V1.5 Update Notes

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Contents

CONTENTS **5**
CHAPTER 1. GETTING STARTED **7**
Introduction 7
Installing The New Version 7
Backup your Database first 7
System Requirements 7
New Option For Checking Web Site For Patches 8
CHAPTER 2. NEW FEATURES **9**
Functional Changes 9
User Customisable Reports and Outputs 9
The Custom Report dialog 9
Customising Report Templates 10
Switchable Form or Grid Display 11
User-Definable Fields in the Report Builder 12
Bill of Materials now includes Units and Revision 13
More persistent Filter and Find for Record Selector 13
Problem Fixes 14
User-Definable Stock Fields 14
Quotes when entering Purchase Order Items 14
Shortages calculation 14
'Calculate Quantities & Costs' dialog ignored changes 14

Chapter 1. Getting Started

Introduction

Stockit for Windows Version 1.5 provides new and additional features to those available in the previous version of the product. It also consolidates all fixes for problems reported since the previous update release. The changes made are listed below.

Installing The New Version

This update is provided as a self-unpacking installation program that will automatically start the **Setup** program needed to install the modified files. Installation will start automatically once download from the Internet is complete. The files modified in this update are:

- Stock.exe (the main Stockit application)
- Stock.chm (the online help)
- Some report files (.ogl, .oga, .dot and .rif files)
- Stockit Users Guide.pdf

Backup your Database first

Although installing the new version does not affect your existing database it is highly recommended that you make a separate backup copy of your database to another location before you install the new version.

System Requirements

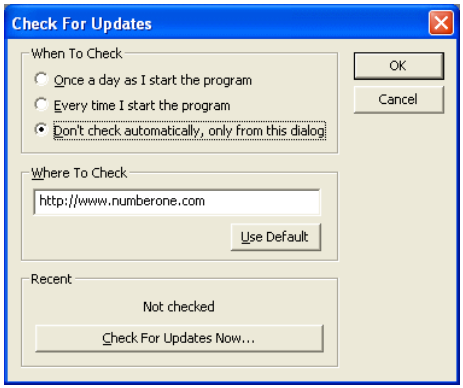
In order to fully utilise the new **User Customisable Reports** and **Output** options you will require the standard **Microsoft Word** product to be installed. If this is not installed, you will still be able to output the standard reports but will not be able to output customised ones.

To use this, you will required Microsoft Word (97, 2000, XP or 2003) to be installed on the system.

This new option is discussed in the next chapter.

New Option For Checking Web Site For Patches

On first running version V1.5 you are prompted to choose whether you want Stockit to check for program updates on the web site. If you say **Yes,** a new dialog is displayed that allows you to set this up. You can also set up this option from the **Support** option on the **Help** menu and **Check for Updates**.



When checking for updates, the current version you are running is compared against the latest patch version available on the web site, and a message box is displayed if a new update is available. You can then opt to get the update, which will launch the appropriate Updates page in your web browser to allow you to download and install the update.

Chapter 2. New Features

Functional Changes

User Customisable Reports and Outputs

Overview

You can make minor modifications or completely re-design the existing format of any Stockit for Windows report or output using the standard **Microsoft Word** product. For example, the **Purchase Order** format could be modified to include a **Company Logo** or a different delivery address.

Templates are provided (in .dot format) for all existing reports and outputs and a customised version can be used alongside or instead of the original built-in report. An interface to the **Microsoft Word Mail Merge** facility is provided for generating standard sized labels.

Note: Use of this feature does required Microsoft Word (97, 2000, XP or 2003) to be installed on the system.

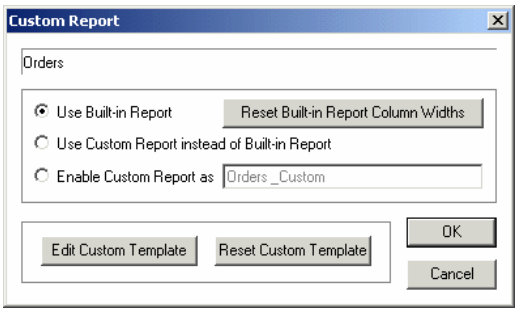
Customising reports

Clicking the **Custom Report…** button on the Reports dialog will display the **Custom Report** dialog which allows a custom version of the selected report to be set up**.**

The Custom Report dialog

A custom version of a report may be setup as an alternative to or in addition to the 'built-in' version of the report and is generated as Microsoft Word document. Any changes made to the Custom Report set up will be applicable to all users.

Note: To use the Custom Report facility you must have Microsoft Word installed on your system



The **Use Built-in Report** option indicates that no custom version of the named report is to be available, only the built-in version.

The **Use Custom Report instead of Built-in Report** option means that the custom version of the report will always be produced instead of the built-in version. Displaying the report from the **Reports** dialog will generate the custom version of the report. In

addition, the custom report will be used whenever the report in question is created as a result of performing some other action. For example, as in the case of Purchase Orders being generated when Shortages are allocated.

Note: Some editing functionality is only available via the built-in version of certain outputs. For example, Adding notes to a Purchase Order can only be done when using the built-in Purchase Order format.

The **Enable Custom Report as** option allows the custom version of the report to be used in addition to the built-in version. The custom report is made available in the list of reports in the **Reports** dialog using the report name specified, which must be different from the name of the built-in report. Where the report is generated by some other action the built-in version will continue to be used.

Custom Reports are generated as Microsoft Word documents and although automatically saved into the Stockit for Windows reports folder, once generated these are 'outside' the Stockit for Windows scope. Any changes made to a custom report after it has been created will not affect the data held in the Stockit for Windows database.

Clicking the **Edit Custom Template** button will display the report's customisable template as a Microsoft Word document template. Once the format has been modified, the template should be saved using the Save option in Word.

Once a report's custom template has been modified it is retained even if the custom version of the report is subsequently turned off. This means that if the custom report is later turned back on, any customisation changes will still be present.

If at any time you wish to discard any changes you have made to the custom template and return it to its default format, you may do so by clicking the **Reset Custom Template** button. You will be asked to confirm that this is what you wish to do before it removes your customisation changes.

Customising Report Templates

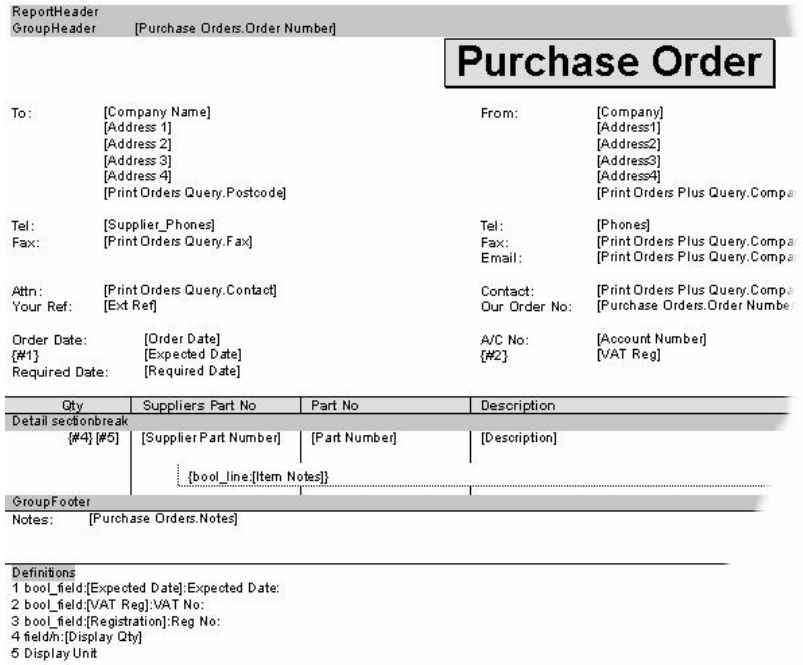
For each type of report or output there is a Word document template that defines the report format and which may be modified, using Microsoft Word, to produce a version of the report customised to your own requirements.

Pictures, ClipArt and WordArt may be inserted into your customised format, the only restriction is that they must be 'inline' with the document text rather than 'floating' in front or behind it.

Stockit for Windows uses its own 'Data', 'Function' and 'Control' fields embedded in the template to specify what and how information is to be included in the report. When the report is generated, these fields are replaced with the data values extracted from the database records used by the report.

The simplest method of customising a report format is to use Microsoft Word to add additional formatting or images, etc to the template and to reposition the Data and Function fields already provided in the report to give the desired layout.

Shown below is an example of the custom template for Purchase Orders:-



If, when modifying a custom report template, an error is introduced, when the custom report is next run a message identifying the problem will be reported and the report will be aborted. The custom template should be re-edited to correct the error and the report run again.

For full details of the 'Data', 'Function' and 'Control' fields supported in report templates, open the Custom Report dialog and then press **F1** to access the relevant online help pages.

The custom templates for the Stockit for Windows label outputs utilise the Microsoft Word MailMerge facility and are each formatted like a MailMerge main document. The label type produced may be changed by selecting a different type of label within the word document template.

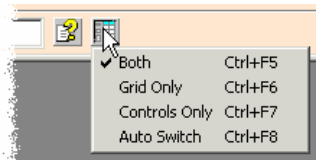
Switchable Form or Grid Display

Overview

Form views in Stockit for Windows, which previously showed both a grid layout of multiple database records and a form layout of a particular record simultaneously, may now be dynamically switched to alternatively show just the form or just the grid, allowing more grid data to be displayed on screen when required. Also the form view may be set to automatically display only when necessary; when a record is chosen for editing or a new record needs to be added.

Grids

It is possible to switch how the grid is displayed on the form in relation to the other controls on the form.



Clicking the **Switch Grid Display** button on the form's navigation bar will display the popup menu, as shown above, allowing you to choose whether to display just the form's controls, just the grid or both the controls and the grid (default).

If **Grid Only** is chosen, it will expand to the entire width of the form window and is useful if you wish to see more columns of data simultaneously. If you edit or add a new record, while just the grid is displayed, the form will automatically switch to show the controls as well as the grid for the duration of the edit.

The **Auto Switch** option will display just the grid normally but will automatically switch to display just the controls during an add or edit action.

The option **All Dialog Controls**, available from the **View** menu on the main menu bar, provides an alternative method of switching between the **Both** and **Auto Switch** modes of display for the current form.

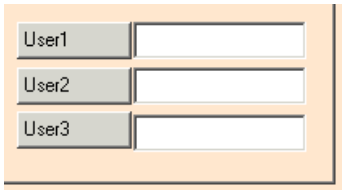
Shortcut keys are defined for each mode of display to allow quick switching via the keyboard.

User-Definable Fields in the Report Builder

It is now possible to fully utilise user-defined stock fields in the Report Builder; not only being able to select them as displayable fields but also being able to include them in the sort and filter criteria.

User-defined fields

As well as the built-in fields on a stock record, there are three fields that you can use for anything you need. Each field can hold up to 255 characters of information.



These fields are initially called User1, User2 and User3, but you can set the name of the field by clicking on the button with the field name on it, while editing or adding a record, and entering the new name.

It is important to remember that the name you use for these fields will apply to all stock records. Changing the name for one record changes it for all, so you should think about what you are going to use these fields for before you start entering data into them.

You may display your new field in the form grid by using the **Customise Grid** option.

Once you have added values to your stock records for your new field you can use the searching, sorting and filtering capabilities, available in the **Record Navigator** at the bottom of the stock form, to provide tailored views of your stock items. You can also use the **Report Builder** to create reports utilising your new field values, which as well as

being included may also be used to filter or sort the report contents. Within the Report Builder, the fields appear prefixed with "Custom_" to identify them as user-defined fields.

As an example, User1 could be renamed as "RoHS" and used to identify those stock items that are RoHS compliant. The Report Builder could then be used to generate a report all RoHS compliant items by selecting information from Stock and setting up a filter of "Custom_RoHS" Is Not "". By extending the filter to include a supplier name you could generate a list of all RoHS compliant items from that particular supplier.

Bill of Materials now includes Units and Revision

The Bill of Materials report has been updated to include the unit of measurement for stock items so that it is clear what the quantities shown represent for non unary items.

Additionally a Bill of Materials report for a Parts List now includes the Parts List revision number to ensure that the correct Bill of Materials is being used.

More persistent Filter and Find for Record Selector

When a filter is used with a record selector, e.g. 'Category Is RESISTOR' when choosing Part Number for a new Purchase Order item, the filter will remain active for the duration of the input form being used so it is no longer necessary to reset the filter each time a new item needs to be chosen. Also the previously used search criteria is retained so the record selector resumes at the previously chosen record.

Problem Fixes

User-Definable Stock Fields

Previously, any name changes to the user-definable fields in the Stock Table would be lost when Stockit for Windows was restarted. This has now been resolved and any name changes are now permanent. Also the correct user-defined field name is now shown in the column heading of the data grid.

Quotes when entering Purchase Order Items

Sometimes the Quotes option on the Enter Purchase Order Items form would incorrectly include all order items and take a very long time to complete giving the appearance of having frozen. This has now been fixed.

Shortages calculation

Previously, the shortages calculation could incorrectly include non-production purchase order quantities that had already been allocated to a Job that had been 'Released To Production' early.

'Calculate Quantities & Costs' dialog ignored changes

The 'Calculate Quantities & Costs' dialog, which is utilised by various other input forms and dialogs, such as the 'New Purchase Order Items' form, and which displays quantities and costs and allows them to be modified, always displayed all fields as editable even though in some cases certain fields should have been non-editable. Now, fields not allowed to be edited are shown as read-only.