

Introduction to *The RecordsKeeper*

What!

The *RecordsKeeper* database system will help you keep records of practically anything that you would like to keep a record of in an easy and intuitive way (well, intuitive for some, perhaps).

It can be a repository for almost anything that you should or might want to keep a record of, either for reference or for historical purposes.

Some things you that you should have good records of are static, that is they don't change much or very often, while other things can be more dynamic and measurable over time

Some of the **Static** things you might want to keep a record of might include all types of:

- **Cards:** credit, banking, identification, business, membership, permit, license, etc.
- **Accounts:** banks, vendors, investments, stores, loans, etc.
- **Documents:** mortgages, wills, powers of attorney, liens, permits, contracts, certificates, awards, passports, income tax returns, letters, agreements, etc.
- **Insurance Policies:** home, auto, life, accident, loan, mortgage, etc.
- **Contacts:** friends, relatives, neighbors, associates, professionals, advisors, agencies, etc.
- **Important Dates:** anniversaries, birthdates, celebrations, appointments, vacations, etc.
- **Possessions:** electronics, furnishings, real estate, automobiles, sporting gear, etc.
- **Web-sites:** memberships, games, references, banking, shopping, e-mail, Sign-on Id's, passwords, etc.
- **Software:** licenses and serial numbers, expiry dates, parameters set, contacts, vendors, versions, locations, etc.
- **Careers:** jobs, roles, assignments, projects, skills, experiences, etc.
- **Education:** schools, degrees, diplomas, certificates, designations, awards, etc.
- **Income Sources:** salaries, pensions, annuities, social assistance, royalties, etc.
- **Medical Conditions:** diseases, allergies, phobias, procedures, tests, accidents, surgeries, dietary, lifestyle (current, historical (childhood), family related, emerging), etc.
- **Medication and Vitamin Regimens:** current, historical, dosages, frequencies, names, schedules, etc.
- **Pets:** breed, pedigree, routines, habits, ailments, feed, etc.
- **Hobbies & Collections:** music, stamps and coins, bird-watching, menus, recipes, movies, etc.
- **Pastimes:** reading, knitting, woodworking, sports, etc.
- **Utilities:** supplier and account information for water, heat, electricity, phone, television, cable, etc.
- **Utilities infrastructure:** operation and location of meters, valves, outlets, switches, cables, wires, pipes, etc.
- **Clubs:** health, golf, sailing, knitting, bridge, etc.
- **Memberships:** golf, sailing, political and other associations, library, etc.
- **Subscriptions:** magazines, book clubs, web-sites, charities, lotteries, etc.
- **Important Things:** lock combinations, locker numbers, safe deposit boxes, key copies and locations etc.
- **Historical Things:** marriages, residences, jobs, experiences, accomplishments, awards, educations, etc.
- **Preferences:** hospitals, shops, restaurants, clinics, magazines, etc.
- **Photos & Videos:** family, friends, vacations, events, etc.
- **Other:** almost anything else you can think of and want to keep a record of

Some of the **Dynamic** things you might want to measure and keep a record of might include:

- **Medical Results:** blood work (cholesterol), blood pressure, weight, etc.
- **Activities:** miles ran, steps climbed, kilometers cycled, hours slept, etc.
- **Other Things:** almost anything else that can be measured over time and that you want to keep a record of

How!

The *RecordsKeeper* database system will allow you to easily customize and label the various screens and data capture fields so that whatever you decide you want to keep a record of, you can organize it using categories, labels and descriptors that you name yourself. You are not in any way limited by the system, since virtually everything can be customized. You can even change the language that is used by default on the screens. And there are a number of help features to guide you along.

The system also provides you with a number of meaningful reports that you can print.

A large number and variety of data fields are available to capture your data – you can enter text, numbers, amounts, hyperlinks (addresses of web-sites, pictures, images, folders and files, etc.) and in some cases, there is no limit to the amount of data you can capture.

When you first use the system, you are provided with a sample user's database of items: things that will give you ideas of how you can exploit the system, and things that you can copy into your own private space and then alter to make it meaningful to you.

Why!

Because most of us keep records of things in various ways and in various formats, and because we often find ourselves looking through files and binders to locate information, there is more and more of a need to be able to keep a reference to everything of interest in one place. If you look for software to help you do this, you will find that many specialize in one area or another (physical assets, financial transactions, and family lineage, for example) but few provide the ability to keep track of virtually everything.

In today's world of computers, there are so many more things to keep track of (licenses, sign-on identifications, passwords, web-sites, web-pages, and so on) that it is becoming more and more necessary to keep better records, and records that are easily organized and accessible.

Having medical records (past and current conditions, family member's conditions, medication regimens and important health measure indicators) well documented and organized in well organized reports can be beneficial during visits with physicians, dealing with insurers and when traveling.

Having well organized records about a myriad of things that are important to you but which would not likely be included in a will because of their nature will help family and estate executors with understanding, locating and disposing of your possessions.

Finally, as computers are used more and more for almost everything (shopping, paying bills, investing, banking, etc.), not everybody in a family or group may have all the details needed to carry on affairs should someone or a main user become incapacitated, or be absent for some period of time. With this system, things of importance can easily be passed on to others. Passwords do protect information that one does not wish to pass on, however.

Caveats!

What you shouldn't use it for:

Note that *RecordsKeeper* is not meant to replace other systems or database applications that are designed for specific transaction processing, such as financial transactions (Quicken, or MSMoney), or spreadsheets (Excel), etc. that are very dynamic. Instead, the system simply points to those applications and keeps notes about them (how they are used, why they are used, where they are, what they contain, how to access and use them, etc.)

So for example, if you have a collection of photos, it might be best to use photo management software to

manage them, and then this system to identify their existence, purpose, location and so on. The same goes for a collection of music, financial records and similar items.

What you should use it for:

RecordsKeeper is meant to keep records that are relatively static in nature, that is, records that do not change much or that often. You can use it to keep a record of where your high transaction systems are, however, so it serves a different purpose.

The one dynamic area where you may find it very useful though is for keeping a record of time measures for things that are important to you. In this area, the system provides you with the ability to keep track of targets and limits as well as the measures themselves, and provides the ability to portray the data in meaningful charts with trend lines. Examples might include keeping track of your weight, your cholesterol levels, or the number of miles or hours you run or jog each week, month or day.

So!

So, give it a try. There is very little to lose except a bit of your time, but a lot to gain in being better organized. Only your imagination will limit what you can do, so have fun!

Introduction to *RecordsKeeper* Structure

The *RecordsKeeper* database system is first of all structured around what is referred to as a user. When you want to use the system for recording your own data, you must establish a valid user name under which your data will be stored.

Users:

The data you store in the *RecordsKeeper* database system is always associated with a specific user and the data is only available to that user. A user's data is protected by a password should the user wish to use one. You can establish an unlimited number of users. These users can be different people in your household or environment, or they can of course be different user names established by the same person to differentiate the data stored and to keep different types of data stored in different ways.

If you choose to use more than one user name, one of those user names must be established as a 'Default' user. There can only be one default user established, and certain system activities can only be carried out by the 'default' user.

Each user can maintain information about two different types of things, **general things** and **personal things**.

General things:

General things are records of the static types of things you want to keep information about. These records are organized under **tabsets** and **tabs**. A tabset contains up to 17 tabs, each fully customizable, and you may establish an unlimited number of tabsets. You choose what to name each tabset and tab, and you choose what to name each data field within a tab using screens established for that purpose. Thus, you have a broad range of organizational possibilities for your data.

General Records: A general record is a collection of data fields (up to 30) in which you store data about the things you want to keep a record of. The types of data fields available to you are described in the 'Introduction to Data Editing' help section. You can store an unlimited number of general records.

Tabs: A tab is a collection of general records that are similar in nature and use the same types of data fields to store information about a thing of interest. You can establish up to 17 tabs within each tabset.

Tabsets: A tabset is a collection of tabs (up to 17) and you may establish as many tabsets as required.

Anything that you want to keep a general record of can also be associated with a **location**, a place where the item is physically stored or kept, such as a safe deposit box or with a custodian such as an estate executor.

Personal Things:

There are four categories of personal things (three static and one dynamic) that you may wish to keep information about. The nature of the information is unique thus the organization and data fields associated with them are different for each of these categories. Each category has its own screen for managing the information.

The first contains general information about a user, such as age, address and place of birth, and is always displayed under the first tab, named 'Personal'.

The second contains information about medication regimens.

The third contains medical related information.

The fourth contains dynamic activity-based time series measurements.

The purpose and possibilities associated with these four personal categories is explained in greater detail within the specific help information topics for them.

Introduction to **RecordsKeeper** Screens and Reports

The **RecordsKeeper** database system, like most other computer based systems, provides you with a series of screens that you can navigate through to accomplish various tasks.

All screens have a similar look and feel and all screens contain one or more of the following elements:

1. **'captions'** that identify the purpose of a screen, screen section or to identify a data field
2. **'helper phrases'** that guide you in the use and purpose of a screen or data field
3. **'buttons'** that allow you to do things (move between screens, prepare a report, open a link, etc.)
4. **'data fields'** that display information or permit you to change information in them
5. **'list boxes'** that display information that you can choose from
6. **'option boxes'** that permit you to decide between alternatives when they are available
7. **'action options'** that permit you to do things (filter or sort data, copy and paste date, close reports, etc.)
8. **'hyperlink fields'** that permit you to store external addresses and link to those addresses
9. **'attachment fields'** that permit you to edit and store images and files, and
10. **'message boxes'** that permit the system to communicate situations to you

1. Captions are used in several ways. They are short phrases used to identify screens, buttons and data fields. They attempt to convey the purpose and a sense of what the screen, button or data field is for. They appear in many places on the screens – in the header bars and top sections of screens, as column headers for tabular listings of data or to the left of or above specific data fields, and within the buttons. *On this screen, for instance, the phrases in the title bar and the buttons are captions, as is the phrase next to the check box at the bottom of the screen.*

2. Helper phrases are used to provide more specific guidance in the use of a screen or data field. They usually appear at or near the bottom of a screen, but can also appear anywhere on a screen. They are longer than captions, usually full sentences that provide you with help in using a screen. Specific helper phrases are also displayed for the more important screen elements when you hover your mouse over one of the elements. *On this screen, for instance, the two sentences at the bottom of the screen are helper phrases, as is the information in the box that appears when you hover your mouse over this part of the screen.*

3. Buttons cause things to happen when you click on them with your mouse. You can always identify a button because your cursor will change to a small hand icon when it hovers over one. A button will always respond to a mouse click and cause an action to occur. These actions include opening screens, closing screens, deleting records, and preparing reports. *On this screen, for instance, there are two buttons in the bottom corners of the screen.*

4. Data fields are just that. They hold and store the information that you enter into the database. There are a number of them available to you and all have different characteristics. Some store text; some store numbers; some store dates; some store complete computer files, and some store the addresses of web-sites and so on. Most have a limit as to how many characters they can store but others can store a virtually unlimited number of characters. These characteristics are easily identifiable and in many cases the amount of space that a data field has remaining and available is displayed for you as you enter data.

Data fields are also used for storing your own captions and helper phrases. This feature permits you to customize the screens with phrases that are more meaningful to you. They can even be in any language that your computer accepts.

If a data field is available for data entry or editing, the background of the field will be white. Conversely, if the data field does not have a white background, you cannot alter the contents of the field in any way, but you can usually select and copy the data in the field.

On this screen, for instance, what you are reading is stored in a data field. Because its background is not white, you cannot alter the information you are reading, but you can select it and paste it into another data field or document if you wanted to. You can edit this data, but not on this screen.

5. List Boxes are data fields that provide a list of pre-defined data items. They are identifiable by the small down arrow at the right side of the data field. The list is opened when the arrow is clicked. In most cases you are limited to the items in the list and you must select one of them. If the list box background is white, then you can enter additional items. *On this screen, for instance, there is a list box near the top right that lists the numbers 1 through 5, corresponding to the topics available on this screen. You can use this list box as an alternative way to move to another topic. Try it! (after you've finished reading this, of course)*

6. Option Boxes are small squares that you can check on or off. They are used to select and identify a specific data record, or to indicate a 'yes' or a 'no' in order to guide the program in what you want to have happen in certain situations. An option box is set on or off by clicking it with your mouse. When it is on, a check mark (✓) is displayed in the box. When it is off, the box is empty. In some cases, the program will allow only one of several check boxes to be on at the same time and when you check one, all others will be turned off automatically. In other cases, several check boxes can be set on at the same time. *On this screen, for instance, there is a set of option boxes near the top of the screen that allows you to select which help topic you would like to view. Only one can be set at a time. When you select one, all others are set off. At the bottom of the screen is another option box that can be either on or off.*

7. Action Options are things you can do in certain situations. Action options are available by clicking your right mouse button when your mouse cursor is in a data field or over a report. In these instances, clicking your right mouse button opens a list of action options that you can then select with your mouse to cause an action to occur. For example, if you wanted to sort a number of records in either ascending or descending order, you can select the data field you wish to sort by first clicking in it, then right clicking and selecting the sort action you want. Action Options are only available when the data field permits it. *On this screen, for instance, if you select some of the text you are reading, and right click with your mouse, a list of action options will open and provide you with options that are permissible in this situation. In this case, only the ability to copy the text you selected is available.*

8. Hyperlink Fields are really data fields that act in a certain way. First, you can only store a hyperlink address in the field, and second, when you click on an entered hyperlink address, another window will open on your computer and display the object at the address that you linked to.

An address in this case is the location of an object on a computer, your own or one that you can access through the world-wide web. Thus, you can enter the address of any web page on any computer, or you can enter the file folder location of any file on your own computer. When a field contains a hyperlink address and you hover your mouse over that address, your cursor will change to a small hand and when clicked, the field will act in the same manner as a button, except in this case, a web page, a computer program, a file folder, or a file will open, depending on what address you have entered.

If a hyperlink data field is available for data entry or editing, the background of the field will be a light blue to distinguish it from normal data fields. Conversely, If a hyperlink data field does not have a light blue background, you cannot alter the contents of the field in any way, but if it contains data, you can click on it to go to the object the address refers to.

On this screen, for example, there are no hyperlink fields

9. Attachment Fields are also data fields that act in a certain way. They permit you to store one or more complete computer files in an attachment field. Thus photos, scanned images, spreadsheets and word processing documents can all be stored, even together in the same field. When you open an attachment, it opens with a program that can process it (i.e. Excel) where it can be edited and stored back in the

RecordsKeeper database.

The attachment field provides an alternative to accessing a file via a hyperlink. Each method has advantages and disadvantages. For example, if you use a hyperlink to open a file, the file must always be in the location where it was first specified in order for the RecordsKeeper system to find it. Should you move the database to another computer, you must also make sure that the file is also moved and placed in a directory with the same name. If you store the file as an attachment within the database, it is always available, but only by opening the RecordsKeeper database first.

10. Message Boxes appear as small screens containing specific messages for you, usually to apprise you of a condition, such as telling you that something you are trying to do cannot be done for some reason.

They usually appear when you try to carry out an action which is not permissible. A message box is really a small screen in its own right, and when it appears, you must click the 'Okay' button on it to close it before you can proceed with any other activity on the screen you are in. *On this screen, for example, you are reading help topic 3, so if you tried to pick topic 3 from the list box at the top of the screen, you would get a message telling you that you cannot proceed to topic 3 because you are already at topic 3. Try it!*

Screen Characteristics

When you start the *RecordsKeeper* database system, your computer screen will be completely filled, with the exception of the Windows taskbar if it is not set to 'Auto-hide'. After entering your password and gaining access to the system, the application area will be completely filled with one of the application screens. While these full screens are open, you will not be able to move them or size them. You can always access other applications on your computer however, by simply using the task bar, the task switcher (Alt + Tab keys), the Windows Task Manager screen or in whatever way your system permits.

In most cases, when you navigate from one screen to another, only the screen you navigate to will show and will replace the screen you left.

In other cases, the screen you open will show on top of the screen you were on, and in these cases, you must close the screen you opened when you are finished with it before you can continue. You will only be able to use the screen that is on top and will not be able to access any other screens until that screen has been closed. Help screens are an exception to this rule. You can use the screen underneath a help screen while the help screen is open.

Most screens cannot be moved. The help screens can be moved however, so that they can be moved out of the way of an item you may be reading about. The help screens can also be stretched or shrunk to and from the right or to and from the bottom. You move a help screen by selecting the title bar (The very top part of the screen) with your mouse and moving it to another location. You stretch or shrink the screen by clicking on the top, left, right, bottom or corner border of the screen and moving your cursor to stretch or shrink the screen. In this case, the help data will automatically reorganize itself to take advantage of the new size if you choose to stretch it. You will lose the ability to view all of the data if you shrink it beyond its original size however. Be careful not to shrink it to the point that the buttons are no longer visible, or you will not be able to close the screen until you stretch it out again. Try it!

Reports

All of the data that you store in the RecordsKeeper can be presented in a variety of reports, each suited and designed for the nature of the data to be printed.

In some cases, you are presented with options that permit you to specify which subsets of the information you want to print so in most cases you have complete control over what a report will contain.

Report Screen Characteristics

You generate a report by clicking a 'Print' button, and then in some cases selecting options that control the content before the report is prepared.

When you choose to print a report, the report will always be presented in what is called 'Preview' mode first.

While in preview mode, there are many options available to you. You can use the actions options to print, save or even e-mail the report to someone.

You may scroll through each page, or jump to a specific page by using the 'Page' buttons at the bottom left of the screen.

If you click the 'Print Preview' menu item at the top left of the page, a number of additional options are made available. You will be able to change the paper size and margins, set the orientation (portrait or landscape), zoom in or out to gain different perspectives, or view many pages at a time.

When ready to print, you can click the 'Print' button in the 'Print Preview' menu or you can right-click within the report and choose the 'Print' action option from the context menu.

If you choose to print, you will be returned to the screen you started from after the report has been sent to your printer.

Introduction to Storing and Editing Data in *RecordsKeeper*

The *RecordsKeeper* database system permits you to store a wide variety of information about the item(s) you wish to keep a record of.

The things you keep a record of are classified as either:

- General, or
- Personal

General Records:

General records are maintained for each user under a tabset and tab structure. Each general record contains information about a specific item that you want to keep a record of.

You can use up to 30 data fields to describe your items using a combination of the following 7 different data formats for the data fields:

1. 11 regular text (a combination of characters and numbers) data fields of varying lengths
2. 2 special text (a combination of characters and numbers) data fields of unlimited length
3. 2 date data fields
4. 3 telephone number data fields
5. 2 amount, or number data fields, and
6. 10 hyperlink data fields, or
7. 9 attachment fields

Note that in the case of the hyperlink and attachment fields, you use one or the other at any point in time.

1: The 11 regular text data fields are of variable lengths, as follows:

- 1 of up to 24 characters in length
- 8 of up to 255 characters in length
- 1 of up to 36 characters in length, and
- 1 of up to 18 characters in length

When using these fields, you can either type the data into the field using your keyboard, or paste the data from another source after having copied it.

2: The 2 special text data fields are of a virtual unlimited length. You can type or paste any number of characters into them (well, up to 2 gigabytes of storage anyway, whatever that means). You can also edit these special fields for style, adding color, different fonts and sizes, underlining and so on.

3: The 2 date data fields are just that, when you double click in them, a calendar opens and permits you to select a date.

4: The 3 telephone number data fields will accept 10 numbers in the area code-exchange number-telephone number format.

5: the 2 amount, or number fields will accept a number of any length with up to 6 decimal places. The data can be displayed in a format of your choice, including currency.

6: the 10 hyperlink fields will accept web-page addresses, e-mail addresses, and any disk drive letter/folder/file path that you enter. You can type in an address, copy and paste it, or select one from a dialog box.

7: the 9 attachment fields will accept and store most types of files that can be opened by a program on your computer, for example, a word processing file. You select the files to attach via a dialog box.

One additional field, called the sequence field, stores a number and is available to help you sequence your records in order of preference. This number is only used to sequence your records on screens and reports, and has no relevance to the record itself, except perhaps for indicating its relative importance.

Finally, there is a field called a location field which is used to specify where the item is physically located.

You will find more specific data editing rules and guidelines on the screens that you use to capture data.

Specific Records:

Specific records are maintained for each user but without the tabset and tab structure. Each specific record contains information about one of four personal categories of information: personal; medical information; medication information; and time series activities. Each of these categories uses a combination of text, number and special data fields to capture and store the information. The specifics of each data field are located with the screens that are used to capture data about them.

Editing and Viewing Data in the Text Fields:

Space limitations on the screens often prohibit all of the data in a text field from being displayed. In such cases, you can click in the field and drag your cursor to the right to see the hidden data.

You can also double-click within a text field to open either a 'View' or an 'Edit' zoom box, a small window that will display all of the data in the field.

This is especially advantageous when your data spans lines.

The zoom box displays the number of characters available, used and remaining for limited length text fields.

The zoom box permits style editing (color, font, indentation control, etc.) when used with unlimited length text fields.

Help for the *The RecordsKeeper* Sign-in Screen

This screen provides the access point to the system.

When it opens, a drop-list of all valid users is presented.

Select a user from the list, and then enter your password. If your password is correct, this screen will close, the main system screen will be presented and all data belonging to the user selected will be available.

You have three chances to enter a correct user name and password combination. If after three attempts, the combination is still not correct, the screen will close and you will have to start the application again.

First Time Use: The first time you use the system (and until another user is established), the only available user will be 'Sample'. The 'Sample' user does not require a password so you can simply click the 'Enter' button or use the 'Enter' key on your keyboard. Once you have access to the system, you can then set up your own user name(s) and password(s), and that user name will appear in the drop-list the next time you use the system.

Password Notes: A password is not required (it can be left blank when setting up a new user, or changed to blank) but is highly recommended. If required, you could set up two user accounts, one without a password for information you do not mind sharing or making available to other users of your computer, and one with a password for private information.

The password may contain any combination of characters but may not exceed 12 characters in length.

Ensure you remember your password because the system cannot recover or reset a password.

Help for *The RecordsKeeper* Medication and Vitamin Regimen Screen

This screen permits you to record and maintain a history of your medication and vitamin regimen.

Its purpose is to provide a recorded history of drugs, medications, vitamins and supplements that you have taken, currently take, or plan to take. This history can be used when visiting with or discussing health issues with your physician, pharmacist or insurance company and may prove valuable while traveling away from home should an incident requiring medical attention occur.

Data Fields: There are 9 data fields available to you.

1: The first field can be used to categorize the regimen record. You might normally use this field to indicate whether the drug or supplement has been prescribed or not. This field is limited to 36 characters of information and is used as a section header in the Regimen report, thus brief phrases such as 'Prescriptive', 'Non-Prescriptive', 'Experimental' are most appropriately used in this field.

2: The second field can be used to record the generic or technical name of the drug or supplement, and related information. You are limited to 72 characters in this field.

3: If important, you can record the name of the manufacturer, supplier or your pharmacist in the second data field. This field is limited to 50 characters.

4: The fourth field can contain the dosage amount whenever the drug or supplement is taken. You are limited to 50 characters in this field.

5: Next, you may select or record the frequency on which you take or ingest the medication. You are limited to 50 characters in this field.

All of the above fields are drop-lists so you can either choose an existing entry, or key in a new one.

6 and 7: The first date field is normally used to record the date on which the medication was first taken and the second, the date on which you stopped taking the medication. If a dosage changes while you are taking the same medication, you can enter a termination date when you change dosage, and then open a new record with the same information and change it to reflect the new dosage.

A date calendar is presented when you double-click in the date fields. Select the date you want by clicking on the day. The calendar will close and the date you selected will be entered for you. The '<<' and '>>' buttons on the calendar screen move the year forward and backward, while the '<' and '>' buttons move the month forward and backward.

8: The Description field can be used to contain any other relevant information. This may include the prescribing physician, the volume of medication on hand, references to literature about the medication, such as side-effects, or any other relevant information. There is no limit to the amount of information you can store in this field.

9: This data field is a hyperlink field that can be used to access a web-site relative to the medication, or to a document image for instructions, regarding side-effects, or whatever. You can paste the link or right-click the field to access a hyperlink dialog box.

10: The last data field is an attachment field that can be used to store images, photos, scanned documents or other objects that can be opened and viewed by a program on your computer. You may store as many objects as you require.

There is also a check box that you can set 'On' if for some reason you do not want a record to print on any report. It is used solely to control whether a record is included on a report or not, so it can be used even temporarily to cause a record not to appear in a report. It is not re-set automatically however. It will have to be reset should you want the record to appear on a subsequent report.

Data Sequence: You can change the sequence by right-clicking in any data field and then selecting either an ascending or descending sequence, based on the field you selected. The data will remain in that sequence when you next open the form, and until it is changed again.

Data Filtering: You can view subsets of the data by right-clicking in a data field and then clicking the 'Filter By' action item. You restore all of the data by closing and opening the screen or by right-clicking in the same field and choosing the 'Filter (Reset all records)' action item.

Printed Report: Clicking the 'Report' button will open a report that you can print if you wish. The report is divided into sections as determined by the first data field.

Data Editing: You can double-click in most fields to open an edit box. This box shows multiple lines and the number of characters that are available to you for the field. Note that the two right-most data fields can be edited for style as well as for content.

Tips and Hint(s):

If you would like to see how this data can be used, change to the 'Sample' user and view that data.

There is only one hyperlink available to you, but should you require additional linkages to other drug or disease related web-sites, you can always store their addresses in a description data field and then copy and paste the address into your web browser when you want to visit the site.

Use the attachment field to store scanned images of medication information provided by your pharmacist. Prescription medications are often accompanied by information sheets that can be scanned and stored as references using this field.

You can delete a record by selecting it (clicking the box on the far left) and pressing the delete key or right-clicking and using the 'Cut' action option.

Help for *The RecordsKeeper* Medical Conditions Screen

This screen permits you to record and maintain a history of your medical conditions. This could include but is not limited to childhood and other diseases, surgeries, allergies, phobias and any other conditions deemed relevant. It can also be used to make note of emerging conditions that you may want to discuss with your physician at a future time.

Its purpose is to provide a recorded history of such conditions that you have or have experienced for use when visiting with or discussing health issues with your physician or insurance companies and may prove valuable while traveling away from home should an incident requiring medical attention occur.

It may also be of benefit to record conditions that others in your immediate family have had or are experiencing so that your doctor may factor that information into your treatment and prognosis.

Data Fields: There are several data fields available to you.

The data fields are contained on two lines on the screen. The fields are described from the first row left to right and then the second row.

1: The first is normally used to capture the general name of a condition or procedure, usually a generally recognized name that the condition or procedure is known as and referred to. You are limited to 50 characters for this field.

2: If important, you can record the technical or medical terminology for the condition or procedure. In some instances, there may be variations or stages of a condition so this may be of significant importance. You are limited to 255 characters for this field.

3: The third field can be used to record the attending physician, or person responsible for any treatment. You are limited to 72 characters for this field.

4: The fourth field can contain the approximate date of condition onset, diagnosis, surgery, accident or whatever. A date calendar is presented when you double-click in the date field. Select the date you want by clicking on the day. The calendar will close and the date you selected will be entered for you. The '<<' and '>>' buttons on the calendar screen move the year forward and backward, while the '<' and '>' buttons move the month forward and backward.

5: Next, you may select from a list or enter a brief phrase to indicate the current status of the condition. You are limited to 255 characters for this field.

6: You can also enter any type of description that is appropriate for the condition: either symptoms; diagnoses; prognoses; or whatever you feel is appropriate information. There is no limit to the number of characters you can store in this field.

On the second line, you will find the following fields.

7: You can enter or select a brief phrase for use as a report header category. When used, this field will always be used at the top of a report page and will cause a page break to occur for each value change. This is useful and can be used to organize your data by category (dermatology, natal, disease, etc.) or by physician or medical center, or anything else that is appropriate. You are limited to 72 characters for this field.

8: The eighth data field is a hyperlink field that can be used to access a web-site relative to the condition, or to a document or folder where images, photos or other relevant material can be stored and referenced.

9: The ninth field is a data field where you can capture any current treatment or other relevant information, if you have not done so already in another data field. There is no limit to the number of characters you can store in this field.

10: The last data field is an attachment field that can be used to store images, photos, scanned documents or other objects that can be opened and viewed by a program on your computer. You may store as many objects as you require.

11: finally, there is a check box that you can set 'On' if for some reason you do not want a record to print on any report. It is used solely to control whether a record is included on a report or not, so it can be used even temporarily to cause a record not to appear in a report. It is not re-set automatically however. It will have to be reset should you want the record to appear on a subsequent report.

Data Sequence: You can change the sequence by right-clicking in any data field and then selecting either an ascending or descending sequence, based on the field you selected. The data will remain in that sequence when you next open the form, and until it is changed again.

Data Filtering: You can view subsets of the data by right-clicking in a data field and then clicking the 'Filter By' action item. You restore all of the data by closing and opening the screen or by right-clicking in the same field and choosing the 'Filter (Reset all records)' action item.

Printed Report: Clicking the 'Report' button will open a report that you can print if you wish. The report is organized by categories with a new page for each, that then into sections as determined by the status field.

Data Editing: You can double-click in most fields to open an edit box. This box shows multiple lines and the number of characters that are available to you for the field. Note that the two right-most data fields can be edited for style as well as for content.

Tips and Hint(s):

If you would like to see how this data can be used, change to the 'Sample' user and view that data.

While the focus of the data fields is on medical conditions, do not overlook the fact that you can use the data fields to capture any type of related information that may be of assistance to a medical practitioner, such as allergies and intolerances (to food or medications), dietary requirements, physical characteristics (age, weight, height), and lifestyle issues (consumption of alcohol, smoking habits, diet, exercise, sleeping patterns and so on).

There is only one hyperlink available to you, but should you require additional linkages to other drug or disease related web-sites, you can always store their addresses in a description data field and then copy and paste the address into your web browser when you want to visit the site.

You can use the attachments data field to capture photos of your condition, although you cannot print the images you capture in this field.

You can delete a record by selecting it (clicking the box on the far left) and pressing the delete key or right-clicking and using the 'Cut' action option.

Note that it may be appropriate to maintain 2 or more lines of information about the same condition. For example, you may have one line to describe the condition itself, and another to describe a treatment, such as surgery, that was undertaken to resolve the condition. In such a case, the dates, attending physicians and information may differ considerably.

Help for *The RecordsKeeper* Measurement Categories Control Screen

This screen permits you to establish the types of time series measures that you wish to track.

You can track any type of activity that can be measured with numbers (up to 6 decimal places).

On this screen you identify the measure by giving it a name, (for example, 'Weight') and entering that name in the 'Activity to Measure' data field. In the next field you enter what you are measuring, in this case it is likely 'Pounds' or 'Kilograms'. Then you enter the number of decimals that is pertinent to that measure, in this case, perhaps '0' if you are measuring by pounds or '1' if you are measuring by kilograms.

The description field can contain an unlimited amount of data, permitting you to describe what, why, how and when you are measuring, the purpose and use of the data, instructions for entering data values on the 'Measurements' screen or anything else that you may deem important about the measure.

The second data line contains 5 data fields. These should carry the captions (names) of the measures you wish to capture. Each measurement category can have up to 5 series of numbers attached to, or associated with it. You decide what they are and what you want to call or label them on this screen. These captions appear as the data field headers on the 'Measurement' screen and report, so you have to be careful that the phrasing you use fits and appears in a useful manner when displayed. These captions can use up to two lines. You force a new line by using the 'Enter' key.

In most cases, you measure things to compare yourself to some standard, or goal. In the case of your weight, most governments and many activity agencies, such as the 'Heart and Stroke Foundation' issue guidelines that are age and stature dependent, usually within a range. Such guidelines normally include upper and lower limits and a recommended target, so in this case, an upper limit for your particular stature may be established at 180 pounds, a lower limit may be 160 and a recommended target may be 170. If you accept these as reasonable limits, you would enter the terms 'My Weight', 'Upper Limit', 'Lower Limit' and 'Recommended Target', or some similar terminology in the first four fields of the second line. The fifth in the series permits you to also enter your own personal target, if it differs from the recommended target, so you might enter 'My Personal Goal' here if you wish.

What you label and call each is entirely up to you, so you can customize the labels to suit yourself. Note however, that space for these labels on the screen and in reports is limited, so you may have to experiment to find wording that will fit the space available.

Note that the decimals field will apply equally to all 5 measures.

When you have completed any changes, click the 'Close' button to return to the 'Measurement Activities' screen.

Adding a New Activity:

If you wish to add a new activity, click the 'Add New' button at the top of the screen to add a new blank record to the end of the list.

Deleting an Activity:

If you wish to delete an activity, select the activity you wish to delete and then click the 'Delete' button at the top of the screen. Note that if there is time series data associated with the activity, you will not be able to delete the record - you must delete all of the time series entries on the previous screen first.

Copying an Activity:

If you wish to create a new activity that is similar to one that has already been created, you can copy it and then make changes to it. You do this by selecting the activity you wish to copy, selecting the user (yourself), and then clicking the 'Copy' button. The new record will contain all of the data that the original record contained except that the name of the activity will have an 'X' in front of it to make it a unique name, since every activity must have a unique name. You then can change it to whatever you need.

Note that you can copy an activity record to another user by selecting a user other than yourself from the list before clicking the 'Copy' button. Note also that the time series data for the activity is not copied, only the activity category description.

Editing an Activity:

With the exception of the decimal places field, you can use an edit box to assist with changes to the other data fields. The edit box allows you to see multiple lines of data and to see how many more characters are available for entry into a data field. You open an edit box by double clicking in the field you want to edit.

Tips and Hints:

While you can measure five different value series for the one activity, keep in mind that when displaying the numbers on a graph, the greater the variation in the sizes of the numbers, the less informative the graph will be. In other words, if one series measures between 1 and 10, and a second series measures between 100,000 and 200,000, the graph may not be very meaningful.

You can in fact use this feature to measure different measures, however. For example, a gross score, a net score, the number of putts taken, the number of fairways hit and the amount of winnings or losses in dollars for a round of golf could be captured and recorded for each game and the chart would be insightful because in this case the variation in the numbers is not significant.

If the numbers for related series are of significant variance, you could capture the values in different categories.

Again, you must use your imagination and configure this screen so that it is meaningful and provides you with the ability to capture the information you need on the actual measurements screen.

Help for *The RecordsKeeper* Tab Control Screen

This screen permits you to manage all aspects of your tabs.

Tabs are used to name or classify one or more general data records that you wish to store in the *RecordsKeeper* database system. They appear as button tabs in the top portion of the main screen.

Tabs are associated with a specific user and with a specific tabset. They are not shared with other users. When a new user is created, that user is provided with a default tabset that is named 'Main' and that tabset is created with a set of default tabs with various names. You can change the names of the default tabs to something that is meaningful to you using this screen.

With the exception of the 'Personal' Tab which is changed via the 'Caption Control' screen, you have complete control over the names all of the tabs that appear on the main screen by setting values using this screen.

When you open this screen, you are presented with the status of the tabs associated with the user and the tabset shown in the header portion of the screen. If you wish to change tabs that belong to other tabsets, you must first close this screen, select the tabset whose tab names you want to change from the list box on the main screen, then return to this screen to make the changes.

Controlling Tabs:

You decide whether or not to display or use a tab by setting the check boxes to the left of the tab name in the 'Show Tab' column 'on' or 'off'. When a check box is set 'off', meaning it does not have a check mark in it, the corresponding tab on the main screen will be inactive. The tab will still appear, but it will not contain a name and will not respond to a mouse click. Note that if a tab contains data records and you subsequently un-check this field, the data associated with the tab is not lost. It simply does not appear on screens or reports. Re-setting the field to 'on' will restore the data, thus you can temporarily set a field 'off' while preparing a report if you wish, or you can set it 'off' if you wish to keep any data hidden.

You decide what to name a tab by entering a name in the second data field. The name cannot be longer than 36 characters in length. You can see what it will look like and whether it will fit in a tab button on the main screen by clicking the button at the bottom of the screen. The number of characters that are still available for a tab name is shown immediately to the right of the tab name. You can click in the tab name field to refresh this number at any time.

You provide a description of what type of information you will be recording under the tab name in the next data field. You are free to include any type of information that will be meaningful in this data field. What you enter here will appear on the main screen to help you with managing the data you store under that tab and will appear on reports to help define the type of data being reported.

You control the order of, or sequence that the tabs appear in on the main screen by using the 'Up' and 'Down' arrow buttons on the right side of the screen. When you move a tab up, it will replace the tab immediately above it and appear before it on the main screen.

You can also control the names of all of the data fields that are used to store data under a specific tab by selecting that tab's check box on the right side of the screen in the 'Select Switch' column and then opening a screen for this purpose by clicking the 'Update Field Headers' button. You will find further help on how to do this when you open that screen.

You do not need to worry what you call a tab, because it can easily be changed to any other name you want by

simply visiting this screen again and changing the name.

If you are only using a few of the tabs for a tabset, you can blank out the names and descriptions of all of the unused tabs by clicking the 'Blank Unused Tabs' button. This will simply reduce clutter on the screen so that you can more clearly see what tabs are currently active.

Tips and Techniques:

You use combinations of tabsets and tabs to organize your data in the manner which is best suitable and meaningful to you.

If you wanted to store information about various types of cards that you have, for example, you could simply name one of your tabs 'Cards' under any tabset, then when you enter a record about a card, you could use such terms as 'Credit Card', 'Debit Card', 'ID Card', 'Membership Card' and 'Business Card' in the 'Type of Card' field to differentiate them. Alternatively, you could create a tabset named 'Cards', and then within that tabset, you could name individual tabs using terms such as 'Credit Cards', 'Debit Cards', 'ID Cards', 'Membership Cards' and 'Business Cards' and then use the 'Type of Card' field to categorize them further using terms such as the 'Vendor', 'Contact' and so on.

There is no one way that is necessarily better than the other, and you can choose to organize your data in the way that is most meaningful to you. The *RecordsKeeper* database system provides you with a variety of ways to do this. Use your creativity!

Have Fun!

Help for *The RecordsKeeper* Tab Data Field Names Control Screen

This screen permits you to customize the names of the various data fields in which your general records information is stored. You can also specify whether or not you want to use a specific data field or not.

When you set up a tab, you must use one mandatory field and you can use up to 29 additional fields to capture data in a record for that tab.

The mandatory field can store up to 16 characters and must be present
The optional fields include:
8 text fields that store up to 255 characters of data
2 text fields that store an unlimited number of characters
2 fields that store numbers (up to 6 decimals)
2 fields that store dates
3 fields that store telephone numbers
10 fields that store hyperlink addresses or 9 fields that store attachments, and
2 fields that store up to 24 characters of data

When you set up a new tab, all 29 fields are established with default names and the first 26 are assumed to be of use. Those names are shown in a column on the left of this screen.

In summary, this screen allows you to determine both the number and types of fields you want to use with a specific tab, and then to assign names to those fields that are suitable and sensible to you, given the nature of the information you wish to record under the selected tab.

Establishing which fields to use:

You establish which fields you want to use by setting the check-mark in the 'Include?' column to 'On'. Conversely, if you un-check a box in this column, that field will not appear on any screens or in any reports.

Note that if a data field contains data and you subsequently un-check the field, the data in that field is not lost. It simply does not appear on screens or reports. Re-setting the field on will restore the data, thus you can temporarily set a field off while preparing a report or to temporarily hide the data if you wish.

Establishing names for the fields to use:

You establish what you want a field to be called or named by entering a name in the relevant white box in the 'Header' column. The number of characters you use is limited, but the language or characters you choose are not. The number of characters that are still available for naming a data field is displayed immediately to the right of the white box. While typing, you can re-calculate the number of remaining characters by clicking in the field you are in.

Date Fields:

Note that for the two date fields (6 & 7), you can determine what format they will appear as by selecting a format from the list box.

Number Fields:

Note that for the two number fields (22 & 23), you can specify the number of decimals that will appear and whether the number should include a currency sign.

Additional Headers:

Note that for fields 22 through 30, you will have the ability to add a second level of header when you enter data

for those fields on the data entry and edit screens. For instance, if you set field 22 to 'Units' and decimals to '0' on this screen, you can later also set the second optional header to 'Target Number' so that the 'Units' designation is more meaningful. The 'Units' and '0' will apply to all records in the tab, but the term 'Target Number' will be unique to a specific record.

Note also that when you enter or change a field name, you must ensure that the caption you use will fit into the available space provided on screens and reports where it is used. The only way to check this is through manual inspection of the results of your entry. You should try to keep these names as brief as possible to avoid this problem.

Attachments:

Should you wish to use a field to store attachments rather than a hyperlink address, then you must set the 'Attach?' switch to 'on' for that field. There are 9 switches for that purpose in fields 8, 10 and 24 through 30.

Attachment objects are stored within the RecordsKeeper database, while hyperlinks point to objects outside the RecordsKeeper database.

Update Options:

The 'Update Options' section of the screen provides you with the ability to make changes to all tab data field names and options at one time by setting them the same as another tab.

You can set them all the same as another tab by selecting the tab you wish to copy or emulate from the drop-list and then clicking the 'Update Captions' button that is made available after you pick a tab to copy from. You can select one of your own tabs to copy from, or you can copy from another user's tab by setting the appropriate option button. Note that you are not copying data from the other tab; you are only copying the header names and establishing the fields that will be used.

You can also set all of the tabs in a tabset to the same setting by first setting the checkbox in the 'Update Options' section on. For example, if all tabs in a tabset will be used to store similar information, you can set the tab options the way you want them on this screen, select that tab name from the list and then click the 'Update Captions' button. All of the tabs in the tabset you are currently updating will be set identically.

Hide or Show Unused Headers:

If there are fields that you will not be using to capture your data (the 'Include' check box is set 'off'), you can reduce clutter on the screen by hiding the unused header rows.

You can do this using the 'Hide' and 'Show' buttons found in the right bottom corner of the screen.

You can set an option on the 'Options' screen to always hide unused headers when this screen is first opened.

Tips and Techniques:

Using this screen to maximize the way your data is described can sometimes be tricky, especially when you decide to store many records under a single tab and those records have different characteristics. For example, if you deal with several different companies, some may use the term 'Account Number' while others may use the term 'Folio Number', 'Reference Number' or 'Policy Number'. In a case like this, if you want to store the number in the same data field for all of them, you will have to settle on a data field name that is suitable to all. Alternatively, you could use several tabs to store the same data, and then use names that are specific to the way the account is referred to in each.

If the number and types of data fields that are required for storing data under a tab are few, you may want to

exclude all of the data fields that will not be used so that screens and reports associated with the data are not cluttered with captions and headings that will not be used. You can always set a field active in the future should you need it.

While it may seem onerous to set up the specifics for every tab, you can save a lot of time by finding a tab that has similar characteristics and uses the same data fields as one you are currently establishing, and then copying its parameters by using the features of the 'Update Options' section of the screen and then making minor changes to the results.

Help for *The RecordsKeeper* Display Record Screen

This screen simply shows all data that has been stored in a specific record, the one that you chose to display.

The screen will only display those fields that have their 'Include' switch set to yes.

Data cannot be altered in any way on this screen. You must use the 'Edit' screen if you wish to make any changes.

In some instances, not all of the data in a data field will display on the screen because of space limitations. In some cases, you can view all of the data in a field by double clicking in the field with your mouse.

Printing This Data:

You can print a report of the data displayed on the screen. You do this by clicking the print button to prepare a preview of the report.

Help for *The RecordsKeeper* Activity Measures Screen

This screen permits you to keep a record of any important activity that can be measured over a span of time.

There is no limit to the number of activities you can keep track of, nor is there any limit as to how many times or how often you wish to record a specific measurement for the activity.

Before you can enter a measure however, you must establish a measurement category for it. You do this by clicking the 'Add New' button to open the Measurement Categories screen. Follow the help and instructions found with that screen. For example, if you wish to keep track of your weight, you would first establish that category by clicking the 'Add New' button to establish 'Weight' as one of the activities you want to measure. (How to complete elements of that screen are shown when you open it)

Once established, you will be able to select 'Weight' from the list box, and then enter your measurement data.

Measurement Data:

In most cases, there will only be two data fields that require data when you enter a measurement: the date of the measurement and the measurement itself.

The 'Date' field is selected from a calendar screen that will open when you double-click in the date field. The measurement value itself is keyed into the 'Measurement' field.

If you elected to use the remaining measurement fields for such things as upper and lower limits, and for setting targets, you will need to enter these values the first time you enter a measurement value. When you enter subsequent measurement values, these limit and target values will be copied from the last record and entered automatically for you, on the assumption that these values will not change that often. You can over-ride these values at any time by simply replacing them. Should you decide to change your personal target at some point, simply change it to another value and then that new value will be entered for you automatically from that point in time onward.

You may enter more than one value for a specific date, but you will not be able to establish a time of day for the measurement. If you require two or more measurements on the same day, then you might consider establishing two or more categories, one called 'AM Measure' one called, 'Noon Measure' one called 'PM Measure' and so on. Alternatively, you could use one or more of the 'Limit' and 'Target' value fields for this purpose by labeling and using them for different measures on the same day.

Entering Data:

First, select the measure you wish to update from the list box. Then, double-click in the left-most field to open the calendar. Select the date you want by clicking on the day. The calendar will close and the date you selected will be entered for you. The '<<' and '>>' buttons on the calendar screen move the year forward and backward, while the '<' and '>' buttons move the month forward and backward.

Enter a measurement value in the next field. If this is the first measure you are entering for this category, then you should also enter data into the other fields if you require them. If a limit or target is usually referred to as less than, more than or equal to, you can also select the appropriate sign from the list boxes beside and to the left of each value field.

Category Description:

If you chose to enter a description of the category on the 'Categories Control' screen, it will show in the upper right hand portion of the screen. You can use this portion to describe the category, or to provide instructions in its use to help you. You can edit the data in this area by clicking the 'Add New' button and making any changes you require. You can view all of the data in this field by double-clicking in it, but you cannot edit it.

Graphical Display:

After you have entered one value series for an activity, the lower right-hand part of the screen will present a graphical display of the data entered. The graph is a line chart showing time across the bottom axis and the values range across the vertical axis. The chart will display all values entered for the category, but if you wish to view a selected date range, you can do so via the reporting controls available when you print a report for the selected activity.

The print version of the chart also includes a trend line that shows a linear trend calculation based on the 'Measurement' data field series.

Report:

You can print a report of the currently selected activity measure by clicking the 'Report' button. When you click this button a screen will open that will permit you to select what you want to print on the report. You have the option of printing all or any combination of the activity description, the time series values and the chart. You also have the option of selecting the start and end dates for the time series values, thus permitting you to print a report that only covers a specific period of time.

Help for *The RecordsKeeper* Hyperlink Tags Control Screen

A hyperlink is a piece of text (an address) on a screen that will cause a connection to an object (web-page, Photo, computer program, file folder, Word document, etc.) that you can access from your computer. It acts the same way as a shortcut on your desktop, or a hot spot on an internet screen.

The RecordsKeeper can internally store items such as photographs, scanned images, spreadsheets and word processing documents in attachment fields. But for types of data that are more logically kept in other systems, such as financial transactions, or home inventory items, and for objects that are stored on the world-wide web, it stores hyperlinks (pointers) to these items and opens them for you when you click on the hyperlink.

Because there are thousands of possible hyperlinks, the characters used as a hyperlink address can be both long (many characters) and complex (unintelligible).

In order to overcome this, and to keep the screens a little neater, RecordsKeeper uses a short phrase to describe the type of hyperlink it has stored, and uses this phrase on most screens and reports.

This screen is used to maintain the phrases that are used.

When you establish a hyperlink on one of the data editing screens, you have the option of choosing one of the phrases on this screen as an over-ride to the hyperlink address itself.

You have complete control over the linkage descriptions by maintaining a list of those descriptions using this screen. Simply enter a new descriptor if one is needed, or delete one that is no longer of use.

Changing a descriptor on this screen will change how that descriptor appears on every other screen where it is used. Add as many new ones as you require. To delete one, click on the left-hand record selector button, then use the delete button on your keyboard. Note however that you will not be able to delete one of these descriptors if it is still in use with one of your hyperlink addresses.

Help for *The RecordsKeeper* Add/Edit Record Screen

This screen permits you to add to, alter or delete data in the various fields that are available to you.

Adding a New Record:

If you clicked the 'Add a New Record' button on the previous screen, this screen will be blank (contain no data) when it opens. You are then free to add data into the available data fields as you require.

Editing an Existing Record:

If you clicked the 'Edit' button on the previous screen, all of the data that is currently associated with the record you selected is presented on the screen. You are then free to add, alter or delete data from the available data fields as you require.

Note that this screen will only display data fields that have their 'Include' option set to 'on'.

Where appropriate, the number of available or remaining characters that a data field can contain appears in the small number to the right of each field. You can update this number by clicking in the field with your mouse while you are editing it, or by clicking in another field.

Hyperlink Fields:

You can identify a hyperlink field because it always has a light blue, rather than a white background.

There are two ways to add or edit data in the hyperlink fields:

- You can type or paste data into one of these fields; or
- You can use an edit box that opens when you right-click in the field.

If you enter a hyperlink address into any of the available hyperlink fields, you should also select a hyperlink caption from the list box immediately below the field where you entered the hyperlink address. This caption will replace the hyperlink address itself on screens so that the screens are more readable.

If you do not select one of the captions, a default caption will be inserted.

Attachment Fields:

You can identify an attachment field because it always has a paperclip icon followed by bracketed number. When the field is empty, the number will be zero (0). The number shows how many attachments the field is currently holding.

You add or remove files from the attachment field by double-clicking the paperclip icon. This opens a dialog box that will permit you to add or remove files.

Types of Fields Available:

While not all may be displayed for any specific record, there are 30 data fields available to you. These data fields vary in format as follows:

1. 11 regular text (a combination of characters and numbers) data fields of varying lengths
2. 2 special text (a combination of characters and numbers) data fields of unlimited length
3. 2 date data fields
4. 3 telephone number data fields
5. 2 amount, or number data fields, and

6. 10 hyperlink data fields or 9 attachment fields

1: The 11 regular text data fields are of variable lengths, as follows:

- 1 of up to 24 characters in length
- 8 of up to 255 characters in length
- 1 of up to 36 characters in length, and
- 1 of up to 18 characters in length

When using these fields, you can either type the data into the field using your keyboard, or paste the data from another source after having copied it.

2: The 2 special text data fields are of a virtual unlimited length. You can type or paste any number of characters into them (well, up to 2 gigabytes of storage anyway, whatever that means)

3: The 2 date data fields are just that, when you double-click in them, a calendar opens and permits you to select a date

4: The 3 telephone number data fields will accept 10 numbers in the area code-exchange number-telephone number format.

5: the 2 amount, or number fields will accept a number of any length with up to 6 decimal places. The data can be displayed in a format of your choice, including currency.

6: the 10 hyperlink fields will accept web-page addresses, e-mail addresses, and any disk drive letter/folder/file path that you enter. You can type in an address, copy and paste it, or select one from a dialog box. The 9 attachment fields will accept most file formats for files that can be opened using a program currently on your computer.

One additional field, called the sequence field, stores a number and is available to help you sequence your records in order of preference. This number is only used to sequence your records on screens and reports, and has no relevance to the record itself, except perhaps for indicating its relative importance.

Tips and Techniques:

If you are using the *RecordsKeeper* database system as a means of recording information about things that you deem important, then it makes sense to capture as much relevant information as possible about that thing. This may include information about:

- what it is
- where it is
- how to locate it
- how to make it work
- how to access it
- how to get help for it
- how much it is worth
- how much it cost
- what you intend to do with it
- what to do if it breaks
- how to fix it
- who can fix it
- where it can be fixed
- any parts it might have or require

- what it does
- who it does it for
- who to contact about various aspects of it
- how you got it
- where you got it
- what you intend to do with it
- its supplier
- its manufacturer
- its model number
- its serial number
- its license number
- and so on

You can capture a lot of this information with words, but do not overlook the hyperlink capability, and use its ability to link to:

- web-sites
- photographs
- electronic documents (correspondence, image scans of important documents, etc.)
- computer programs
- file folders
- and so on

Following are some examples:

- If you are a homeowner, you could scan an image of a map of any underground wires, cables and pipes with references to local city and utility company agencies that monitor such items
 - If you have a will and powers of attorney, you could scan images of them and store them on your computer for reference
-

Help for *The RecordsKeeper* Move/Copy Record Screen

This screen permits you to move a record from one tab to another tab or to copy a record from one tab to another tab.

Move:

When you move a record, the record is moved in its entirety. After it is moved, it is no longer available under the tab it was moved from and is only available under the tab it was moved to.

Copy:

When you copy a record, the record is copied in its entirety. After it is copied, it is still available under the tab it was copied from and is also available under the tab it was copied to.

The record that is moved or copied is the record that was selected when you clicked the 'Move/Copy' button.

Note that you can only move one record at a time.

Note also that it is possible to move or copy a record to another tabset and to another user.

For security and privacy reasons, you can only move or copy your own data to other users; you cannot import data from another user.

Tips and Techniques:

If you are entering data for several items that are similar, you may find it easier to copy an existing record and then edit it to make any changes required to make it a unique record.

If you find that some records under the 'Sample' user are similar to what you require, you can change user and sign in as the 'Sample' user, then copy the records you need from there to your own tabsets for modification. Note that you cannot move a 'Sample' user's record, you can only copy it.

Help for *The RecordsKeeper* Main Screen

Once successfully signed in to the *RecordsKeeper* database system, this screen is your home, or main screen.

All other screens are accessed through this screen, and all other screens eventually return you to this screen when they are closed.

All of your general records stored under your tabset(s) and tabs are also accessible from this screen by selecting a tabset (if you want to reference data under a tabset other than your default) and then clicking on a tab. When you are referencing data under any tab other than your 'Personal' tab, simply click the 'Personal' tab to return to this screen.

Your user name always appears at the top of the screen and usually appears on most other screens that you access from this one.

If you use more than one tabset, you can switch between tabsets by selecting another from the list box under your user name.

The screen has two main views: a view when the 'Personal' tab is selected and a view when any other (general) tab is selected.

The tabs consist of the 3 rows of 6 buttons aligned across and near the top of the screen. You select a tab by clicking on it, and the currently selected tab will always show in red lettering.

When first opened, the screen will display data associated with the 'Personal' tab.

The 'Personal' Tab:

When the 'Personal' tab is selected (Clicked), your personal information is shown in the center portion of the screen. This information is surrounded by a number of buttons that permit you to perform other groups of activities. From here you can:

- Manage your tabsets, general tabs and general tab data field options
- Print reports
- Manage system options (only accessible by the default user)
- Access and manage additional personal data
- Access and manage user information

Manage your Tabset, Tab and Tab Data Field Options

When clicked, these buttons give you access to screens where you can customize (add, change or delete) your locations and location information, your tabsets, your general tabs and all of the data fields associated with the general tabs.

Print Reports

When clicked, these buttons lead to the preparation of several reports that you can view or print.

Manage System Options

The system options provides you with alternatives as to how the database operates, and the 'Captions' control screen permits you to manage (edit) virtually all of the headers, messages, titles and help information used on the screens and reports. You can also customize the hyperlink tags and the date formats that are used.

Additional information on how to manage that data is found with the screens when you open them.

Access and Manage Personal Data

When clicked, these buttons give you access to screens that permit you to capture and manage additional personal information not collected under the 'General' tabs. You access your medical conditions data, your medication regimen data and your personal activity data through these buttons.

Manage User Information

This series of buttons provides you with the ability to manage the personal data displayed in the center of the screen, and to add, delete or change user information.

Additional information about each of the screens that you can access with these buttons will be available to you when you open one of the screens.

All other information that you use the *RecordsKeeper* database system to keep records of is managed by using a combination of a tabset and the other 17 'General' tabs shown on this screen.

The 'General' Tabs:

If a general tab is active, it will respond to a click and display all of the data that is currently stored in the database under that tab. The names on these tabs vary depending on how you name them.

Help on how to use the general tab information and on additional screens that are available when viewing general tab data will be made available when you open a general tab.

Help for *The RecordsKeeper* Personal Data Edit Screen

This screen permits you to edit (add, change or delete) any information that is available to you in the personal data fields on this screen.

All of the fields are optional and do not require any data.

The information on this screen is displayed under the 'Personal' tab on the 'Main' screen at all times, regardless of what tabset is selected.

The information is also displayed on the main information report when that report is printed if you choose to print it.

It is simply a repository for personal information about the current user.

The small number beside and to the right of some of the data fields indicate how many free characters are still available for that field. You can update this number while you are typing in a field by clicking in the field with your mouse, or by moving to another data field.

The 'notes and comments' and the 'lineage' fields can be edited for style as well as for content. You can add color, indentation and change font types and sizes. You do this by selecting some or all of the text with your cursor and then moving the cursor to the right and slightly above the text you selected to open a style editing screen. Double-click in these fields to open an edit box that will allow you to see more data and permit easier editing.

If you wish, you can cancel all of the changes that you have made since the screen was opened by clicking the 'Cancel all Changes' button. Clicking this button will return all fields to their original state.

Click the 'Save and Return' button to save any changes that you wish to keep and to close the screen.

Lineage:

RecordsKeeper is not designed to store family tree data, as there are many other applications available for this. The 'lineage' data field is simply a free form field in which you can enter family history information should you so desire. It is of course entirely optional.

Help for *The RecordsKeeper* 'Add New User' Screen

This screen permits you to add another user to the system.

A user name is normally associated with a unique individual, but could be a second (or third) name for the same individual.

You can create as many user names as you require, but they must of course be unique.

Adding a user is a simple procedure. Simply type the desired user name and password into the data fields provided and close the screen.

A user name may not contain more than 36 characters and the password may not contain more than 12 characters. A password may be left blank if desired.

The user name is used on all screens and reports to identify the current user. Note that any data you enter in the system under a user name is only associated with that user and is not available to other users.

If you use a password, be sure to remember what it is, because if it is lost and you do not remember it, you will no longer be able to access any data that you have entered. There is no password recovery mechanism available to you.

When you close this screen after entering a new user name, a default tabset named 'Main' and a set of default tabs associated with that tabset will be established for you. You can then change the default names to ones that suit you and add (or delete) as many others as you require.

The tabs will not contain any data.

Help for *The RecordsKeeper* System Options Control Screen

This screen permits you to establish a number of system control options.

When the options are applied, they apply equally to all users.

Only the default user can set these options.

The options are established by setting a check box to 'on' or to 'off'.

OPTIONS:

1: The first option allows you to remove the 'Sample' user from the list of user names presented on the sign-in screen. Once you have familiarized yourself with the system and no longer need the 'Sample' data for reference, you may want to set this option on to prevent the 'Sample' name from appearing in the list.

2: When the second option is set to 'on', passwords will be visible on the general tab screen rather than hidden. If you are not concerned about the visibility of your passwords, you can set this check box on so that you do not have to uncover the passwords each time you change tabs.

3: If you no longer need the initial general help screen that appears at startup, you can prevent its appearance by setting the third option 'on'. When this check box is set to 'on', the first screen you will see when a user starts the system will be the 'Sign-in' screen.

4: The fourth option will prevent help tips from showing on all of the screens. If you no longer need the help tips or if you find them distracting, you can prevent them from displaying by setting this option to 'on'.

5: If the fifth option is set to 'on' the alternate option descriptions will appear as the default when this screen is opened in the future.

6: Set this switch to on if you have copied the 'RKTables.accde' file to another location and want to use and reference it from that location. When you set this switch on, the 'Change Database Location' button at the top of this screen will be activated and allow you to proceed with the change.

7: You set this switch on if you want to be prompted to create a back-up copy of your data records when you close the system. You should make a habit of backing up the records whenever they are changed so as not to lose any data changes you may have made.

Note that it is not necessary to make frequent back-ups of the data while you are working because each time you move from a record you are editing, it is saved. There is no need to save a back-up if you have simply been viewing data in the database and not making any changes. It is a good idea to save a back-up after you have made changes to records, however.

8: You set this switch on if you want to restore all of the 'Sample' user's data records to the state they were initially in when the database was installed. When you close this screen, all of the changes you may have made to the 'Sample' data will be backed out and the data restored to its initial state. Do not be concerned about changing the 'Sample' data then, as it is there for you to learn about the system. Note that the files in the 'attachments' data fields cannot be restored if you change them. This is the only exception.

9: You set this switch on if you want to hide the headers and header options for data fields that are not being used with a specific tab whenever you open the 'Tab Data Fields Update' screen. This will not affect any headers or data, it will simply reduce clutter on that screen to make it more easily readable and so that you can

more easily see which fields are being used.

Editing the Option Descriptors:

You can change the wording of an 'Option' descriptor if you wish. You do so by setting the top check box in the header section to 'on' and then making any changes to the descriptors.

Alternate Descriptors:

You can display alternate descriptors also if you wish. You do so by setting the lower check box in the header section to 'on'. You can edit that data as well when it is displayed.

Note that when an option is set, the option chosen will be applied for all users and to all screens. They will be saved and applied each time the system is used until they are changed again.

Help for *The RecordsKeeper* Tabset Control Screen

This screen permits you to manage all aspects of your tabsets.

You can add or delete a tabset, name and describe them as you see fit, establish the sequence they will appear in, and designate which is to be your default tabset.

Tabsets are simply names for groups of tabs that appear on the main screen and under which data records are stored. You can use as many tabsets as you require.

On this screen, you create a new tabset by first clicking the 'Add New Tabset' button and then entering a tabset name in the last record. After entering a name, enter a position number in the next data field and a description in the last field. The position number is only used to sequence the tabsets when they are listed or displayed on reports. The description is used on screens and reports so it should contain a brief but meaningful over-view of what type of information you are planning to store under the tabs for this tabset, especially if the nature of the data will be similar for all tabs.

Tabsets are associated with a specific user. They are not shared with other users. When a new user is created, that user is provided with a default tabset that is named 'Main'. You can change the name of that tabset to something that is meaningful to you, and then do the same for the default tab names.

You do not need to worry what you call a tabset, because it can easily be changed to any other name you want by simply visiting this screen again and changing the name.

Default Tabset:

If you use more than one tabset, you must designate one of them as the 'default' tabset. You can only have one 'default' tabset. It is the one that will appear when you sign in to the database. You set the 'default' tabset by setting one of the check boxes 'on'. When you set one of the check boxes 'on', all others, if there are any, will be automatically set 'off'.

Deleting a Tabset:

You can delete a tabset that is no longer required by selecting it and the clicking the 'Delete' button. Be aware however, that when you do so, all the tabs and all of the data records associated with those tabs will also be deleted and will not be recoverable.

Tips and Techniques:

You can use combinations of tabsets and tabs to organize your data in the manner which is best suitable and meaningful to you.

If you wanted to store information about the subjects and locations of photos for example, you could simply name one of your tabs 'Photos' under any tabset, then when you enter a record about a photo or a group of photos, you could use such terms as 'Mom', 'Dad', and 'Family' in the 'Type of Photo' field to differentiate them. Alternatively, you could create a tabset named 'Photos', and then within that tabset, you could name individual tabs using terms such as 'Mom', 'Dad' and 'Family' and then use the 'Type of Photo' field to further categorize them.

If you wanted to store information about some of your possessions, you could simply name one of your tabs 'Assets' or 'Possessions' and record the information there. Alternatively, you could use two or more tabs and differentiate your possessions with terms such as 'Clothing' and 'Furnishings'. Another alternative might be to use a tabset named 'Assets' or 'Possessions', then use the tabs to clarify their primary locations with such terms as 'Kitchen', 'Living Room', 'Patio' and so on.

There is no one way that is necessarily better than the other, and you can choose to organize your data in the way that is most meaningful to you. The *RecordsKeeper* database system provides you with a variety of ways to do this. Use your creativity!

Help for *The RecordsKeeper* Default User Control Screen

This screen permits you to change a user name and to set the default user for the system.

There must be one default user established at all times.

When you use the system for the first time, and until you establish a new user, the user named 'Sample' is the default. When you create a new user for the first time, using the 'New User Initialization' screen, that new user is automatically established as the default user. As new users are established, you use this screen if you want to change the 'default' user.

To avoid confusion and conflict, the system options and the system header captions can only be changed by the default user. This is because these options and captions apply to all users once they are set.

You change a user name by changing the value in the 'User Name' data field. A user name is limited to 36 characters

Help for *The RecordsKeeper* Caption Control Screen

The Caption Control screen provides you with the ability to control the text content of virtually everything that appears on a screen or in a report within the *RecordsKeeper* database system with the exception of items that a specific user has control over.

All the wording of the screen titles, column headers, buttons, data field names, system messages, help tips, and even the help screen text can be edited to suit your particular needs using this screen. This permits the use of local phrases or language.

Note however, that when a change is applied, it is applied for all users. This screen is only available to the default user.

Each caption item that is available has two fields: a default field and an optional, or over-ride field. Until changed, each of these caption item fields contains the same data.

You cannot alter the contents of the default fields (grey background) but you can select and copy data from them when required. If the data in the default field is not acceptable, you can make any changes that you desire in the over-ride field (white background). When you do so and if you want to use the over-ride field, you must also set the over-ride check box to 'On' in order for the over-ride capability to take effect. Over-ride check boxes are located within an item field on the right side of the screen.

The over-ride fields are intended to provide you with the option of using alternative languages, or local phrases that are more meaningful than the default information that is supplied.

You can set a single over-ride field on, you can set all of the over-ride fields for a specific screen or report on, or you can set the over-rides to take effect for all of the screens and reports, depending on how you use the options available on this screen.

Finding Items:

You locate the item you want to change by using the three list boxes at the top of the screen. The first list box lets you select the screen type, then the second will present you with a list of the screens or reports that you have caption control over.

When a specific screen or report is selected, the lower list box will contain a list of the type(s) of items that can be changed.

When you select a field type from the lower list box, all of the manageable items of that type will be displayed for you. If an item is not displayed, it cannot be changed.

The left part of the screen displays the data field name and the type of data it is. While these may seem cryptic, they may be of help in determining the correct caption field to change.

Changing Values:

Should you choose to make any changes to this data, you must be very careful to ensure that the new value will fit in the space allocated to it on a screen or report. This is particularly true in the case of captions. The only way to ensure that what you enter will fit is by trial and error. This means that after a change, you will have to access the screen or report and view the impact of the change to ensure that it is appropriate for the space

allocated. You should try to ensure that any new wording is about the same length as the default wording for captions.

In some cases, particularly with captions and helper phrases, there may be more than one line allocated on the screen or report. In these cases, you have to ensure that a line break is inserted at the proper point. The 'Enter' key will force a line break in the fields on this screen rather than move you to the next field.

In a few instances, a caption is derived from a previous screen if the data on the open screen is sourced from the previous screen. In these instances, you must make any caption change on the originating screen. This is also true for reports where data is sourced from an originating screen.

Introduction to Getting *RecordsKeeper* Help

The *RecordsKeeper* database system provides you with several options for getting help as you work with it.

Help Screens:

Most screens have a help button that when clicked, will open another screen with information that is specific to the screen you are working with. That help screen will help you better understand the screen you are using – what it is for, what you can do with it, and how to use it effectively.

The help screen that opens can be moved so that it is out of the way of items on the screen underneath it. It can also be stretched or shrunk so it displays more or less data, as you require.

If you require a report of the help information for a specific screen, you can print one from the 'Main' page while under the 'Personal' tab. After preparing the 'Help' report, print the page(s) you require.

Help Tips:

A 'help tip' is a short phrase or series of phrases that is attached to all buttons, data fields and most other items on a screen. They are specific to the item itself. You access a 'help tip' by hovering your mouse cursor over the item you want help with. After a brief second or so, a 'help tip' for the item your cursor is over will appear on the screen and remain there until you move your cursor.

Some people may find that the 'help tips' are bothersome or in the way, so they can be turned off if you prefer. When they are turned off, they will be off for all users, however.

If you hover your mouse over this area of the screen, for instance, a boxed phrase should appear, if the feature has not been turned off, that is.

Guidance Phrases:

Many screens have one or more phrases that are designed to help you. They are found at various places on a screen where room permits, or where they are appropriate. Most often, they appear at the bottom of a screen.

Note that all of the information in the help screens, the help tips and the guidance phrases are customizable. They may be changed and/or translated by the default user so that they are most effective for your specific purposes.

Help for *The RecordsKeeper* 'Change Password' Control Screen

This screen permits you to change your password.

You must enter your current password if you wish to change it to another.

You may then change your password to another (or leave the two new password fields blank if you do not wish to use a password). You must enter the new password twice in the fields provided and they must exactly match each other.

The password may not contain more than 12 characters. A password may be left blank if desired.

If you do not want to make a change, click the 'Cancel' button.

When you are satisfied with the changes you have made, click the 'Save' button to close this screen and return to the 'Main' screen.

Remember that if you choose to use a password to protect your data, you must ensure that you keep a record of it and remember what it is. If you do not enter a correct password after having set one, you will not be able to gain access to your data. There is no password recovery option available with this system.

Help for *The RecordsKeeper* General Tabs Screen

The 'General' Tabs:

There are 17 general tabs available to you on this screen. They take the form of buttons and are aligned in three rows across the top portion of the screen.

The names shown on the tabs are those associated with the tabset that is shown in the list box at the top of the screen and with the user name shown above the list box. The names on these tabs vary depending on how you name them.

If you are using more than one tabset, you change to another tabset by selecting one from the list box.

If a general tab is active, it will respond to a mouse click and display all of the data that is currently stored in the database under that tab.

When you click on one of the 17 general tabs, all of the records currently stored for the user, tabset and tab that you selected are listed. If there are more records than can be displayed on the screen, a scroll bar on the right permits you to scroll down through all of the records.

A description of the type of data stored under the selected tab is displayed at the bottom left of the screen.

Space on the screen limits how much of the data associated with any particular record can be displayed, but you can view all of the data associated with any specific record by clicking the 'View all data for this record button' that is within that record on the right hand side of the screen. A screen will open and display all of the data currently stored with the selected record.

You cannot alter data on this screen. If you wish to edit (add, change or delete) information in any of the available data fields, you first select (set the check box within the record on the left hand side of the screen to 'On') the record you want to edit and then click the left-most button at the bottom of the screen. This will open a screen that permits you to change your data.

You add a new record to the database by clicking the second button at the bottom of the screen. This will open a screen that permits you to add data into the available data fields.

You can also delete a complete record by first selecting it, and then clicking the third of the four buttons near the bottom of the screen. Once you delete a record, the data is lost and cannot be recovered.

You can move any of the records displayed to another tab (or user or tabset). You can also copy any of the records displayed to the same or another tab by first selecting it and then clicking the rightmost button near the bottom of the screen. This will open a screen that will permit you to specify where you want to move or copy the record to.

Note that if the column headings on this screen are not to your liking, or not appropriately descriptive for the information that you are storing under the active tab, you can change these headings to more appropriate phrasing by using the tab control features available under the 'Personal' tab.

You can use the check box found within the column headers to either show or hide the data in the field beside it. This column is normally used for passwords but can be used for anything that might be private (i.e. combination lock numbers).

The number that displays (if you entered one) within a record on the left hand side of the screen is a sequence

number that you can use to order the way the records appear on the screen. You can enter any number you wish so that a record appears where you want it to relative to other records on this screen.

Tips and Techniques:

If you are entering data for several items that are similar, you may find it easier to copy an existing record and then edit it to make any changes required to make it a unique record.

If you find that some records under the 'Sample' user are similar to what you require, you can change user and sign in as the 'Sample' user, then copy the records you need from there to your own tabsets for modification. Note that you cannot move a 'Sample' user's record, you can only copy it.

There are other tips and techniques available to you with the help information provided with the 'Add' and 'Edit' screens.

Clicking the 'Personal' tab will return you to the home page.

Help for *The RecordsKeeper* 'Date Format' Control Screen

This screen permits you to set a date format to determine how a general record date will appear on screens and reports.

You can set a custom date format for each of the two date fields available to you within your tab records. You do that on the 'Tab Data Fields Control Screen', not via this screen. This screen only provides you with the options that you can use on that screen.

You must be very careful and ensure that you only use valid abbreviations and separators when setting a date format. The valid entries are shown as help phrases in the lower section on the screen.

If you have entered a correct combination of characters, the result will show in the center of the screen as today's date in the format you entered. You can determine whether or not you entered a valid format combination by the result returned. If it does not look like a legitimate date, then you should change it or the screens and reports will display unpredictable results.

Tips for Use:

This feature permits you to display a date in a format that is most applicable for a given situation. For example, if you are using a tab for credit cards and want to show an expiry date, an appropriate format would be just the month and the year, as that is how an expiry date normally appears on a credit card. If you wanted to display an anniversary date, the full date would be more appropriate. Finally, there are instances when only the year may be appropriate, for recording vacation experiences, for instance.

Note that when you specify a date format for a specific tab, that date format will apply to all the records stored under that tab.

Help for *THE RecordsKeeper* 'Location' Control Screen

A location is usually a place where you store items, although it can be anything at all. For example, jewelry, savings bonds and a stamp collection may all be stored, or located in a **safe deposit box**, a **home vault** or a home **wall safe**. Important documents such as wills and powers of attorney may also be stored in those locations, but could be held by a custodian such as an **estate executor**. Alternatively any of these items could be stored in a **desk drawer**, or in a **trunk**. Extra sets of house or car keys may be held by a **neighbor**. All of the underlined terms are examples of locations.

You can use locations to group items even when they are part of different tabsets or different tabs. Grouping items in this way permits you to print reports of all items that are stored, or located in one place.

Use of the 'Location' feature is optional but when used, it will provide additional organizational capability for your general record items.

This screen permits you to specify an unlimited number of locations and to provide details about the location.

You add, delete or change the name of a location in the column on the left. When you click your cursor on one of the locations in this column, the right side of the screen will display all descriptive data for the location selected.

All of the fields are optional. You can choose whether to use any or none of the fields by setting the check boxes to the right of each field either 'on' or 'off'.

You can change the name of a field to anything that is appropriate to your needs by entering an over-ride field header in the white boxes to the left of the data fields and then setting the over-ride switch beside it 'on'.

Assigning Locations to General Tab Items:

Once a location has been established on this screen, it will be available for your use on the general tab update screen. You assign an item to a location on that screen, not on this one.

Tips for Use:

This feature permits you to print reports that list all of the important things that you keep in one place. This report can be used to help someone locate and recover those things when necessary.

In some cases, if there is someone who has knowledge about an important item, you could set that person up as a location, so that others will know who to contact when an item must be located, thus a location does not have to be a physical location.

You can use this feature for other purposes. For instance, if you wanted to leave certain possessions to different people or members of the family, you could set up each person as a location and assign the items you want to leave them to each person. You can only link an item to one location however, so this option may not work for that purpose in all cases. A workaround to this latter issue is to make copies of general record items that you wish to link to two locations and keep them in separate tabs or tabsets, with different location linkages.

Editing the Data Fields:

You can double click in most of the fields to open an edit window. The edit window will permit you to see all of the data in a field and to see multiple lines of data. The edit window also shows you how much room you have for data in a specific field.

Note that the 'Notes and Comments' field can be edited for style as well as for content.

Help for the *The RecordsKeeper* Main Report Print Control Screen

This screen provides a series of options that permit you to set the scope, level of detail and format for the general records main report.

There are 5 sections on the screen. They permit you to:

1. specify whether you want to print general records for all tabsets or just for one specific tabset;
2. specify what tab records to print
3. specify whether to include all data fields or just those that currently contain data in them
4. specify whether to organize the report by location, and whether to include records for all locations or just for one specific location, and
5. specify whether or not you want to show the contents of the password field on your report.

You specify what to include in a given report by setting these options in combination with one another.

Section 1: Tabset Print Options:

The default for this option is the current tabset, the tabset that was open when you opened this screen. If not changed, your report will only include records from the currently selected tabset.

You may choose to print a report for any other tabset by selecting one from the list box and leaving the second check-box in this section set to 'on'.

You may choose to print a report that includes records from all of your tabsets by setting the first check-box in this section to 'on'.

Section 2: Tab Print Options:

Preparing a report for a specific tabset:

If you selected option 2 in section 1 (printing records for a specific tabset), this section of the screen will display the active tabs for that tabset. They will all initially be set to 'on'. You can then exclude specific tabs by setting the relevant check-boxes to 'off' if you wish.

Note that you cannot specify which records within a tab to print, you are limited to all or none. If you wish to print a report for a specific record within a tab, you must use the print feature found on the general record display screen.

Preparing a report for all tabsets:

If you selected option 1 in section 1 (printing records for all of your tabsets), you may exclude any tab(s) in any or your tabsets by selecting the relevant tabset from the list box in section 1 and then setting the relevant check-boxes to 'off'.

Section 3: Report Options:

This section permits you to choose whether or not to show all of the active data fields within a tab on the report, regardless of whether they contain any data.

The default for this section is option 2 (do not print empty data fields).

Section 4: Location Print Options:

There is no default for this option, so if you wish to organize your data by location, you must set one of the two option check-boxes to 'on'.

When the first check-box is set to 'on', all of the data specified by the other options will be organized (grouped) by location on your report.

When the second option is set to 'on' and you have selected a location from the list box, your report will only include records that are associated with the selected location.

Note that if you choose an option in this section, your report will only show general records that have been assigned to a location.

Section 5: Hide or Print Password Option:

This option permits you to decide whether or not you want the contents of the password field to print on the report. The default is to print the password, so you set this switch on to hide the password.

To indicate that there is data in the password field, asterisks are printed in place of the content of the field when this switch is set to 'on'.

Note that this field does not have to contain only a password, it can be used for any other sensitive information that you may want to hide, such as a locker or safe combination number.

Help for the *The RecordsKeeper* Other Reports Print Control Screen

This screen permits you to print any of the reports that are available within the RecordsKeeper system.

They include the:

1. Locations Report
2. Tabsets Report
3. Tabs Report
4. Medication Regimen Report
5. Medical Conditions Report
6. Activity Measurements Report
7. Header Captions Report
8. Help and Guidance Report, and the
9. General Records Report

To print a report, select the report you want to print by setting its option box to 'on' and then clicking the 'Preview' button. With the exception of the following two reports, all reports will open when you click the 'Preview' button.

Activity Measurements Report:

Because it is only possible to print one activity measure at a time, if you select this report, you will be re-directed to the 'Activity Measures Control' screen, where you can select the measure you want to print.

General Records Report:

Because there are several options that control the printing of the General Records report, you will be directed to the 'Main Report - Print Options' screen, where you can select the options you want for this report.

Note that in all cases, the data on the reports will only apply to the current user. You must change user in order to print data for another user.
