



# Inventory Manager

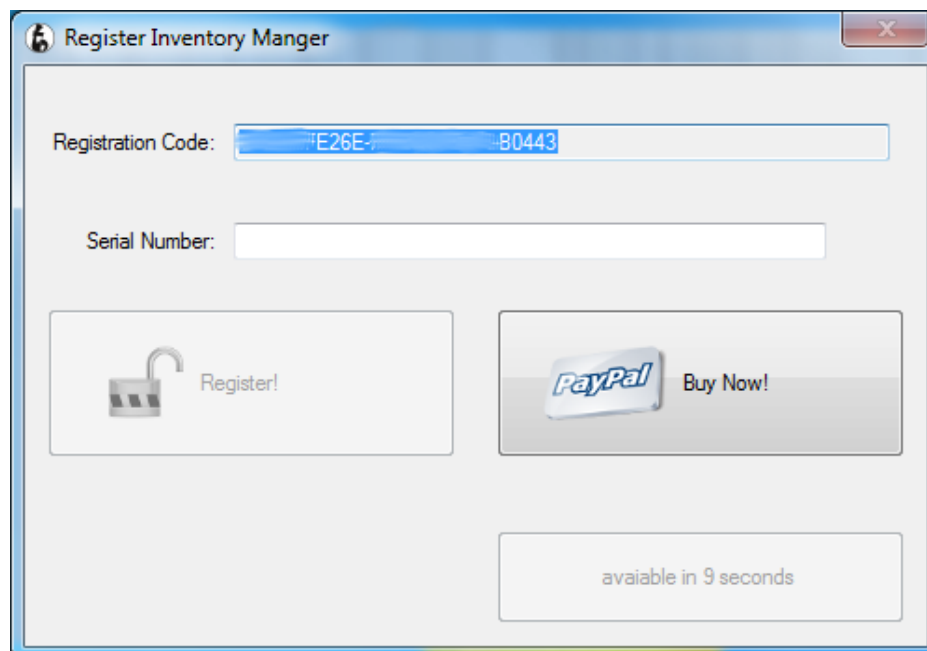
## Getting started – Usage – and general How-To

### Before you begin:

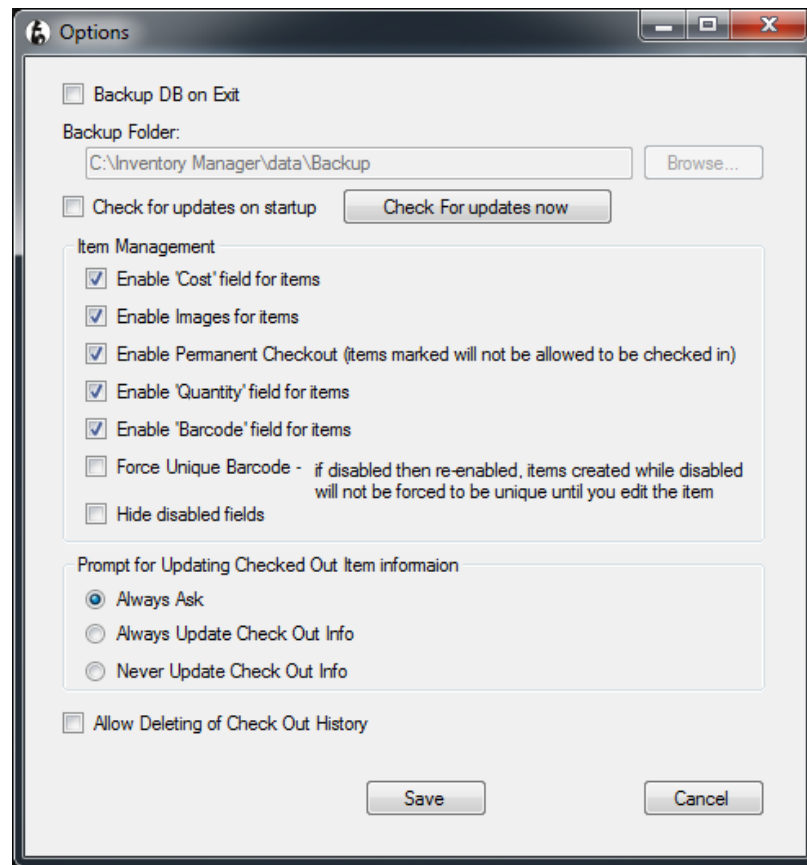
- Prerequisites:
  - SQL Server 2008 R2 Express Edition with the default SQLEXPRESS instance MUST be installed in order to use Inventory Manager. If you do not have the correct version, you will get an error when starting the program.
    - You can download a custom built “Express Installer” from <http://www.simple-im.com/download.php>
  - Microsoft Excel 2003 OR GREATER must be installed to use “Export To Excel” option (registered user option)
    - The program opens Excel, and formats columns automatically, not just exporting to a file with an .xls file extension.

### Getting Started:

- Once you’ve ensured that you have SQL Server 2008 R2 Express Edition with the default SQLEXPRESS instance installed, run Setup-InventoryManagerXXXX.exe (where XXXX is the version you downloaded), and complete the steps to install Inventory Manager – **MAKE SURE YOU CHOOSE AN INSTALLATION FOLDER WHERE YOUR USER HAS WRITE PERMISSIONS!**
- When you launch the application, you’ll be prompted with the registration form. Registration is OPTIONAL for HOME USE ONLY – **BUSINESS USE OF ANY KIND MUST REGISTER.**
- To register, click on “Buy Now!” to take you to the website where you can purchase your serial number – your registration code will be filled into the appropriate box automatically. If you have any coupon codes, enter them, then click “Buy Now” and complete the check out process. You will receive your Serial Number within 1-2 business days, but typically within a few hours.



## Setting options (Registered users only):



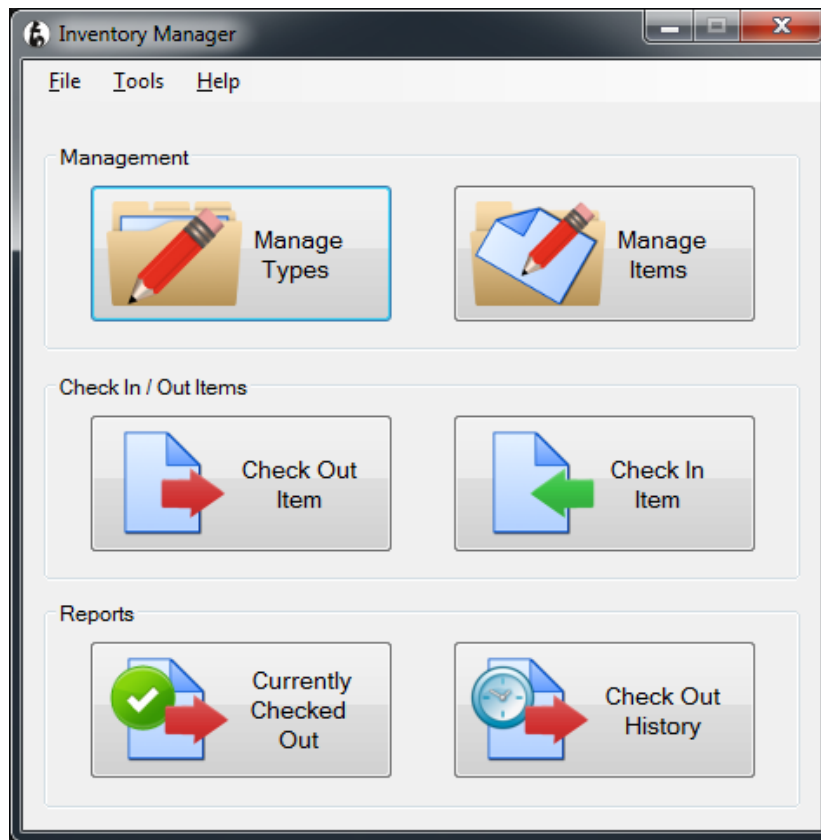
- Backup DB on Exit (checkbox)
  - Check this option to create a backup of your database when you close the program
  - Enables the Backup Folder field and Browse button
- Backup Folder (text field)
  - The folder to send the backup file – If it doesn't exist, Inventory Manager will ask you if you would like to create it – this field CAN be a mapped network drive.
- Check for Updates on startup (checkbox)
  - Checks for updates when the program starts, and will prompt you if there is an update available.
- Check for updates now (button)
  - Will check for updates right now and alert you whether or not there is an update available.
- Enable 'Cost' field for Items (checkbox)
  - Adds a 'Cost' field for items that will show up in Check Out Reports
- Enable Images for items (checkbox)
  - Adds Image fields in the Add / Edit Item windows – when enabled, images will be resized and copied to data folder
- Enable Permanent Checkout
  - Items with this tag set will not show up in "Check In" screen when checked out
- Enable 'Quantity' field for Items
  - Manage quantities for items – keep track of In-Hand and Checked Out items
- Enable 'Barcode' field for items (checkbox)
  - Adds a Barcode field for items

### **Setting options (Registered users only) - continued:**

- Force Unique Barcode (checkbox)
  - Checks when saving items if barcode is already in use, and won't allow you to save until it is unique
- Hide disabled fields (checkbox)
  - When selected, previous "Enable ..." options that aren't selected will not show in Add / Edit windows
- Prompt for Updating Checked Out Items information (radio buttons)
  - Always Ask – Will ask every time you change an item that has check out records whether the information for those records should be updated with the new values.
  - Always Update – Will always update Check Out records without asking
  - Never Update – Won't ask you to update, and won't update Check Out records.
- Allow Deleting of Check Out History (checkbox)
  - When selected, a "Delete Selected Row" button is enabled on the Check Out History window

## General Usage:

Main Screen:



**Manage Types:** Create, Edit, and Delete inventory types

**Manage Items:** Create, Edit, and Delete inventory items

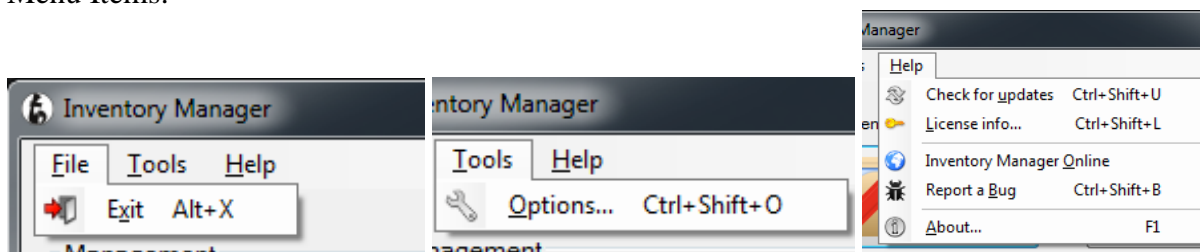
**Check Item Out:** Select an item (either by barcode or drop down menus,) enter a “Checked Out To” name and date

**Check Item In:** Select an item (either by barcode or searching through types) and check it back in

**Currently Checked Out:** Displays all items that are currently checked out in a printable form

**Check Out History:** Displays all records for items that have ever been checked out, regardless of current check out status

Menu Items:

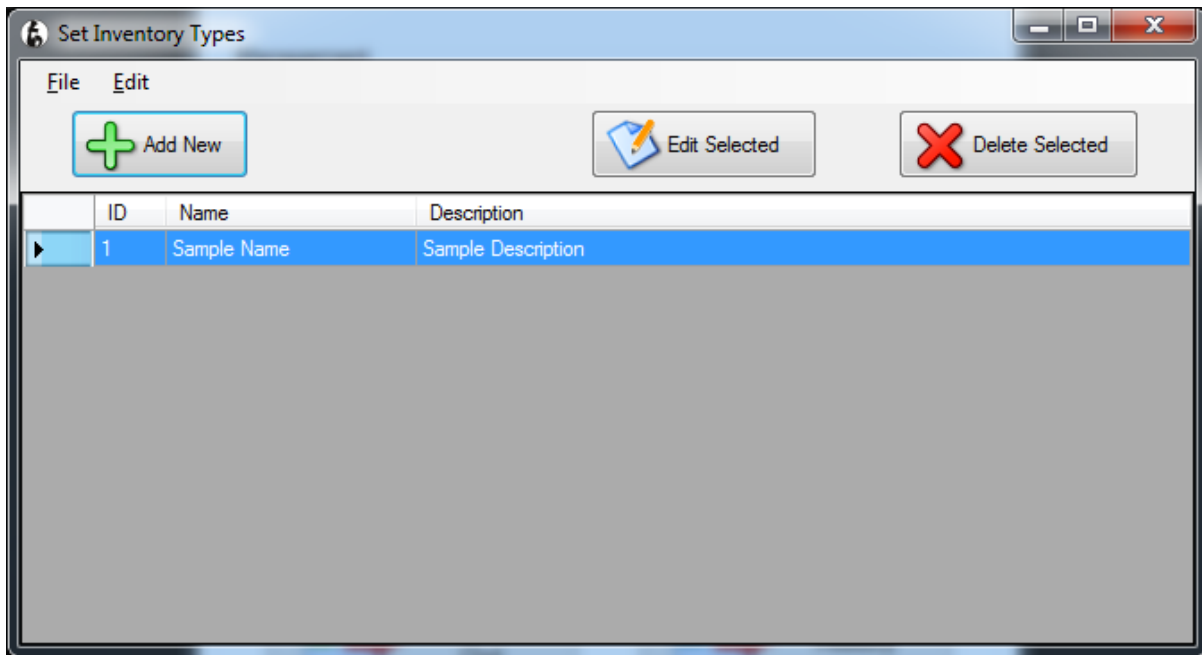


Inventory Manager

project: <http://www.simple-im.com>

website: <http://www.tbare.com>

## Manage Types:



**File Menu:** Export to Excel (Registered users only), Print, Print Preview, Page Setup, Close

**Context Menu & Edit Menu:** Edit, Delete (Item must be checked in), Check Item In (Item must be checked out)

**Add New:** Add a new Inventory Type

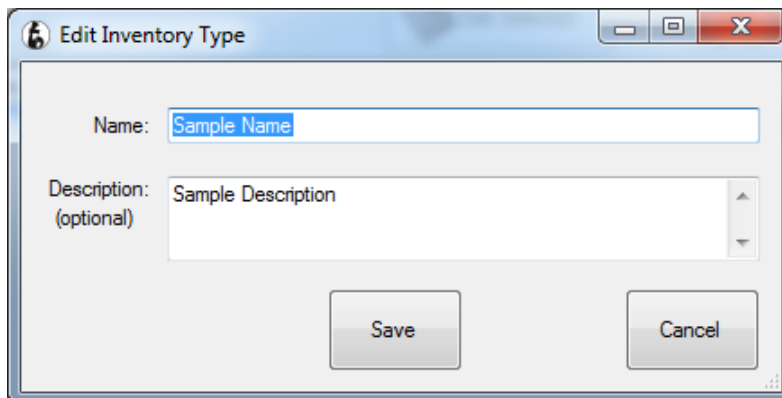
**Edit Selected:** Edit the selected Inventory Type

**Delete Selected:** Delete the selected Inventory Type

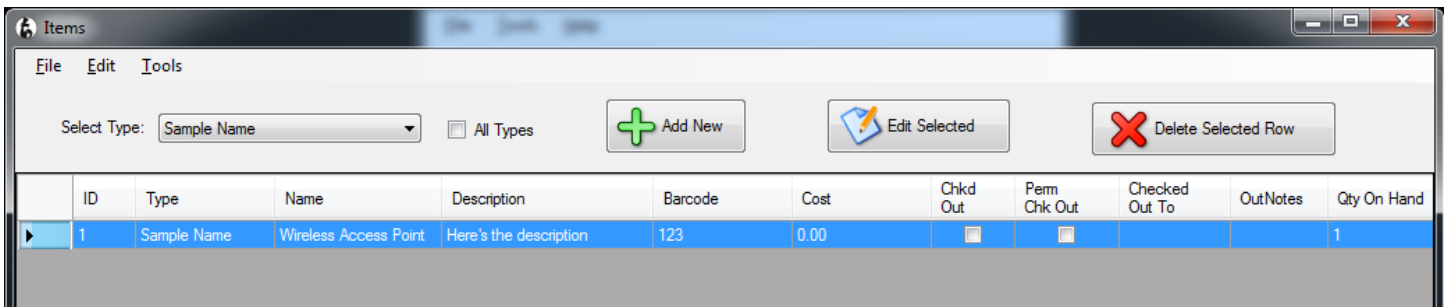
- **Types that can NOT be deleted:**
  - The last Inventory Type
  - Inventory Types with Items associated with them

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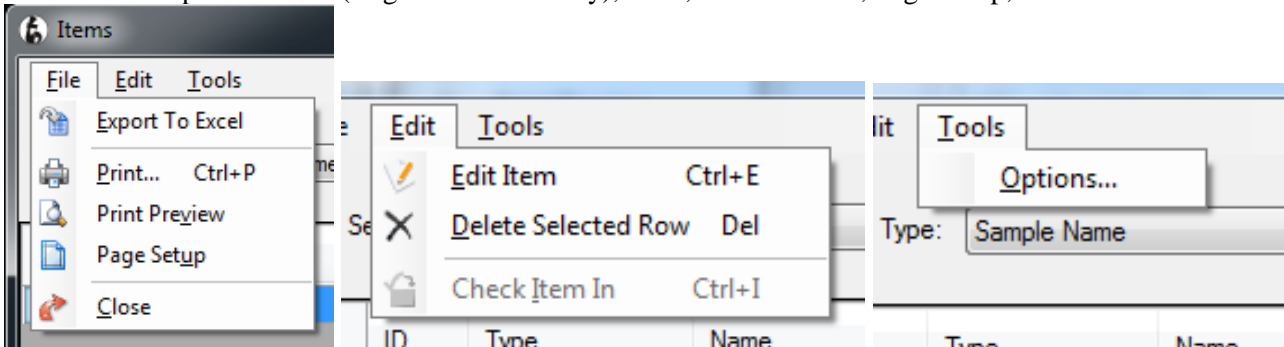
## Edit Type:



## Manage Items:



**File Menu:** Export to Excel (Registered users only), Print, Print Preview, Page Setup, Close



**Context Menu & Edit Menu:** Edit, Delete (Item must be checked in), Check Item In (Item must be checked out)

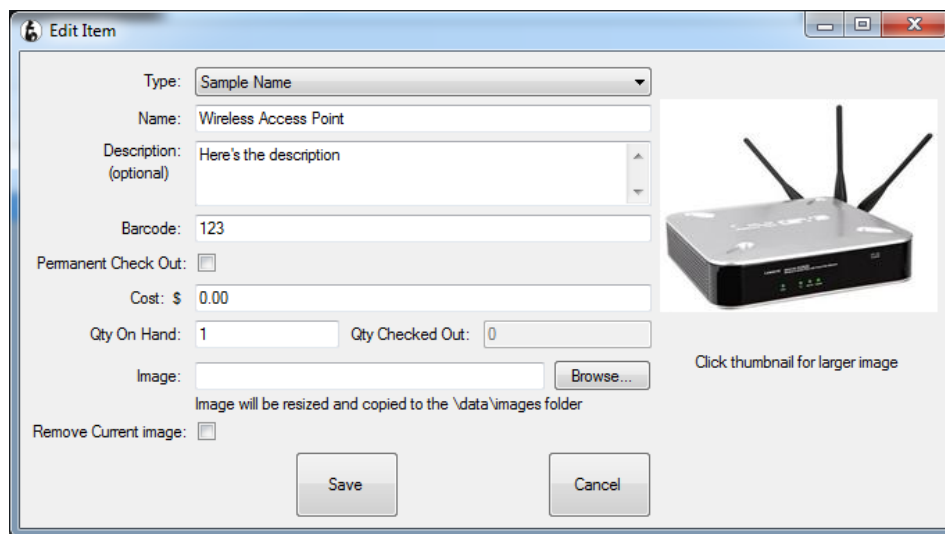
**Tools:** Options (Show / Hide columns)

**Add New:** Add a new Inventory Item

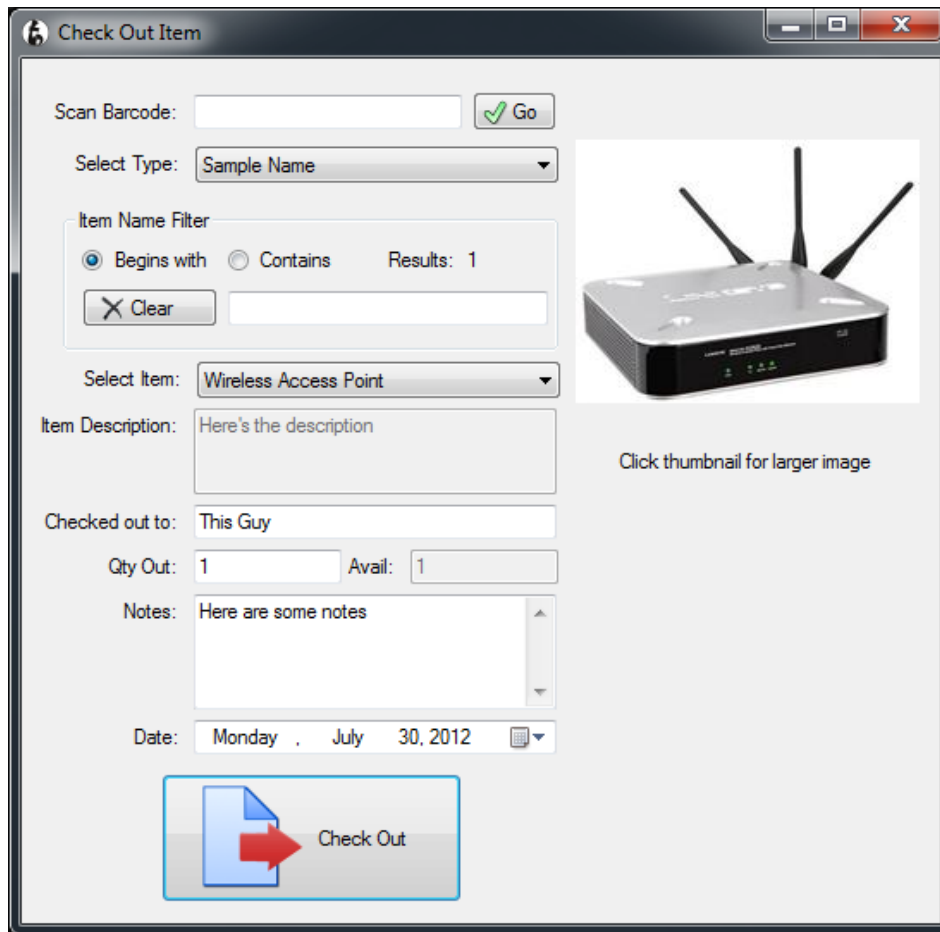
**Edit Selected:** Edit the selected Inventory Item

**Delete Selected:** Delete the selected Inventory Item

## Edit Item:



## Check Item Out:



The screenshot shows a web application window titled "Check Out Item". The interface includes the following elements:

- Scan Barcode:** A text input field with a "Go" button (green checkmark icon).
- Select Type:** A dropdown menu currently showing "Sample Name".
- Item Name Filter:** Radio buttons for "Begins with" (selected) and "Contains", followed by "Results: 1". A "Clear" button (X icon) and a text input field are also present.
- Select Item:** A dropdown menu currently showing "Wireless Access Point".
- Item Description:** A text area containing the text "Here's the description".
- Checked out to:** A text input field containing "This Guy".
- Qty Out:** A text input field containing "1".
- Avail:** A text input field containing "1".
- Notes:** A text area containing "Here are some notes".
- Date:** A date picker showing "Monday, July 30, 2012".
- Image:** A thumbnail image of a wireless access point router with three antennas. Below the image is the text "Click thumbnail for larger image".
- Check Out Button:** A large button with a blue document icon and a red arrow pointing right, labeled "Check Out".

**Scan Barcode:** Search for an item using a barcode, if enabled. If barcode is NOT forced to be unique and multiple items are found with the entered barcode, the select item drop down is filtered to show all items with that barcode.

**Select Type:** Filter the Items dropdown by selected Type

**Item Name Filter:** Filter the Items dropdown in the selected type with items that begin with or contain the entered text

**Item Name Filter – Clear button:** Clear the filter results

**Select Item:** Select the item that is to be checked out

**Checked out to:** Specify to whom the item is being checked out

**Qty Out:** Specify the quantity to check out

**Avail:** Quantity On-Hand

**Notes:** Notes about the check out record

**Date:** Date that the item was check out (defaults to today)

## Check Item In:

**Quick Check In:** (checkbox) – If checked, focus will be set back to Barcode field (if enabled) and window remains open after “Check In” button is clicked.

**Scan Barcode:** Search for an item using a barcode, if enabled. If barcode is NOT forced to be unique and multiple items are found with the entered barcode, the select item drop down is filtered to show all items with that barcode.

**Select Type:** Filter the Items dropdown by selected Type

**Item Name Filter:** Filter the Items dropdown in the selected type with items that begin with or contain the entered text

**Item Name Filter – Clear button:** Clear the filter results

**Select Item:** Select the item that is to be checked out

**Qty Out:** Specify the quantity to check out

**Avail:** Quantity On-Hand

**Notes:** Notes about the check in record

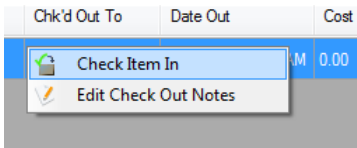
**Date:** Date that the item was check in (defaults to today)



## Currently Checked Out:

ID	Barcode	Type	Item	Description	Chk'd Out To	Qty	Date Out	Cost	Perm Chk Out	Out
1	123	Sample Name	Wireless Access Point	Here's the description	This Guy	1	7/30/2012 12:51 PM	0.00	<input type="checkbox"/>	Here's the description

**File Menu:** Export to Excel (Registered users only), Print, Print Preview, Page Setup, Close



**Context Menu & Edit Menu:** Check Item In, Edit Check Out Notes

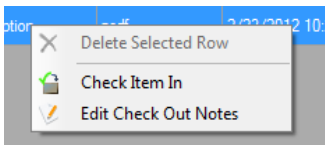
**Tools:** Options (Show / Hide columns)

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## Check Out History:

ID	Item ID	Barcode	Type	Name	Description	Qty	Chk'd Out To	Date Out	Date In	Cost
1	1	123	Sample Name	Wireless Access Point	Here's the description	1	This Guy	7/30/2012 12:46 PM	7/30/2012 12:47 PM	0.00
2	1	123	Sample Name	Wireless Access Point	Here's the description	1	This Guy	7/30/2012 12:51 PM		0.00

**File Menu:** Export to Excel (Registered users only), Print, Print Preview, Page Setup, Close



**Context Menu & Edit Menu:** Delete Selected Row (Delete keyboard key also works -- only enabled if "Allow Deleting of Check Out History" option is set in Options menu and item is checked in), Check Item In, Edit Check Out Notes

**Tools:** Options (Show / Hide columns)

**Delete Selected Row:** Delete the selected Check Out History record – Item MUST be checked in prior to deleting the record.