (click on) an existing appointment or to-do entry in its corresponding list and click the <Revise...> button. The *Schedule Event* dialog will be displayed for your interaction (see below). Unlike the <Add...> command, this time it will have the information already filled in based on the way the appointment or to-do entry was previously recorded so that you can readily make changes.

Remove!
Select this command to remove (delete) an appointment or to-do entry already recorded in the appropriate list. To do this, highlight (click on) an existing appointment or to-do

entry in its corresponding list and click the <Remove!> button. The entry will immediately disappear from the list (you may be prompted for confirmation in some circumstances).

Completed!

Select this command to "toggle" the completed status of an appointment or to-do entry already recorded in the appropriate list. To do this, highlight (click on) an existing appointment or to-do entry in its corresponding list and click the <Completed!> button. The entry will immediately change to include an **X** to its far left if one is not already present, or remove it if one is already present.

Cancel Changes! ,
Save Changes!

As with other data entry dialogs in the HomeFiler system, you can use the <Enter> key to advance through the data fields (in this case the appointments list, to-do list, and notes) and have the data record saved after the last field has been visited. The <Esc> and <F7> keys also have their expected uses -- to cancel or save changes, respectively. As an additional convenience in the editing process, <Cancel Changes!> and <Save Changes!> command buttons have been provided so that you can use the mouse directly to cancel or commit desired changes.

Clear!

Select this command to clear (delete) a day's entire entry from the date book. If no actual <u>database</u> entry exists for the given day, no action will be taken and you will see the message "No Current Record to Delete".

<< ,
>> ,
Current Month

You can select which day to work with by interacting with the calendar located in the upper right corner of the dialog. Clicking on the << and >> buttons advance the calendar in the appropriate direction a month at a time. To quickly return to the current month you can click on the <Current Month> button. Clicking on any available day of the month causes the date book entry to be shown for that day. You can <Add/Revise> at any time.

<< Today >>

You can also use the <<, <Today>, and >> buttons that appear above the appointments list window to position directly to the current day's entry, or to "move" day-by-day in either direction.

Note: The <Previous>, <Next>, and <Retrieve> commands work with actual daily entries physically recorded in the database. They intentionally "skip over" days for which no actual database entries exist! This is consistent with standard HomeFiler behavior and should be expected.

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Schedule Event
The *Schedule Event* dialog is presented whenever you select either the <Add...> or

<Revise...> button.

Description
Indicate the appointment or to-do event description in this field. The event will be specific to the current date book!

Start Time, AM, PM (Appointments Only)
Indicate the start time (in five minute increments) associated with the appointment.

End Time, AM, PM (Appointments Only)
Indicate the ending time (in five minute increments), if any, associated with the appointment, or leave it blank if none really applies.

Remind at, AM, PM (Appointments Only)
Indicate the time at which you want to be reminded of the appointment. HomeFiler will use this value to determine when to display a reminder message. If you leave this field as "(auto)", HomeFiler will present a reminder notice prior to the actual start time based on the "lead time" value associated with the type of category you assign (see below).

Category (Appointments Only)
Indicate a category associated with the appointment. "Reminder" is the default.

Category	**Lead Time**	
Reminder	5	minutes
Meeting	10	minutes
Periodic	5	minutes
Offsite	30	minutes
Holiday	0	minutes
Birthday	0	minutes
Anniversary	0	minutes
Special	0	minutes

Priority (To-Do Tasks Only)
Indicate a priority level associated with the to-do task.   You can leave this blank, select from 1-9, or enter your own (no more than three characters in length).

Roll Forward Until Done (To-Do Tasks Only)
Check this box if you want uncompleted tasks to be automatically carried (rolled) forward on successive days until marked completed (done).

Set Appointment!
Select this button to schedule the event as an appointment.

Make To-Do!
Select this button to schedule the event as a "to-do" entry.

Repeating Event Details
This section is used to specify the conditions under which a given recurring activity repeats.

Repeating >>
If the event is repeating, pressing this button will expand the dialog window to show the

"repeat event" options.

Note 1: The check box to the left of this button is provided as an indicator for whether or not repeating event options have actually been set. It will always coincide with the setting (checked or unchecked) of the "repeat event" check box. You cannot change it directly!

Note 2: A to-do event can be either "Roll Forward Until Done" or "Repeat Event". HomeFiler will not allow you to select both at the same time!

Repeat Event
Check this box if you want the event to be treated as recurring over some period of time. If this box is not checked, the remaining repeating event details will be ignored!

Start Date
Indicate a starting date for the repeating event. HomeFiler defaults this to the date of the date book entry. If left blank, the date of event creation is used internally instead!

Note: An event repeats annually on the start (or creation) date unless specific weeks and days are specifically indicated (discussed below).

End Date
Indicate an ending date (if one applies) for the repeating event. HomeFiler will use this value to limit the span of time over which the repeating event is valid. You may leave this field blank if you want an event repeated indefinitely.

Each Month
Check this box if the event repeats monthly. The day number used is the one on which you create the event (not the start or end date) unless you specifically indicate a combination of week(s) and day(s).

Yearly Only!
Check this box if the event repeats only once each year. The month and day number used is the one on which you create the event (not the start or end date) unless you specifically indicate a combination of week(s) and day(s).

Week(s)...1, 2, 3, 4, Last, Even #'d, Odd #'d, All
Check one or more of these boxes, as appropriate, to indicate one or more specific weeks of a given month in which the event repeats.

Note 1: "Week" as used here implies the occurrence of a given day of the week within a given month. For example, if an event occurs on the first and third Tuesdays of the month, then the "1" and "3" boxes should be checked and the others left unchecked. In other words, days 1 thru 7 comprise week 1, days 8 thru 14 for week 2, days 15 thru 21 for week 3, and days 22 thru 28 for week 4, regardless of which day of the week a given month begins with! Since this does not include the days 29, 30, and 31 that occur in several months of the year, and since some events may be every week, the "All" check box has also been provided. If an event occurs on a "last" given day of the month (such as Memorial Day -- the last Monday in May), then you should check the "Last" box to indicate that condition.

Note 2: If the event occurs "every other week", select either "Even #'d" or "Odd #'d". The status (EVEN or ODD) for the current event week is shown at the top right of the window for your convenience. This considers weeks 1 thru 52+ of the year starting with January 1st of the year. (Selecting both even and odd implies all!)

Day(s)...Sunday - Friday, Every Day!
 Check one or more of these boxes, as appropriate, to indicate on which day(s) of the week the event recurs.   (Note: If no "week" is specifically indicated, "WeekAll" is assumed.)

[<< Hide Details]
 Selecting this command "collapses" the event dialog to hide the "repeat event" details.

[Revise...]
 Selecting <Revise...> for an existing event causes the scheduling dialog to appear with the current event settings displayed, including the date it was created.

 Note: You are not permitted to change an appointment into a to-do event, or vice-versa!

Event Reminder Notices
Event reminder notices are presented in the upper left corner of the display instead of in the center. If more than one occurs at once, they will stack on top of each other. Press the <OK> button to remove the event reminder notice.

Note 1: Applicable event notices are presented if and only if they apply to the current user id for which they were originally created. Also, it is not necessary to have the date book open to have the notices pop up. As long as you are logged in to HomeFiler, you will receive any appropriate event notices established under your user id, even if you do nothing else. Reminder notices are only presented for events recorded as appointments or stored as special dates or events (see below). To-do events are never presented in pop-up event reminder notices!

Note 2: To help avoid accidental closures at the time an event notice window is displayed, a brief delay (about 1 second) is enforced before the <OK> will be accepted.

Repeating Events & Rolling Forward To-Do's
HomeFiler distinguishes recurring or rolled-forward events visually by displaying a plus (+) sign in the completed column of the respective event lists, thus indicating that they are logically part of the day's events when not already physically recorded.

If you <Add/Revise...>, the plus signs are removed automatically. If you then save, the entries become part of a physical date book (database) entry for the day. However, the plus signs will reappear if instead you subsequently cancel without creating an actual physical date book entry.

Note: "Built-in" holidays (such as New Year's Day and Independence Day) and user-defined "*Special Dates and Events*" (discussed below) that recur and are not declared as hidden will also appear in the appointments list when appropriate. However, instead of using a plus (**+**) sign to indicate their reccurrence, for built-in holidays a "**$**" is used (indicating "**$**ystem-**$**pecial"), while special dates and events have an "**S**" displayed (to indicate "**S**pecial"). Such events are hidden from view when <Add/Revise...> is selected, and are thus protected from direct revision!

Other Commands & Features
[Addresses]
 This command button provides convenient "fast path" access to HomeFiler's Address

Book module.

Special...

Select this command when you want to establish particular special dates, occasions, and noteworthy events. (See the *Special Dates & Events* dialog discussion below.)

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Special Dates & Events

Use this *Special Dates & Events* dialog to establish particular special dates, occasions, and noteworthy events.

Description

A one line indication of the particular special date or event.

Month

Select from the list of January thru December for the month of the event.

Day

Select from the list of 1 to 31 for the day of the event within the selected month.

Year

Indicate the (first) year the event occurs.

Memo

Enter any additional comments or notes that may be appropriate.

Remind on Same Date of Each Year!

If the event recurs annually, place an **X** in the check box so that HomeFiler will remember it every year. Otherwise HomeFiler will not present a reminder notice in successive years.

Hidden

Place an **X** in this check box if you <u>do not</u> want HomeFiler to automatically show this event in the appointments list of the date book on the appropriate date(s). Reminder notices will still be presented as appropriate.

Check Books

Use the *Check Books* dialog to establish the various checking accounts for which HomeFiler will be used.

Check Book
　　Enter a name that identifies this check register.

Account #
　　Enter the checking account number.

Register #
　　This field accepts up to four characters in which you can specify an identifier such as the current year. It can be used to separate your checking activity among successive check book registers for a given account number. For example, you may want to establish a new check book register each year and bring forward the balance from the previous year.

　　If this field contained the value 1994, this might imply that another entry also exists for the same check book and account number, but with a register number of 1993. If so, then the "starting balance" would actually have been "carried forward" from the 1993 year end balance.

Starting Balance
　　Enter the starting balance that applies before any checks are entered.

Comments
　　Additional information regarding the account can be placed here.
　　　　　　　　　　　　_____

Check Register
Use the *Check Register* dialog to record the various checking transactions that occur for the account, including checks written, interest accrued, service charges, and ATM transactions.

Please Note: You should establish check categories and payees BEFORE you begin using them in the "Category" and "Pay to the Order of" fields of the check register dialog. Although you can freely type in these two fields, HomeFiler guarantees that any given Payee is associated with the proper Category as specified in the Payees dialog (see below). If the Payee has not been previously entered in the Payees dialog, then no Category association can exist! In this case HomeFiler will <u>force</u> the Category to <u>NONE</u>! It is in this way that HomeFiler is able to guarantee the accuracy and integrity of the category and payee reports.

Check Type
　　The check type is used to indicate either a true check to a payee, a deposit from some source into the account, or a transaction (such as with an ATM or bank charges) that moves money into or out of the account.

Category
　　The category is used to group checking activities for reporting so that you can get a better picture of where the money is coming from and going to (cash flow).

Check
　　This is either the actual number of a check, DPST for deposits (by default), or TRAN for transactions (by default). However, you may use something other than DPST or TRAN if

you desire. You may even make the field blank (empty).

Check Number Auto-Assignment
Notice the <#> button. HomeFiler keeps track of the largest check number used for this account and automatically assigns the next check number in sequence when you add a new check ledger entry. If you should ever need to adjust the value used by HomeFiler, press the <#> button. HomeFiler will present you with a "check number auto-assignment" dialog. By changing the number and Accepting, you can directly influence the value of the very next check number that HomeFiler will assign.

Date
Date on which the activity occurred.

Pay to the Order of
Who the check was written to, or that the activity was a deposit, or that a particular transaction occurred.

Amount
Dollar Amount of the Activity.

Memo
A brief note, reminder, or comment might be placed here.

Tax Deductible
Place an X (check the box) to indicate a tax deductible status if applicable.

Cleared!
Place an X (check the box) if this is an actual CHECK that has cleared the account.

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Additional Command Features

Reports..

When the <Reports...> command is selected, you are first prompted for the type of report and an associated date range (see the *Check Book Report Selection* discussion below). The selected check book report will include only activity that falls within the specified date range.

Payees...

Invoke this command to access the *Check Payees* dialog (discussed below).

Categories...

Invoke this command to access the *Check Categories* dialog (discussed below). Categories should be defined before entering the Payees which belong to them.

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Check Categories
Use the *Check Categories* dialog to establish the various categories of checks that are written.

Category
Indicate the name of a category you would like to use for grouping some of the payees

under.

Transaction
Place an X (check the box) if the category is associated with some type of transaction that is not strictly a cash deposit or check payment.

Deposit (In)
Indicates that the category is related to Cash-In (money paid into the account).

Payment (Out)
Indicates that the category is related to Cash-Out (money paid from the account).

Include for Budgeting
Place an X (check the box) if you would like this category used in the budget reporting.

Monthly Budget Amount
If you have selected to include this as a budget category, then enter the dollar amount budgeted (set aside) monthly to pay its expenses.

Comments
Additional information regarding the category can go here.

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Check Payees

Use the *Check Payees* dialog to establish the various payees to which most of the checks are written.

Payee
Enter a name to which regular check payments or transactions will occur.

Category
Indicate which category this payee should be associated with (NONE by default).

Address (line 1)
Enter the first address line of this payee (optional).

Address (line 2)
Enter the second address line of this payee if applicable (optional)

Address (line 3)
Enter the associated city, state, and zipcode (optional).

Phone #
Enter a phone number by which the payee can be contacted (optional).

Remember Amount
Place an X (check the box) to select this if you want the amount to be filled in automatically when this payee is selected.

Amount
If you have elected to have the amount entered automatically, enter that dollar amount here.

Tax Deductible
Place an X (check the box) if this payee's activity is always tax deductible.

Comments

Additional information regarding the payee can go here.

Check Book Report Selection

The *Check Book Report Selection* dialog provides you with a list of available reports and a means of limiting the report output to a specific period of time. The default date range is from January 1st of the current year thru the current date.

Reports Available...
> Select (highlight) one of the reports selections shown in the list:

> **Check Register Listing**
>> Prints the check register detail.

> **Uncleared Register Entries**
>> Prints a report showing which check register entries have not yet been marked as cleared.

> **Payee Report**
>> Prints a report showing what checks were written in which categories to each different payee..

> **Category Report**
>> Prints a report showing what checks were written to which payees for each different category.

> **Tax-Deductible Entries by Payee**
>> Prints a report showing tax-deductible check register entries, organized by payee.

> **Tax-Deductible Entries by Category**
>> Prints a report showing tax-deductible check register entries, organized by category.

Date From
> Indicate the starting point for which the report should include data.

Date To
> Indicate the ending point at which the report will stop processing more data.

Savings Registers

Use the *Savings Accounts* dialog to establish the various savings accounts for which HomeFiler will be used.

Savings Book
  You may have several different savings registers, each of which is identifiable by name.

Account #
  Indicate the account number associated with this savings register.

Register #
  This field accepts up to four characters in which you can specify an identifier such as the current year. It can be used to separate your savings activity among successive savings registers for a given account number. For example, you may want to establish a new savings register each year and bring forward the balance from the previous year.

  If this field contained the value 1994, this might imply that another entry also exists for the same savings book and account number, but with a register number of 1993. If so, then the "starting balance" would actually have been "carried forward" from the 1993 year end balance.

Starting Balance
  Indicate the starting balance for this register prior to any account activity.

Comments
  Enter any additional descriptive information concerning this savings account.

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Savings Register

Use the *Savings Register* dialog to record the various savings transactions that occur for the current account, including deposits, interest accrued, and service charges.

Date
  Indicate the type of savings activity, specifically Deposit, Interest, or Withdrawal.

Activity Type
  Indicate the date on which the activity occurred.

Amount
  Enter the dollar amount associated with the activity.

Explanation
  Indicate a brief explanation about the activity itself.

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Additional Command Features

Report...

  When the <Report...> command is selected, you are first prompted for a date range (*Date Range Selection* dialog). The resulting savings register report will include only activity that falls within the specified date range.

Date Range Selection

This *Date Range Selection* dialog provides you with a means of limiting the report output to a specific period of time. The default is from January 1st of the current year thru the current date.

Date From

Indicate the starting point for which the report should include data.

Date To

Indicate the ending point at which the report will stop processing more data.

Credit Cards

Use the *Credit Card Accounts* dialog to establish each of the various credit card registers you want to maintain within the HomeFiler system. HomeFiler manages credit card transactions much the way it does for checking and savings activity. The transaction history for a given credit card account is similarly maintained in one or more registers as defined by you.

Credit Lender
    Indicate the name of the bank, business, or company that extended the credit.

Account #
    Indicate the credit account number.

Name on Card
    Indicate the name of the individual primarily responsible for this account.

Expiration
    Indicate the date on which the credit (card) expires.

Credit Limit
    Indicate the amount or limit of credit extended.

Annual Percentage Rate
    Indicate the annual percentage rate (APR) applied to the account balance.

Annual Fee
    Indicate the amount of annual fees or charges applied to this account by the lender.

Customer Service Phone
    If available, enter a customer service telephone number to call for assistance.

Register #
    This field accepts up to four characters in which you can specify an identifier such as the current year. It can be used to separate your credit card activity among successive credit card registers for a given account number. For example, you may want to establish a new credit card register each year and bring forward the balance from the previous year.

    If this field contained the value 1994, this might imply that   another entry also exists for the same credit card and account number, but with a register number of 1993. If so, then the "starting balance" would actually have been "carried forward" from the 1993 year end balance.

Starting Balance
    Indicate the starting balance for this register prior to any account activity.

Comments, Additional Information
    Enter any additional information pertinent to this credit card account.
    _____

Credit Card Transactions
Use the *Credit Card Transactions* dialog to record the individual transactions for the credit card.

Date

Indicate the date of the particular transaction.

Description
What was the transaction that is being recorded.

Type
Indicate the type of credit transaction from the list provided.

Amount ($)
Indicate the (dollar) amount of the transaction.

Cleared!
Once the transaction appears on your billing statement, you can check the box to indicate the transaction has cleared and is thereby accounted for.

Additional Command Features

Monthly...

Select this command to access the *Credit Card Monthly Summaries* dialog (discussed below).

Reports..

When the <Reports...> command is selected, you are first prompted for the type of report and an associated date range (*Credit Card Report Selection* dialog). The selected credit card report will include only activity that falls within the specified date range.

Credit Card Report Selection
The *Credit Card Report Selection* dialog provides you with a list of available reports and a means of limiting the report output to a specific period of time. The default date range is from January 1st of the current year thru the current date.

Reports Available...
Select (highlight) one of the reports selections shown in the list:

Credit Card Register Listing
Prints the credit card transactions register detail.

Uncleared Register Entries
Prints a report showing which credit card transactions have not yet been marked as cleared.

Date From
Indicate the starting point for which the report should include data.

Date To
Indicate the ending point at which the report will stop processing more data.

Credit Card Monthly Summaries
Use the *Credit Card Monthly Summaries* dialog to record a summary of the monthly activity associated with a particular credit card. The account information is usually available directly

from the monthly statements.

Date of Bill
    Indicate the billing or closing date of the statement.

New Balance
    Indicate the total amount of the new balance.

New Charges
    Indicate the total amount of any new charges applied to the account.

Finance Charge
    Indicate the total amount of any finance charges applied.

Misc. Credits
    Indicate the amount of any miscellaneous credits applied to the account.

Minimum Due
    Indicate the minimum amount due to be paid.

Date Paid
    Indicate the date on which payment for the statement was made.

Amount Paid
    Indicate the total amount paid toward the balance shown on the statement.

Comments, Detail
    Enter any additional notes or comments that seem appropriate.

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Additional Command Features

    When the <Report...> command is selected, you are first prompted for a date range via
    the *Date Range Selection* dialog as previously discussed in the savings register section.
    The resulting credit card monthly summaries report will include only activity that falls
    within the specified date range.

Electric Usage

Use the *Electric Utility Accounts Selection* dialog to establish a record of your local power company.

Name
 Indicate the name on the account primarily responsible for making the payments.

Address
 Indicate the address where the electric service is being used.

City, State, Zip
 Indicate the city, state, and zipcode associated with the address.

Phone #
 Indicate the phone number at the address indicated.

Meter #
 Enter the meter number assigned by the electric company.

Rate Schedule
 Indicate the rate schedule for applied charges, typically either commercial or residential.

Power Company
 Indicate the name of the electric company providing the service.

Account #
 Indicate the account number assigned to this service.

Office Phone #
 Enter the telephone number of the local office.

Inquiries Phone #
 Enter the telephone number (typically an 800 number) to be used for billing inquiries.

Comments
 Enter any additional notes or comments.

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Monthly Detail

Use the *Electric Utility Monthly Detail* dialog to record the monthly activity associated with your electric usage.

Date of Bill
 Indicate the closing (or billing) date of the statement.

Meter Reading
 Enter the electric meter reading shown on the statement.

Total Cost
 Indicate the total amount of charges for the billing period.

KWH Used
 Indicate (from the statement) the total kilowatt hours (KWH) used during the billing

period.

Avg. Daily KWH
Indicate the average daily kilowatt hours (KWH) used during the billing period. (Press F8 to calculate this from starting and ending dates and meter readings.)

Date Paid
Indicate the date payment was made on this bill.

Amount Paid
Indicate the amount paid toward this bill.

Comments
Indicate any additional notes or comments related to the statement.

Stamp Collections

Use the *Stamp Collections* dialog to establish the various ones you want to keep on file.

Country
You may have several groups or categories of stamps, each referred to by name

Comments
Comments may be helpful to describe more fully what kinds of stamps are in a particular collection.

Stamp Entries
Use the *Stamp Entries* dialog to record each of the various stamps that belong to the collection.

Type of Stamp
Indicate the type of the stamp.

Description
Indicate a brief description of the stamp.

Year Issued
Indicate the date or time the stamp was issued.

Duplicates
Indicate how many duplicates of this one stamp you have.

Condition
Indicate the condition of the stamp.

$ Value
Indicate the dollar value of the stamp.

Comments
Enter any additional comments or noteworthy information that may be appropriate.

Coin Collections

Use the *Coin Collections* dialog to establish the various ones you want to keep on file.

Country
    You may desire to categorize your coins into several collections, each referenced by a name.

Comments
    Use this space to more fully describe the collection.

Coins

Use this *Coins* dialog to record each of the various coins that belong to the collection.

Type of Coin
    Indicate for a particular coin or currency what the type is.

Description
    Enter a brief description of the coin or currency.

Year Issued
    When was it issued or, if not known, when was the approximated time of origin.

 # Duplicates
    If you have several duplicates, indicate how many additional copies you have.

Condition
    Indicate for a particular coin or currency what the condition (of the best duplicate) is.

$ Value
    What is the estimated value or worth of the coin or currency in possession.

Comments
    You may want to indicate some additional information or details.

Audio & Video Collections

Use the *Audio/Video Collections* dialog to establish the various ones you want to keep on file.

Audio / Video
> You may have several individual audio and video collections, each one with its own name. Such collections might range from music CDs, cassette tapes, and albums to video tapes, movies, and 35mm slides.

Comments
> A description or background information may be desirable.

Audio / Video Entries

Use the *Audio/Video Entries* dialog to record each of the various items that belong to the collection.

Artist / Group
> Who is the work associated with (performer or group)?

Title
> What is the title of the item?

Category
> Indicate a category (such as Rock, Jazz, Pop or Action and Adventure) if appropriate.

Released
> When was the work released (or first produced)?

$ Value
> What did this item cost, or how much is it worth?

Comments
> Additional information may be desirable or noteworthy.

Book Collections

Use the *Book Collections* dialog to establish the various ones you want to keep on file.

Books
  You may desire to maintain several different book or magazine collections, each with an identifying name

Comments
  You may desire to more fully describe the type of collection this is.

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Books
Use the *Books* dialog to record each of the various items that belong to the collection.

Title
  Enter the title of the book, magazine, or journal.

Author(s)
  Indicate the primary author(s), editor(s), publisher(s), or other appropriate persons.

Published
  When was this work published or copyrighted.

$ Cost / Value
  Indicate the cost or replacement value.

Comments
  Use this area to record any notes or other information you want to remember.

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Additional Command Features

Access by Title
  Select this to review, retrieve, and report in alphabetical order by title.

Access by Author(s)
  Select this to review, retrieve, and report in alphabetical order by author(s).

Sports Card Collections

Use the *Sports Card Collections* dialog to establish the various ones you want to keep on file.

Sport
> You may want to maintain several different types of card collections, each one referenced by its particular name.

Comments
> Comments may be appropriate to briefly describe the type of cards in the collection.

Sports Cards
Use the *Sports Cards* dialog to record each of the various cards that belong to the collection.

Player
> Indicate the name of the player or item on the card.

Year
> Indicate the year of issue of the card, or the year it applies to if different.

Team
> Indicate the team represented by the card.

Condition
> Indicate the best condition of the card.

$ Value
> Indicate the trading value of the card.

 # Duplicates
> Indicate how many duplicates of the card (if any) you have.

Comments
> Enter any additional comments that may be appropriate.

Additional Command Features

Access by Player
> Select this to review, retrieve, and report in alphabetical order by player names. Note that the cards are first grouped by year, and then ordered by player name.

Access by Team
> Select this to review, retrieve, and report in alphabetical order by teams. Note that the cards are first grouped by year, and then ordered by team names.