



# Inventory Manager

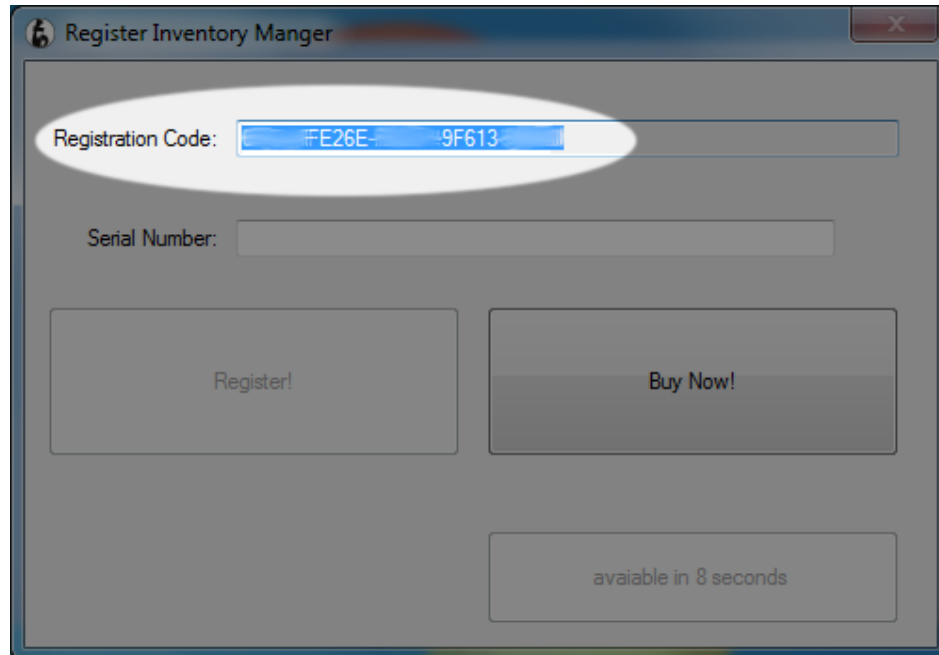
## Getting started – Usage – and general How-To

### Before you begin:

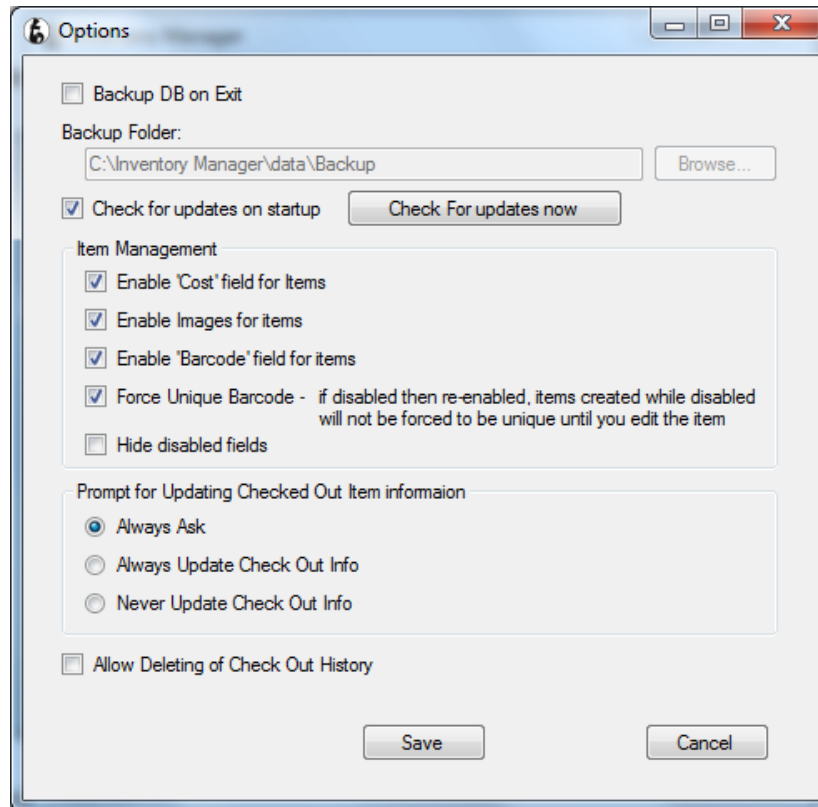
- Prerequisites:
  - SQL Server 2005 Express Edition (Min SP4) with the default SQLEXPRESS instance MUST be installed in order to use Inventory Manager. If you do not have the correct version, you will get an error when starting the program. – You can download the correct version from <http://inventorymanager.tbare.com>.

### Getting Started:

- Once you've ensured that you have SQL Server 2005 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 after you decide it fits your organization's needs.**
- To register, copy the Registration Code from the dialog box, and click on “Buy Now!” to take you to the website where you can purchase your serial number. Click on the Buy Now link that will take you to PayPal where you can purchase your copy. **Make sure you include your Registration Code in the notes section.**



## Setting options (Registered users only):



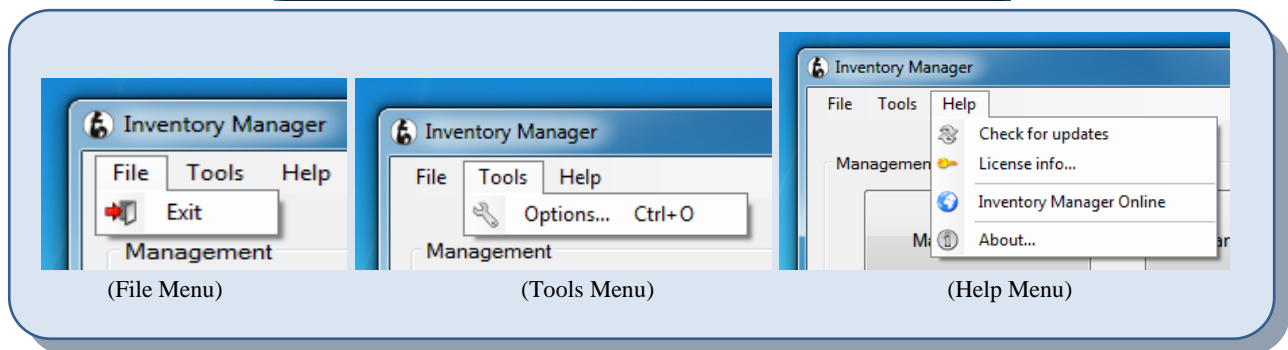
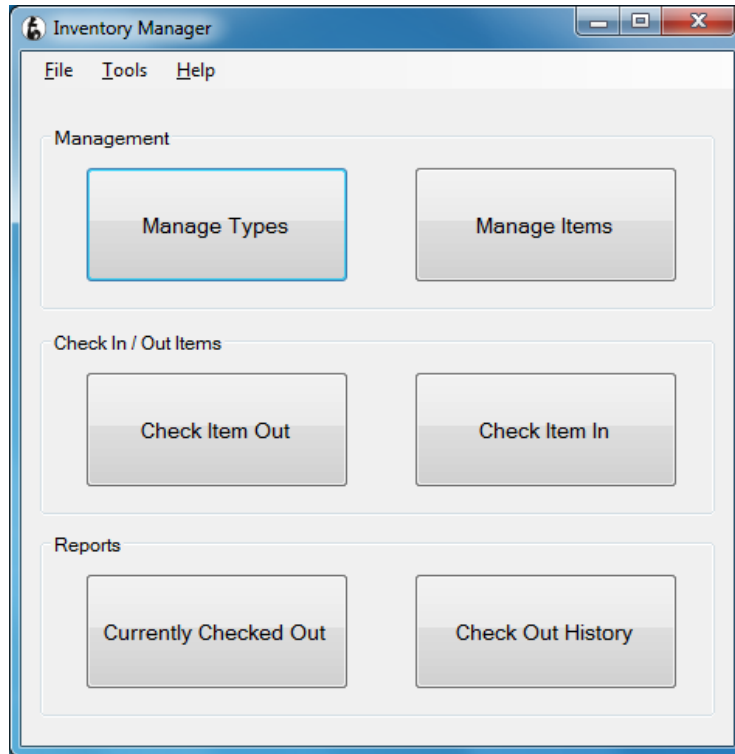
- Backup DB on Exit (checkbox)
  - Check this option to create a backup of your database when you close the program
  - Enables the Backup Folder field and Browse button
- Backup Folder (text field)
  - The folder to send the backup file – If it doesn't exist, Inventory Manager will ask you if you would 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 'Barcode' field for items (checkbox)
  - Adds a Barcode field for items
- 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

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

- 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

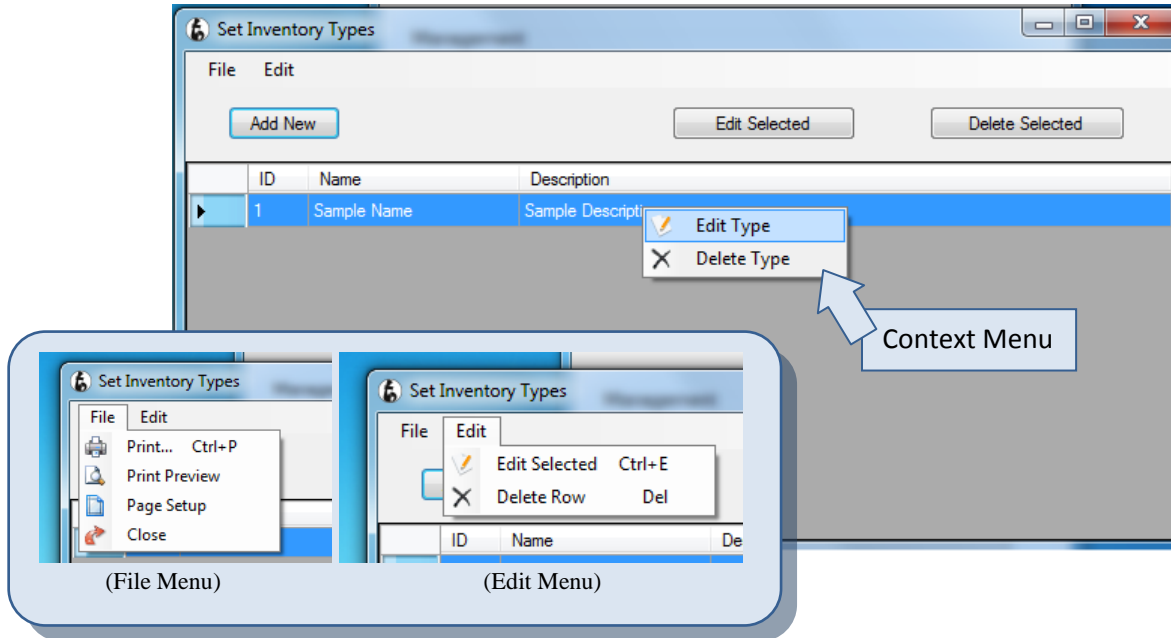
**Check Item Out:** Select an item (either by barcode or drop down menus,) enter a “Checked Out To” name and date

**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

## Manage Types:



**File Menu:** Print (Ctrl+P), Print Preview, and Page Setup, Close

**Edit Menu:** Edit Selected (Ctrl+E), Delete Row (Del)

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

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

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

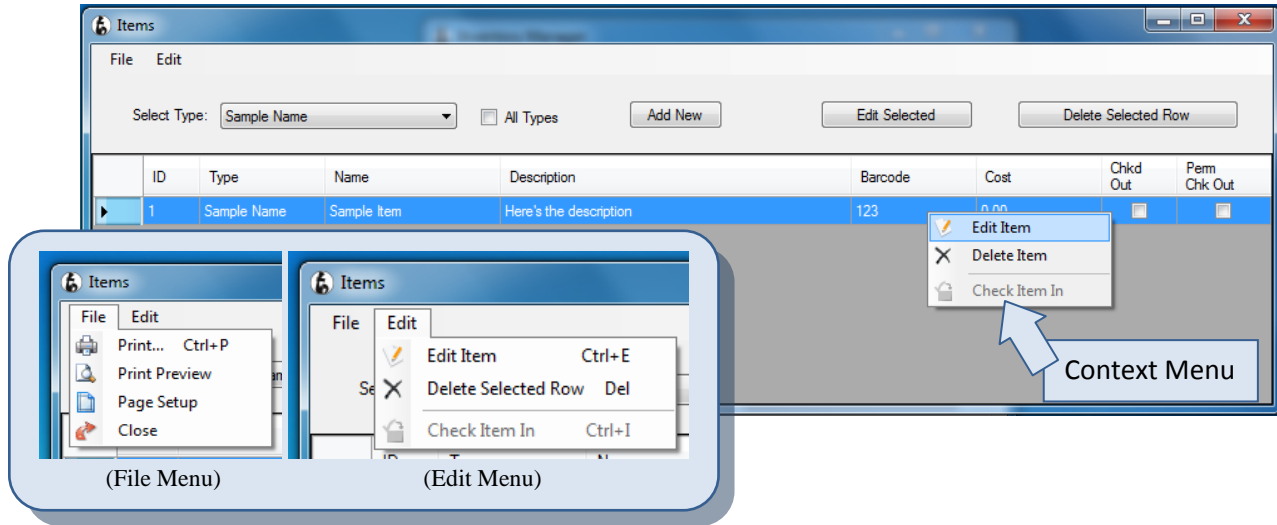
- **Types that can NOT be deleted:**
  - The last Inventory Type
  - Inventory Types with Items associated with them

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## Add New:

The screenshot shows the 'Add Inventory Type' dialog box. It has a 'Name:' label followed by a text input field. Below that is a 'Description:' label followed by a text area, with '(optional)' written below the label. At the bottom, there are two buttons: 'Save' and 'Cancel'.

## Manage Items:



**File Menu:** Print (Ctrl+P), Print Preview, and Page Setup

**Edit Menu:** Edit Item (Ctrl+E), Delete Selected Row (Del), Check Item In (Ctrl+I)

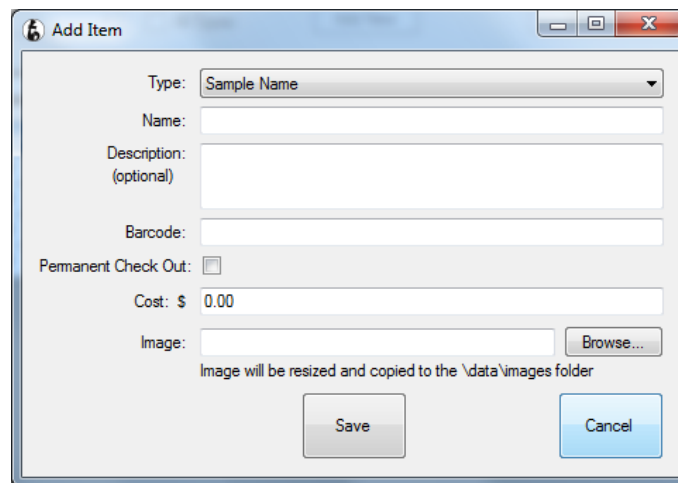
**Add New:** Add a new Inventory Item

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

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

**Check Item In:** Check in the selected item with the current date / time.

Add New:



**Barcode:** If option is enabled, this field must be unique

**Permanent Check Out:** Specify whether item is able to be checked back in

**Cost:** Specify a cost for the item for tracking purposes

**Image:** Path to an image for the file – Image will be copied to the /data/images folder

Edit Selected:

The screenshot shows the 'Edit Item' dialog box with the following fields and options:

- Type: Sample Name
- Name: Sample Item
- Description (optional): Here's the description
- Barcode: 123
- Permanent Check Out:
- Cost: \$ 0.00
- Image:  Browse...
- Remove Current image:

Image will be resized and copied to the \data\images folder

Click thumbnail for larger image

**Barcode:** If option is enabled, this field must be unique

**Permanent Check Out:** Specify whether item is able to be checked back in

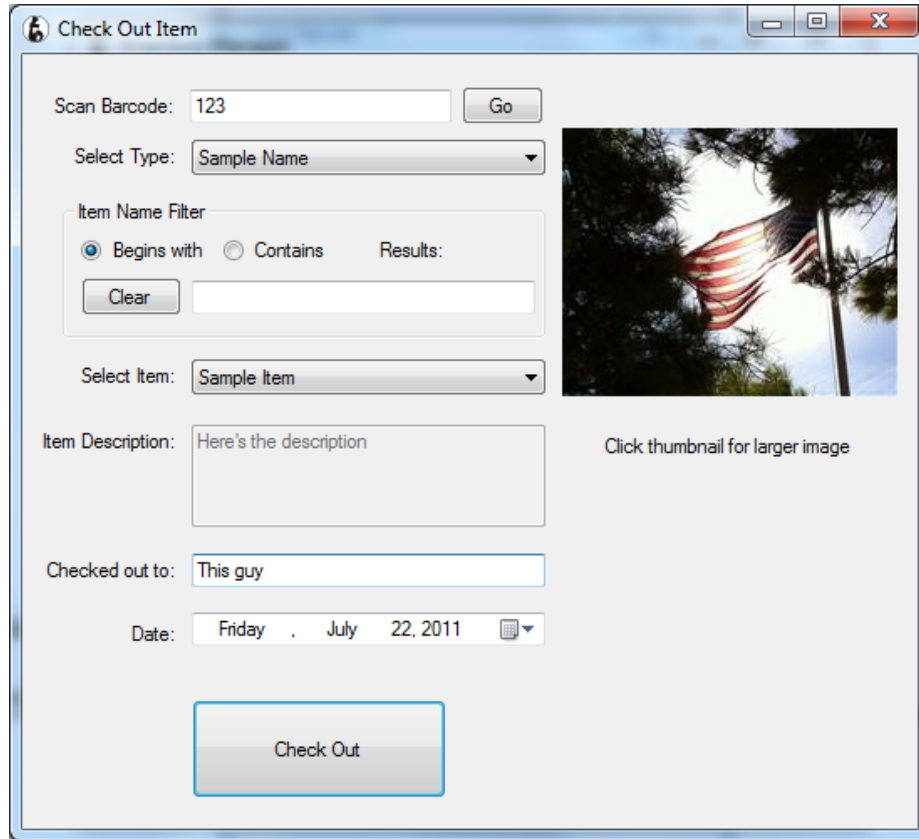
**Cost:** Specify a cost for the item for tracking purposes

**Image:** Path to an image for the file – Image will be copied to the /data/images folder

**Remove Current image:** check this box to delete the image associated with the item.

**Image thumbnail:** Appears if there is an image associated with the item. Click on the thumbnail to view a larger version of the image.

Check Item 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, and the “Select Type” drop down is changed to a “Clear Barcode Filter” button

**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

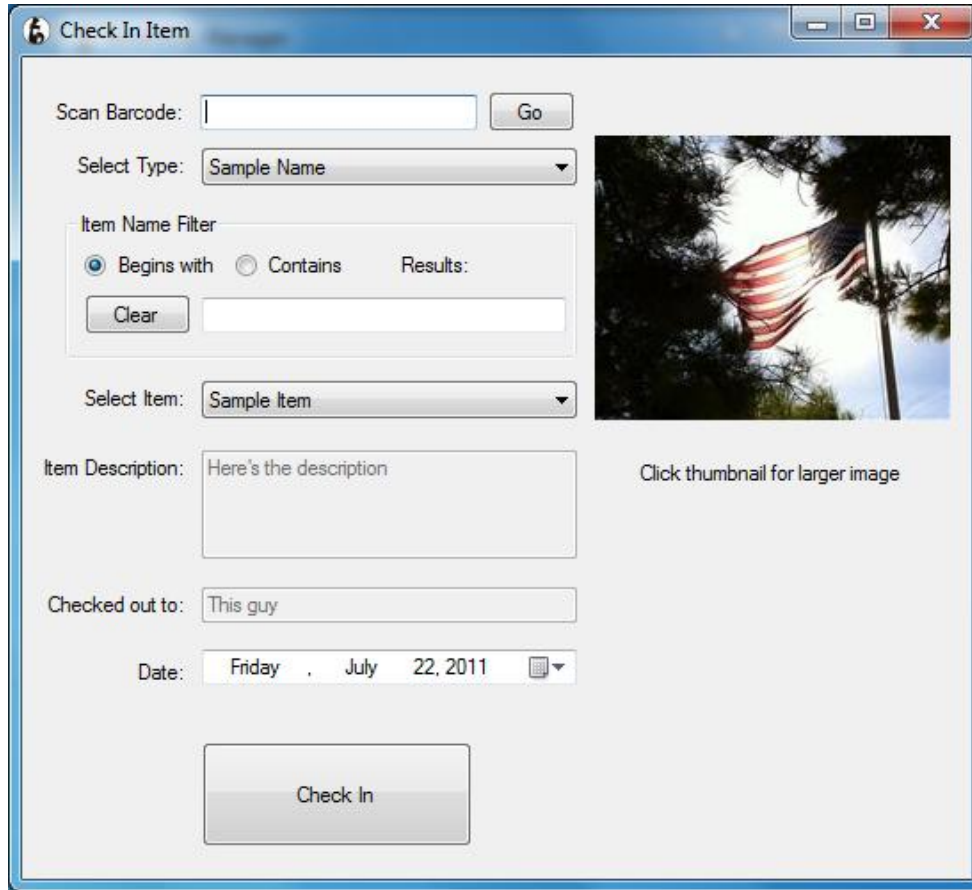
**Item Name Filter – Clear button:** Clear the filter results

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

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

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

## Check Item In:



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

- Scan Barcode:** A text input field followed by a "Go" button.
- Select Type:** A dropdown menu currently showing "Sample Name".
- Item Name Filter:** A section with two radio buttons: "Begins with" (selected) and "Contains". To the right is a "Results:" label and a text input field. Below this is a "Clear" button.
- Select Item:** A dropdown menu currently showing "Sample Item".
- Item Description:** A text area containing the text "Here's the description".
- Checked out to:** A text input field containing "This guy".
- Date:** A date picker showing "Friday . July 22, 2011".
- Image:** A thumbnail image of an American flag flying in front of trees. Below the image is the text "Click thumbnail for larger image".
- Check In:** A large button at the bottom center of the form.

**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

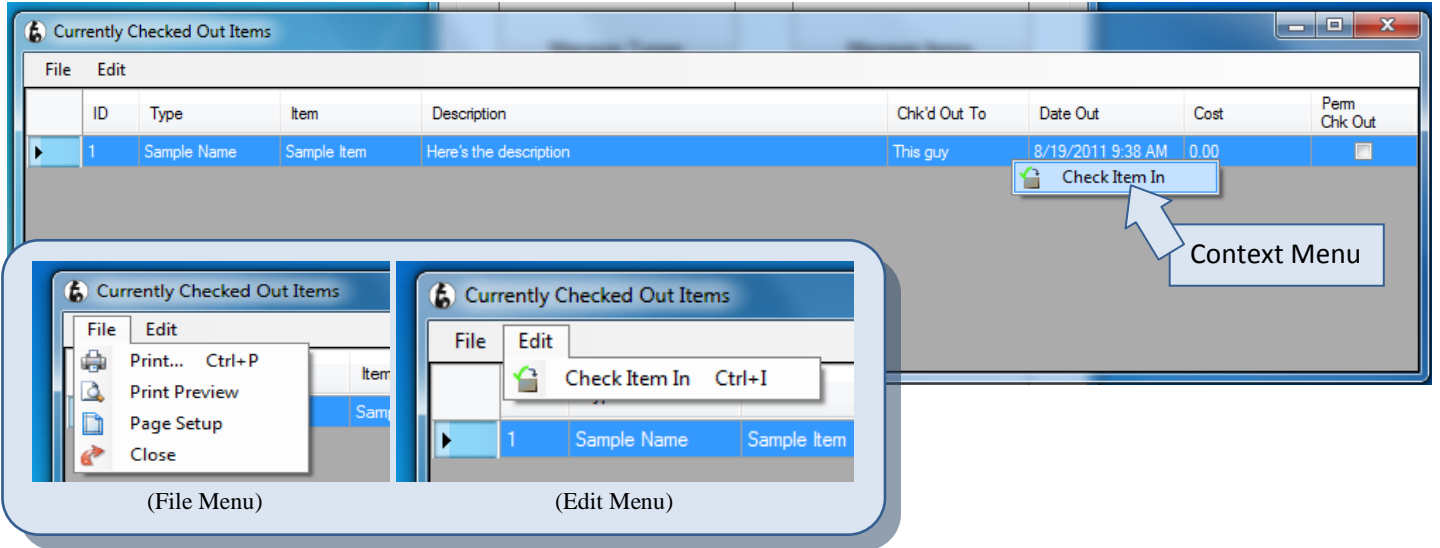
**Item Name Filter:** Filter the Items dropdown in the selected type with items that begin with or contain the entered text

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

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

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

### Currently Checked Out:

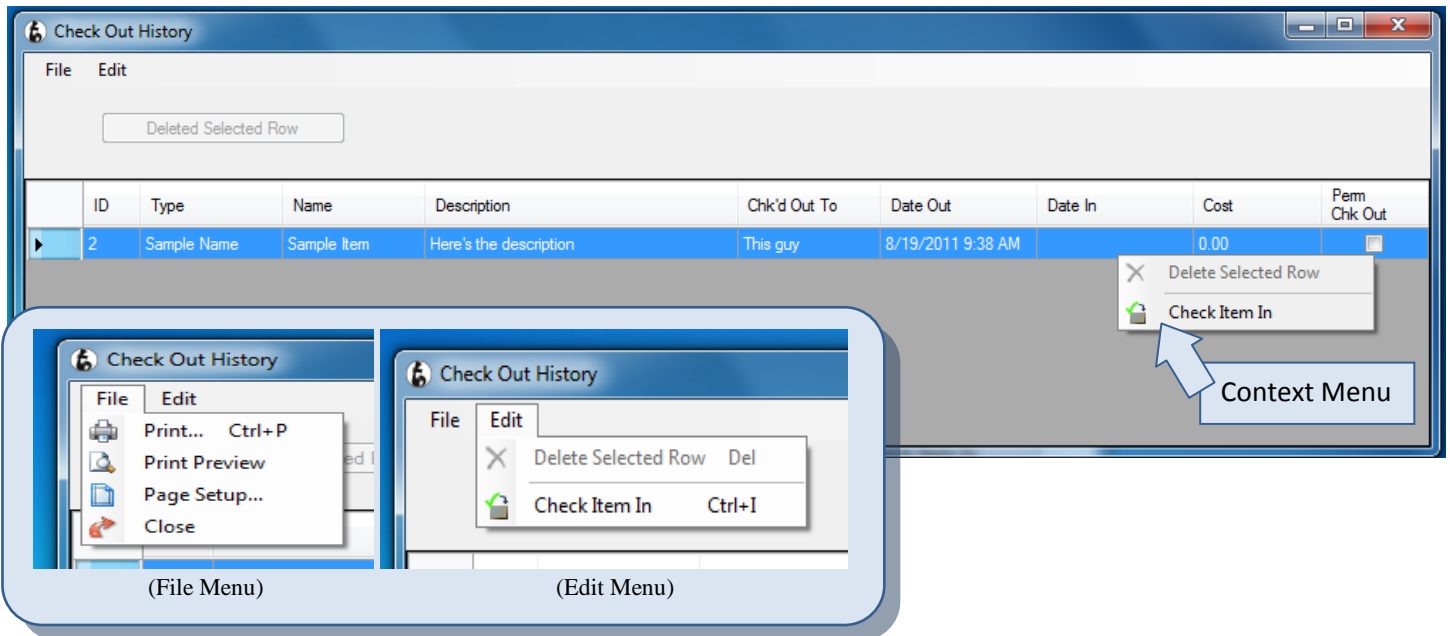


**File Menu:** Print (Ctrl+P), Print Preview, and Page Setup

**Edit Menu:** Check Item In (Ctrl+I)

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### Check Out History:



**File Menu:** Print (Ctrl+P), Print Preview, and Page Setup

**Edit Menu:** Delete (Del) – Only enabled if “Allow Deleting of Check Out History” option is set in Options menu, Check Item In (Ctrl+I)

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