

Inventory Report Tools Microsoft Word 2007 Add In Instructions and Information. *Also see our online video demonstration.* http://www.activeinventories.co.uk/inv_report_tools_video.htm

Our 'Inventory Report Tools' Add In utilises the built in Word 2007 galleries for creating and using extended Building Block (auto text entries.) In addition we have incorporated an image insertion tool. With this tool images can be inserted at your chosen size, with, or without, a caption. Also included are convenient table row tools for quickly adding and deleting table rows.

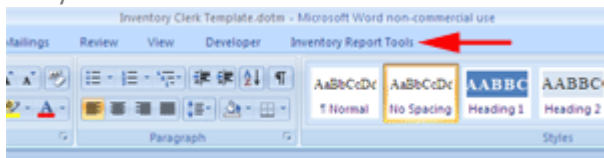
The template can be used to quickly insert specialist inventory related text and images in to any document, *especially with the included ready to use professional inventory report document.*

The 'Inventory Report Tools' text tools categories and entries facility of the Add In is fully customisable to suit your own requirements to the extents of Microsoft Word 2007 specifications.

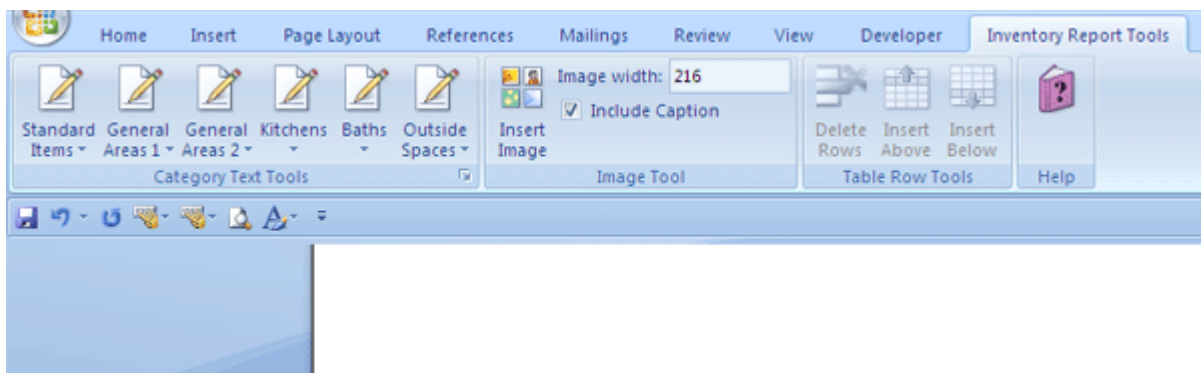
Quick Start Instructions.

Double click 'Inventory Clerk Template.dotm'. This will open the template with an empty new inventory report document. (You can also right click on the file and select 'New') **NOTE.** *Instructions are set out later to replace the included document with other or your preferred inventory reports document layouts.*

When you open the template you will notice a new tab on the top row of Microsoft Word 2007 titled 'Inventory Report Tools'. Click on this tab and the extra tools we have provided will display and be ready to use.



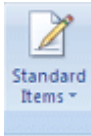
The quickest way to understand the facilities is to experiment by clicking each of the various icon links displayed and explore the various facilities.



There are four areas to the Add In. 'Category Text Tools', 'Image Tool', 'Table Row Tools' and 'Help'. The facilities in the sections are each explained below.

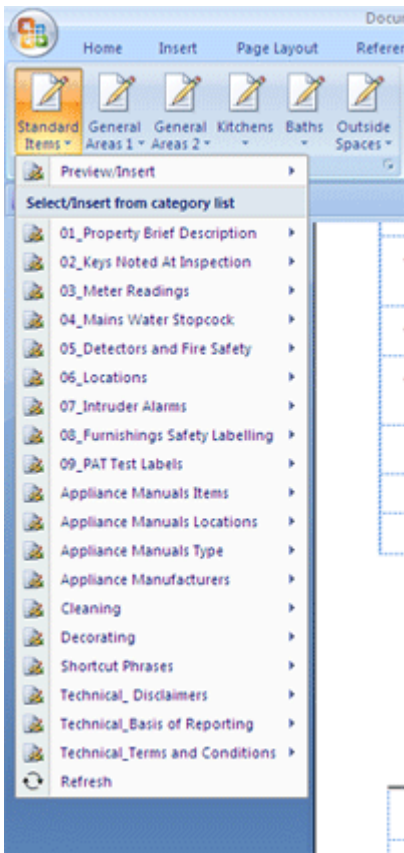
Category Text Tools section.

There are five main menus in the 'Category Text Tools' section. They are set out in a logical left to right order to match an inventory report entry order.



The first icon on the left in the 'Category Text Tools' section is named 'Standard Items'.

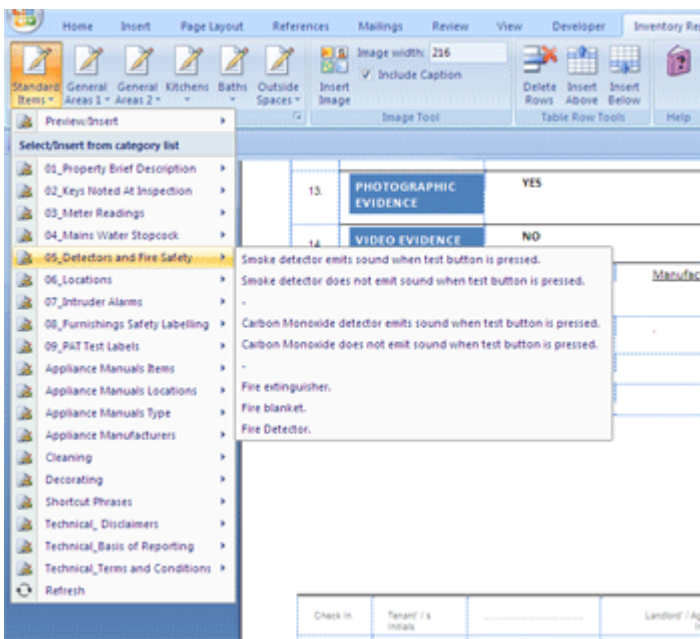
When clicked the icon opens a drop down menu containing a range of preliminary inventory reporting categories in the order encountered on the included inventory report document.



The menu shows a list of 'Categories'. The displayed 'Categories' include meter readings and safety items etc. There are also categories for entering commonly used decoration condition and cleanliness statements. In addition we have added 'Technical Disclaimer' and 'Basis of Reporting Statement' categories which you can adapt for your particular circumstances.

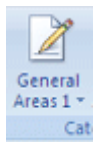
The 'Categories' each contain a further drop down menu containing text entries and phrases which you can point to and click to insert text and phrases in to the inventory report document.

Note. All phrases and text in the 'Category Text Tools' section can be adapted to your own requirements You can add your own categories and text entries as well as deleting unwanted entries. (See later full product description editing techniques.)



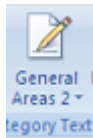
When a 'Category' from the drop down menu is selected a further menu displays with text and phrases relevant to the chosen category. When you choose text or a phrase it will be

inserted in to your document at the current document cursor position.



The next icon 'General Areas 1'.

The categories displayed relate to all living rooms types components. (Living rooms, Bedrooms, Stairs and landings, Conservatories etc.) The text entries range from ceilings, walls and floors etc right through to contents, fixtures and fittings and ornamentation etc.



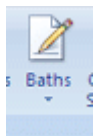
The next icon 'General Areas 2'.

The categories displayed continue from General Areas1.



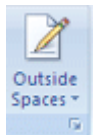
The next icon 'Kitchens'.

The categories displayed relate to kitchen areas.



The next icon 'Baths'.

The categories displayed relate to Bathrooms, Cloakrooms and En Suites etc.



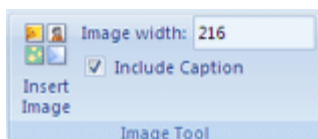
The next icon 'Outside Spaces'.

The final icon in the 'Category Text Tools' section relates to Gardens and other external property areas.

Image Tools section.

The Image Tool is set to initially open and look for images in a specific folder C:\Inventory Images on your computer. Before using the tool you need to create this folder on your computer. You can browse from this initial folder to find images at any location on your computer. Although, you will probably find it more convenient and faster to use 'Image Tool' if you set up sub folders for each of your property images within the initial C:\Inventory Images location.

Create a folder named Inventory Images on the C: drive of your computer. (C:\Inventory Images). Store your individual property images in sub folders within this folder. For example: C:\Inventory Images \10 Smith Street London W1A 1AA. You can create sub folders for all your individual properties within 'C:\Inventory Images'. You can store all of a properties images or only the specific images you intent to insert in your reports in each sub folder.



The 'Image Tools' options.

You are able to pre select an image width and whether or not to include an image caption.

IMAGE WIDTH. The image width you require can be pre selected entering a number in the 'Image Width' input box. The image size is set by inputting a width number. (80 width = one inch (2.84 cm width) *(approx)*). You will soon learn how to gauge your image sizes by experimentation. Once the images are inserted you can also make all the usual adjustments using the standard Microsoft Word 2007 allowed editing facilities. **NOTE.** *The image height aspect ratio is preserved when an image is inserted.*

INCLUDE CAPTION. You can specify whether or not a caption is included for any inserted image by ticking or un-ticking the 'Include Caption' box. If a caption is included the Microsoft Word standard caption options are displayed enabling you to set your caption preferences before the image is inserted. (**NOTE.** *You can also set a caption after the image is inserted using Microsoft Word 2007 standard image controls*)

INSERT IMAGE.

Click the Insert Image button.

A new window will open displaying the files and folders within the 'C:\Inventory Images' folder.

Browse to the image you wish to insert.

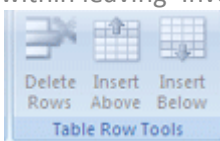
Double click the chosen image or select the 'Open' button.

The image will insert at the current document cursor position at the size you have specified.

Note: *You may wish to add rows to the document to insert large size images in the document. We discuss image insertion in more detail later in these instructions.*

Table Row Tools section.

We have included useful table row commands so that inserting and deleting rows can be carried out within leaving 'Inventory Report Tools'



To delete an unused table row place your cursor in the row and click the 'Delete Row' button.

To insert a new row above your current table row position click the 'Insert Above' button.

To insert a new row below your current table row position click the 'Insert Below' button.

Help section.

When you click the help button you are referred to the instructions supplied with the Inventory report Tools template. Copyright information is also displayed.



Installing other document layouts in to the Inventory Report Tools template

- Place your cursor any where in the included document layout. Hold down the Ctrl and a keys on your keyboard to select the entire document. <Ctrl a>. (*Select all.*)
- All the layout and text etc. will be highlighted. Press 'Delete'. You will now have a blank document.
- Open the alternative document you wish to insert a new layout and text from.

- Place your cursor any where in the alternative document layout. Hold down the Ctrl and a keys together on your keyboard to select the entire document. <Ctrl a>. All the layout and text etc. will be highlighted.
- Press Ctrl and c together <Ctrl c>. (*Copy*) This will copy the alternative document layout and text.
- Return to the initial document and place your cursor anywhere in the blank document area.
- Paste your alternative document in to the blank document. The keyboard shortcut to paste is Ctrl v. <Ctrl v> (*Paste*)

You can then save your revised layout with a new name. In this way you can set up a series of inventory documents as templates to suit your requirements. For example Initial Inventory report (as installed) Check In and Check Out reports etc.

When carrying out the above steps you may benefit with the information below regarding fonts.

Keeping control of fonts

The supplied template building block (auto text) entries use the following font: Calibri at font size 10 using Automatic (black) colour.

The initial (installed) document layout has been set up using the Calibri font in all anticipated building block text entry areas. If you wish to change the font you are able to this by using standard Microsoft Word 2007 facilities.

We make the following suggestion to make font changes fast and simple when you have loaded new document layouts using different fonts.

- Select the areas on the document you wish to change the font for.
- Click the Microsoft Word 2007 'Home' tab.
- Click the small arrow on the lower right hand corner 'Font' area.
- This opens the 'Font' dialogue options.
- Choose the font attributes you require.
- Click the 'OK' button.

Note: *Fonts are a huge subject and you should study Microsoft Word 2007 help articles to get the most out of using fonts.*

How to add your own 'Building Blocks' (auto text) to 'Category text Tools'.

You are able to add your own entries to the maximum specified in Microsoft Word 2007 specifications. **Note.** *This process may seem very complicated at first glance. However, once you have added a few entries you should soon get proficient in easily adding new entries.*

In simple terms:

Type your required text to store.

Select the required text.

Assign the text to an existing or new 'Gallery '. (*Using the 'Create New Building Block' dialogue box*)(Hold down the .Alt and F3 keys together on your keyboard)

The built in Microsoft Word 2007 'Galleries; relate to the 'Category Text Tools' as follows:

'Category Text Tools' Gallery Names

Word 2007 Galleries

Entries displaying under 'Standard Items' are stored in Custom Auto Text

Entries displaying under 'General Areas 1' are stored in Custom 1

Entries displaying under 'General Areas 2' are stored in Custom 2

Entries displaying under 'Kitchens' are stored in Custom 3

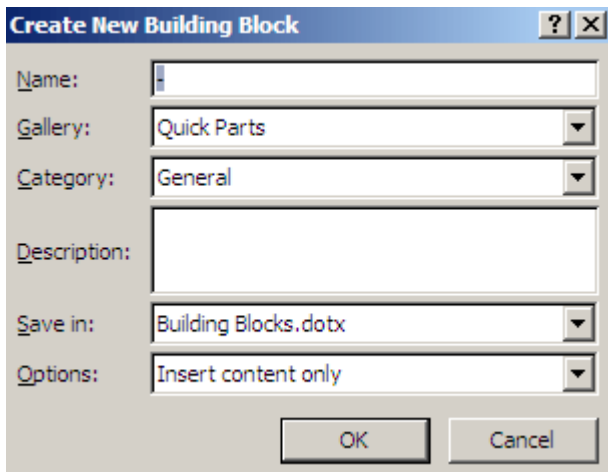
Entries displaying under 'Bathrooms' are stored in Custom 4

Entries displaying under 'Outside Spaces' are stored in Custom 5

- Each 'Gallery' can have multiple 'Categories'. *(To the limit of Microsoft Word 2007 specifications)*
- Categories can be selected when entering building blocks (auto text)
- New Categories can be added when entering building blocks (auto text)

Step by Step

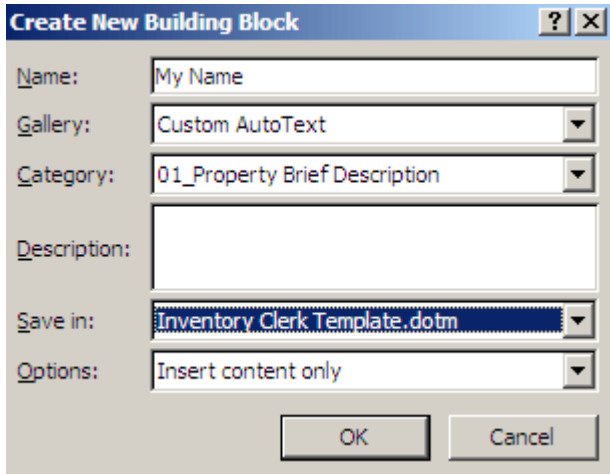
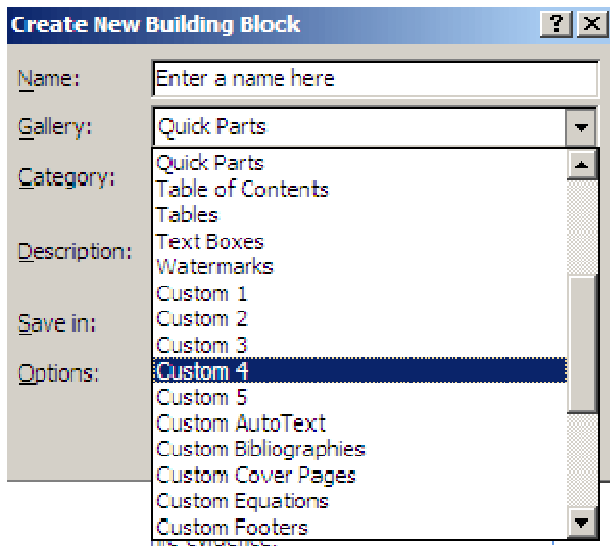
- Type your required text to store.
- Select required the text. *(or you can select existing text already typed)*
- Hold down Alt on your keyboard and press F3. <Alt + F3>
- This will bring up and display the 'Create New Building Block' dialogue box.



- **Name:** The first part of your selected text will be automatically displayed here. You can leave this or change.
We strongly suggest you do not include any special character in your chosen name. (./#\ & etc,)*
- **Gallery:** Scroll down the list and choose your chosen gallery. (See list above)
- **Category:** Choose from a displayed category or create a new category. The option to create a new category is located at the bottom of the 'Category' list.

We strongly suggest you do not include any special characters in the new category names. (.*/#\ & etc,)

- **Description:** You can enter a description. We have not used this facility in the installed building blocks (auto text). You may wish to experiment with using this option.
- **Save In:** Select 'Inventory Clerk Template.dotm'.
- **Options:** We have selected 'Insert Content Only' for the included entries.



Notes:

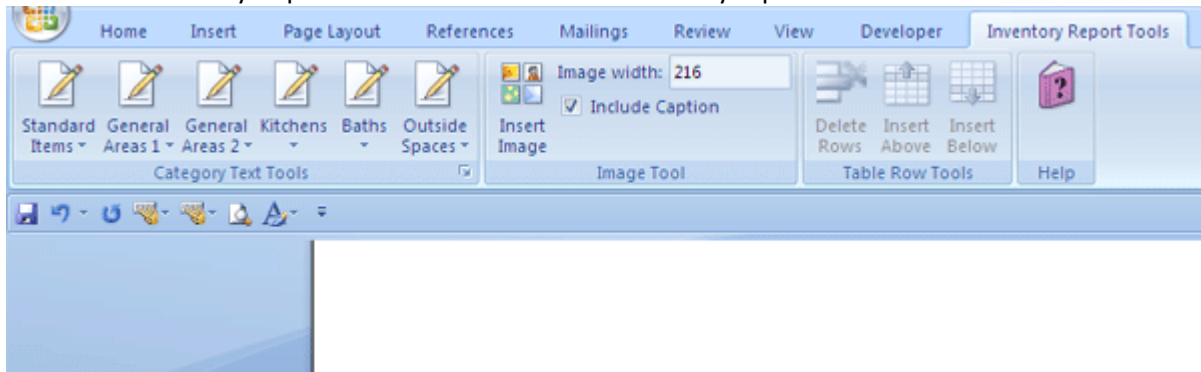
- Your new building block (auto text) entries are added to a chosen 'Category' in the order they are added. Therefore, you will find new entries displayed at the bottom of a chosen 'Category' drop down menu.
- Categories are displayed in alpha numeric order. Therefore, a new category you may add will display in a category list alphabetically according to the title you enter.

- We have explained how to use the 'Create New Building Block' in line within the concepts of our 'Inventory Clerk Template' only. You should be aware that the 'Building Blocks' concepts in Microsoft Word 2007 are far reaching and not explained in full detail in these instructions. You may wish to research all the aspects of Building Blocks so you can take best advantage of Microsoft Word 2007.
- TIP. When adding your own entries.
Make sure that the text to be selected is formatted to match the installed text. Our templates use 'Cambria' at '10' points. *(You are able to use any formatting you may prefer if it better suits your own requirements.)*
- TIP. Before selecting text to add to the template turn on 'Show paragraph marks' (¶). The command to do this can be found on the 'Home' tab on the Microsoft Word 2007 'Ribbon'. *(Keyboard shortcut = Ctrl+Shift+*) (Hold down Ctrl and Shift and + together)*
- TIP. Decide whether your new entry will need to be on its own line *(Paragraph mode)* or whether you wish the entry to be pasted from your chosen gallery without a carriage return *(Enter)* being added *(Continuous mode)*.
If desired to be added with a carriage return when the new auto text entry is used *(Paragraph mode)* make sure that the paragraph mark (¶) at the end of your text is included with your selection.
If your auto Building Block *(auto text entry)* is not desired to be on its own line with a carriage return after it *(Continuous mode)* make sure that the paragraph mark (¶) **is not** included when you select your text.
You may need to turn off 'Use Smart Paragraph Selection' in Microsoft Word 2007 to allow this form of selection.
To do this click the Office Button and choose 'Word Options' at the bottom of the pop up box.
Select 'Advanced' on the left hand choice list.
From the list under 'Editing Options' un-tick 'Use smart paragraph selection'.
This will allow you to select your text without including the paragraph mark (¶) at the end of your text. If using 'continuous mode' you should include a space at the end of your text. (e.g. After any full stop / period character.) So that subsequent words or phrases are entered with the correct spacing.
- Here is a shortcut for selecting text without an end of paragraph mark.
Place your cursor immediately before the paragraph mark (¶) at the end of your text. Hold down the Ctrl and Shift keys. Then press the Up Arrow key (^). This will select the text from the end to the beginning of the required text without including the paragraph mark (¶).
(You can include the paragraph mark in the selection for a 'Paragraph' mode entry.)
- **VERY IMPORTANT.**
Never use '&' (or other special characters) in a Building Block *(auto text)* or Category name. This may crash the software. Always type 'and'. For example: 'Rugs & Mats is not suitable for the Template. The '&' (and other special characters) may cause the software to crash. Rugs and mats is suitable.

How to test your added building blocks (auto text) entry

Place your cursor in the document where you wish your new auto text entry to be inserted.

Select the 'Inventory Report Tools' tab to show the inventory report tools ribbon.



Select the Gallery under which you assigned your auto text entry (for example 'Standard Items')

The menu of 'Categories' will drop down.

Click 'Refresh' at the bottom of the displayed 'Category' list.

If you do not click 'Refresh' after adding items they will not show in the list.

Once refreshed in to the list they will remain unless deleted (*Deleting is carried out using the Building Blocks Organiser*). More information follows later in these instructions.)

Select the 'Category' where you assigned your new auto text entry.

Choose your new auto text entry from the displayed list. The text will be inserted in to the document at the current cursor position.

Note:

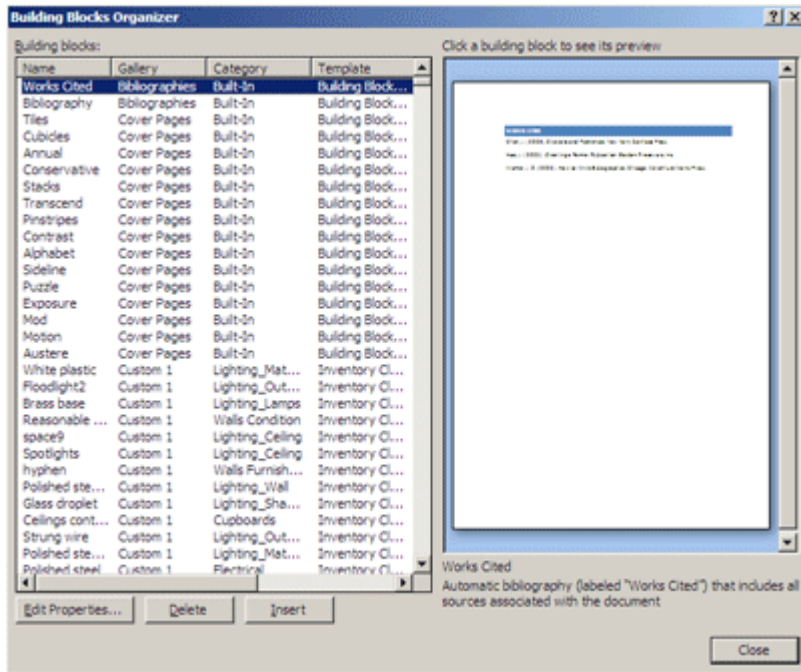
When you close your document you will be asked if you wish to save your new Building Block (auto text) entries in the 'Inventory Clerk Template.docm'. To save new entries for later use choose 'Yes'. To discard the changes choose 'No'. Word 2007 keeps track of documents based on the Inventory Clerk Template and additions and deletions you make to the Inventory Report Tools in such documents stay linked to the original template new documents you create based on the template (Inventory Clerk Template.docm)

How to delete building blocks (auto text) entries

To delete unwanted entries you will need to use the Word 2007 built in 'Building Blocks Organiser'. This is accessed by selecting the 'Insert' tab on the Word 2007 main ribbon. Inside the 'Insert' ribbon display choose 'Quick Parts' and then select 'Building Blocks Organiser'.

Familiarise yourself with the organiser before undertaking deletions or editing so that you are confident of what you are trying to achieve. On first glance the organiser can be daunting as it affects many aspects of Microsoft Word 2007 Building Blocks concepts.

You will need to carefully locate the entry you are trying to edit or delete. Once located you will be able to edit or delete using the Word 2007 built in facilities.



TIP.

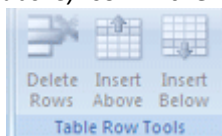
Double click the 'Category' column head tab at the top of the display. This will sort the list below and be easier to find an entry for deletion in its 'Category'. You can also widen the column by hovering your cursor on the right hand side edge of the 'Category' tab and double clicking when the cursor changes to a cross type symbol. (†)

IMPORTANT:

We strongly suggest that you restrict activities in the 'Building Blocks Organiser' to only deleting unwanted items. We have found that editing Building Blocks can cause the 'Inventory Report Tools' template to crash. We have found that It is easier and more reliable to delete an unsatisfactory 'Building Block' (auto text) entry than to risk a crash by editing it.

Image Insertion Tips

The supplied inventory report document is set out in nested tables. (tables within other tables) You may find the table cells sizes restrict the size options you may require for your images. To easily overcome this you can insert a full size row anywhere in the document. When inserting a new row for this purpose place your cursor in the left most area of a row and click the 'Insert Row Below' (or above) icon in the 'Table Row Tools' area of the template.



It is worth experimenting with this aspect so you can easily display images exactly how you wish.

Backing up the template.

You cannot change the name of the template as it is hard coded in the template file xml and vba. We suggest you keep a backup on external media.

IMPORTANT.

If you need to restore the template you must never have two files with the name 'Inventory Clerk Template.docm' stored on your computer or opened at the same time. Microsoft Word 2007 keeps track of the template and having two file of the same name on your computer may crash the template.

More help.

Please see the video demonstration on our website.

http://www.activeinventories.co.uk/inv_report_tools_video.htm

Please contact us if require further assistance.

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AUTHORIZED USAGE

The usage of this report is limited to bone-fide purchasers of the Inventory Clerk Template.docm. Any other usage must be authorized.

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DISCLAIMER

The preceding information and details represent a general guide to using our 'Inventory Report Tools' Add In. These instructions are set out as a practical guide to the extent of the capabilities of the 'Inventory Report Tools' Add In capabilities and scope of facilities offered which are delivered on an 'As Is' basis. We do not guarantee the accuracy of any information set out in this document. Any actions the reader may take in relation to activities described herein are solely the responsibility of the reader

No warranty of accuracy is given concerning the contents of the information contained either in the information above or in the ability of the 'Inventory Report Tools' Add In to operate beyond the scope of the software programming as delivered. To the extent permitted by law no liability (including liability to any person by reason of negligence) will be accepted by Active Management Services Limited Trading as Active Inventories or its subsidiaries or employees or agents for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document or in failures of any description with the provided software..