

# **SmartTracker Inventory for Windows**

Track, Organize and Catalog  
your  
Personal Possessions

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## **General Information**

### **Disclaimer**

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### **About Insight Software Solutions**

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### **Program Support**

As a registered user, you will receive notification of major updates and new products. Registration includes a 90 day support policy where free updates will be provided for major problems. If a problem cannot be resolved, then a refund of money will be made.

Insight Software Solutions offers support through the mail, phone, fax, BBS and CIS. Please refer to the address and phone numbers above. Our official support BBS is the Rocky Mountain Software BBS (RMS). RMS can be reached 24 hours a day at (801) 963-8721 where a conference dedicated to us can be found. Our latest software products and versions, bulletins, news and message system are located on RMS under conference #4. RMS accepts modem baud rates of 1200 to 57600.

## **Getting Started With SmartTracker Inventory**

### **System Requirements**

SmartTracker Inventory has been written to run under Windows version 3.1. A VGA monitor is required along with 4 Megabytes of RAM. It requires close to a megabyte of initial hard disk space and slightly more during the installation process.

### **Installation**

SmartTracker Inventory contains a SETUP program which is used to install SmartTracker Inventory onto your hard disk and make itself available under Windows. SmartTracker Inventory and associated files will be placed in a group named "ISS (Insight Software Solutions) Collection Series. To run the Setup program, select "File" from the program manager and select "Run" from within the File Menu. Enter "A:\SETUP" (B:\SETUP if disk is in drive B:) and press enter. On screen instructions will then be given.

### **Running SmartTracker Inventory**

SmartTracker Inventory cannot be run from the floppy disk as the files are compressed. You will need to install the program first (see above). To run SmartTracker Inventory, simply double click on SmartTracker Inventory Icon that can be found in the ISS Collection Series group.

## **Main Window**

### **Fields**

**INVENTORY VIEWER:** The inventory viewer lists the items that you have entered. It lists the elements of each inventory item in a row. A horizontal scroll bar is present to allow you to move back and forth to view the inventory information. The viewer maintains a definable page size. The page size determines the maximum number of items that appear in the viewer at one time. You may scroll through these using the vertical scroll bar. Simply press the PgUp or PgDn button to load in the previous or next page of items. For large databases of inventory items, a smaller page size prevents extremely long waits that would occur in attempting to load the entire database. The inventory viewer is also the recipient of searches.

### **Buttons**

**ADD BUTTON:** Selecting the Add Button takes you to the Item Input Window. All fields will be set to their initial default values (mostly blank). Information can now be entered about an item.

**EDIT BUTTON:** Selecting the Edit Button takes you to the Item Input Window. All fields will be set to the values entered previously for the particular item selected. Information can now be modified if desired.

**COPY BUTTON:** Selecting the Copy Button takes you to the Item Input Window. All fields will be set to the values entered previously for the particular item selected. Information can now be modified if desired. When the Update button is pressed, the information will be saved as a new item. The previous item that had been selected will remain intact. You will find the copy command very useful for items that are very similar.

**DELETE BUTTON:** Selecting the Delete Button allows you to remove the selected item from the data base. You will be prompted to make sure that you want to delete the item before actual deletion takes place.

**SEARCH BUTTON:** Selecting the Search Button activates the Search Window. You may enter a variety of search information to locate the desired items. All items which fit the search criteria will be moved into the inventory viewer. A message appears in the upper left corner of the inventory viewer which states "SEARCH ON" to indicate that the inventory viewer contains search information. In addition, the End Search button will activate which allows you to turn off the search. While a search is on, you may continue to work as normal--copy, edit, delete, etc. You may also use the export command which will limit the export to the search criteria only.

**END SEARCH BUTTON:** Pressing the End Search button will deactivate a search. The inventory viewer will reload using the entire database. The "SEARCH ON" message is removed to indicate that a search is not in progress.

**REPORT BUTTON:** Selecting the Report Button activates the Report Window. You may view and print a variety of reports.

**VIEWER BUTTON:** This invokes the Inventory Viewer Configuration Window allowing you to set your preferences for the Inventory Viewer.

**HELP BUTTON:** This simply invokes the help system at the main index.

**CLOSE BUTTON:** This provides a quick exit from the program.

## **Menu System**

### **File Menu Command**

Selecting File from the Menu brings up a submenu consisting of Add, Edit, Delete, Maintenance and Exit. Selecting Add from the Menu performs the same operation as the Add Button. Selecting Edit from the Menu performs the same operation as the Edit Button. Selecting Delete from the Menu performs the same operation as the Delete Button. Selecting Maintenance from the Menu brings up a submenu which contains four items. The first is for maintaining your list of Locations, Categories and Owners which calls the Maintenance List Window. The other three submenu items are all for maintaining the actual database and are mainly used for troubleshooting and resolving problems that may be present in the database. These three options are named Rebuild Index, Pack Database and Reset Key. They are described in more detail in the maintenance section.

### **Report Menu Command**

Selecting Report from the Menu performs the same operation as the Report Button.

### **Options Menu Command**

Selecting Options from the Menu displays a submenu consisting of Colors, Viewer, Import and Export. Selecting Viewer invokes the Inventory Viewer Configuration Window. Selecting Import or Export invokes the Import and Export Windows. These are described in more detail in their sections in the manual. Selecting Colors allows you to configure the colors for many elements of the window. You may do this to all windows or to a particular set of windows. This option brings up a submenu consisting of the windows which can have their colors changed. Selecting one of these options takes you to the Color Selection Window. The submenu options are as follows: All Windows (sets the colors for all color configurable windows), Main Window (sets the color only for the opening main window), Edit Window (sets the color for the edit window), Search Window (sets the color for the search options window), Report Window (sets the color for the report windows), Maintenance Windows (sets the window for all the maintenance type windows including the Import Window, Export Window and the List Maintenance Window).

### **Help Menu Command**

Selecting Help from the Menu brings up a submenu consisting of Contents and About. Selecting Contents from the Menu invokes the help system and brings you to the Index within it. Selecting About from the Menu displays the version number of the program and the copyright notice.

## Item Input Window

This allows you to enter all the information about a particular item. Information includes the Item, Brand, Model, Serial Number, Cost, Value, Replacement Cost, Owner, Quantity, Location, Category, Date Purchased, Purchased From, Warranty, Warranty Expiration Date, Warranty Notes, ID Marks and Description. These characteristics can be cleared for an easy start-over of entering the item information as well as canceling the whole input.

### Input Fields

**ITEM:** This is the name of the home inventory item. It can be anything that you wish to keep track of. There are many reasons for wanting to keep track of your personal items. Some of these include: Insurance purposes (replacement), Police notification in case of theft (locating), and calculating personal net worth.

**BRAND:** This is the brand of the item. Depending on the item, this can vary. Some examples would be Whirlpool, Sony, Levis, etc.

**MODEL:** This is the model of the item. This varies from item to item, but will usually be a combination of numbers and letters. Some examples: PV4301 (Panasonic VCR), 501 (Levi Jeans), UX-103 (Sharp Fax Machine), etc.

**SERIAL #:** This is the serial number on the item. Not all items have serial numbers. For those that don't, simply leave this field blank.

**COST:** This is the cost of the item.

**VALUE:** This is the estimated value of the item.

**REPLACEMENT COST:** This is the cost required to replace the item.

**QUANTITY:** This is the number of items you have. For certain items like a refrigerator, TV or stereo, it is most likely you will only have one of a particular brand and model. But with certain items you will have multiple amounts. For example you may have 8 forks in a silver dining set.

**LOCATION:** The location describes the location of the item which is typically a room in the residence. There are many different possibilities for rooms. These may include such rooms as Kitchen, Garage, Bedroom, etc. A predefined list of rooms is provided with the software. However, you are given flexibility over what you would like to appear in this list. You may add, remove and modify the locations by selecting the Add Button.

**OWNER:** This is the owner of the item. This would typically be a family member, room mate, etc. You are given the ability to add and delete the list of owners. Press the Add Button to do so.

**CATEGORY:** The category describes the type of item. There are many different possibilities for item categories. These may include such things as Appliances, Jewelry, Automotive, etc. A predefined list of categories is provided with the software. However, you are given flexibility over what you would like to appear in this list. You may add, remove and modify the categories by selecting the Add Button.

**PURCHASED FROM:** This specifies where you bought the item.

**ID MARKS:** If the item has any unique identification marks, then enter them here.

**DATE PURCHASED:** This is the date that the item was purchased.

COMMENTS: This is for any additional description or comments that you may wish to make about the item.

WARRANTY: This allows you to specify if the item has a warranty or not.

EXPIRATION: This is the date that the warranty expires on the item.

WARRANTY NOTES: This is to record any special notes, limitations, etc regarding the warranty.

### **Buttons**

UPDATE: Selecting the Update Button saves all the information about the item and returns you to the main window.

CANCEL: Selecting the Cancel Button aborts any changes you have made regarding the item. You are returned to the main window.

CLEAR: Selecting the Clear Button removes all information about the item that may have been entered and sets all values to the initial default values.

HELP: This invokes the help system with the Item Input Window as the current topic.

ADD: Selecting the Add Button brings up the Maintenance List Window and allows you to modify the category and room lists.

## Report Window

The Report Window allows you to view or print a variety of reports. The report type is determined by selecting a Sort Order and a Report Style. User Definable reports are also available as an option under the report style. In addition, information regarding your insurance company and policy can be selected to be included in the report.

### Input Fields

**SORT ORDER:** You may have your reports sorted in one of four ways. These are as follows:

**Item Name:** This will generate a report where the items are sorted alphabetically in the list.

**Location:** This will generate a report where the items are grouped by location. A subheading consisting of the location where the item is located will appear above all items at that location. A list box is available so that you can print out the items for a single location if desired. You may wish to do this after updating items in a location instead of printing the entire list out again. To print an entire list, you would select the ALL LOCATIONS choice in the list box.

**Category:** This will generate a report where the items are grouped by category. A subheading consisting of the category of the item will appear above all items found in that category. A list box is available so that you can print out the items for a single category if desired. You may wish to do this after updating items in a category instead of printing the entire list out again. To print an entire list, you would select the ALL CATEGORIES choice in the list box.

**Owner:** This will generate a report where the items are grouped by owner. A subheading consisting of the owner of the item will appear above all items belonging to the particular owner. A list box is available so that you can print out the items for a single owner if desired. You may wish to do this after updating items for a single owner instead of printing the entire list out again. To print an entire list, you would select the ALL OWNERS choice in the list box.

**STYLE:** The style of the report determines the amount of information you want printed about each item. This consists of five different options.

**1 Line Description:** This will generate a report where there is only one line of data for each item. The information included is the Item Name, Location, Owner, Cost and Replacement Cost.

**2 Line Description:** This will generate a report where there are two lines of data for each item. The information included is the Item Name, Location, Category, Cost, Replacement Cost, Brand, Model, Serial Number and Warranty.

**Full Description:** This will generate a report where all the information about an item is printed. This requires 7 lines of data for each item.

**Values Summary:** This will generate a report where only the cost, value and replacement cost values are displayed as sub group totals and grand totals.

**User Defined:** This allows you to select a user defined report. The software comes with a couple user defined reports and allows you to create your own. With this option selected, the report description list box is activated as well as the Edit Button. The Edit button allows you to edit, delete and create your own reports.

**INSURANCE:** One good reason to maintain a list of personal belongings is to have a record for your insurance company in the event of loss. Four options are available in the Report Window to make submitting your reports to your insurance company easier.

**Print Date:** This places the date at the bottom of each page of the report. Simply fill in the date or press the Today's Date button and the date will be updated with the current date.

**Print Ins. Co.:** This places the name of the insurance company at the bottom of each page of the report. Simply fill in the name of your insurance company in the edit box provided..

**Print Policy #:** This places the policy number of your insurance policy at the bottom of each page of the report. Simply fill in the policy number in the edit box provided.

**Print Insurance Inventory Statement:** This adds a line at the end of the report indicating that

you attest that the inventory list is correct as of the date printed to the best of your knowledge. A place to sign your name is provided along with your printed name.

NOTE: We purposely did not include a place to include your address and phone number as we feel that if the inventory report fell into the wrong hands that it could lead to a possible attempt of theft. We chose to include only the insurance company and policy number so that the report could be readily identified by the insurance company. However, you may still include your address, phone number or whatever on the reports by simply setting up your own user definable report and adding that information in the report titles section.

### **Buttons**

VIEW/PRINT: Selecting the this Button generates the desired report and sends it to the Report Viewing Window where it can be viewed, printed or sent to an ascii file.

HELP: This invokes the help system with the Report Window as the current topic.

CLOSE: This exits the Report Window and returns to the Main Window.

## **Report Viewing Window**

This window is for viewing the reports prior to printing them. It consists of a large scrollable window that contains a page of the report. You may use the scroll bars to view the different parts of the current page. A menu bar exists at the top of this window to allow for several actions. They are as follows:

**Print:** This brings up a submenu with four options. One is for printing the current page you are viewing and one is for printing the entire document. The other two are for saving the current page or the entire document out to an ascii text file.

**Next Page:** This creates and displays the next page of the report. If you are on the last page, then nothing happens.

**Previous Page:** This creates and displays the previous page of the report. If you are on the first page, then nothing happens.

**Exit:** This exits the report viewing window and returns to the report options window.

**Setup:** This allows for selecting and setting up of your printer for the printed report.

**Help:** This simply invokes the help system.

## **User Definable Reports Window**

This window allows you to create your own report layouts. The description of the report appears as an item in the user definable list box on the report window where it can be selected and used.

### **Input Fields**

**REPORT NAME:** This is a descriptive name of the report and does not actually appear on the report. This name appears as one of the choices in the list box of user definable reports.

**REPORT WIDTH:** You may specify a report width of 90 characters which produces a larger, more legible report. Alternatively, you may specify a report width of 120 which will allow you to pack much more information on each page.

**FONT:** You may choose from any True Type font that has been loaded on your computer. This font will be used as the report font. You may optionally select to bold or italicize the font without having to go and rechoose the font.

**CREATE/MODIFY REPORT CONTENT:** Each inventory item can occupy up to 12 lines. You enter the number of lines you wish each inventory item to use. Each line has a button associated with it. Pressing one of the buttons takes you to the Edit Report Line Window where you can specify the layout of the particular line. Each line may have labels, blanks and database elements placed on them. As the line format is created, the basic format of the line is displayed below. Totals allows the total amount of all inventory items, costs, replacement costs and/or values to be displayed in the report. Pressing the Mod Totals Line button takes you to the Edit Report Line Window where you can set up how the totals line is to look. Please Note: It is possible to create statistics/summary only reports by setting the number of lines to be used to zero and entering a definition for the Totals Line.

**REPORT TITLES:** You may specify up to three report headers which will appear on the top of each page of the report. Use these for your name, import information about your possessions or for anything appropriate.

**MISCELLANEOUS:** There are two items available under the miscellaneous section consisting of Column Headers and Page Numbers. Column Headers are only available for reports which use only one line for each inventory item. Selecting this option will automatically place a column header at the top of each page and at the start of each new group of the inventory items. Selecting Page Numbers causes the report to show page numbers at the bottom of each page.

### **Buttons**

**UPDATE:** This simply saves all the report layout information and makes it available as a report option.

**DELETE:** This removes the report layout from the computer. The delete button is only active if the report title has not been changed.

**CANCEL:** This allows you to abandon any changes that you have made.

**HELP:** This simply invokes the help system.

## **Edit Report Line Window**

This window allows you to design an individual line that will appear in the user definable report. You may specify up to 20 items to appear on the line. These items can consist of database elements, blanks or labels.

### **Input Fields**

**LINE ITEM:** This consists of a list box which allows you to choose the item to be presented on the line. It contains an option for a label (<LABEL>), an option for blanks (<FILLER>) and options consisting of the database elements. If the report line is for Totals, then the database elements will only contain those items which can have totals applied to them. Selecting an item will place it at the current location in the line. At the bottom of the screen, there will be an illustration of where the items will be in the line.

**SIZE:** This specifies the number of spaces to allocate to the item. If the item is too big to fit in the space allocated, it will be truncated. If you try to allocate more space than is currently available on the line, the amount of space will be truncated to the maximum available size.

**LABEL:** This is only available if the Line Item selected is a label (<LABEL>). This is the actual text that you want to appear on the report as the label.

### **Buttons**

**OK:** This simply accepts the information and returns you to the previous window.

**CANCEL:** This allows you to abandon any changes that you have made.

**NOTE:** Labels are always right justified while database elements are always left justified. You may therefore wish to place blanks (fillers) between labels and database elements.

## **Search Window**

The Search Window allows you to enter search criteria to locate a given item. The following information can be searched upon: Item Name, Brand, Serial Number, Description, Location, Owner, Warranty and/or Category. You may select to search on one item or multiple items. For example, if you want to search for all items located in the garage, then select garage in the Room field. If you wanted to search for all items located in the garage that fell under the Lawn Accessories Category, then select garage in the Location field and Lawn Accessories in the Category field. Where text is entered, you need only enter that portion of the text that you want a search to take place on. For example, under Item, you could enter "flower" to find all items that had the word "flower" in the name of the item. This would find all items with "flower" and "flowers". If you just wanted to find "flowers", then you would enter "flowers".

Once the search criteria has been entered, you select the OK Button and the search immediately takes place. If for some reason you decide that you do not want to perform a search after all, then you may select the Cancel Button. The Clear Button is available as a tool to quickly clear all the search fields so different search criteria can be entered. Once search criteria has been entered, it is remembered so that the next time you want to perform a search, the last search criteria used will be present.

## **Viewer Configuration Window**

You may configure the Inventory Viewer to your liking by selecting the order of items and the width of each item. You may also select only those items you wish to see in the viewer.

### **Input Fields**

**INVENTORY ELEMENT:** The Viewer Configuration Window displays a list of check boxes consisting of each of the inventory item elements. Simply check the box of the element that you wish to appear in the viewer.

**COLUMN ORDER:** Following each check box is an edit box which specifies the order in which to display the inventory item elements. Placing a '1' in the box will indicate that the element is to be displayed first. A '2' indicates that it will be second. When setting the order, you must start at "1" and use consecutive numbers. An error will be displayed if numbers are duplicated or used out of sequence.

**COLUMN WIDTH:** Following the Column Order is another edit box which specifies the width (in characters) to allow for the inventory item element. For example, if you specify 20 characters for the inventory item description, then those descriptions which are longer will be truncated and the truncated part will not show up in the viewer. Please note that proportional spaced fonts are used in the viewer. When specifying a width of 20, more or less than 20 characters may fit in the space allotted depending on the characters themselves.

**PAGE SIZE:** This allows you to specify the number of items to load into the Inventory Viewer at one time. The current range is from 10 to 1000. You may ask: What page size should I use and what impact does it have? The biggest concern here is a factor of time. Using large page sizes requires more time to load an entire page into the Inventory Viewer. However, once in the viewer, you can scroll through the items more quickly. The trade off is the ability to scroll through more items quickly versus waiting for the items to load into the viewer. Our recommendation is to keep the Page Size relatively small at around 50 or 100 items.

### **Buttons**

**OK:** This is used to accept the selections which have been made. Once pressed, the Inventory Viewer will be updated and the Viewer Configuration Window will close. Your configuration choices will be saved.

**CANCEL:** This simply aborts the configuration process.

## **Import Window**

You may import inventory item information from an Ascii Delimited File. The Ascii Delimited File format is supported by most other programs with export capabilities. This format creates an ascii file with each element of the database surrounded in double quotes and separated by commas. Much flexibility is given with the import feature--you may specify which items to import and the order in which to import them.

### **Input Fields**

**SELECT ITEMS:** The Import Window displays a list of check boxes consisting of each of the inventory item elements. Simply check the box and that element will be imported.

**SELECT ORDER:** Following each check box is an edit box which specifies the order in which to import. For example, if the first item of each record to be imported is the "Comment" field, then enter a "1" in the edit box following the "Comment" checkbox. Before any importing takes place, a check is made to verify that the order is okay.

### **Buttons**

**IMPORT:** This is used to activate the import once all the import criteria has been selected. Once pressed, you will be prompted for a file name to import from. After importing is complete, the options you selected for import will be saved so that they will appear the next time the import feature is used.

**CANCEL:** This simply aborts the import process.

**NOTE:** Please be aware that the date format for both importing and exporting takes the following form: dd Mmm yyyy (12 Jun 1995)

**CAUTION:** You must make sure that order and number of fields selected matches that of the file you are importing from. Undesirable results may occur if they do not. When in doubt, test the import with one item first to make sure it will import in the way desired.

## **Export Window**

You may export inventory item information to an Ascii Delimited File. The Ascii Delimited File format is supported by most other programs with import capabilities. This format creates an ascii file with each element of the database surrounded in double quotes and separated by commas. Great flexibility is given with the export feature--you may specify which items to export and the order in which to export them. You can also limit the number of items to export by using the Search mode.

### **Selecting Items**

You may export the entire database of items or you may limit the number of items to export. Limiting the items is done through use of the search facility. If a search is currently in progress when the export facility is invoked, then only those items which were found in the search will be exported. A database status box appears in the lower left corner of the export window indicating whether the entire database will be exported or if only the search criteria will be exported.

### **Input Fields**

**SELECT ITEMS:** The Export Window displays a list of check boxes consisting of each of the inventory item elements. Simply check the box and that element will be exported.

**SELECT ORDER:** Following each check box is an edit box which specifies the order in which to export. For example, if you want the first item of each record to be the "Comment" field, then enter a "1" in the edit box following the "Comment" checkbox. Before any exporting takes place, a check is made to verify that the order is okay.

### **Buttons**

**EXPORT:** This is used to activate the export once all the export criteria has been selected. Once pressed, you will be prompted for a file name to export to. After exporting is complete, the options you selected for export will be saved so that they will appear the next time the export feature is used.

**CANCEL:** This simply aborts the export process.

**NOTE:** Please be aware that the date format for both importing and exporting takes the following form: dd Mmm yyyy (12 Jun 1995)

## **Color Selection Window**

The Color Selection Window allows you to setup the colors you wish to appear on the selected window. The selected Window is selected when using the color menu option. As color options are made, the selections appear on the window. This way you can visualize the impact. You may cancel the color selection process simply by pressing the Cancel button. To use the colors you have selected, press the OK button.

### **Color Options**

**BACKGROUND:** This is the color that will fill the background of the window.

**MAJOR TITLES:** Many windows have large lettered titles on them. This sets the color for them.

**MINOR TITLES:** Many windows have average sized titles on them. This sets the color for them.

**EDIT BACKGROUND:** This is the color that will fill the background of any edit boxes that may be on the window.

**EDIT TEXT:** This is the color of the text that will be inside the edit boxes.

**RADIO AND CHECK BOXES:** This is the color that any radio or check boxes will appear in.

**3D COLORS:** Many windows contain 3D looking boxes surrounding different items on the screen. This option lets you choose one of two color schemes to give the 3D affect.

**PREDEFINED COLOR SETS:** Several predefined color sets are included with the software. You may simply choose one of these if you find them to your liking. Or you may choose one and then modify one or two items to better suite your tastes.

## **Maintenance Menu**

### **Maintenance List Window**

The Maintenance List Window allows you to maintain a list of Categories, Locations and Owners for your personal belongings. The software comes with predefined categories and location. You may however, at your discretion, add new categories and rooms or remove them. If you live in a small house with only 4 rooms, then you may wish to list just those rooms as all others will have no meaning. You may also set up your own category system for your personal belongings. Owners may be freely added and removed.

You may add a category by filling in the category edit box and then selecting the Add Button. To delete a category, you highlight the desired category inside the list box and then select the Delete Button. If you wish to modify a category, you will need to first delete it, then add it back in with the correct spelling. You may add, remove and modify locations and owners in the same manner.

### **Pack Database**

This program uses DBase compatible files. When a deletion of an inventory item occurs, it is only marked as deleted. To physically remove the deleted items from the database, a process called "packing" must occur. Selecting this option will "pack" the database and thus free up space. It is recommended that you pack your database every once in a while.

### **Rebuild Index (Troubleshooting)**

It is possible for your index files to become corrupted. This may happen by not exiting the program properly (shutting the computer off while the program is running) or by other means. As a result, some items may not show up in the viewer or in reports because they cannot be found in the appropriate index. Selecting this option will rebuild your index files correctly so that the problem will go away.

### **Reset Key (Troubleshooting)**

The program maintains a counter to use as a unique KEY in the database for each new inventory item. If this counter gets out of sequence with the number of items, an error message claiming a "Unique Key" must be used will occur when a new item is added. Selecting this option will automatically reset this counter to the correct value thus resolving the problem.