

Expensive v0.2 User Guide

EzXpns



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Chapter 1

User Guide

1.1 Start screen

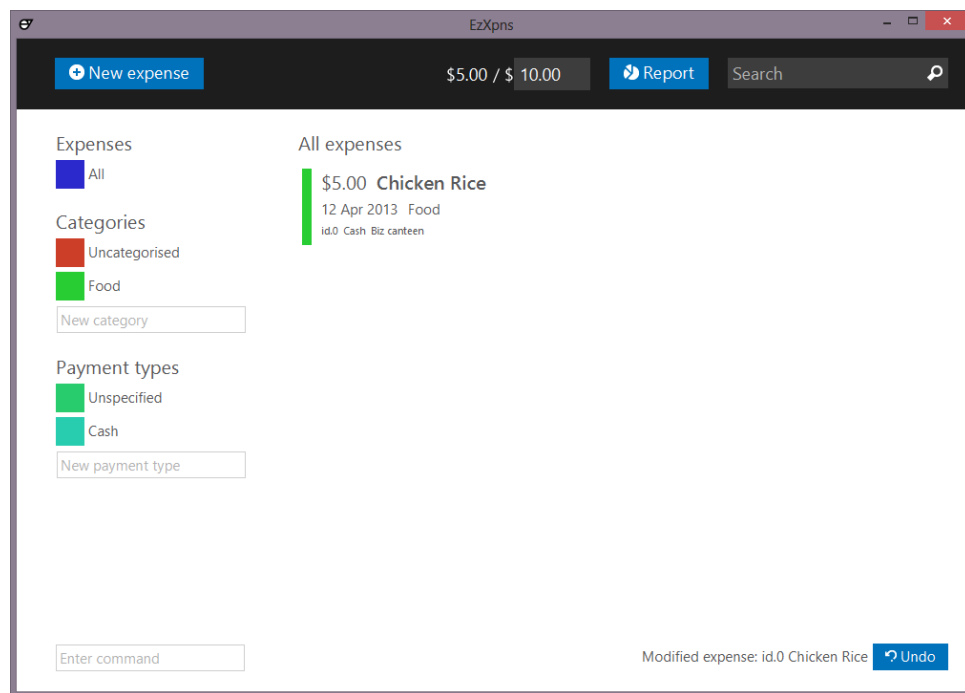


Figure 1.1: The initial start screen

1.2 Modify budget

1. Click the budget amount in the top bar (see Figure 1.1).
2. In the text field that appears, enter your new budget.
3. Hit the key.
4. Your budget will be updated accordingly.

1.3 Expenses

1.3.1 Add expense

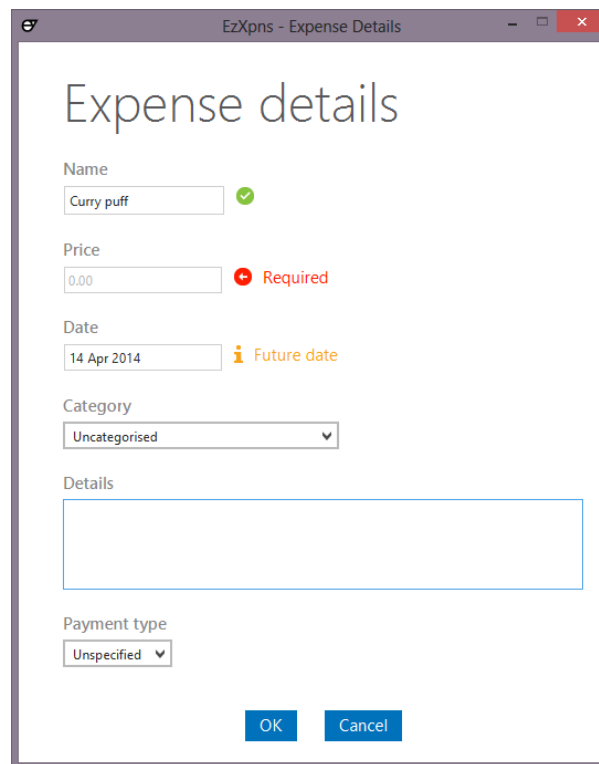
A screenshot of a web application window titled "EzXpns - Expense Details". The window contains a form for adding an expense. The form has the following fields: "Name" with the value "Curry puff" and a green checkmark; "Price" with the value "0.00" and a red error message "Required"; "Date" with the value "14 Apr 2014" and an orange warning message "Future date"; "Category" with a dropdown menu showing "Uncategorised"; "Details" with a large empty text area; and "Payment type" with a dropdown menu showing "Unspecified". At the bottom of the form are two buttons: "OK" and "Cancel".

Figure 1.2: The expense details window

1. Click the **New expense** button in the top bar.
2. In the popup (see Figure 1.2), fill in, for this expense:
 - Short name
 - Price
 - Date
 - Category
 - Details (optional)
 - Payment type
3. Click **OK**.
4. Your expense will be recorded.

1.3.2 Retrieve expenses

1. Click on any filter in the side bar.
2. The relevant expenses are displayed in the main panel.

1.3.3 Edit an expense

Using the expense details window

1. Click/hover over the expense you want to modify.
2. Click the **Edit** button next to the expense.
3. In the popup, change the details to the desired values.
4. Click **OK**.
5. The expense will be modified with the updated details.

Using drag-and-drop

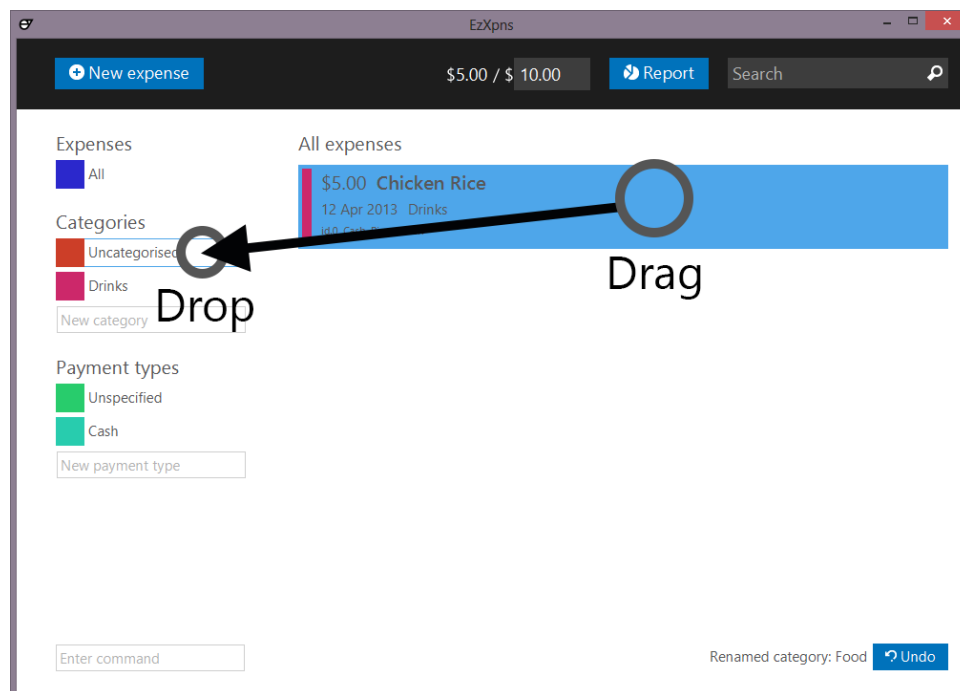


Figure 1.3: Drag and drop to edit an expense

1. Click and hold down the mouse button over the expense you want to modify.
2. While keeping the mouse button pressed, drag the expense over the category or payment type you wish to move the expense to.
3. Release the mouse button.
4. The expense will be modified with the target category or payment type.

1.3.4 Delete an expense

1. Click/hover over the expense you want to delete.
2. Click the **Delete** button next to the expense.
3. The expense will be deleted.

1.4 Categories and payment types

1.4.1 Create a category or payment type

1. Click on / in the side bar below the last listed category or payment type.
2. Type in the name of your new category or payment type.
3. Hit the key.
4. The new category or payment type is created and shown in the side bar.

1.4.2 Rename a category or payment type

1. In the side bar, click/hover over the category or payment type you wish to rename.
2. Click the button next to the category or payment type.
3. In the text field that shows up, enter a new name for the category or payment type.
4. Hit the key.
5. The category or payment type is renamed.

1.4.3 Delete a category or payment type

1. In the side bar, click/hover over the category or payment type you wish to delete.
2. Click the button next to the category or payment type.
3. In the case of deleting a category, the category is removed from the side bar, and all expenses tagged with this category are now uncategorised.
In the case of deleting a payment type, the payment type is removed from the side bar, and all expenses tagged with this payment type are now unspecified.

1.5 Search

1.5.1 Basic search

To perform a search, simply click on the search box in the top bar and start entering a few keywords. Expenses that match the keywords will be displayed immediately.

1.5.2 Advanced search

Advanced search allows you to search using multiple criteria. There is no limit on the number of search terms.

The input format for advanced search is as follows:

```
category:food&&text:"name" "description"  
date:3 Apr 2013..7 Apr 2013||paymentType:cash
```

Search types available are: payment type, category, text, date range.

Terms surrounded by a pair of quotation marks ("") are exact text search terms – expenses must contain the exact text included in the terms. The text attribute can have several search keywords. The order of search terms is not important.

1.6 Reports

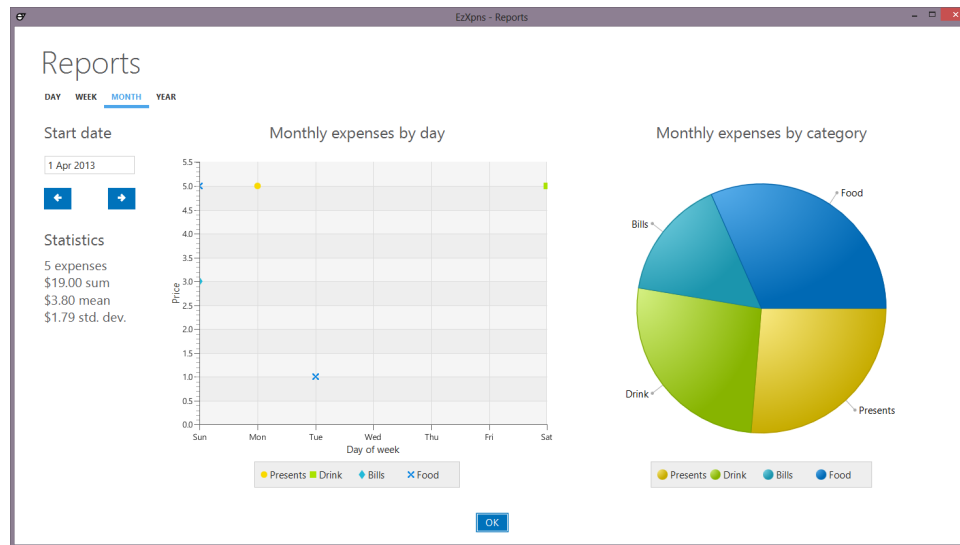


Figure 1.4: The reports window

1. Click the **Report** button in the top bar.
2. A new window will open, showing a report for the expenses for the current month (see Figure 1.4).
3. Switch between report types by clicking a tab along the top of the window. Change the reporting period by using the buttons on the left side of the window.

1.7 Undo

1.7.1 Undoing actions

1. Click the **Undo** button at the bottom right of the start screen to undo any undoable action.

1.7.2 Undoable actions

- Modify budget
- Create, modify, delete expenses
- Create, rename, delete categories and payment types

1.8 Alerts

A warning will appear when your expenses exceed your budget. Your total expenditure for the month will be coloured in red in the top bar of the start screen.

1.9 Command line

Every feature of EzXpns can be accessed through the command line. The command line is located at the bottom left of the start screen. It can quickly be accessed by using the **Ctrl**+**;** keyboard shortcut.

Action	Command
Add expense	add expense name=abc&&price=5&&category=food&&paymentType=Cash&&date= The order of attributes should be followed strictly. Optional attributes: description, date If date is empty, it will be treated as today's date. Required attributes: Name, price, category, paymentType If category or paymentType are new, they will be added along with the expense.
Update expense	update expense id=20&&paymentType=card&&description=food&& date=12Apr2013&&price=7&&name=abcd&&category=food The order of attributes is not important. Required attributes: id Optional attributes: paymentType, description, date, price, name, category Unspecified optional attributes will not be updated.
Delete expense	delete expense id=20 Required attributes: id
Add category	add category name=transport Required attributes: name name should be unique.
Update category	update category oldName=fud&&newName=food Required attributes: oldName, newName newName should be unique.
Delete category	delete category name=food Required attributes: name All expenses in the deleted category will be recategorised under "Uncategorised".
Add payment type	add paymentType name=cash Required attributes: name
Update payment type	update paymentType oldName=card&&newName=cash Required attributes: oldName, newName If the category specified in newName does not exist, it will be created.
Search expenses	search input=term Required attributes: input Refer to section 1.5.2 for input format.
View expenses	view expenses This command lists all expenses.
Generate report	generate report This command opens the reports window.
Undo last action	undo This command undos the last performed undoable action.
Set budget	set budget=100 Required attributes: budget

1.10 Keyboard shortcuts

The following keyboard shortcuts help you to quickly perform the most commonly used actions.

Key combinations	Function
Ctrl + z	Undo
Ctrl + n	New expense
Ctrl + r	Open report window
Ctrl + e	Edit selected expense
Del.	Delete selected expense
Ctrl + ;	Go to the command line
F3, Ctrl + f, or Ctrl + k	Go to the search bar
Ctrl + b	Go to the budget field