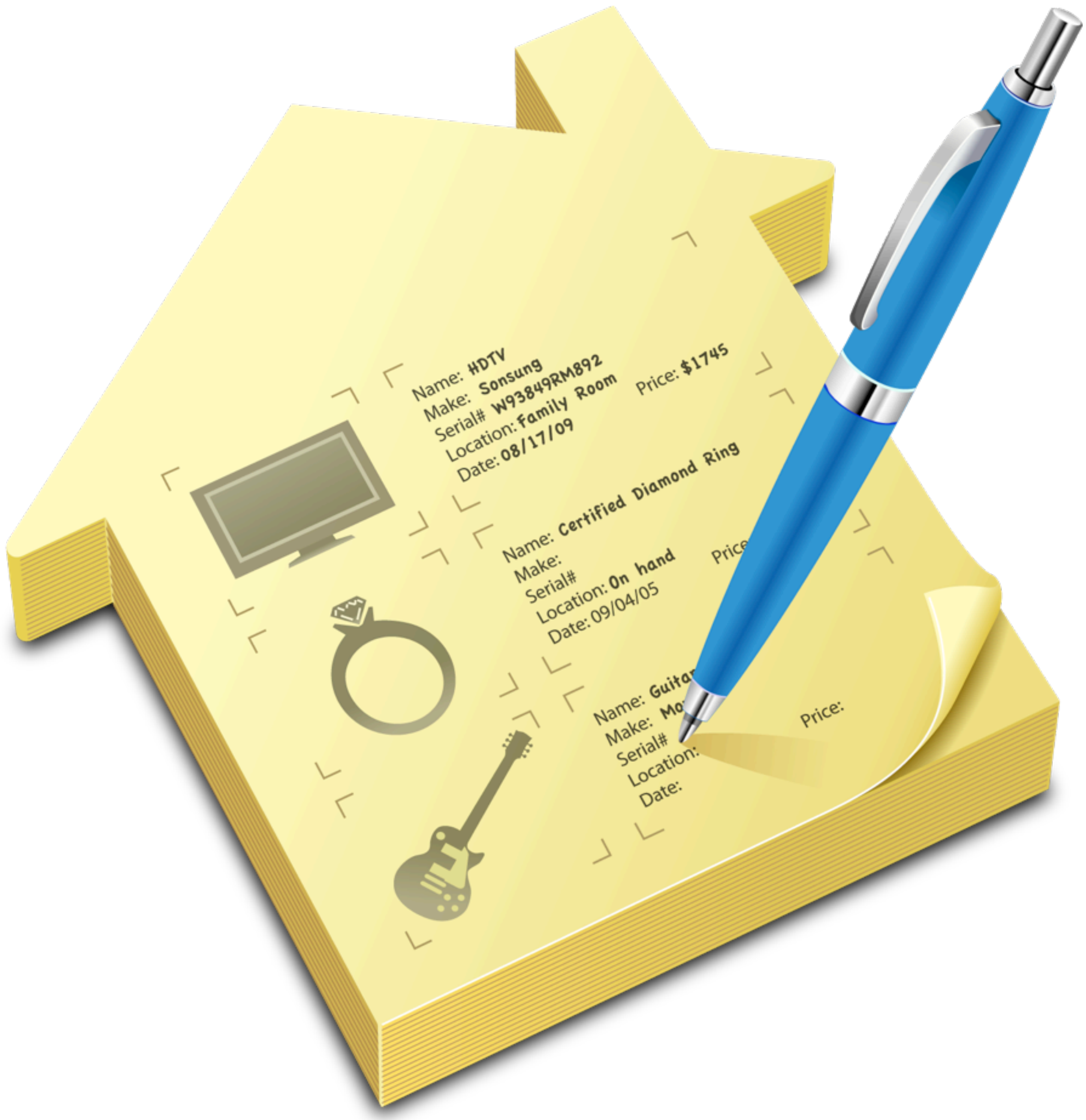
Home Inventory User Guide Version 3.0



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About Home Inventory

What is Home Inventory?

Home Inventory can best be summed up with the answer to this question: If you were sitting in your insurance adjuster's office about to file a claim for the property you lost due to some calamity, would you be able to come up with a complete list of the property you lost, show proof that you actually owned it, and be able to come up with an accurate monetary value for all of it? You purchased insurance to help you replace your valuables should they be damaged or stolen, but insurance alone is not enough. In the event you do have to make a claim, having a complete and up-to-date inventory of the items in your home will let you be able to determine exactly what items were lost or damaged, present proof of ownership of those items, and determine what they are all worth.

Home Inventory makes it easy and fun to build and maintain a complete inventory of the items in your home. With Home Inventory, you can store all kinds of information about your items as well attach photos and receipts of purchase, which can be offered as proof of possession. You can print a detailed report of all of your items to keep in a safe place should you ever need the information to make a claim.

Home Inventory is more than just an easy to use inventory management system. Its dated notes feature can be used to keep track of everything from item repair histories to room renovations. You can enter the coverage information from your insurance policies and use Home Inventory's coverage analysis report to determine if you are under-covered or over-covered in any areas. You can also store warranty information so that it will be easily accessible when something stops working, and attach files to items, which is a great way to keep product manuals and other information close at hand should you need them.

System Requirements

Home Inventory will run on any Intel-based Mac running OS X 10.7 (Lion) or later. It is recommended that you have at least 2.0 GB of RAM on your system. The amount of hard drive space required depends on the amount of information you store in your inventory.

Creating a Home Inventory

Completing an initial inventory of your home can be a time consuming process. There are a variety of different approaches you can take. The first section of this chapter is dedicated to one such approach. Before beginning the process, it is recommended that you finish reading this manual so you are familiar with all the features in Home Inventory and how they can be used to build and maintain your inventory.

Suggested Method for Performing a Home Inventory

The method outlined below is a suggestion of a process to complete an initial inventory of your home. Home Inventory does not require that you adhere to any specific methodology when building your inventory, though it is recommended that you use an orderly approach to insure all of your items are thoroughly documented.

- Carefully read through your insurance policy and any related material from your insurance provider so that you are aware of the extent of your coverage and the information you will be asked to provide in the event you need to file a claim. You may also want to contact your insurance agent to find out if he or she has any additional suggestions. Depending on your policy, it may not be necessary to document certain types of items individually, such as clothing, but instead just keep an estimate of the quantity of these types of items (e.g. 12 dresses, 7 pairs of pants, etc). Be sure to consult the issuer of your policy if you have any questions or doubts about the information you would need to file a claim.

- You can build your inventory entirely with your Mac or with the help of Home Inventory Photo Remote. Home Inventory Photo Remote is an iOS helper app that allows you to add new categories, collections, locations, photos, and items to your inventory from your mobile device so you can build a quick outline of your inventory and fill in the details later. You can find out more about Home Inventory Photo Remote in the Home Inventory Photo Remote chapter.

- Make a list of the locations in your home where you have personal property. Usually a location will equate to a room in your home, but it is important not to forget those locations that aren't necessarily rooms, such as the attic, closets, the garage, and the deck. Don't worry about adding any items yet. Instead, concentrate on building a list of locations. You can find out more about entering locations in Home Inventory in the Categories, Collections, & Locations and Home Inventory Photo Remote chapters.

- If you have a large group of common items, such as DVDs, a fine china set, or baseball cards, consider creating a collection to place these items in. You can find out more about creating collections in Home Inventory in the Categories, Collections, & Locations and Home Inventory Photo Remote chapters.
- Complete your inventory one location or collection at a time before moving on to the next, especially if you are just starting out on building a home inventory. Proceeding in an orderly manner will help ensure everything is documented properly.
- When you begin to work on a location or collection, take some photos of the location or the collection as a whole and add them to the location/collection in Home Inventory. These photos show your items in their places in your home and help to establish proof of possession. You may want to make relevant notes about the location/collection, such as any renovations you may have made to a room or the color of paint used on the walls. You can find out more about adding photos and notes to a location or collection in the Categories, Collections, & Locations and Home Inventory Photo Remote chapters.
- Enter the name and quantity of the items in the location or collection you are working on. You don't need to worry about filling in any additional information right now. The important thing is to have a complete list of all items. You can find out more information on adding items in Home Inventory in the Working with Items chapter.
- Print an *Item List* report for the specific location or collection you are working on. Using this report as a reference, gather all the receipts and other pertinent information about these items. You can find out more about creating and printing reports in the Reports chapter.
- Take photos of the items in the location or collection you are working on. You may also want to take photos of serial number, model number, and other identifying characteristics of your items, where applicable. These photos help establish your proof of ownership should you need to make a claim. While professionally photographed product shots found on manufacturers' websites and online retailers, such as Amazon, look good, they do not establish proof of ownership. You can find out more about adding photos to an item in the Photos and Receipts and the Home Inventory Photo Remote chapters.
- Fill out the details from the information you have gathered for each of the items in the location or collection. You can take advantage of the Home Inventory built-in

scanning feature to scan printed receipts (and photos, if you don't have a digital camera). If you prefer to import all your photos and/or receipts at one time and then attach them to your items, you can do so using the *Album View*. Take a look at the Working with Items chapter for more information on the entering item information and the Album View chapter for more information on using the *Album View.*

- Fill out the item information for the next location or collection in your list and keep repeating the process until you have finished documenting all items in all locations and collections.

Making Sure You Have Adequate Coverage

Having a complete home inventory is necessary to assess the adequacy of your coverage. Using the Home Inventory Policy View, you can enter all the coverage details of your homeowners or renters insurance policy. Home Inventory will let you know the value of the items covered by a given coverage entry and if you exceed the coverage limits defined by your policy. For a more detailed analysis you can run a *Coverage Analysis* report to determine if any adjustments are needed in the coverage provided by your policy.

If you do not have an insurance policy that covers the property in your home, you can print an *Item List* report, organized by category, to take to an insurance agent who can use the information to put together a policy that suits your needs.

Home Inventory can also store information about other types of insurances policies such as automobile insurance, life insurance, and more.

Refer to the chapter on Managing Your Insurance Policies for more information on entering policy information into Home Inventory and the Reports chapter for more information on generating *Item List* and *Coverage Analysis* reports.

Keeping Your Inventory Up-to-Date

It is important to add new items to your inventory as you acquire them and remove those that you have discarded so your inventory is always up-to-date. You should also run a *Coverage Analysis* report at least once a year to make sure your policy still adequately covers your belongings.

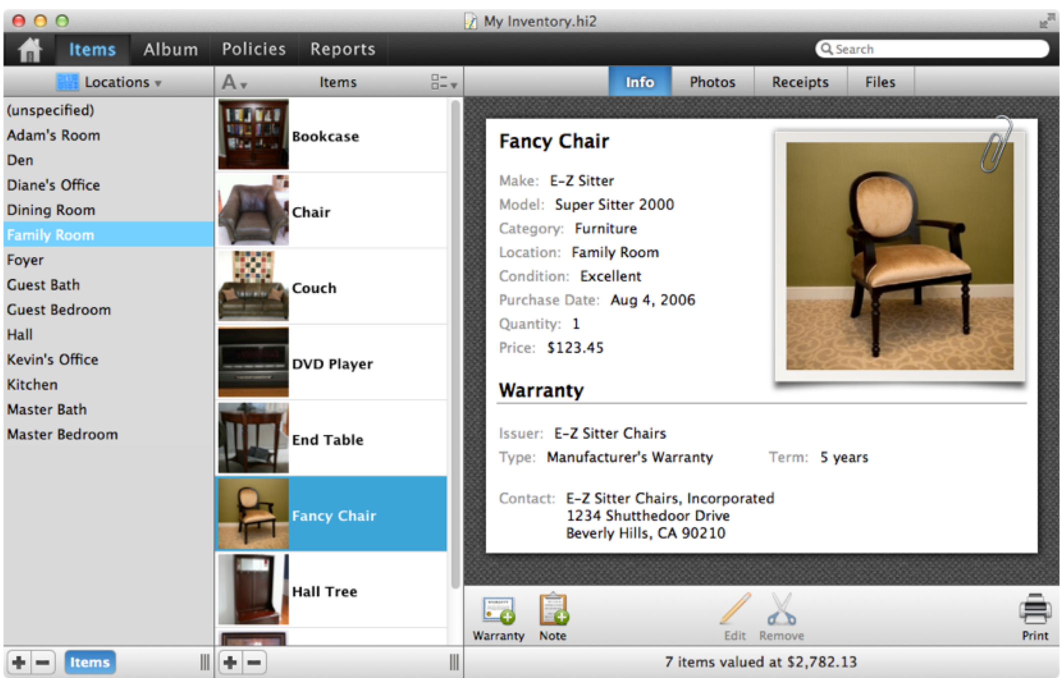
Home Inventory Basics

Home Inventory is a tool for managing creating and maintaining an inventory of the items in your home.

An inventory consists of the items, categories, collections, locations, policies, and related information (such as photos, receipts, warranties, notes, attached files, coverage entries, etc) that together describe your personal property and the insurance policies that cover it. Home Inventory stores all the information for an inventory in a file on your computer called an inventory file.

Inventory Windows

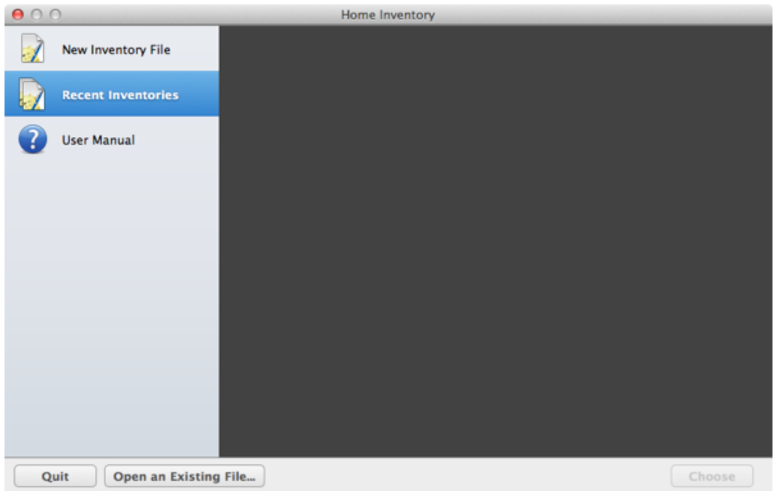
An inventory is displayed in an *Inventory Window*:



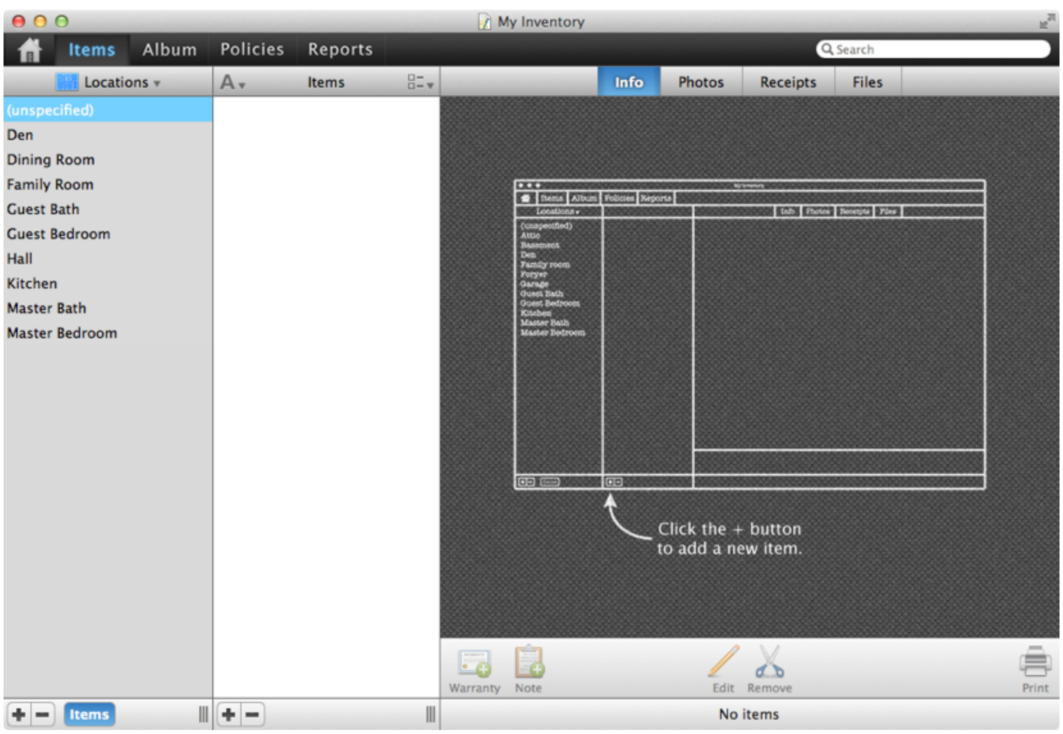
Home Inventory can manage multiple inventories and you can have more than one inventory open at one time. Each open inventory will have its own inventory window. If you have belongings at more than one physical location (such as a storage facility or a vacation home), it is recommended that you use a separate inventory file for each location.

What Happens When Home Inventory Starts

The first time you start Home Inventory, you will be presented with the *Inventory File Manager Window*:



To create a new inventory file in which to store your data, click *New Inventory File*. You will be asked for a name for your inventory file and a location to save it on your hard drive. Once you have done this, you will be presented with an inventory window:



This new inventory contains a few pre-created locations (rooms) and categories to get you started. You can edit, add to, and remove these if you choose (See the Categories, Collections, & Locations chapter for more information).

Once you have saved an inventory file, Home Inventory will automatically open the last inventory file you worked with the next time it is run.

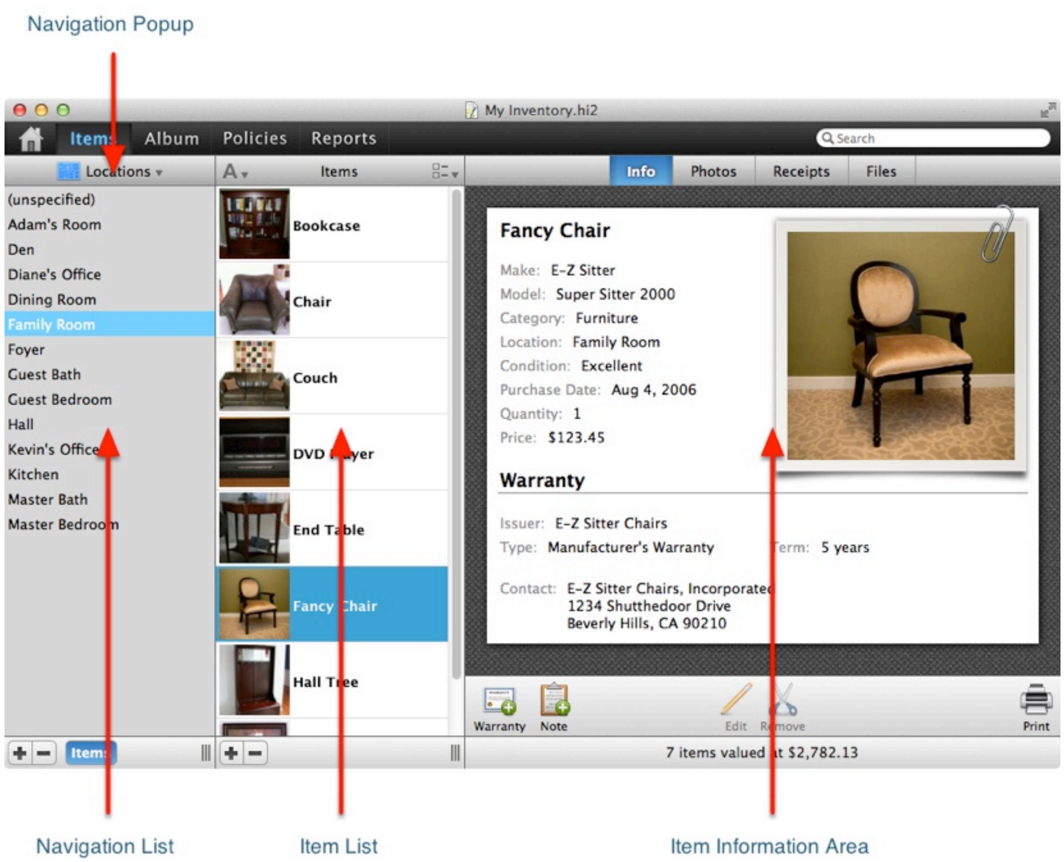
Creating a New Inventory

You can create a new, empty inventory by selecting *New* from the *File* menu. An inventory file will be created for this inventory when you first save it (with a name and location of your choosing).

Working with Items

Introducing the Item View

The Home Inventory *Item View* is where you go to add, edit, and view item information. You can add, edit and remove items, organize your items by location, category, or collection, and create and manage locations, categories, and collections. When Home Inventory opens an existing inventory file or creates a new, empty inventory, the *Inventory Window* is displayed showing the *Item View*:



The *Item View* is divided into four key areas:

Item List: The contents of the *Item List* is dependent upon what is selected in the *Navigation Popup* and in the *Navigation List*. If *Categories* is selected in the *Navigation Popup*, the items belonging to the category selected in the *Navigation List* are displayed in the *Item List*. If *Collections* is selected in the *Navigation Popup*, the *Item List* displays the items for the selected collection in the *Navigation List*. If *Locations* is selected in the *Navigation Popup*, the items in the location selected in the *Navigation List* are displayed in the *Item List*. If *All Items* is selected in the *Navigation Popup*, the *Item List* is hidden and all the items in your inventory are displayed in the *Navigation List*, effectively making it the *Item List*.

Item Information Area: This is where you see the detailed information about the item(s) selected in the *Item List*.

Navigation List: The contents of this list depend on what is selected in the *Navigation Popup*. If *Locations* is selected, the *Navigation List* displays all the locations you have defined in your inventory. If *Categories* is selected, the *Navigation List* displays all the categories defined in your inventory. If *Collections* is selected, the *Navigation List* displays all the collections you have defined in your inventory. If *All Items* is selected, the *Navigation List* displays all the items you have in your inventory. In the case of *All Items*, the *Item List* is not shown as the items are shown in the *Navigation List* and you can select the item(s) you wish to view in the *Item Information Area* from that list.

Navigation Popup: You can click on the *Navigation Popup* to choose the type of information shown in the *Navigation List* (locations, categories, collections, or all items in your inventory).

Items

Home Inventory was built to track and manage your personal property and that property is made up of items. An item is a unique object, such as a ring or a television. Home Inventory can keep track of a variety of characteristics about each of your items, including:

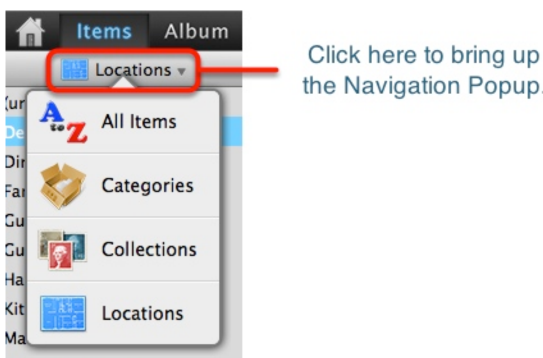
- Name/title/short description
- Make/manufacturer
- Model number
- Serial number
- Category (electronics, jewelry, etc.)
- Location/room an item is in
- General condition (excellent, good, poor, etc.)
- Collection the item belongs to (books, DVDs, etc.)
- Where or from whom an item was purchased or acquired
- Purchase date

- Purchase price
- Current/replacement value
- Quantity of the same item in your inventory
- User assigned tags
- ISBN or EAN number
- Photos of your items
- Receipts of purchase
- Notes on your items
- Warranty information
- File attachments that can be used to store owner's manuals, etc.

Home Inventory also lets you add up to ten custom fields to keep track of additional characteristics for items in your inventory.

Navigating the Item List

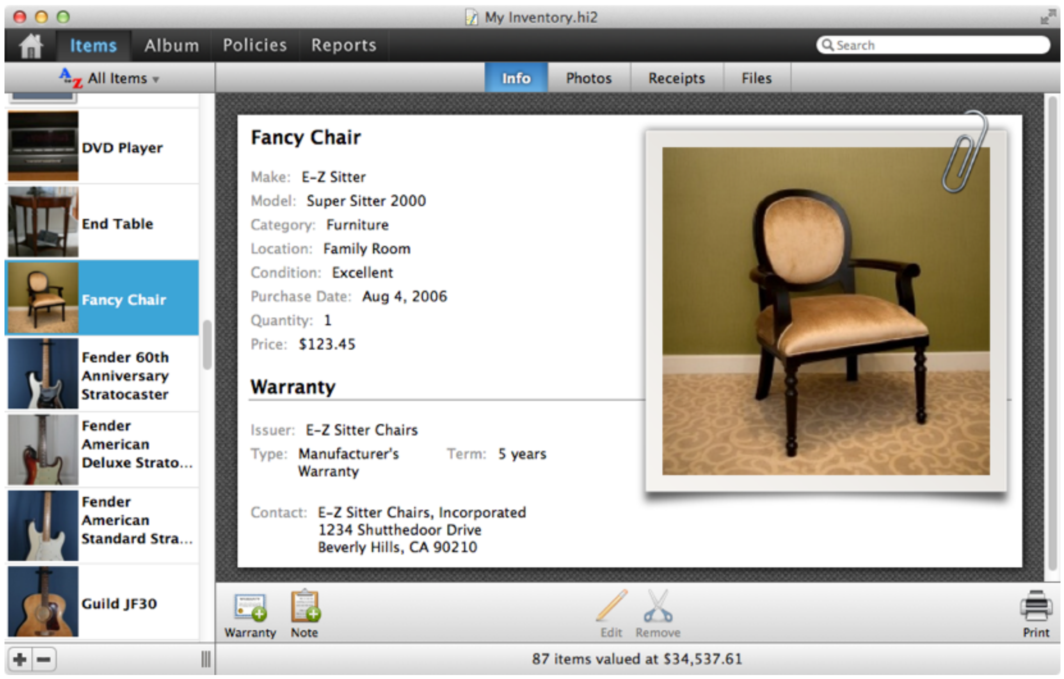
There are four different ways to navigate your way through the items in your inventory. The first three involve filtering the items you see in the *Item List* by the category, collection, or location. To do this, click on the *Navigation Popup* and select either *Categories*, *Collections*, or *Locations*:



Depending on what you select, either the categories, collections, or locations in your inventory will be shown in the *Navigation List*. When you select a category, collection, or location from the *Navigation List*, the items belonging to that selection will be shown in the *Item List* (for example, if you have *Locations* selected in the *Navigation Popup* and then select Kitchen from the *Navigation List*, all the items you have in the kitchen will appear in the *Item List*). To view the detailed information about an item, click that item in the *Item List* to select it and the item detail will be shown in the *Item Information Area*.

When you are browsing items by category, collection, or location and add a new item to your inventory, the information for that item will automatically be populated with the category, collection, or location selected in the *Navigation List*.

If you would rather see all of your items in a single list click on the *Navigation Popup* and select *All Items*. When you do this, the *Item List* will disappear and all the items in your inventory will appear in the *Navigation List*:



To view the detailed information for an item, click on the item in the *Navigation List*. The detailed information for the item will be shown in the *Item Information Area*.

Selecting Multiple Items

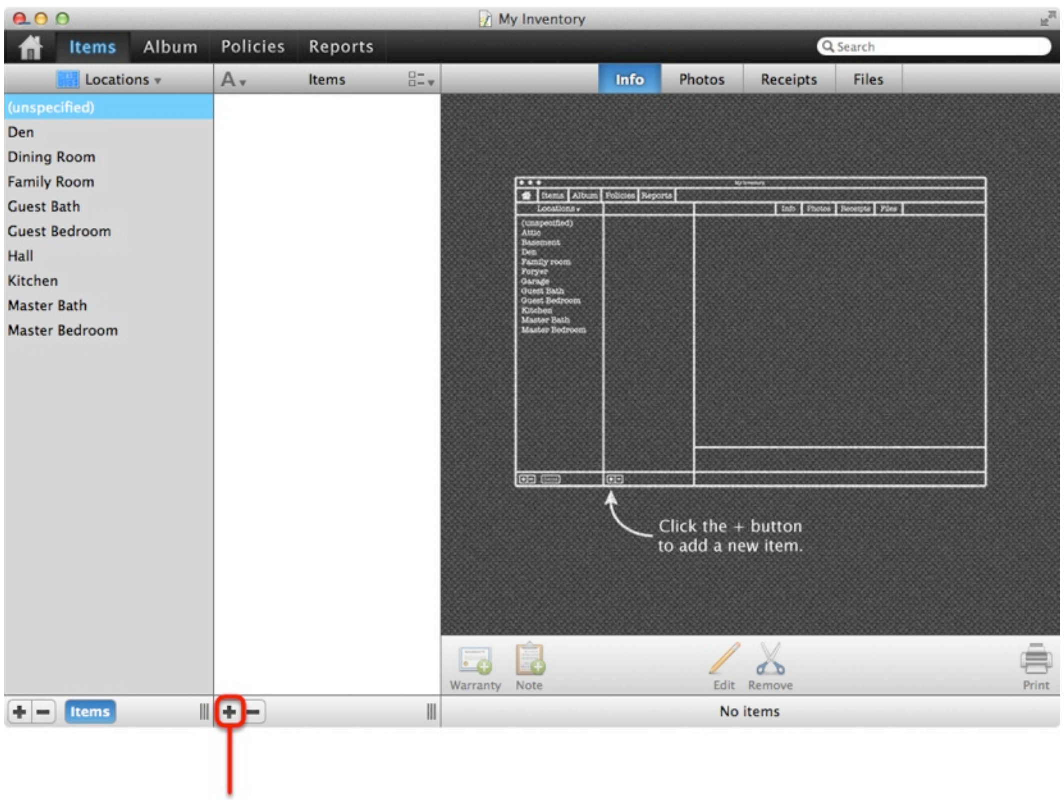
Regardless of the navigation you are using, you can view information about multiple items simultaneously. To select consecutive items in a list click on the first item in the list you are interested in. Then, while holding down the shift key on your keyboard, click the last item. Home Inventory will automatically select the first item you clicked on, the last item you clicked on, and every item in between. If you wish to select multiple items that are not grouped together in the list, you can hold down the Command (⌘) key while clicking an item. That item will be selected without deselecting any previously selected item(s).

When multiple items are selected, the Item Information Area only shows the characteristics that are common to the selected items. Any characteristic that is changed, added, or removed will be applied to all the items selected. For example, if you have multiple items selected and change the location to Bedroom, all the selected items will be moved to the Bedroom location. Likewise, if you add a photo or receipt when you have multiple items selected, that photo or receipt is attached to all the selected items. If you click the **-** button beneath the list of items to remove an item, all the selected items will be removed from your inventory.

Multiple selection is an easy way to make bulk changes to items or remove multiple items from your inventory at one time.

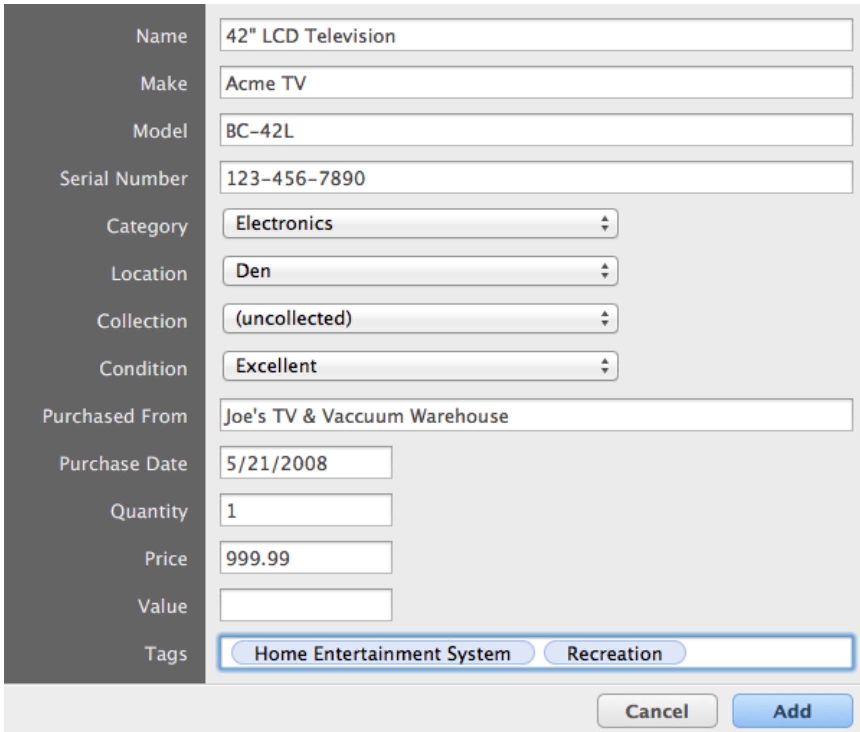
Adding a Item

To add a new item to your inventory, click the + button underneath the *Item List* (or *Navigation List* if you are navigating by *All Items*):



Click this button to add a new item.

You will then be prompted to enter information about your item in the *Item Information Entry Panel*:



Fill in the relevant fields – you do not have to enter information for every field; only the *Name* field is required – and click the *Add* button to add the item to your inventory.

The fields shown here represent the default field layout. You can change the fields and the order in which they are shown, or add your own custom fields (see the Field Layouts & Custom Fields chapter for more information). The following table describes the purpose of each of the fields supplied by Home Inventory:

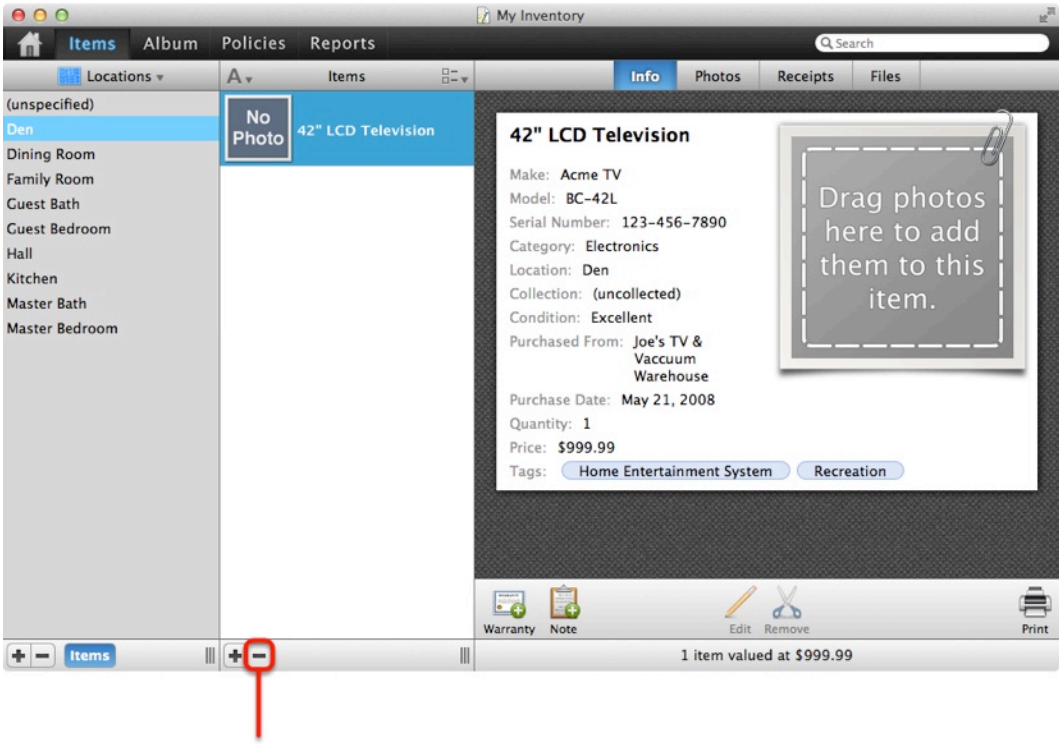
Field Name	Purpose
Category	The class or type of item, such as electronics or jewelry.
Collection	The collection the item belongs to.
Condition	The general condition of the item (excellent, good, poor, etc).
Date	The date the item was purchased or acquired.
ISBN/EAN Number	The ISBN or EAN number for the item. ISBN and EAN numbers are typically associated with published media, such as books and music CDs. *This field is not displayed in the layout by default.*
Location	The location of the item in your home. This is typically a room, such as the kitchen, or some other area in or around your home, such as the front porch or garage.
Make	The name of the company that produced the item.

Field Name	Purpose
Model	The model number of the item.
Name	The name of the item. This is typically a short description of your item, such a 42” LC Television or MacBook Pro Laptop. In the case of a book, movie, or CD the title is often used as the name.
Price	The purchase price of the item.
Purchased From	Where you purchased or acquired the item.
Quantity	The number of these items that are in your inventory.
Serial Number	The serial number of the item.
Tags	A series of words or phrases that are typically used to further describe the item or its purpose, though they can be used however you like. When entering multiple tags, separate each tag with a comma (,).
Value	The value of the item. This is used by the policy and reporting features in Home Inventory in calculating coverage assessments and totaling the value of your items. If no value is specified, the item’s price is used in its place. For most policies, the value would be the replacement cost of the item.

Removing an Item

There are two ways to remove an item from your inventory.

1. Select the item in the *Item List* and then click the **-** button:



Click this button to remove the selected item.

2. Or, select the item in the *Item List* and then click anywhere on the item's information in *Item Information Area* to select it (it will be highlighted in blue when selected):

Click the *Remove* button in the *Bottom Button Bar* at the bottom of the *Item Information Area*:

You will be prompted to confirm the removal before the item is permanently removed from your inventory.

Editing Item Information

There are three methods to choose from when you want to edit the basic information for an item:

1. Double-click the name of the item in the *Item List*.

2. Double-click the item's information in the *Item Information Area*.

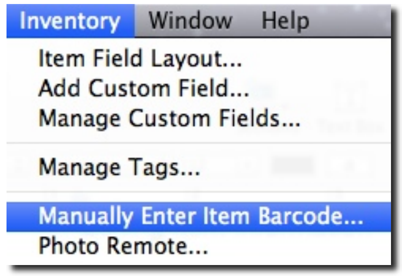
3. Click on the item's information in the *Item Information Area* (it will turn blue when selected) and then click the *Edit* button in *Bottom Button Bar*:

You will then be presented with the *Item Information Entry Panel*. Update the relevant fields and then click the *Update* button to save the changes.

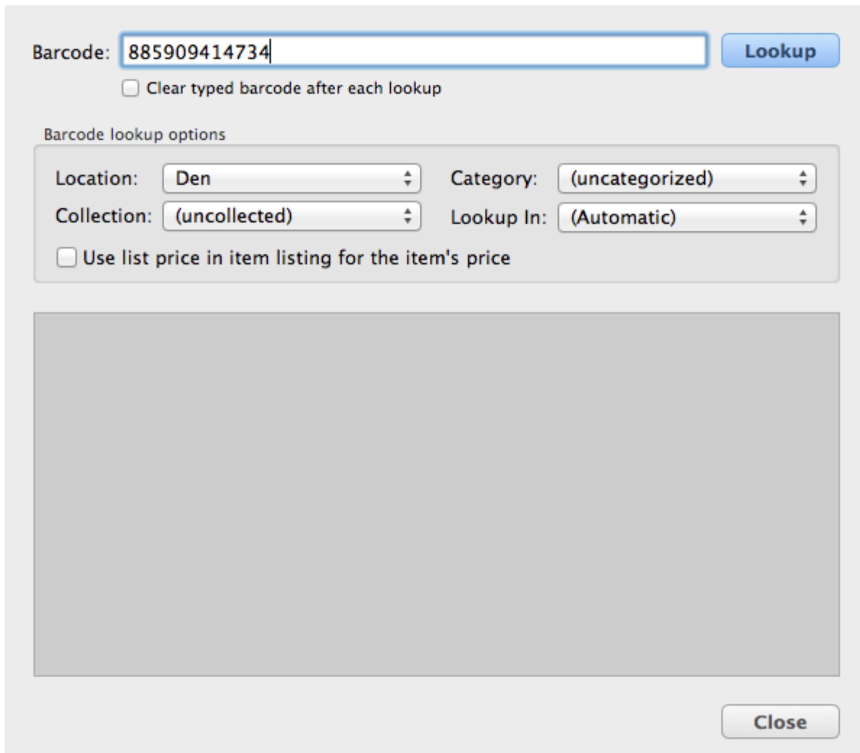
Adding an Item By Entering a Barcode

An alternative way to add an item to your inventory is to enter the barcode found on the item or its packaging and have Home Inventory lookup the item's information online. Home Inventory lets you enter the barcode number using your keyboard or using a barcode scanner that mimics keyboard input. If you are using a barcode scanner, you will want to make sure you set it up so that a New Line character is sent at the end of each scan. You will need to consult the documentation for your barcode scanner on how to do this.

To enter a barcode, select *Manually Enter Item Barcode...* from the *Inventory* menu:



This will bring up the *Barcode Entry Window*:



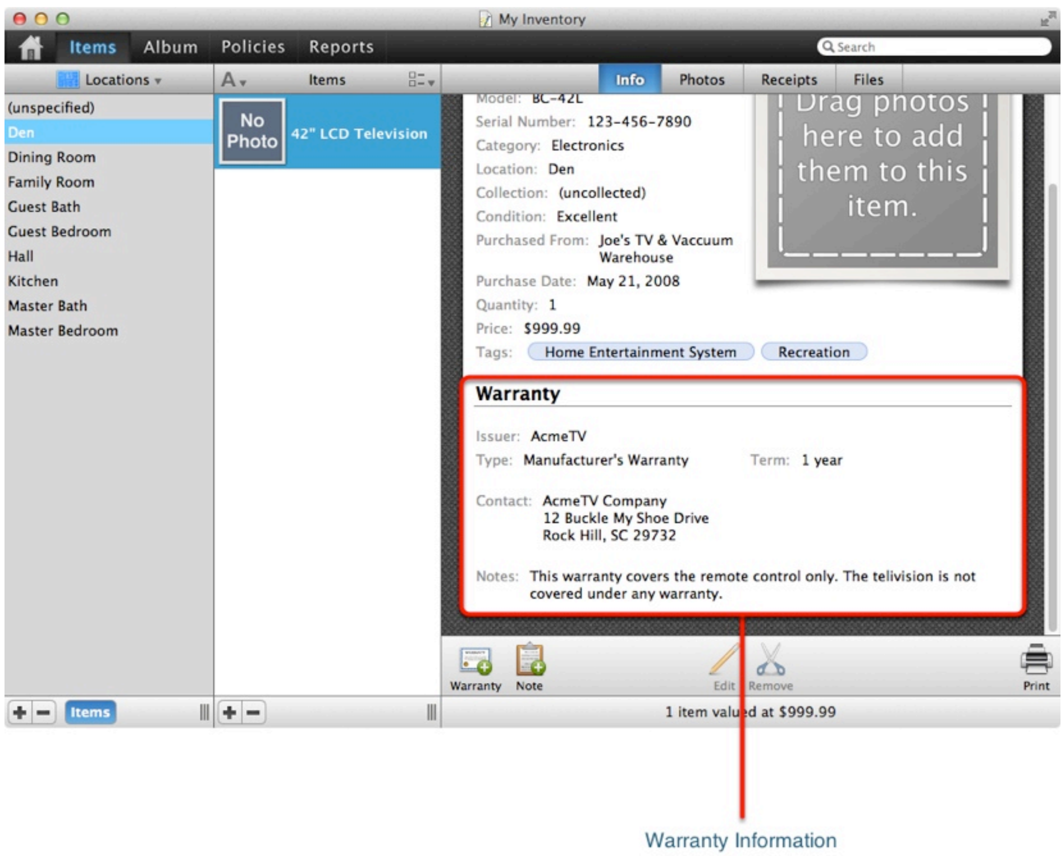
Enter the barcode number in the *Barcode* field and press the *Return* key or click the *Lookup* button to lookup the item information online and add it to your inventory. You can change the online source used to lookup barcode information by clicking on the *Lookup In* popup.

By default, items added through the *Barcode Entry Window* are added to the category, collection, and location currently selected in the *Inventory Window*'s navigation lists. You can change the category, collection, and location the item will be assigned to by selecting the appropriate popup in the *Barcode Entry Window*.

NOTE: Home Inventory relies on third party services to lookup item information from a barcode scan. Binary Formations LLC cannot guarantee the accuracy of this information or the availability of any or all of these services for use by Home Inventory. Currently this feature is supported only for items with barcodes that originate in the United States, United Kingdom, France, Germany, Canada, or Japan.

Item Warranties

Warranty information for an item is shown beneath the item information in the *Item Information Area*:

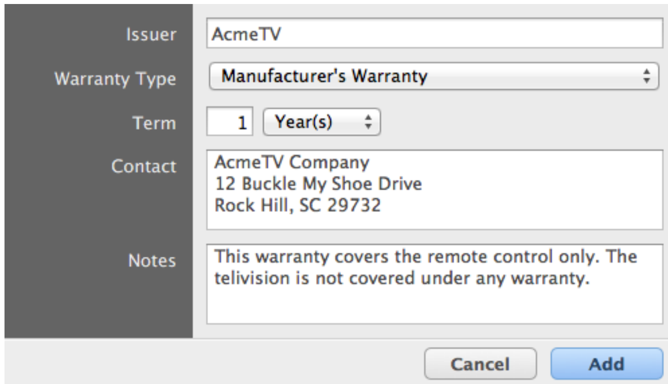


Home Inventory can store multiple warranties for each item which lets you enter the manufacturer's warranty and any extended or supplementary warranties.

Adding a Warranty to an Item

To add a warranty entry for the selected item, click the *Add Warranty* button in the *Bottom Button Bar*:

This will bring up the *Warranty Panel*:



Enter the name of the company or organization that issued the warranty in the *Issuer Box*. You can select the type of warranty from the *Type Popup* (available options are manufacturer's warranty, extended warranty, and other).

Enter the term (duration) of the warranty using the *Term Box* and *Term Period Popup*. For example, to enter a warranty term of five years, you would type 5 in the *Term Box* and select *Year(s)* from the *Term Period Popup*. For lifetime warranties you do not need to enter anything into the *Term Box*, just select the *Lifetime* option from the *Term Period Popup*.

The *Contact Info Box* is used to enter any contact information you wish to record in order to get in touch with the warranty issuer should the need to file a warranty claim arise.

The *Notes Box* is used to enter any additional information you wish to record regarding the warranty.

Once you have finished filling in the necessary information, click the *Add* button to add the warranty to your item.

Removing a Warranty

You can remove a warranty from an item by first clicking on the warranty in the Warranty Information section of the *Item Information Area* to select it (the warranty will have a blue background when it is selected). Next, either press the delete key on your keyboard or click the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the warranty's removal before it is permanently removed from your inventory.

Editing a Warranty

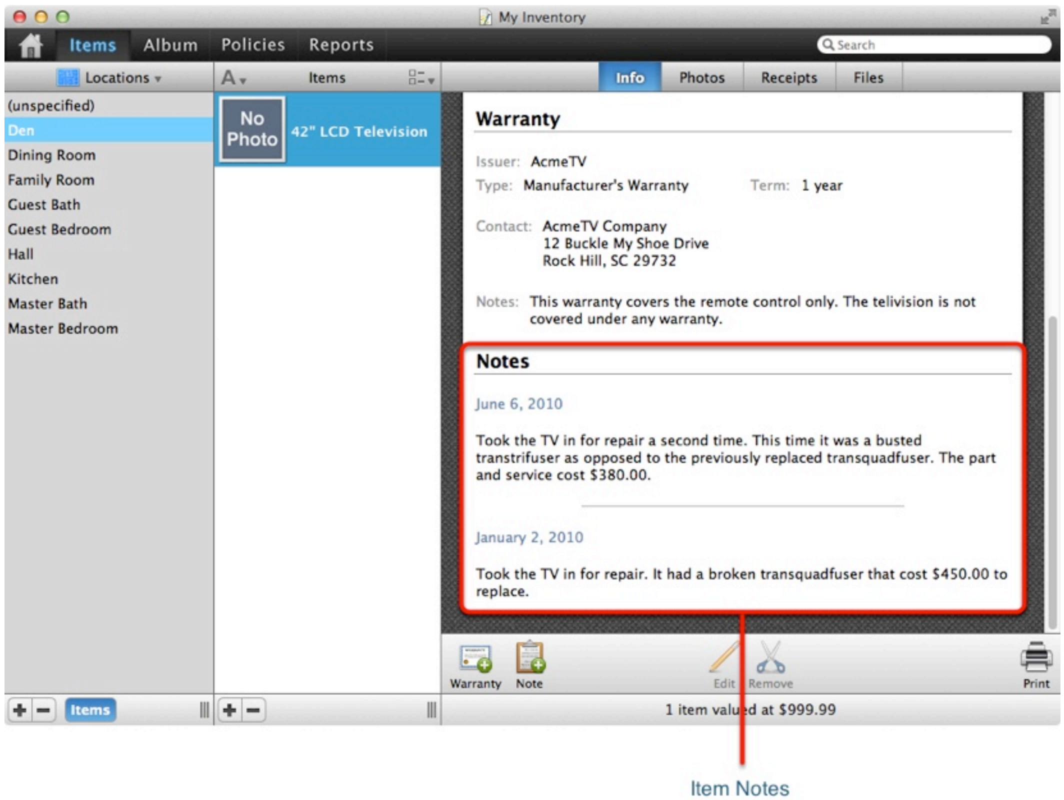
You can edit a warranty by double-clicking on the warranty in the *Warranty Information* section of the *Item Information Area* or clicking on it once to select it (the warranty's background will turn blue when it is selected) and then clicking the *Edit* button on the *Bottom Button Bar*:

This will bring up the *Warranty Panel* with the information for the selected warranty. Make whatever changes you need and then click the *Update* button to save these changes.

Item Notes

It is often useful to keep notes about an item. Maybe you have a computer that you upgrade periodically, adding new RAM, putting in a bigger hard drive, etc, or you had an item repaired and want to keep track of its repair history. Home Inventory allows you to add an unlimited number of notes to your items. Each note can have an optional date.

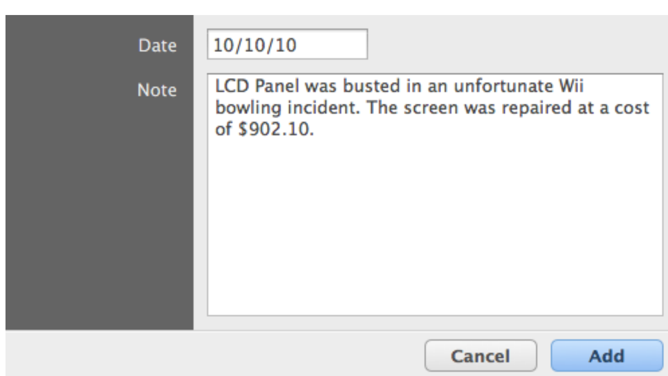
The notes for an item are shown beneath the item information (and warranty information, if there is any) in the the *Item Information Area*:



Adding a Note

To add a new note to an item, click the *Add Note* button in the *Bottom Button Bar*:

This will bring up the *Note Panel*:



To mark the note with a date, enter the date in the *Date Box* (date is optional). Type your note in the *Note Box*. When finished, click the *Add* button to add the note to your item.

Removing a Note

Remove a note from an item by first clicking on the note in the *Item Notes* section of the *Item Information Area* to select it (the background of the note will turn blue when it is selected). Next, either press the delete key or click the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the note's removal before it is permanently removed from your inventory.

Editing a Note

Edit a note by double-clicking on the note in the *Item Notes* section of the *Item Information Area* or clicking on it once to select it (the background of the note will turn blue when it is selected) and then clicking the *Edit* button on the *Bottom Button Bar*:

This will bring up the *Note Panel* with the information for the selected note. Make the changes you need and then click the *Update* button to save these changes.

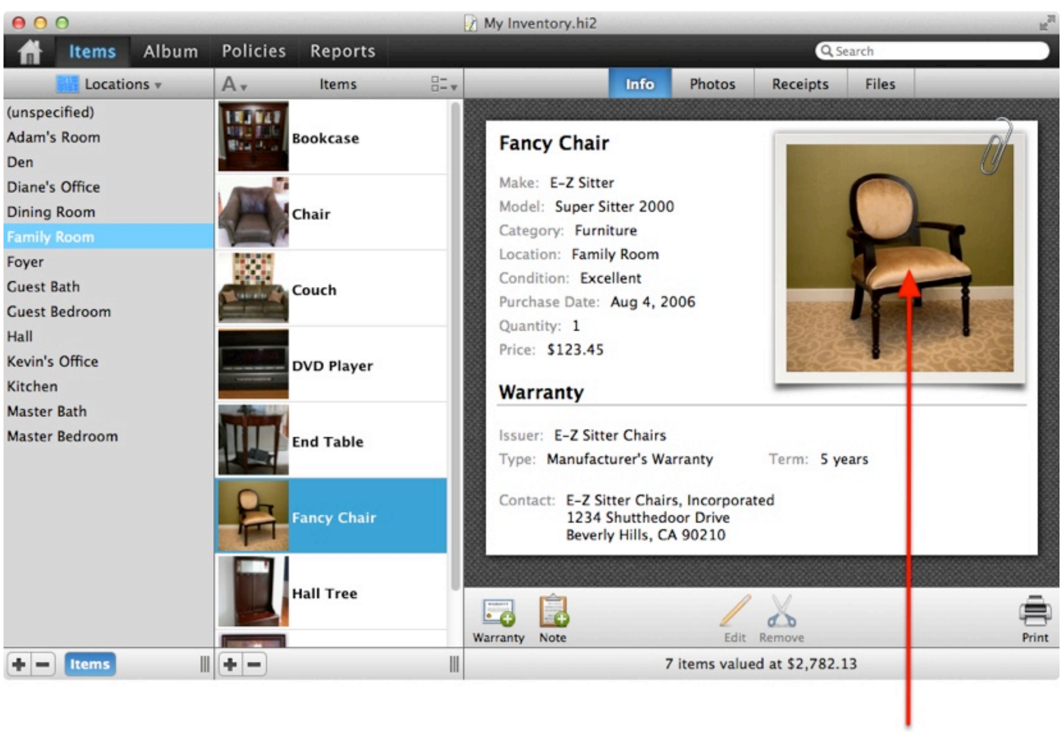
Photos and Receipts

Item Photos

Photos of your items in your home provide a way to show your belongings were in your possession. Home Inventory has no hard limit on the number of photos you can have for each item, though all you really need is a single, clear and distinct photo of each item. Photos of any identifying markings, such as the serial number and model number or any unique features, can also be helpful to the police in the case of theft.

Since proof of ownership and condition are the main purposes of including photos in your inventory, it is best to include photos of the actual item in your home rather than promotional shots found online. Although these professionally taken photos look great, they do nothing to show the item was in your possession.

The main photo for an item is the photo shown to the right of the item's information:

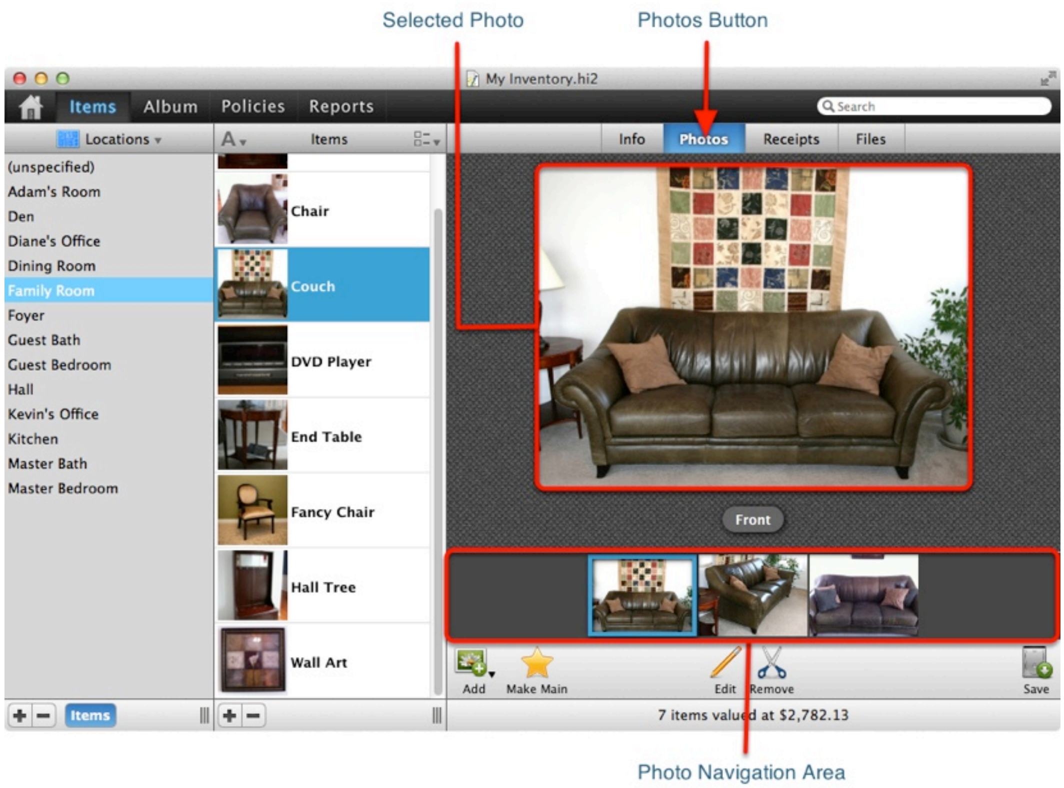


Main Photo

You can add a photo to an item by dragging and dropping the image or image file into the photo area. This not only adds the photo to the item, but makes it the main photo (in the case of multiple item photos).

The Photo View

You can view and manage all of the photos associated with an item in the *Photo View*. To show the *Photo View*, click the *Photos* button at the top of the *Item Information Area*:



The *Selected Photo* (the photo that an operation such as make main, edit, remove, or save might be applied to) takes up most of the view. If the *Selected Photo* has a label, it will appear directly beneath it.

If the item has more than one photo, the *Photo Navigation Area* is shown. This gives you thumbnails of all the photos associated with the item. Clicking on a photo in the *Photo Navigation Area* makes it the *Selected Photo*.

Adding Photos

Home Inventory provides several ways to add photos to an item in the *Photo View*:

• From image files on your computer

• Taking a picture with your onboard iSight or other video camera

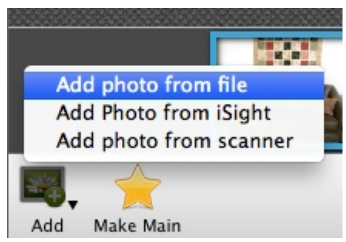
• Scanning the photo using a scanner

• Using drag and drop

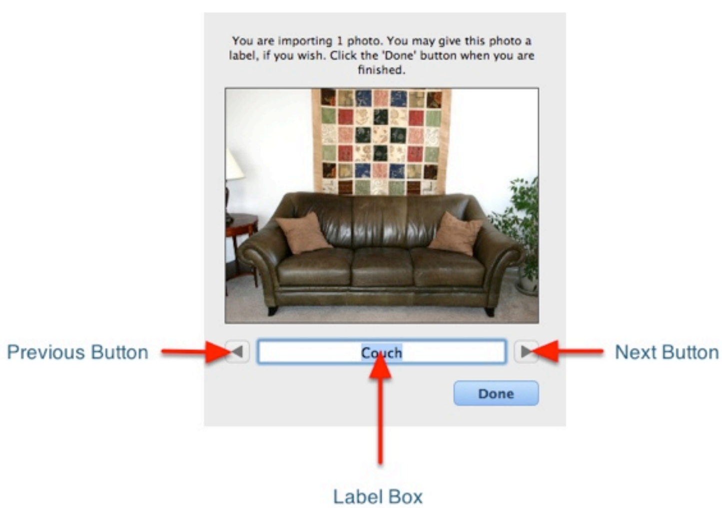
These methods will be discussed in detail over the next few sections.

Adding a Photo from a File

One method of adding a photo to an item is by importing the photo from an image file. To do this, click the *Add Photo* button on the *Bottom Button Bar* and select the *Add photo from file* option from the popup menu:



This will bring up a file browser that lets you browse your Mac's hard drive and select the image file(s) you wish to add. Select the image file or files that you wish to add to your item and click the *Open* button. Next, Home Inventory will bring up the *Label Panel* so that you can label your photo(s):

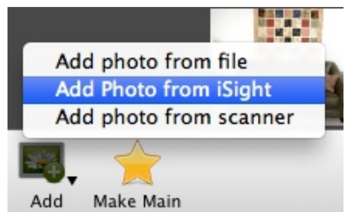


The Label Panel provides a convenient way to label all of the photos you are importing in one action without having to edit the photo and change the label using the *Image Editor*.

Just enter the label you wish to give the photo in the *Label Box*. Use the next and previous buttons to move to other photos in the list. It is not mandatory to provide a label for the photo.

Adding a Photo Using an iSight Camera

Another way to add a photo to an item is to use the built-in iSight or other attached video camera to capture a still image of your item. To do this, click the *Add Photo* button on the *Bottom Button Bar* and select *Add photo from iSight* from the popup menu:



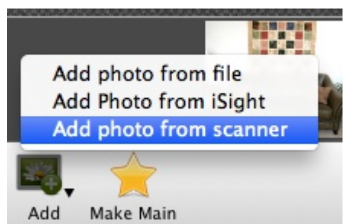
This will bring up the *Capture Window*:

The *Capture Window* shows a live feed from the selected video camera in the *Preview Area*. If you have more than one camera attached to your system, you can choose the camera by selecting it from the *Video Source Popup*.

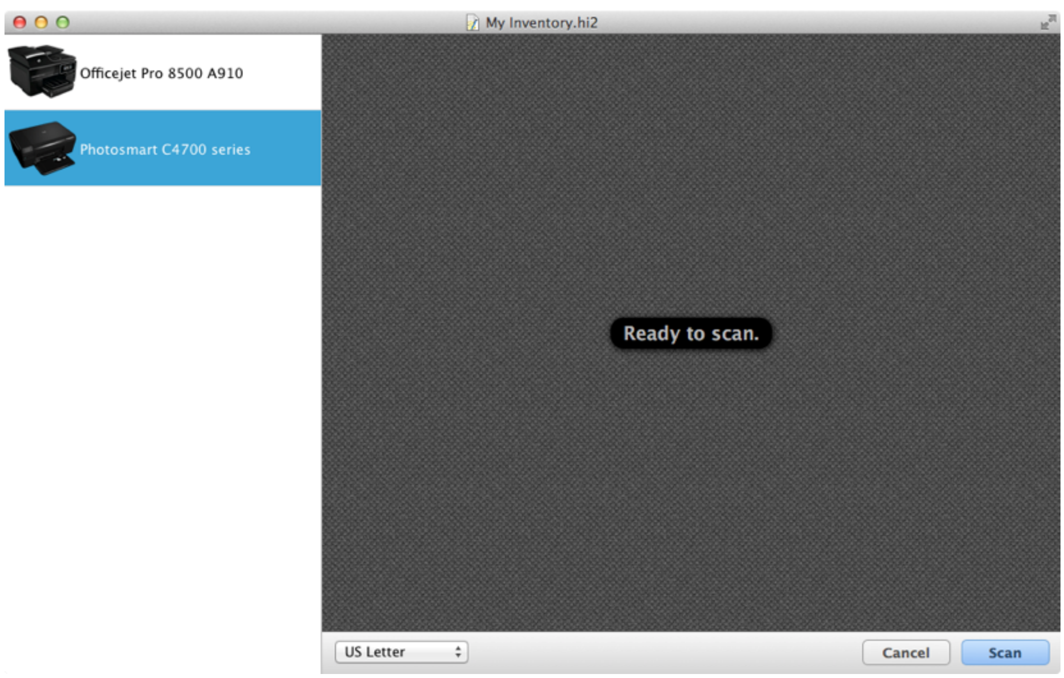
To capture a still photo of the item, hold the item in front of the camera and then click the *Capture* button. This takes a snapshot of the item and places the *Capture Window* in *Edit Mode*. At this point you can edit the photo (see the chapter on Using the Image Editor to learn about editing images). When you are finished, click the *Ok* button to add the captured photo to your item.

Adding a Photo Using a Scanner

To scan a photo, click the *Add Photo* button in the *Bottom Button Bar* and select *Add photo from dcanner* from the popup menu that appears:



This will bring up the *Scan View*:



Home Inventory supports scanners that are compatible with Apple's Image Capture interface and displays all compatible scanners in the *Scanner List* on the left side of the

Scan View. This includes scanners connected directly to your computer as well as those that are shared on your local network.

To begin scanning, click a scanner in the *Scanner List*. Depending on how the scanner is connected (either directly or over a network), it may take a moment for Home Inventory to connect to the scanner. Once Home Inventory has connected to the scanner, you will see the *Ready to scan* message in the view. At this point, simply click the *Scan* button to scan the image and add it to the selected item(s).

Adding a Photo Using Drag and Drop

You can drag and drop image files from your computer as well as images from other applications, such as iPhoto and Safari.

To drag and drop photos into Home Inventory, select the images or image files and then, while still holding down the mouse button, drag them over to the *Photo View*. Next, release the mouse button to *drop* the images into Home Inventory. As with adding photos from a file, you will be prompted to label the photos you added using drag and drop.

The Make Main Button

The main photo is the primary photo associated with an item and is displayed to the right of the item's information. To make the *Selected Photo* the main photo, click the *Make Main* button in the *Bottom Button Bar*:

Removing Photos

You can remove the *Selected Photo* by clicking the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the removal before it is permanently removed from your inventory. If the photo is attached to more than one item, the association is only removed from the selected item(s) and it will not be permanently removed from your inventory until it is removed from all of the items it is attached to or those items are removed.

Editing Photos

You can edit the *Selected* Photo by double-clicking on it or by clicking the *Edit* button on the *Bottom Button Bar*:

This will bring up the *Image Editor* with your photo, where you can rotate, crop, adjust the brightness, contrast, and color saturation, and label your photo. The *Image Edito*r is also used to edit image receipts and can be launched from other areas of the application . Editing photos and image receipts in the *Image Editor* is covered in detail in the Using the Image Editor chapter.

Saving Photos to Your Computer

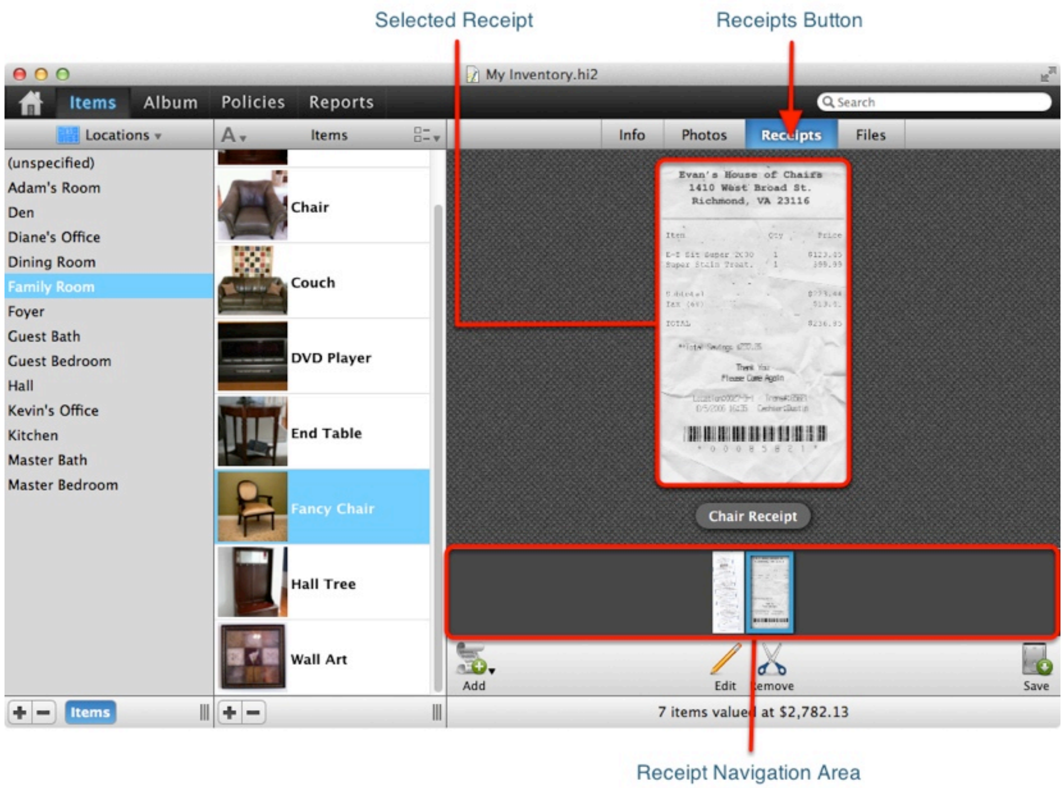
If you ever need to get a photo out of Home Inventory, just click the *Save File* button in the *Bottom Button Bar* to save the *Selected Photo* to you hard drive:

A file browser will appear allowing you to choose the filename and location to save the image. Photos are saved in the JPEG format.

Item Receipts and the Receipt View

Home Inventory will also store receipts. Receipts can help establish proof of possession. Home Inventory does not limit the number of receipts you can have attached to an item. Being able to store multiple receipts for a single item is useful in several instances, such as when the original item is replaced by the seller due to a defect or the item is something that is modified over a period of time and you want to store the receipts for each modification made.

Any receipts that are attached to an item are shown in the *Receipt View*, which you can get to by clicking the *Receipts* button at the top of the *Item Information Area:*



The *Selected Receipt* (the receipt that an operation such as edit, remove, or save might be applied to) takes of most of the view. If the *Selected Receipt* has a label, it will appear directly beneath it if the receipt is an image receipt (more on these in a bit).

If the item has more than one receipt, the *Receipt Navigation Area* is shown. This gives you thumbnails of all the receipts associated with the item. Clicking on a receipt in the *Receipt Navigation Area* makes it the *Selected Receipt*.

Receipt Types

Home Inventory can store three different types of receipts. The first type is called an image receipt and is simply a photo or scanned image of a receipt. Image receipts are used whenever you need to store a photo or scan of a physical receipt.

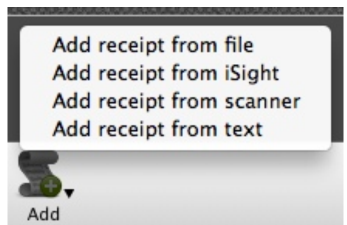
The second type of receipt is a PDF receipt. This is simply a PDF file that Home Inventory stores in your inventory file when you add a PDF file as a receipt.

The final type of receipt is called a text receipt. A text receipt is made up of editable characters, like the contents of an email message. The purpose of text receipts is to store receipts for online purchases that you received in your email.

Adding a Receipt to an Item

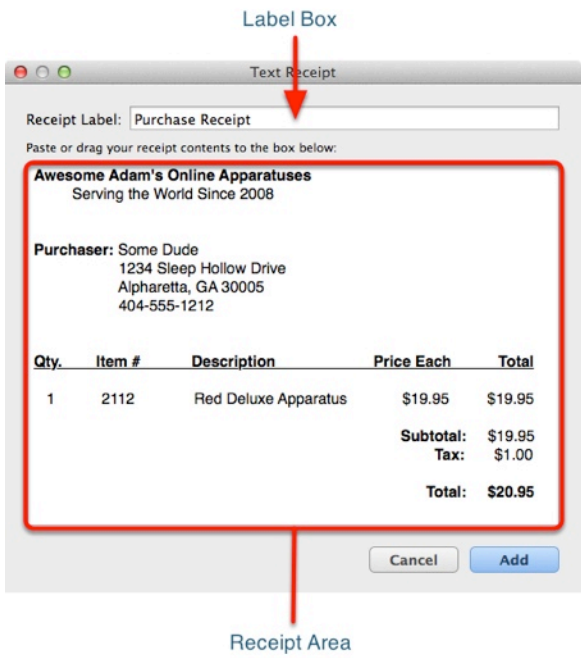
To add an image receipt to your item, click the *Add Receipt* button in the *Bottom Button Bar*:

This will produce a popup menu from which you can choose the method and type of receipt to add:



The first three options (*Add receipt from file*, *Add receipt from iSight*, and *Add receipt from scanner*) are used primarily to add image receipts and work exactly the same as the corresponding options for adding a photo. The *Add receipt from file* option can also be used to add a PDF receipt if you choose a PDF file in the file browser. Refer to the sections on adding photos in this chapter for more detailed information.

The last option, *Add Receipt from text*, adds a text receipt. When you select this option, Home Inventory brings up the *Text Receipt Panel*:



You can enter the label for your receipt in the *Label Box*. Next, select the contents of the receipt in your email application, web browser, or wherever else the receipt is stored. To get the receipt content into the *Receipt Area*, you can copy and paste the receipt contents or drag and drop them.

To copy and paste the contents, choose the *Copy* option under the *Edit* menu from the source application (this would be your email application, web browser, etc). Next, click the *Receipt Area* in the *Text Receipt Panel* in Home Inventory to make it active and then select *Paste* from the *Edit* menu in Home Inventory to paste the receipt contents into the *Receipt Area*.

To use the drag and drop approach, click on the selected receipt contents in the source application and, while still holding down the mouse button, drag them over to the *Receipt Area* of the *Text Receipt Panel*, then let go of the mouse button. The receipt contents should appear in the *Receipt Area*.

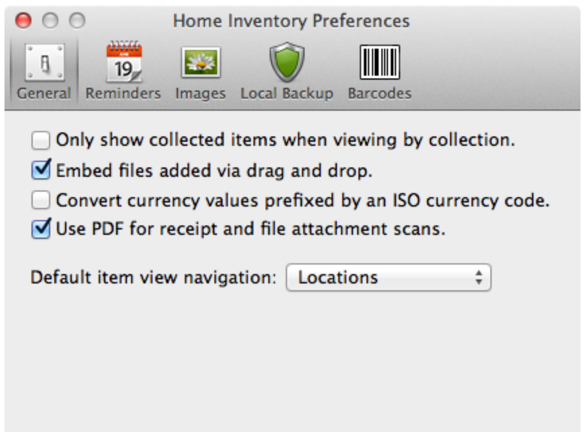
When you are finished, click the *Add* button in the *Text Receipt Panel* to add the receipt to your item.

Scanning PDF Receipts

The *Use PDF for receipt and file attachment scans* preference setting determines whether or not receipts (and files attachments, as you will see later on) added using your scanner are stored as PDF receipts or images.

In general, images will take up less space in your inventory file. However, there are a couple of reasons to store scanned receipts and file attachments as PDF files. The primary among these is when using a document feeder to scan multiple pages. If the PDF option is enabled, these pages will be combined into a single PDF file that is added to your inventory. The other reason to use the PDF format is if you want exceptional quality.

To enable the use of the PDF format for scanning receipts and file attachments, select *Preferences* from the *Home Inventory* menu and check the *Use PDF for receipt and file attachment scans* option:



Removing Receipts

You can remove the *Selected Receipt* clicking the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the removal before it is permanently removed from your inventory. If the receipt is attached to more than one item, the association is only removed from the selected item(s) and it will not be permanently removed from your inventory until it is removed from all of the items it is attached to or those items are themselves removed.

Editing Receipts

You can edit the *Selected Receipt* by double-clicking it or by clicking the *Edit* button on the *Bottom Button Bar*:

If the receipt is an image receipt, Home Inventory will bring up the *Image Editor* with your receipt, where you can rotate, crop, adjust the brightness, contrast, and color saturation, and label your receipt. You can learn more about the *Image Editor* in the Using the Image Editor chapter.

If the receipt is a text receipt, the *Text Receipt Panel* is shown with the contents of the receipt. You can make whatever changes you need to the receipt and then click the *Update* button to make those changes permanent.

Saving Receipts to Your Computer

Home Inventory lets you save receipts to your computer. To save the *Selected Receipt* click the *Save File* button in the *Bottom Button Bar*:

A file browser will appear allowing you to choose the filename and location to save the image. Image receipts are saved in the JPEG image format. PDF receipts are saved in the PDF format. Text receipts are saved in the Rich Text Format (RTF).

File Attachments

Item Files

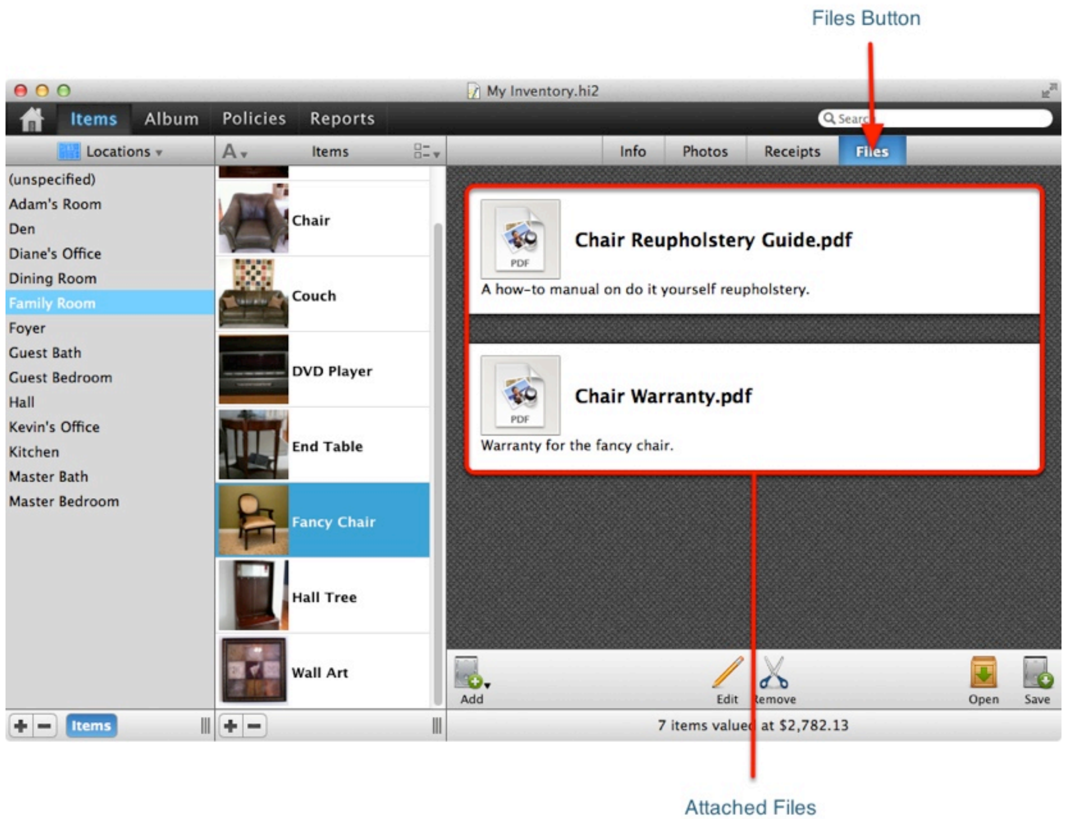
Home Inventory allows you to attach files to your items and insurance policy entries (the latter is covered in the Managing Your Insurance Policies chapter). There are only a few restrictions to the types of files that can be attached. In general, they can be anything from a PDF version of a user manual to scanned images of a warranty. You cannot attach directories and applications can only be attached if they are compressed. To compress an application, first select the application in Finder and then select the *Compress* option from the *File* menu to create a compressed version (a ZIP file) that you can attach.

There are two different ways to attach a file to an item: as an embedded file or a linked file.

An embedded file stores the file in your inventory file. While using this method can increase the size of your inventory file by a substantial amount, it has the advantage of making sure the file is always available to Home Inventory even when you move your inventory file to another computer or delete the original file from you hard drive.

With a linked file, only a link to the file on your hard drive is kept in your Inventory File. The file itself is not stored. While this method takes up very little space in your inventory file, it has the downside of not being able to access the file through Home Inventory if the file is deleted, renamed, or moved to a different location on your hard drive. You will also be unable to access the file from Home Inventory if you move your inventory file to a different computer.

You can view and manage all of the file attachments associated with the item in the item's *File View*. To show the *File View*, click the *File* button at the top of the *Item Information Area* (for policies, the *File* button is at the top of the *Policy Information Area*):

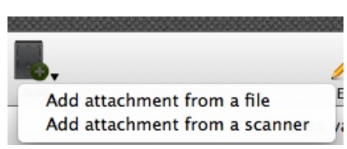


Attaching a File

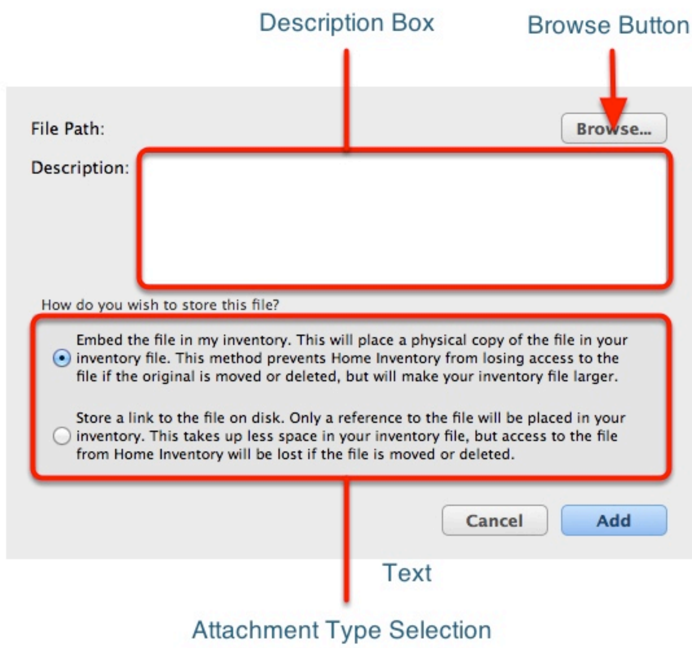
You can attach a file by dragging and dropping it into the *File View*. By default, files added through drag and drop are attached as embedded files. You can change this by opening the *Preferences Panel* (select *Preferences* from the *Home Inventory* menu) and un-checking *Embed files added via drag and drop* in the *General* section of the *Preferences Panel*.

As an alternative, you can attach a file by clicking the *Add File* button in the *Bottom Button Bar*:

This will bring up a popup menu that gives you the option of attaching a file by browsing for it on your Mac's hard drive or attaching a file as an image using a scanner:



If you choose the first option, *Add attachment from a file*, you will be presented with the *File Panel*:



Click the *Browse* button to bring up a file browser to choose the file you want to attach.

If you wish to give your file a description, you may enter it in the *Description Box*. Use the *Attachment Type Selection* to select whether you wish to add the file as an embedded file or a linked file.

Click the *Add* button to attach the file.

Removing a File

You can remove a file by first clicking on the file in the *File View* to select it (the background will turn blue when it is selected). Next, click the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the removal before it is permanently removed from your inventory.

Editing a File Description

Unlike other elements, double-clicking a file will open the file. In order to edit the description, you must first select the file by clicking on it once to select it (the file's background will turn blue when it is selected) and then clicking the *Edit* button on the *Bottom Button Bar*:

This will bring up the *File Panel* with the information for the selected file. You will only be able to make changes to the description. When you are done with your changes, click the *Update* button to make save these changes.

Opening an Attached File

You can open file attachments in their native application or viewer from within Home Inventory. To open a file, either double-click the file in the *File View* or select the file and then click the *Open File* button in the *Bottom Button Bar*:

Opening an embedded file may take a few moments as Home Inventory must first retrieve and decompress the stored file and save it to a temporary location on your hard drive. This temporary version of the file will be deleted when Home Inventory exits.

Saving an Attached File

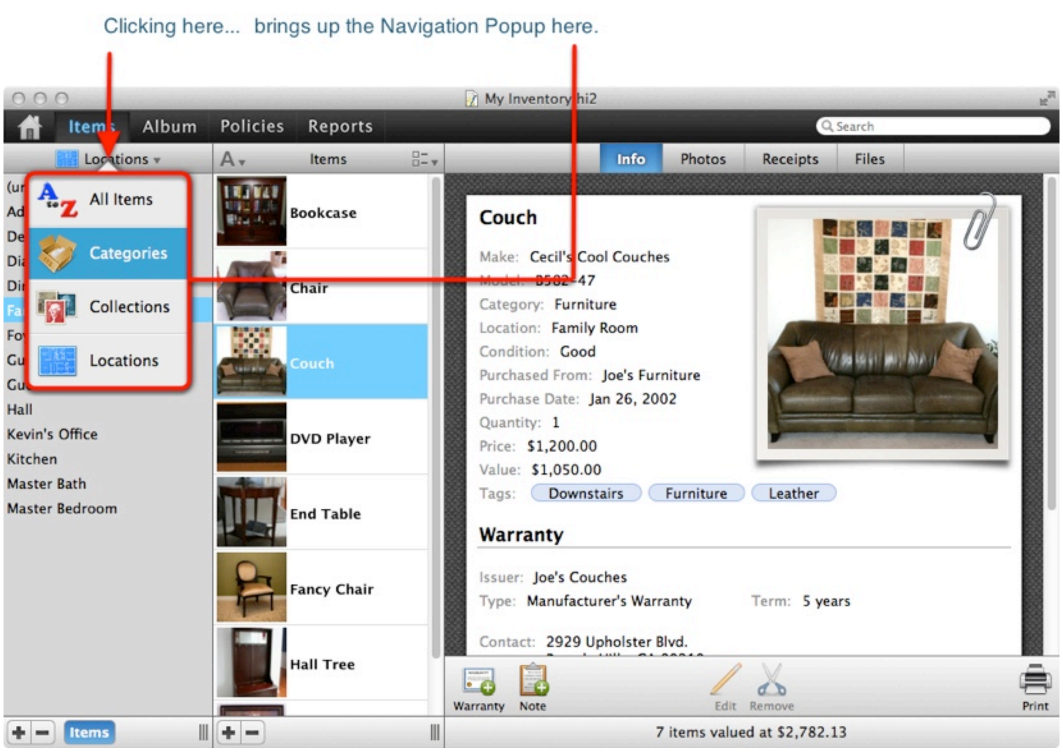
You can save an embedded file to your hard drive by first clicking the file in the *File View* to select it and then clicking the *Save File* button in the *Bottom Button Bar*:

A file browser will appear allowing you to choose the filename and location to save the file.

Categories, Collections, & Locations

Navigation Options

You can navigate your inventory in several ways. By default, you navigate by location and selecting a location in the *Navigation List* will show you all of the items at that location. You can also navigate by category or collection, or simply view all of the items in your inventory in a single list. You can change your navigation by method clicking above the *Navigation List* to bring up the *Navigation Popup* and then selecting the navigation method you wish to use:



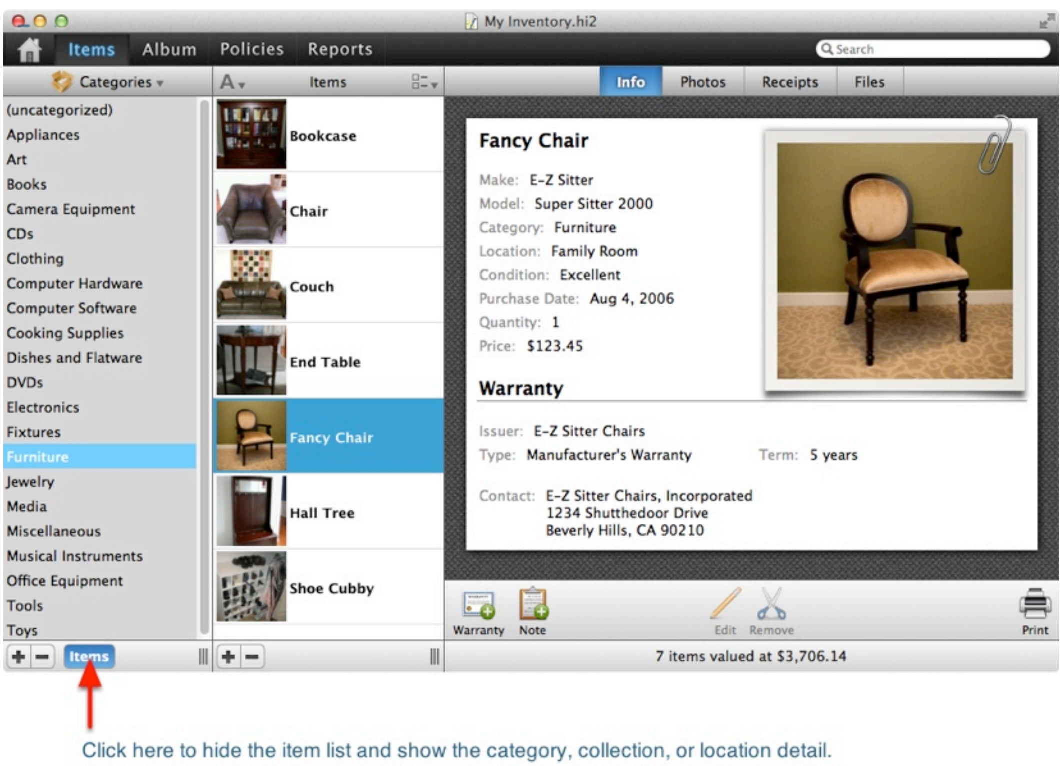
Categories

Items are classified using categories. Categories are typically general types of items, such as electronics or furniture. When you create a new, blank inventory, Home Inventory creates several categories for you by default. You are free to edit, remove, and add to these categories as you wish.

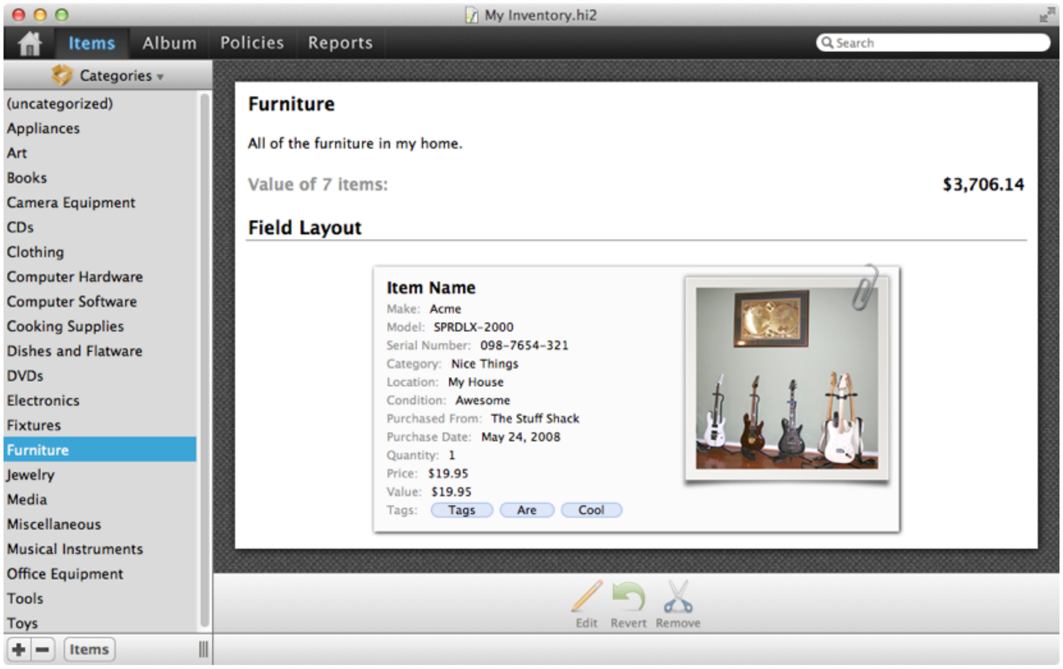
You can view the list of available categories in the *Navigation List*. To add, edit, and remove categories, select *Categories* from the *Navigation Popup*. Any items that have not been assigned a category are designated as *(uncategorized)*.

Viewing a Category's Information

The only information a category is required to have is a name. It can also have a description and a custom field layout that is used when displaying any items belonging to that category. You can view this information by clicking the *Show/Hide Item List* button underneath the *Navigation List*:



Clicking the *Show/Hide Item List* button will hide the *Item List* and replace the *Item Information Area* with the *Category Information Area*:

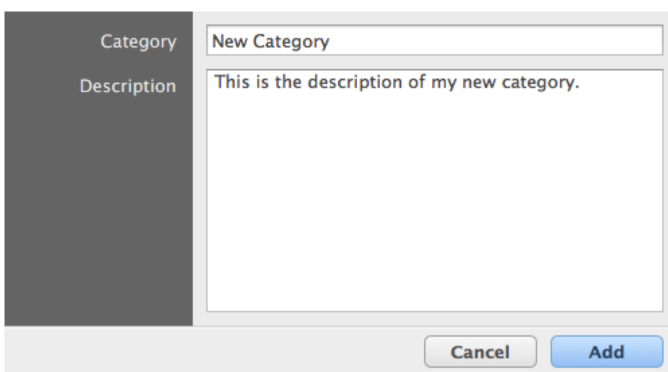


To make the *Item List* and *Item Information Area* visible again (and hide the *Category Information Area*), click the *Show/Hide Item List* button again.

Adding a new Category

To add a new category, click the + button beneath the *Navigation List*.

This will bring up the *Category Panel*:

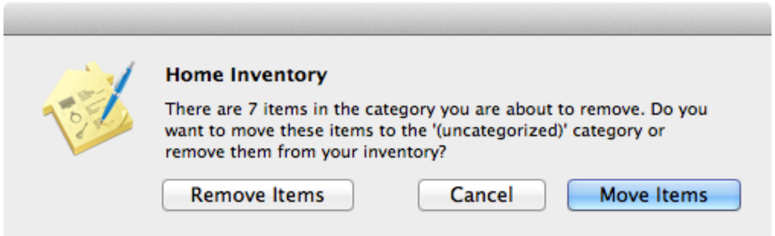


The new category requires a name, but the description is optional.

Removing a Category

To remove a category, select the category in the *Navigation List* and then click the - button underneath the *Navigation List*.

You will be prompted to confirm the removal before the category is permanently removed from your inventory. If the category you are removing contains any items, the following dialog box will be displayed:



Click the *Move Items* button to move them to the *(uncategorized)* category or click the *Remove Items* button if you want to remove the items from your inventory.

Editing Basic Category Information

There are three ways to edit the basic information (name and description) of a category. The first method is to double-click the category in the *Navigation List*.

If you have clicked on the *Show/Hide Item List* button to hide the *Item List* and show the *Category Information Area* then either double-click the category's information or click it once to select the category and then click the *Edit* button in the *Bottom Button Bar*:

All three methods bring up the *Category Panel*. Make your changes and then click the *Update* button to save your changes.

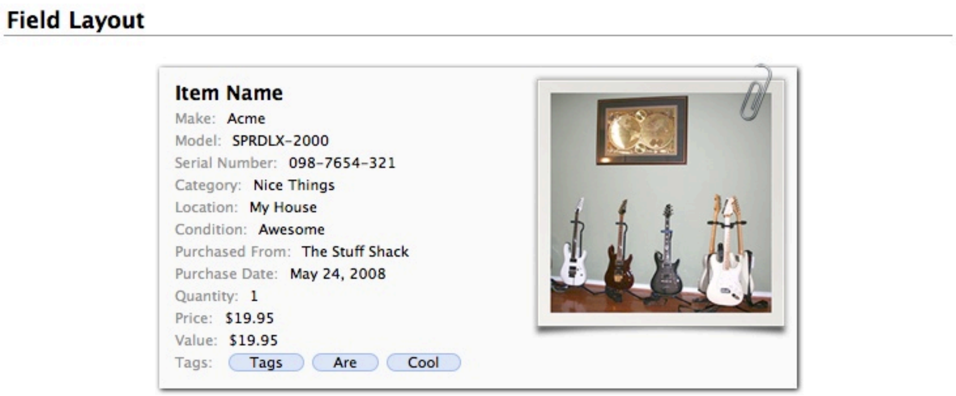
Moving Items from One Category to Another

You can use drag and drop to move items from one category to another.

To do this, select *Categories* from the *Navigation Popup* and make sure the *Item List* is visible (if it is not, you can click the *Show/Hide Item List* button to show the *Item List* in the window). Next, select the category with the item(s) you wish to move in the *Navigation List* and then select the item(s) you wish to move in the *Item List*. Finally, drag and drop those items onto the category you wish to move them to in the *Navigation List*.

Changing the Field Layout for a Category

The information for an item can be displayed differently based on its category. The field layout for a given category determines which fields are shown for items belonging to that category and the order in which those fields are presented. The field layout used for the category is shown in the *Category Information Area:*



To change the field layout for a category, you must first select *Categories* from the *Navigation Popup*. Next, select the the category from the *Navigation List*. If the *Item List* is visible, click the *Show/Hide Item List* button hide the *Item List* and show the *Category Information Area*.

Next, either double-click field layout in the *Category Information Area* or click it once to select the field layout and then click the *Edit* button in the *Bottom Button Bar*:

This will bring up the *Field Layout Editor* for the category. Changing a field layout is discussed in detail in the Field Layouts chapter. Click the *Apply* button to make it the field layout used to display item information for items belonging to the category.

If you changed the field layout for a category and want to revert to using the *Default Field Layout* for that category, select the field layout by clicking on it in the *Category Information Area* and then click the *Revert* button in the *Bottom Button Bar*:

Collections

A collection is a special group of items that usually have some common theme or element. A collection could be a set of baseball cards, CDs, or the books you own. Collections offer a convenient way to organize items other than by location and category. Home Inventory does not create a default list of collections for you.

You can view, add, edit and remove collections in the *Navigation List* by selecting *Collections* from the *Navigation Popup*. Any items that have not been assigned a collection are designated as *(uncollected)*.

Collection Value Calculation Methods

Collections affect the way items making up the collection are valued. For example, you may have a complete series of comic books that are worth more as an entire set than they would be if each is valued individually.

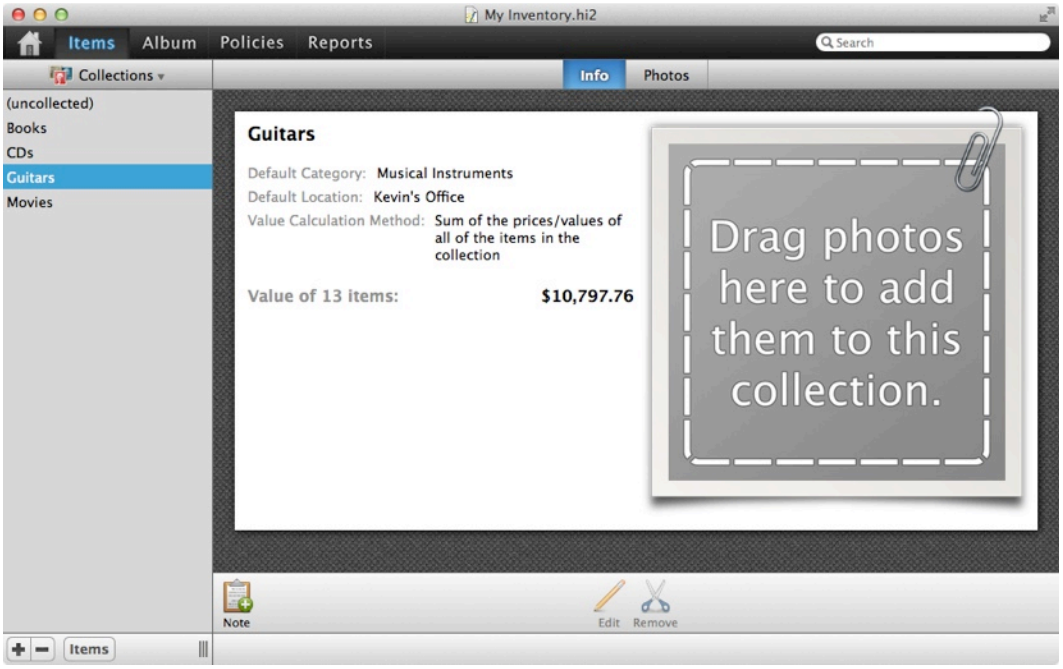
There are three different value calculation methods you can use. The first is the sum of the values of all of the items in the collection (if a given item does not have a specified valued, the purchase price of that item is used as its value).

The second method is the sum of the values of all the items in the collection plus the value given to the collection itself. This calculation method is useful when you purchase some of the items in your collection as a bundle for a fixed price and then add items to the collection over time.

The final method simply uses the value given to the collection itself without taking into account the values assigned to the individual items that make up the collection.

Viewing Collection Information

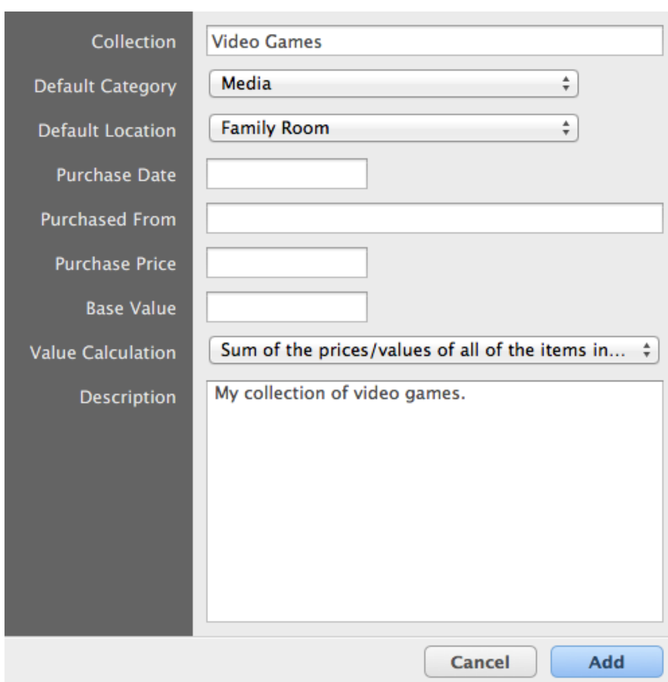
The only information that is required to create a collection is a name. You may also add photos and notes to your collections. As with categories, when you click the *Show/Hide Item List* button to hide the *Item List*, you will be able to view detailed information about the selected collection in the *Collection Information Area*:



To make the *Item List* and *Item Information Area* visible again (and hide the *Collection Information Area*), click the *Show/Hide Item List* button again.

Adding a Collection

To add a new collection, click the + button beneath the *Navigation List*. This will bring up the *Collection Panel*:



The *Collection Panel* has the following fields:

Field Name	Purpose
Calculation Method	This describes how the total value of the collection is calculated for reporting and was discussed in detail in the previous sub-section.
Default category for new items	This is the category automatically assigned to any new item created when the *Navigation Popup* is set to *Collections* and this collection is selected in the *Navigation List*. You can change this category when filling in the information for the item or by editing it later on.
Default location for new items	This is the location automatically assigned to any new item when the *Navigation Popup* is set to *Collections* and this collection is selected in the *Navigation List*. You can change this location when filling in the information for the item or by editing it later on.
Description	An optional description of the collection.
Purchase Date	The date the collection was purchased. This field should only be filled in if some or all the items in the collection were purchased at once as a bundle.
Purchase Price	The price you paid for the collection. This field should only be filled in if some or all the items in the collection were purchased at once as a bundle.
Purchased From	Where the collection was purchased. This field should only be filled in if some or all the items in the collection were purchased at once as a bundle.
Value	Value of the collection. Depending on the value calculation method you have chosen for the collection, this field (or the purchase price, if the value is left blank) may be used in calculating the total value of the collection. What goes here depends on the calculation method you have chosen.

Removing a Collection

To remove a collection, select the collection in the Navigation List and then click the - button underneath the Navigation List.

You will be prompted to confirm the removal before the collection is permanently removed from your inventory. If the collection contains any items, you will be asked whether you wish to remove those items from your inventory or mark them as *(uncollected)*. Click the *Move Items* button to move them to the *(uncollected)* collection or click the *Remove Items* button if you want to remove the items in the collection from your inventory.

Editing Basic Collection Information

There are three ways to edit the basic information of a collection. The first method is to double-click the collection in the *Navigation List*.

If you have clicked on the *Show/Hide Item List* button to hide the *Item List* and show the *Collection Information Area* then either double-click the collection's information in the *Collection Information Area* or click click on the collection information once to select it and then click the *Edit* button in the *Bottom Button Bar*:

All three methods bring up the *Collection Panel*. Make your changes and then click the *Update* button to save your changes.

Collection Photos

You can also add photos to collections. Adding, editing, and removing collection photos works just as it does with items. See Item Photos section of the Photos and Receipts chapter for more information on working with photos.

Collection Notes

Collections can also have notes, just like items. Adding, editing, and removing notes from a collection works just as it does with items. See the Item Notes section of the Working with Items chapter for more information on working with notes.

Moving Items from One Collection to Another

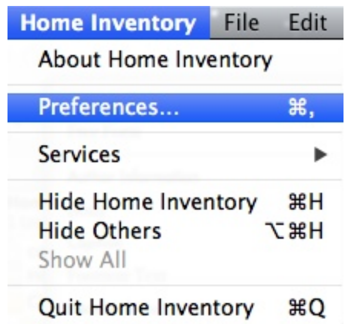
You can change the collection an item belongs to in the *Item Panel.* You can also use drag and drop to move items from one collection to another.

To change the collection using drag and drop, select *Collections* from the *Navigation Popup* and make sure the *Item List* is visible (if it is not, you can click the *Show/Hide Item List* button to show the *Item List* in the window). Next, select from the *Navigation List* the collection containing the item(s) you wish to move and then select the item(s) you wish to move in the *Item List*. Finally, drag and drop those items onto the new collection.

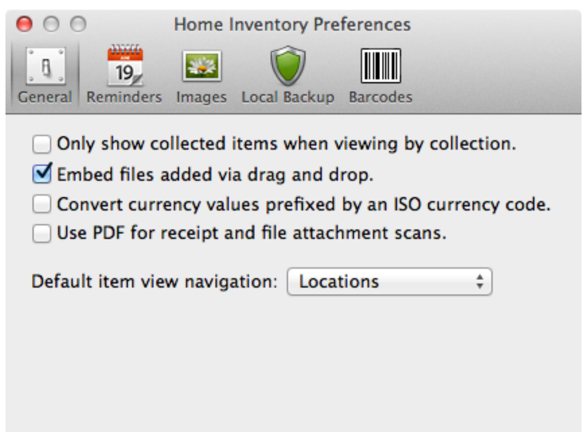
Keeping Collected Items Separate

Items that are part of a collection can also be viewed by location and category in the *Navigation List* when *All Items* is selected in the *Navigation Popup*. However, if your have collections with a large number of items (such as a CD collection with hundreds of CDs), you may wish to have collected items display only when navigating by collection.

To do this, open the *Preferences Panel* by selecting the *Preferences...* menu option under the *Home Inventory* menu:



Next, under the *General* preferences section, check the *Only show collected items when viewing by collection* checkbox:



Close the *Preferences Panel*. Collected items will now only show up in the *Item List* when the *Navigation Popup* is set to *Collections*.

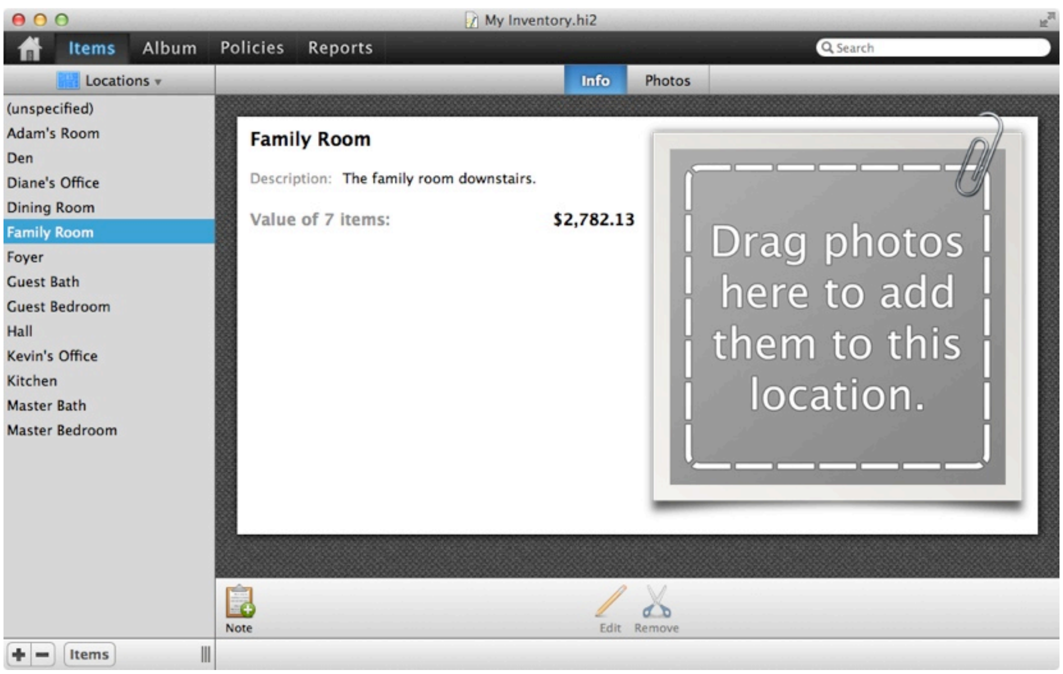
Locations

The location of an item specifies where that item is stored. Typically a location is a room in your home, but it could just as easily be a cabinet, a box, or a storage unit. When you create a new, blank inventory, Home Inventory creates several locations for you by default. You are free to edit, remove, and add to these locations.

You can view, add, edit and remove from the list of available locations in the *Navigation List* by selecting *Locations* from the *Navigation Popup*. Any items that have not been assigned a location appear with a location of *(unspecified)*.

Viewing Location Information

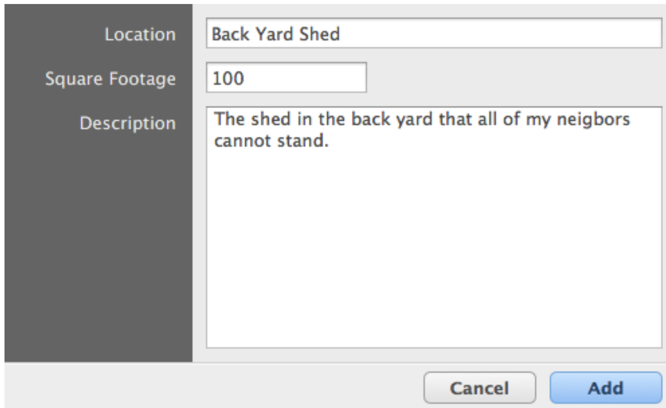
The only information a location is required to have is a name. It can also have a description, photos, and notes. As with categories, when you click the *Show/Hide Item List* button to hide the *Item List*, you will be able to view detailed information about the selected location in the *Location Information Area*:



To make the *Item List* and *Item Information Area* visible again (and hide the *Location Information Area*), click the *Show/Hide Item List* button again.

Adding a Location

To add a new location, click the + button beneath the *Navigation List*. This will bring up the *Location Panel*:



The *Location Panel* only has three fields: *Name*, *Square Footage* (called *Floor Area*) for non-US users), and *Description*. You must give the new location a name, but the square footage and description are optional.

Removing a Location

To remove a location, select the location in the *Navigation List* and then click the - button underneath the *Navigation List*. You will be prompted to confirm the removal before the location is permanently removed from your inventory. If the location contains any items, you will be asked whether you wish to remove those items from your inventory or mark them as *(unspecified)*. Click the *Move Items* button to move them to the *(unspecified)* location or click the *Remove Items* button if you want to remove the items from your inventory.

Editing Basic Location Information

There are three ways to edit the basic information of a location. The first method is to double-click the location in the *Navigation List*. If you have clicked on the *Show/Hide Item List* button to hide the *Item List* and show the *Location Information Area* then either double-click the location's information in the *Location Information Area* or click it once to select it (the background will turn blue to indicate it is selected) and click the *Edit* button in the *Bottom Button Bar*:

All three methods bring up the *Location Panel*. Make your changes and then click the *Update* button to save your changes.

Location Photos

You can also add photos to locations. Adding, editing, and removing location photos works just as it does with items. See the Item Photos section of the Photos and Receipts chapter for more information on working with photos.

Location Notes

Locations can also have notes. Adding, editing, and removing notes from a location works just as it does with items. See the Item Notes section of the Working with Items chapter for more information on working with notes.

Moving Items from One Location to Another

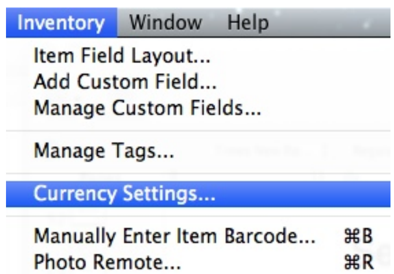
You can change the location an item belongs to in the Item Panel when editing the item's basic information. You can also use drag and drop to move items from one location to another.

To change the location using drag and drop, select *Locations* from the *Navigation Popup* and make sure the *Item List* is visible (if it is not, you can click the *Show/Hide Item List* button to show the *Item List* in the window). Next, select the location with the item(s) you wish to move in the *Navigation List*. Now select the item(s) you wish to move in the *Item List*. Finally, drag and drop those items onto the location you wish to move them to in the *Navigation List*.

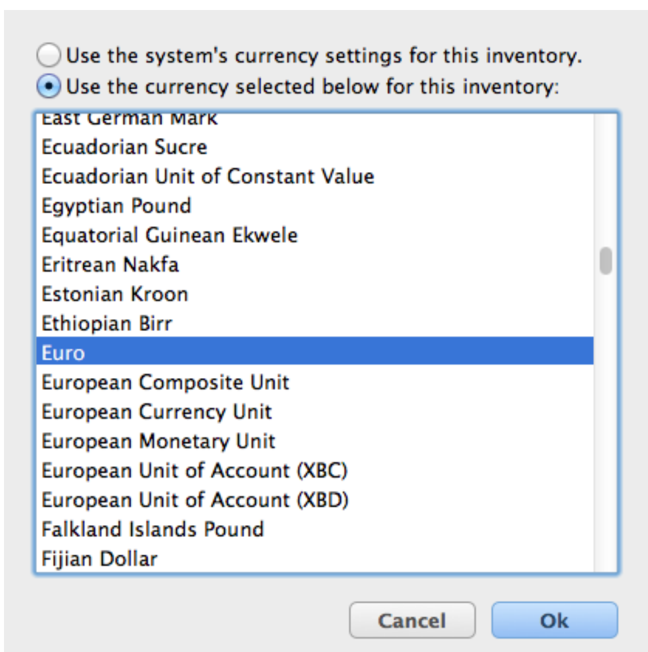
Currency Support

Setting the Currency Used for an Inventory File

By default, Home Inventory uses the currency settings defined in the *Language & Text* section of the *System Preferences* panel. This is fine for most cases. However, there are some situations where it is necessary to use a different currency for a given inventory file. To change the currency setting for a specific inventory file, select *Currency Settings* from the *Inventory* menu:



This will bring up the *Currency Settings* panel:



To select a specific currency that is to be used for the inventory file, click the *Use the currency selected below for this inventory.* option. Next, select the currency you wish to use from the list and click the *Ok* button. This currency will be used in displaying item prices and values, as well as for coverage information and in reports for this inventory file.

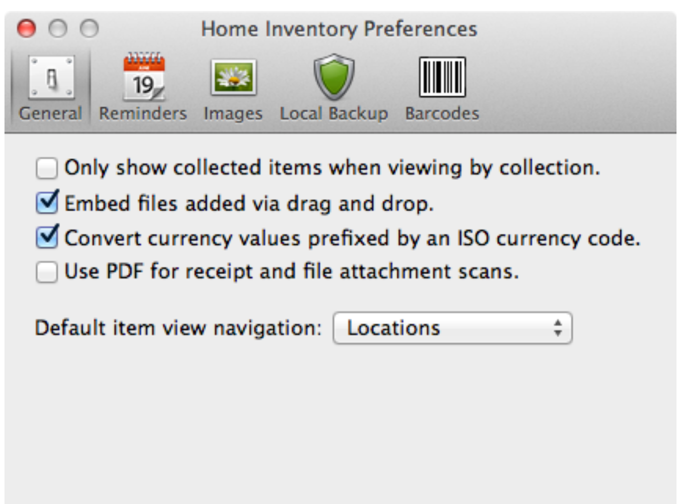
To go back to using the currency settings specified under *System Preferences*, select the *Use the system's currency settings for this inventory.* option.

Currency Conversion

Home Inventory's currency conversion feature lets you covert foreign currency amounts to the currency used for the inventory file based on currently available exchange rates. This feature is especially useful if you frequently purchase items while traveling in other countries.

Enabling Support for Currency Conversion

To enable support for currency conversion, open the *Home Inventory Preferences Panel* by selecting *Preferences...* from the *Home Inventory* menu. Next, make sure the *Convert currency values prefixed by an ISO currency code* option in the *General* section of the *Home Inventory Preferences Panel* is checked:

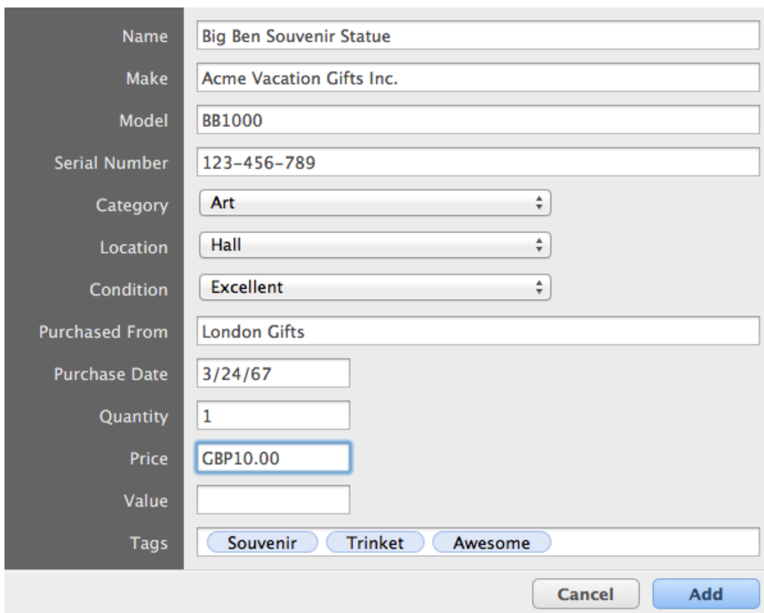


With this option enabled, Home Inventory will automatically convert any value entered into a currency field (including the item *Price* and *Value* fields) with an ISO standard currency prefix to the currency used for the inventory file. The currency conversion feature uses an online lookup to obtain the current exchange rate, so an Internet connection is required in order to make use of this feature.

Converting from One Currency to Another

Once currency conversion has been enabled in the *Preferences Panel*, you can convert from one currency to another by prefixing the amount with the three-letter ISO standard currency code of the currency you wish to convert from in any currency field in Home Inventory (see http://en.wikipedia.org/wiki/ISO_currency_code for more information about ISO currency codes and a list of currency codes).

For example, if you purchased an item in the UK for £10.00 and your inventory uses US dollars as its currency, entering GBP10.00 in the *Price* field will tell Home Inventory to convert from ten British pounds-sterling to US dollars using the current exchange rate:



Field Layouts & Custom Fields

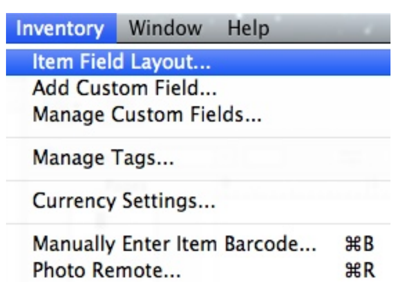
About Field Layouts

One of the key features in Home Inventory is the ability to change the field layout used when presenting item information. You can change what fields are present and the order in which they appear.

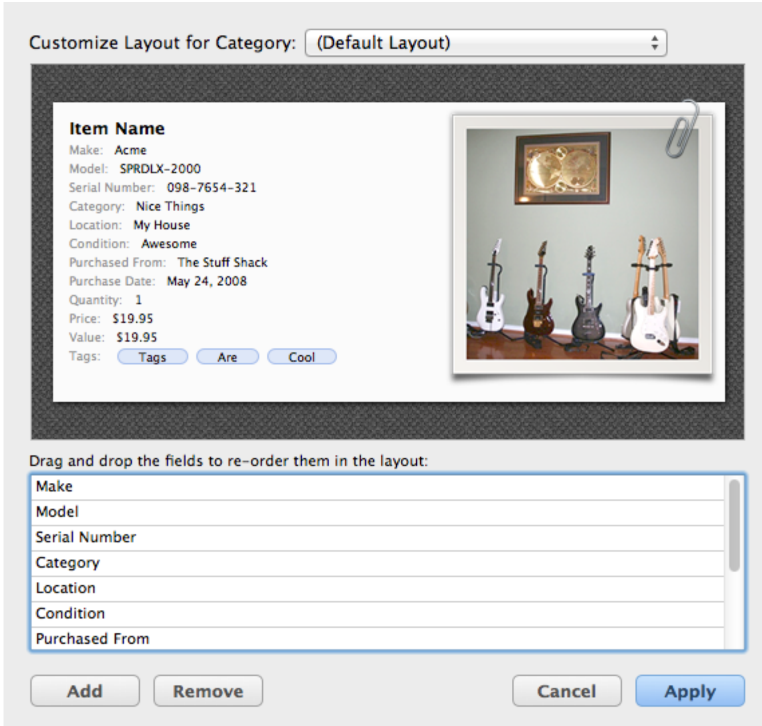
There are two types of field layouts: category field layouts and the default field layout. A category field layout is a field layout that is setup for a given category and used when displaying items belonging to that category. The default field layout is the field layout used for displaying any items that do not belong to a category with its own category field layout. By default, a category does not have its own field layout and the default field layout is used for displaying items belonging to the category. You can give a category its own field layout by editing the field layout for the category as described in the Changing the Field Layout for a Category subsection of the Categories, Collections, & Locations chapter.

Changing the Default Field Layout

To change the default field layout, select *Item Field Layout...* from the *Inventory* menu:



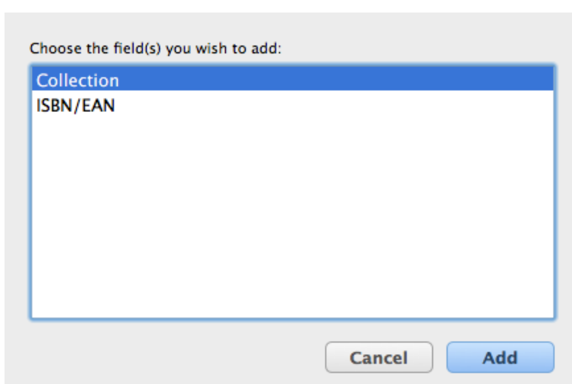
This will bring up the *Field Layout Panel*:



The popup at the top of the panel, labeled *Customize Layout for Category,* indicates that the default field layout is being edited. If you want to change the field layout for items of a specific category, click the popup and select the category you wish to modify the field layout for. You can also edit the field layout for a given category from that category's detail view (see the Categories, Collections, & Locations chapter for more information).

Adding Additional Fields to the Layout

The field layout you are editing may not show all available fields. To add a field that is not shown in the layout to the layout, click the *Add* button. This will bring up the *Add Field Panel*:



Select the field(s) you wish to add to the layout and then click the *Add* button.

Removing a Field from the Layout

To remove a field from the layout, click the name of the field in the *Field Layout Panel* and then click the *Remove* button.

Changing the Position of a Field in the Layout

Fields are drawn left to right, top to bottom in the order they appear in the *Field List*. To change the order in which fields appear in the *Field List*, select one or more fields and, while still holding down the mouse button, drag the fields to the location you want them to appear in the *Field List*. Release the mouse button to complete the drag and drop operation.

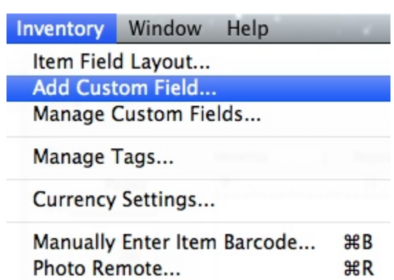
To select more than one field, hold down the Command (⌘) or shift key while clicking on a field to select that field without clearing the previous selection.

About Custom Fields

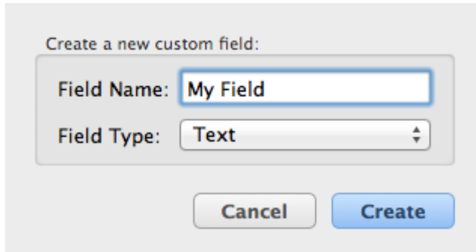
Custom fields provide a way of adding your own fields to the fifteen standard fields provided by Home Inventory. You may have up to ten custom fields per inventory file.

Adding a Custom Field

To add a new custom field, select the *Add Custom Field...* option under the Inventory menu:



This will bring up the *Add Custom Field Panel*:



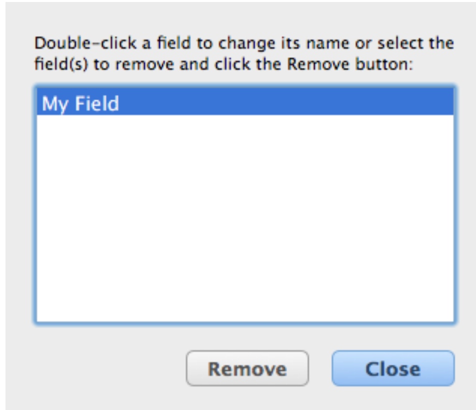
Give the new field a name and select the type of field you want to add. The *Field Type* describes the type of data that is allowed in the field and can be one of the following:

Field Type	Purpose
Currency	This is a price or some other currency amount, such as $19.95.
Date	Date fields can contain dates.
Integer	A number without a decimal point, such as 24, -3, or 17.
Positive Integer	Same as an integer, but the number may not be negative.
Positive Integer (non-zero)	Same as an integer, but the number may not be negative or zero.
Real Number	A number with an optional fractional component, such as 2 or 3.14159.
Text	A text field can contain anything: letters, numbers, symbols, etc.

Once you have given the field a name and type, click the *Create* button to add the custom field. After you have created your custom field, you may now add it to a category layout or the default field layout. The field will not be visible until you add it to a layout.

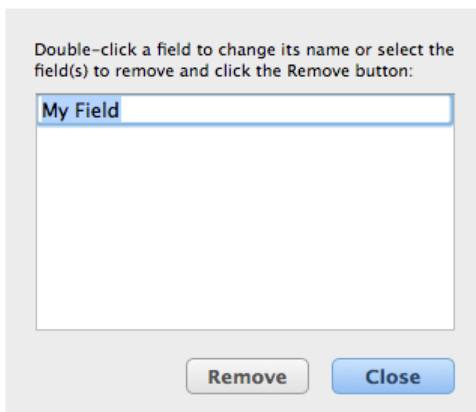
Removing and Changing the Name of a Custom Field

To remove or change the name of a custom field, select the *Manage Custom Fields...* option under the Inventory menu. This will bring up the *Custom Field Manager*:



To remove a custom field, select the field you wish to remove from the list and click the *Remove* button. **Any data associated with a custom field will be deleted from the database when the custom field is removed.**

To change the name of a custom field, double-click the name of the field in the list to change to edit mode. The field will be highlighted in light blue:



Enter the new name for the custom field and press return.

Click the *Close* button to close the *Custom Field Manager*.

Using the Image Editor

Editing a Photo or Receipt

The *Image Editor* can be used to crop, rotate, label, and adjust the brightness, contrast, and saturation of photos and image receipts (PDF and text receipts cannot be edited in the Image Editor). You can edit a photo or receipt by selecting it in the Photo View or Receipt View and then clicking the *Edit* button in the *Bottom Button Bar*, or by just double-clicking the photo or receipt. This will bring up the *Image Editor*:

Zooming In and Out

When the *Image Editor* first appears, the photo or receipt will be scaled so the entire image fits within the *Image Editor* window. You can zoom into the image to make it larger so you can see more detail by clicking the *Zoom In* button:

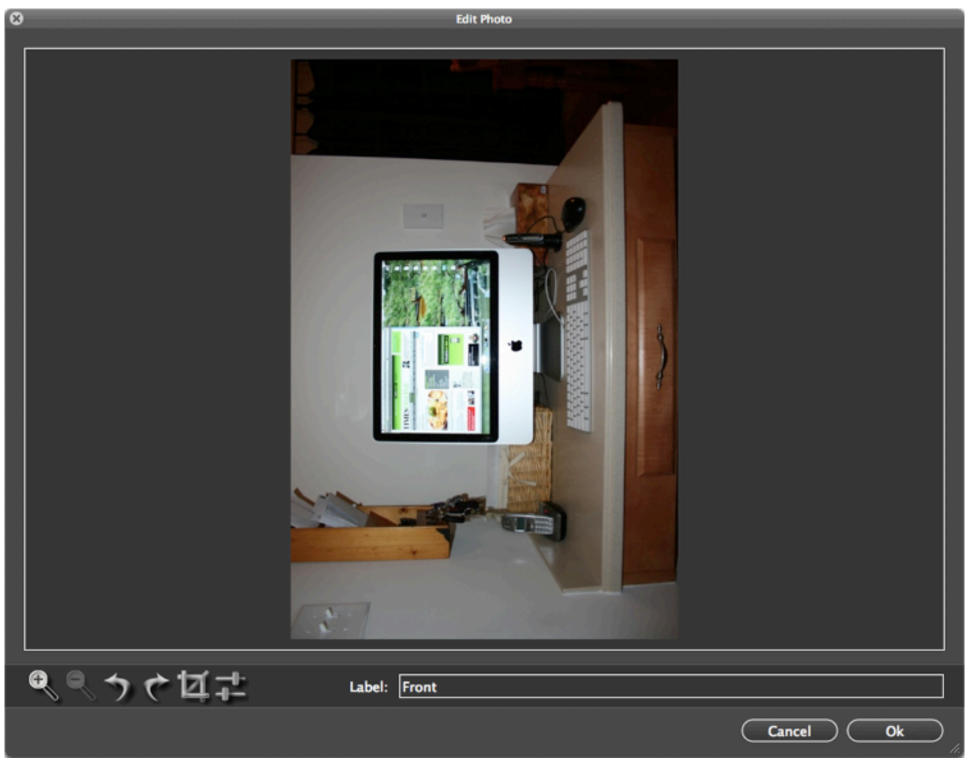
You can zoom into the image several times, each time progressively increasing the size of the image shown. If the zoomed in image cannot fit entirely within the *Image Editor* window, scroll bars will appear to the right and bottom of the image. You can use these scroll bars to move around the image.

To zoom back out of the image to the previous zoom level, click the *Zoom Out* button:

Rotating

To rotate the image to the left (counterclockwise) by 90 degrees, click the *Rotate Left* button:

The image will immediately appear rotated in the *Image Editor*:



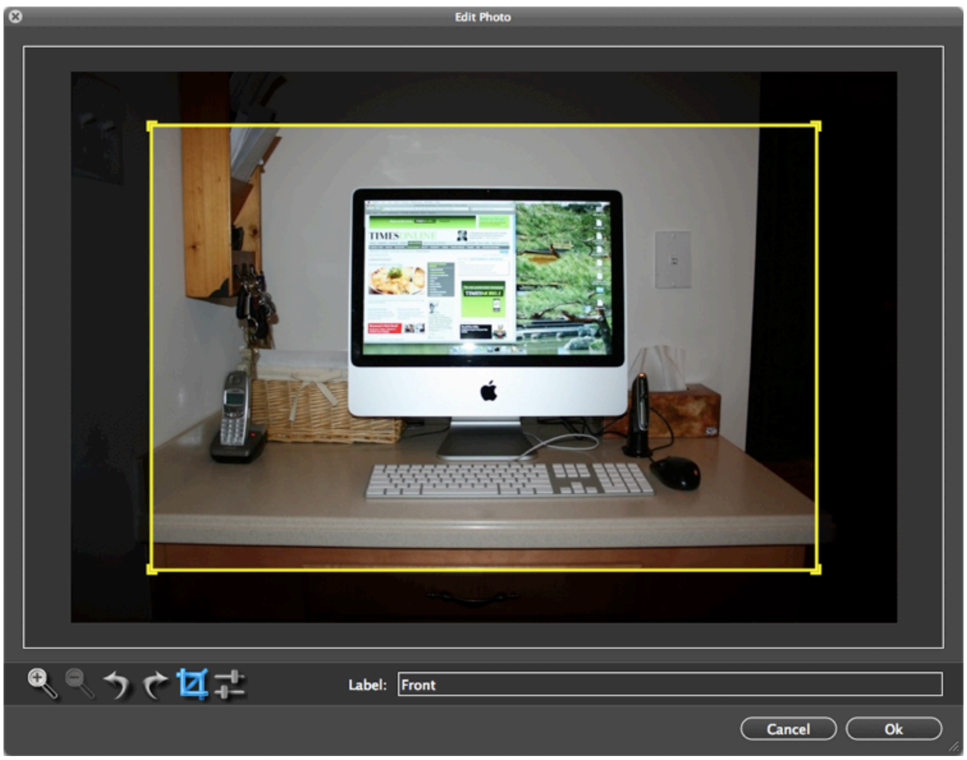
To rotate the image to the right (clockwise) by 90 degrees, click the *Rotate Right* button:

Cropping the Image

With some images, you may only be interested in a portion of the image and not the entire thing. When you crop an image, you reduce it to a selected part of the original image.

To begin cropping an image, click the *Crop* button:

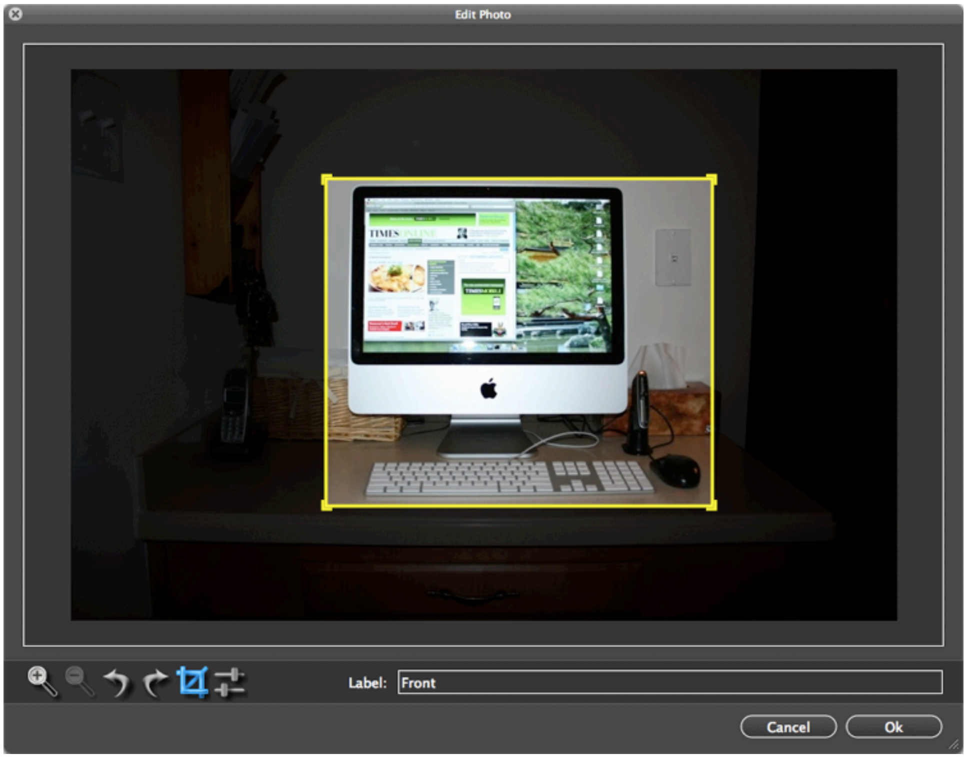
A crop rectangle will be superimposed over the image:



The area of the image inside the *Crop Rectangle* (defined by the yellow rectangle) is the portion of the image that will remain after the image is cropped. The areas outside of the crop rectangle will be removed.

You can adjust the size and position of the *Crop Rectangle* by clicking one of its edges and holding down the mouse button and dragging the mouse. Once you have moved the edge to its desired location, release the mouse button. If you want to expand the rectangle horizontally and vertically at the same time, click and drag any of the four corners of the *Crop Rectangle*.

The following example shows the *Crop Rectangle* positioned and sized so that just the portion of the sample image with the computer will be in the image once it is cropped:



The crop operation will take affect once you click the *Ok* button in the *Image Editor*.

The *Crop* button turns blue to let you know a crop operation is in effect:

This is to let you know the *Image Editor* is in *Crop Mode* and you can adjust the *Crop Rectangle*. If you decide that you do not wish to crop your image, click the *Crop Button* again and the *Image Editor* will exit *Crop Mode* and the *Crop Rectangle* will disappear.

Adjusting the Brightness, Contrast, and Color Saturation

Another change you can make to an image is adjusting its brightness, contrast, and color saturation. To adjust the brightness, contrast, or color saturation of an image, click the *Adjustments* button:

This will bring up the *Adjustments Panel* directly above the *Adjustments* button:

Move the *Saturation* slider to the right to make the colors in your image more intense and to the left to make them less intense. Moving the *Brightness* slider to the right will make the image appear brighter, while moving it to the left will darken the image. Moving the *Contrast* slider to the right will cause the darker portions of your image to become darker and the lighter portions to become lighter, increasing the contrast between the two. Moving it to the left will cause the darker portions to become lighter, decreasing the contrast between light and dark.

When you have finished making your adjustments, click anywhere in the *Image Editor* to hide the *Adjustments Panel*.

Setting the Label

To change the label for the image (or give the image a label if it doesn't have one), click in the *Label box* and type your new label.

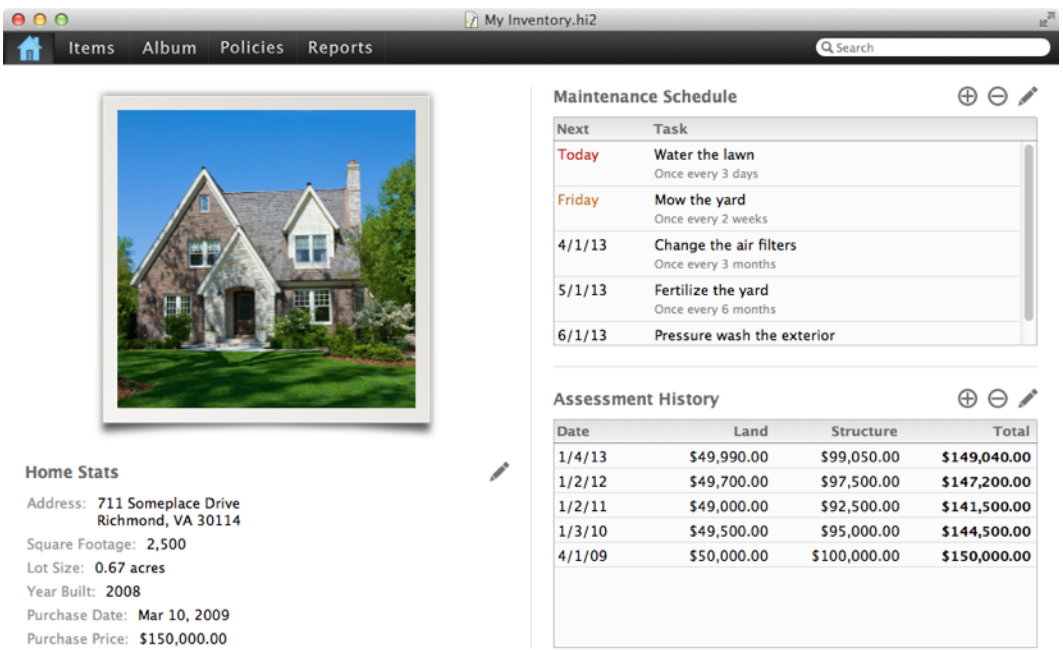
Saving Your Changes

When you have finished editing your image, click the *Ok* button in the *Image Editor* to save the changes.

The Home View

About the Home View

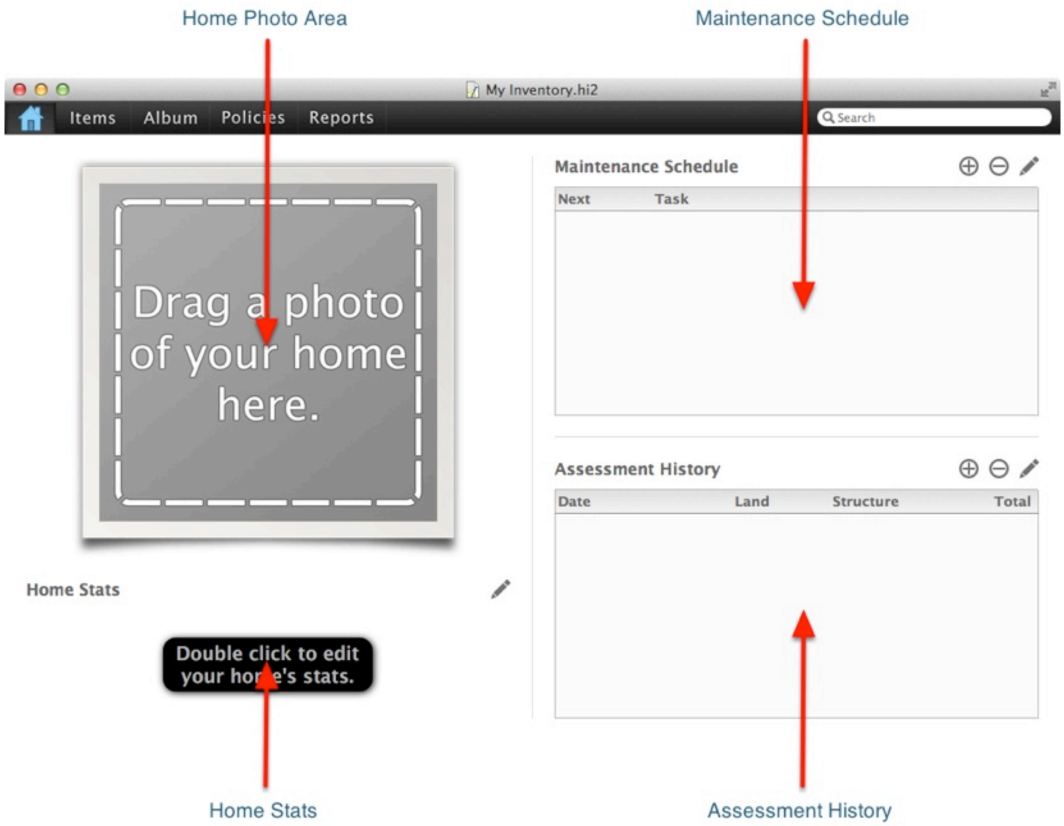
Home Inventory does more than just keep track of the items in your home. It can keep track of general information about your home as well. Home Inventory's *Home View* helps you manage regular home maintenance tasks, such as changing the batteries in your smoke detectors and winterizing the sprinkler system, keeps a history of your property assessments, and stores basic home stats, such as the square footage, purchase date, and the year your home was built:



To switch to the *Home View*, click the *Home View* button on the *Toolbar*:

Configuring the Home View

When you first switch to the *Home View*, you will be presented with an empty view:



There are four main components to the *Home View*. The *Home Photo Area* holds a photo of your home. The *Home Stats* section can keep basic information about your home such as the address, purchase price, square footage, etc. You can track your home's maintenance tasks in the *Maintenance Schedule* section and the *Assessment History* section maintains a history of your property assessment notices.

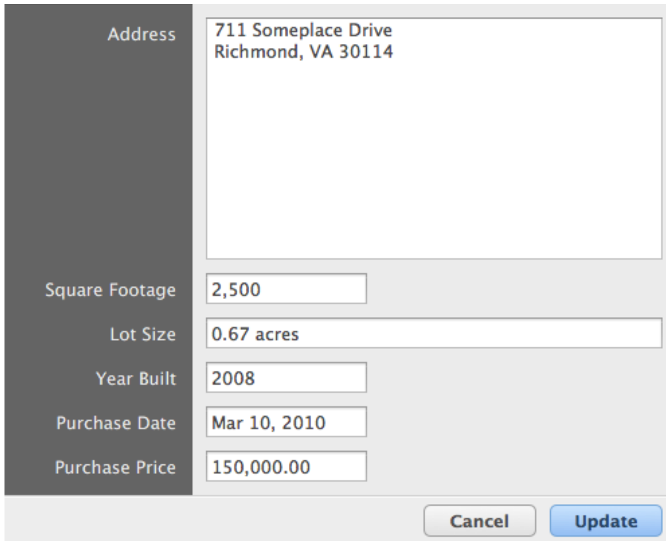
Adding a Home Photo

To add a photo of your home, simply drag and drop the photo (or image file) into the *Home Photo Area*.

Home Stats

To add or change the basic information about your home, double-click in the *Home Stats* area or click the *Edit* button to the right of the Home Stats header:

This will bring up the *Home Stats Panel*:

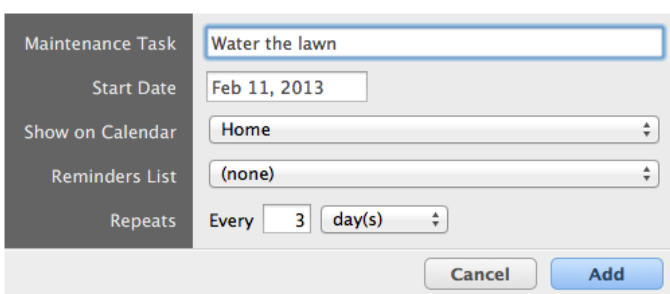


You can enter your home's address, square footage (floor area for non-US users), lot size, the year your home was built, purchase date, and purchase price. You are not required to fill in all of the fields, only those you wish to use.

Home Maintenance Tasks

You can use the *Maintenance Schedule* section to keep track of regular household maintenance tasks, such as cleaning the gutters and aerating the yard. If you are running OS X 10.8 (Mountain Lion) or later, you can even add these tasks to your calendar or reminders list. To add a new maintenance task, click the *Add* button to the right of the Maintenance Schedule header:

This will bring up the *Maintenance Task Panel*:



Give the task a name and a start date and choose how often it repeats. If you are using OS X 10.8, you can also choose to have the maintenance task appear on your calendar or reminders list. This is especially helpful if you sync your calendar and reminders with iCloud as you can have your maintenance schedule on your iPhone, iPad, or any other Macs you may sync with.

To edit an existing maintenance task, select it in the list by clicking on it and then click the *Edit* button to the right of the Maintenance Schedule header:

You can also edit a maintenance task by double-clicking on it.

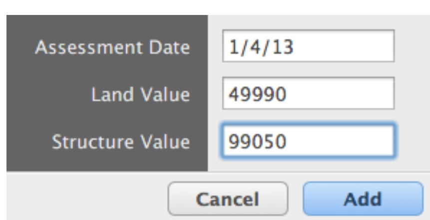
To remove a maintenance task, select it in the list by clicking on it and then click the *Remove* button to the right of the Maintenance Schedule header:

Assessment History

If you own your home, you no doubt have a keen interest in the periodic assessments of your home's value. The *Assessment History* section helps you keep track on this information.

To add a new assessment entry, simply click the *Add* button to the right of the Assessment History header:

This will bring up the *Assessment Panel*, where you can enter the date of the assessment along with the assessed land and structure values:



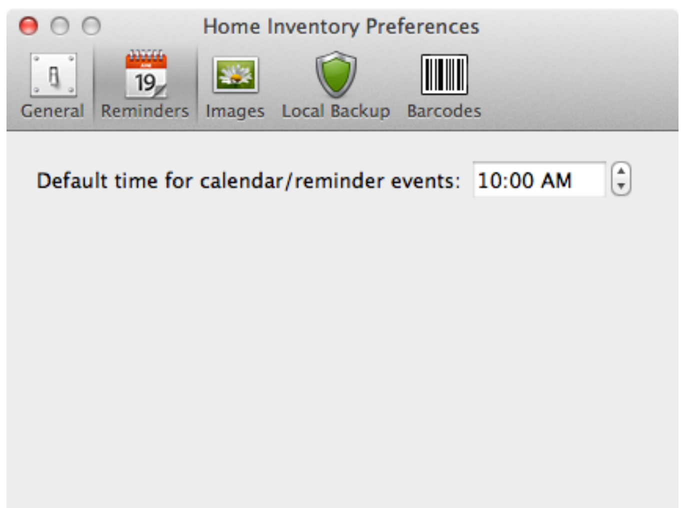
To edit an existing assessment entry, click on the entry to select it and then click the *Edit* button to the right of the Assessment History header:

You can also edit an assessment entry by double-clicking on it.

To remove an assessment entry, click on the entry to select it and then click the *Remove* button to the right of the Assessment History header:

Calendar & Reminder Times for Maintenance Tasks

Adding a maintenance event to your calendar or reminders lists requires that the event is associated with a specific time of day. This time is a global option that can be configured in the *Reminders* section of the *Preferences Panel* (to open the *Preferences Panel*, select *Preferences...* from the *Home Inventory* menu):

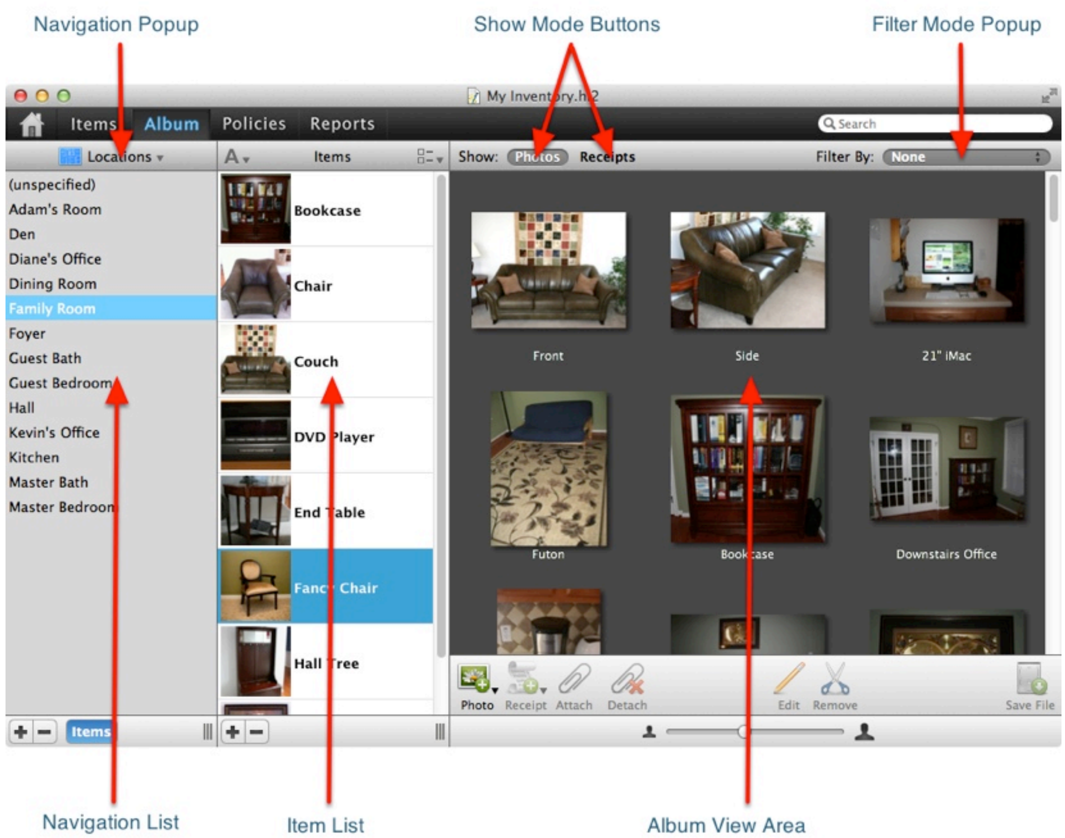


The Album View

About the Album View

The Album View lets you view all the photos and receipts in your inventory simultaneously. You can also edit photos and receipts and attach them to or detach them from your items.

Click the *Album* button on the *Toolbar* to switch to the *Album View*:



The *Album View* consists of the following key areas:

Album View Area: The photos and receipts in your inventory are displayed in this area. You can use this area to select photos or receipts to edit, save, attach, detach, or remove them from your inventory.

Filter Mode Popup: Click this popup to filter the photos or receipts shown in the *Album View*. You can view all of the photos or receipts in your inventory, just those attached to the selected item(s), collection, or location, only photos or receipts that are not attached to any item, collection, or location, or the photo(s)/receipt(s) last imported into Home Inventory.

Item List: The contents of the *Item List* are dependent on what is selected in the *Navigation Popup* and in the *Navigation List*. If *Categories* is selected, the items in the category that are selected in the *Navigation List* are displayed in the *Item List*. If Collections is selected, the *Item List* displays the items for the selected collection. If *Locations* is selected, the items in the selected location are displayed in the *Item List*.

Navigation List: The contents of this list depends on the selection made in the *Navigation Popup*. If *Locations* is selected, the *Navigation List* displays all the locations you have defined in your inventory. If *Categories* is selected, the *Navigation List* displays all the categories defined in your inventory. If *Collections* is selected, the *Navigation List* displays all the collections you have defined in your inventory. If *All Items* is selected, the *Navigation List* displays all the items you have in your inventory. In the case of *All Items*, the *Item List* is not shown as the items are shown in the *Navigation List*.

Navigation Popup: You can click on the *Navigation Popup* to select the type of information shown in the *Navigation List* (locations, categories, collections, or all items in your inventory).

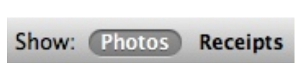
Show Mode Buttons: Use these buttons to select whether photos or receipts are shown in the *Album View*.

Show Modes and Filters

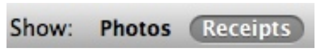
The *Show Mode* buttons and *Filter Mode Popup* are used to control what is shown in the *Album View Area*. The *Show Mode* lets you choose between displaying photos or receipts. The *Filter Mode* determines if any filter is applied to the photos or receipts to restrict which photos or receipts are shown.

Switching Between Photos and Receipts

To show the photos in your inventory in the *Album View Area*, click the *Photos Show Mode* button:

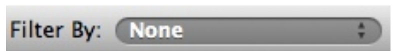


To show the receipts in your inventory in the *Album View Area*, click the *Receipts Show Mode* button:

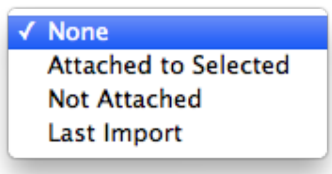


Filtering the Photos/Receipts Shown

You can filter the photos or receipts that are shown in the *Album View Area* by clicking on the *Filter Mode Popup*:



This will bring up a popup menu where you can select the type of filter you wish to apply:



There are four filters to choose from:

None: This will show you all of the photos or receipts in your inventory.

Attached to Selected: This filter will show only photos or receipts attached to the selected item(s) in the *Item List*. If you click the *Show/Hide Item List* button to hide the *Item List*, this filter will show you photos only for the selected location or collection in the *Navigation List*.

Not Attached: This will show you only the photos or receipts that are not attached to any item, collection, or location. This is useful when you wish to add photos or receipts to your inventory and come back at a later date to create the items for them.

Last Import: Shows only the photos or receipts that were last added/imported into your inventory. Similar to the *Not Attached* filter, this filter is useful in cases where you want to add a number of photos or receipts all at once and then use the *Attach* feature in the *Album View* to attach them to the right items.

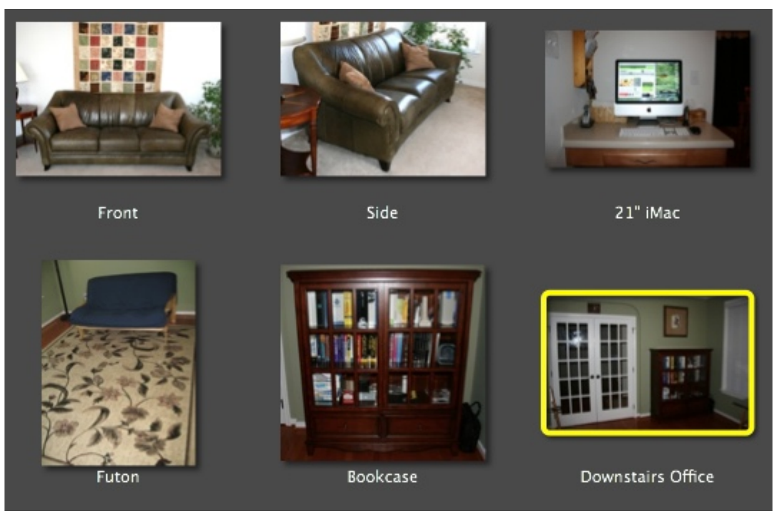
Adjusting the Size of the Images in the Album View

You can change the size of the thumbnail images for the photos and receipts shown in the *Album View Area* by adjusting the *Image Size* along the bottom of the window:

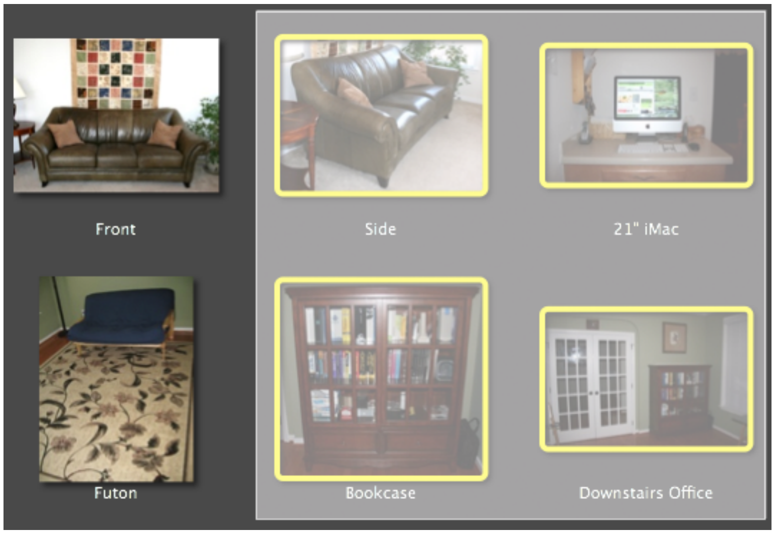
Moving the slider to the right makes the images in the *Album View Area* larger and easier to see. Moving the slider to the left makes them smaller, but allows more images to fit in the *Album View Area*.

Selecting Images in the Album View

You can select a single photo or receipt by simply clicking on it in the *Album View Area*. A photo or receipt that is selected will be surrounded by a bright yellow border:



You can select a group of photos or receipts by drawing a box around them. To do this, click the location in the background of the *Album View Area* that you wish to begin your selection and, while still holding the mouse button down, move your cursor to the location in the *Album View Area* where you wish to end your selection. A rectangular box will mark the selection area:



When you release your mouse button, any photos or receipts that are partially or fully inside the box will be selected.

Another method you can use is called sequential selection. To use this method, first click on a photo or receipt in the *Album View Area*. Next, while holding down the shift key on your keyboard, click another photo or receipt. All of the photos or receipts between the two will be selected.

You may wish to select additional photos or receipts without de-selecting any of the photos or receipts already selected. You can do this by holding down the Command (⌘) key on your keyboard while selecting the additional photos using any of the methods described above.

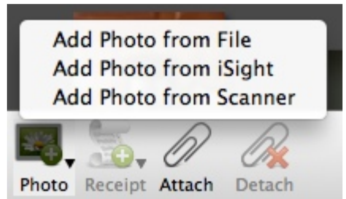
Finally, you can select all the photos or receipts shown in the *Album View Area* by holding down the Command (⌘) key while pressing the A key.

To de-select all of the selected photos or receipts, simply click in the background of the *Album View Area*.

Adding Photos

Adding photos from within the *Album View* works the same way as in the *Photo View* (see the Item Photos section in the Photos and Receipts chapter for more details) with one exception: photos are not automatically attached to the selected item(s) (or location or collection if working with those entities directly) when added.

You can add photos from files on your hard drive, or by capturing an image from an attached iSight or other video camera, or from a scanner by clicking on the *Photos* button in the *Bottom Button Bar* and selecting the method you wish to use from the popup menu that appears:



Alternatively, you can also add photos by dragging and dropping images from another application, such as a web browser, or image files from your hard drive into the *Album View Area*.

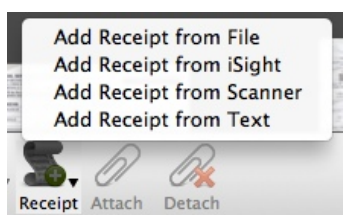
The *Show Mode* must be set to *Photos* in order to add photos within the *Album View*.

Adding Receipts

As with adding photos, adding receipts to the *Album View* works just as it does in the *Item View* (please see the Item Receipts and the Receipt View in the Photos and Receipts chapter for more details). Also as is the case with adding photos through the *Album View*, any receipts added in the Album View are not automatically attached to the selected item(s) in the *Item List*.

The *Album View* displays both image receipts and text receipts. Both types of receipts can be added by clicking the *Receipts* button in the *Bottom Button Bar* and selecting the method you wish to use to add your receipt(s) from the popup menu that appears.

The *Show Mode* must be set to *Receipts* in order to add receipts within the *Album View*.



Alternatively, you can also add image receipts by dragging and dropping images from your computer or from another application, such as a web browser into the *Album View Area*.

The *Show Mode* must be set to *Receipts* in order to add receipts from within Album View.

Removing Photos and Receipts

To remove photos or receipts from your inventory, simply select the photos or receipts you wish to remove in the *Album View Area* and then click the *Remove* button in the *Bottom Button Bar*:

You will be asked to confirm the removal before the selected photos or receipts are permanently removed from your inventory.

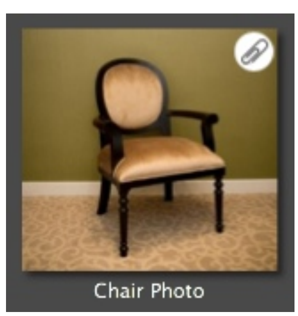
Editing Photos and Receipts

To edit a photo or receipt, select it in the *Album View Area* and then click the *Edit* button in the *Bottom Button Bar*:

Photos and image receipts will be brought up in the *Image Editor* for editing. See the Using the Image Editor chapter for more information on editing images. Text receipts are edited in the *Text Receipt Panel*. See the Item Receipts and the Receipt View section of the Photos and Receipts chapter for more information about editing text receipts.

Attaching and Detaching Photos and Receipts

Photos and receipts that are attached to the selected item in the *Item List* are marked with a paper clip symbol in the top right corner. If the *Item List* is hidden, photos and receipts that are marked with a paperclip symbol in the top right corner are attached to the selected location or collection:



You can attach photos and receipts to an item (or photos to a location or collection when the *Item List* is hidden) by first selecting the item in the *Item List*. Next, select the photos or receipts you wish to attach. Finally, click the *Attach* button in the *Bottom Button Bar*:

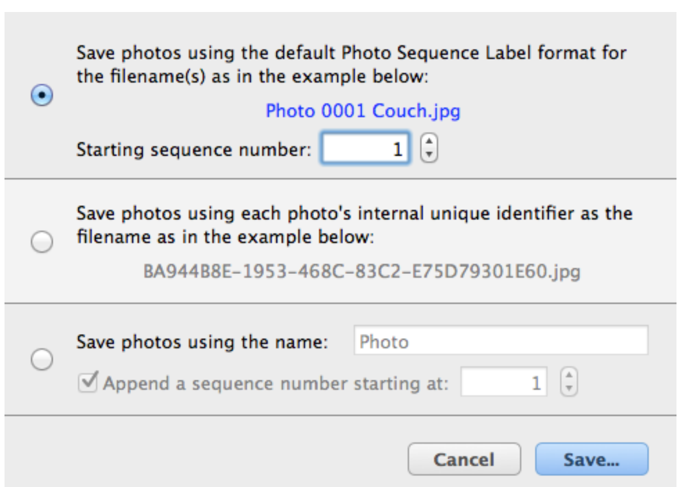
To detach photos and receipts from an item (or from a location or collection when the *Item List* is hidden) select the item in the *Item List*. Next, select the photos or receipts you wish to remove the attachment for and click the *Detach* button in the *Bottom Button Bar*:

Detach a photo or receipt does not remove the photo or receipt from your inventory.

Saving Photos and Receipts

To save photos or receipts from Home Inventory to your computer, select the photos or receipts you wish to save in the *Album View Area* and then click the *Save* button:

The will bring up the *Save Options* panel:

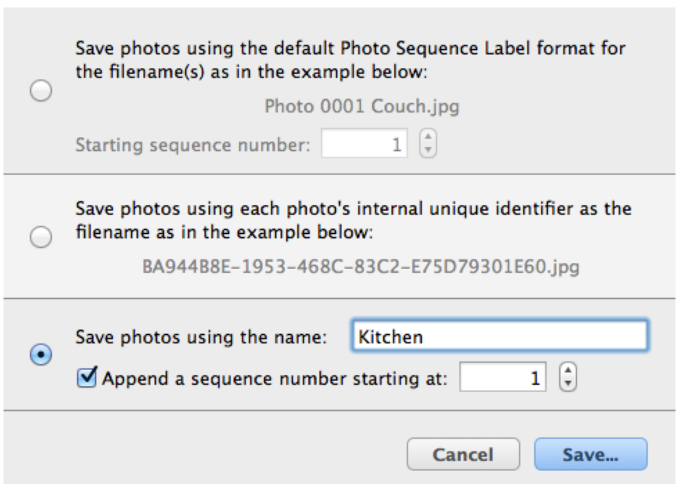


Next select the method used to name your photos or receipts when they are saved to your hard drive. The first method (shown selected in the screenshot above), uses a naming scheme of *type sequence label* where the type is either *Photo* or *Receipt*, depending on whether you selected photos or receipts to save, the sequence is the sequential number of the photo or receipt in your selection, and the label is the label you gave to the photo or receipt, if it has one. For example, if you selected five receipts to save and the third receipt has a label of *TV Receipt*, the filename used for saving the third receipt would be *Receipt 0003 TV Receipt.jpg*.

The sequence portion of the filename will begin with the number in the *Starting sequence number* box and increment by one with each photo or receipt that is saved from your selection. By default, the starting sequence number is 1.

The second naming option saves each photo or receipt using its internal unique identifier as the filename.

The third naming option allows you to give the photo or receipt a filename. If you selected multiple photos or receipts, you can check *Append a sequence number starting at* to add a sequence number to the end of the filename as in the following example:



If you chose three photos and used the naming option in the above example, they would be saved to your computer as Kitchen 0001.jpg, Kitchen 0002.jpg, and Kitchen 0003.jpg.

Once you have chosen and configured the naming method, click the *Save* button. A dialog box will appear where you can select the folder into which you wish to save the selected photos or receipts. Select the folder and then click the *Open* button in the dialog box to save the photos.

Photos and image receipts will be saved in the JPEG format with a extension of jpg. Text receipts will be saved in the Rich Text Format with an extension of RTF.

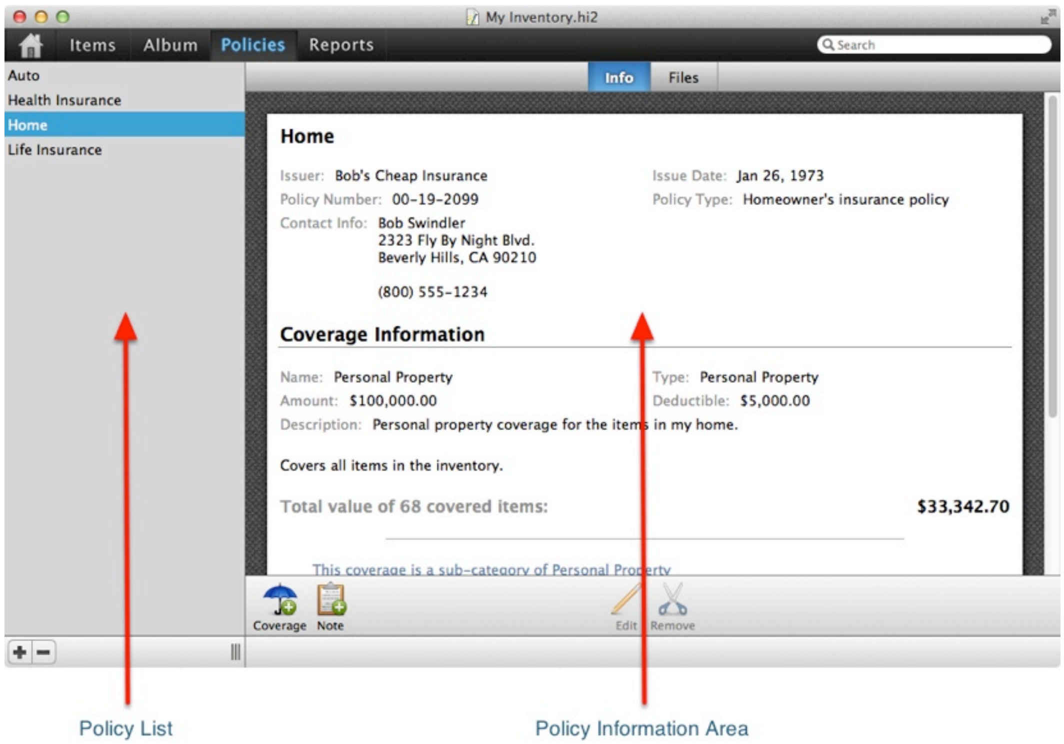
Managing Your Insurance Policies

About the Policy View

Knowing where you stand with the level of insurance coverage you have is one of the more important aspects of keeping an up-to-date inventory. Do you have more coverage than you need? Do you have enough coverage for all of your possessions? The *Policy View* helps you answer these questions.

You can use the *Policy View* to enter information about the various insurance policies you have. Home Inventory supports several policy types, including homeowner's insurance, renter's insurance, automobile insurance, life insurance, and health insurance so that you can keep a record of this information in case you need it. The main focus of the *Policy View*, however, is property-related policies, such as a homeowners, renters, and auto insurance.

Click the *Policies* button on the *Toolbar* to display the *Policy View*:



Policy Information Area: Displays the detailed information for the policy currently selected in the *Policy List*.

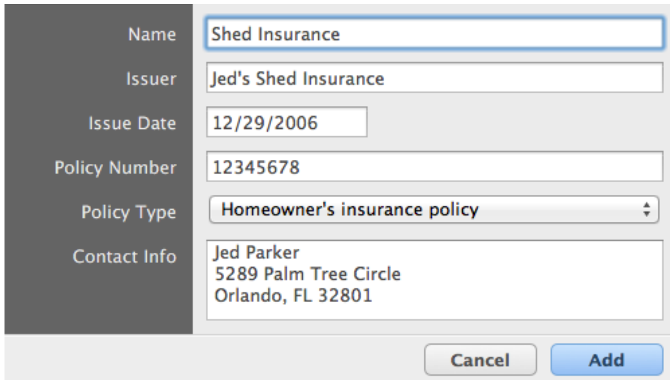
Policy List: Displays a list of all the policies you have defined in your inventory.

Policies

A policy in Home Inventory can consist of up to four distinct types of information: basic policy information, policy coverage information, notes, and attached files. The basic information (consisting of a name for the policy, the type of policy, issue information, and contact information) is entered when a new policy is added to Home Inventory. The other components (coverage information, notes, and files) may be added at any time.

Adding a New Policy

To add a new policy, click the + button beneath the *Policy List*. This will bring up the *Policy Panel* where you can fill in the basic information about your policy:



The *Policy Panel* has the following fields:

Field Name	Purpose
Contact Information	Contact information you wish to keep regarding the policy.
Issuer	The name of the company or organization that issued the policy.
Issue Date	The date the policy was issued.
Name	The name of the policy that will appear in the *Policy List*.
Policy Number	The identifying number for the policy given by the issuer.
Policy Type	The type of policy (automobile, health, homeowner's, life insurance, renter's, or other). The type of policy you choose affects the type of coverage that can be added to the policy.

Once you have filled in the information for your policy, click the *Add* button to add the new policy to your inventory.

Editing a Policy

You can edit a policy's basic information by double clicking on the name of the policy in the *Policy List*, double-clicking the *Basic Policy Information* section in the *Policy Information Area*, or clicking on the *Basic Policy Information* section to select it (the background will turn blue to indicate the section is selected) and then clicking the *Edit* button in the *Bottom Button Bar*:

Regardless of which method you use, Home Inventory will bring up the *Policy Panel* where you can edit the basic information for the policy.

Removing a Policy

To remove a policy, select it in the *Policy List* and then click the - button beneath the *Policy List*. You will be asked to confirm the removal before the policy is permanently removed from your inventory.

Coverage

Coverage entries describe different aspects of the coverage provided by your policy. For example, a homeowner's policy may have coverage entries for the structure, personal property, and flood coverage. While Home Inventory offers several coverage types to choose from, each of these types falls into one of two categories: basic or property related. Basic coverage types (collision, dwelling, liability, flood damage, other, and structure) consist of a name, description, coverage amount, and deductible.

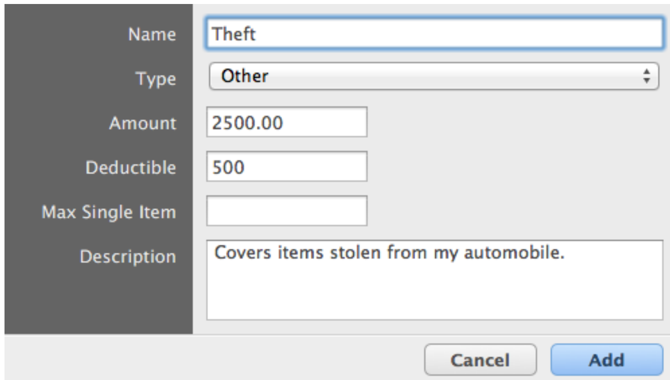
Property related coverage types (business property, personal property, and other property) include the same information as the basic coverage types, but also let you determine which items are covered under the coverage entry, the maximum value covered for a single item, and whether the coverage entry is a sub-category of another coverage entry. Property related coverage types will also produce warning messages if you do not have adequate coverage for the items.

The types of coverage entries allowed depends on the type of policy you are adding.

Adding a Coverage Entry to a Policy

To add a coverage entry to the policy selected in the *Policy List*, click the *Add Coverage* button in the *Bottom Button Bar*:

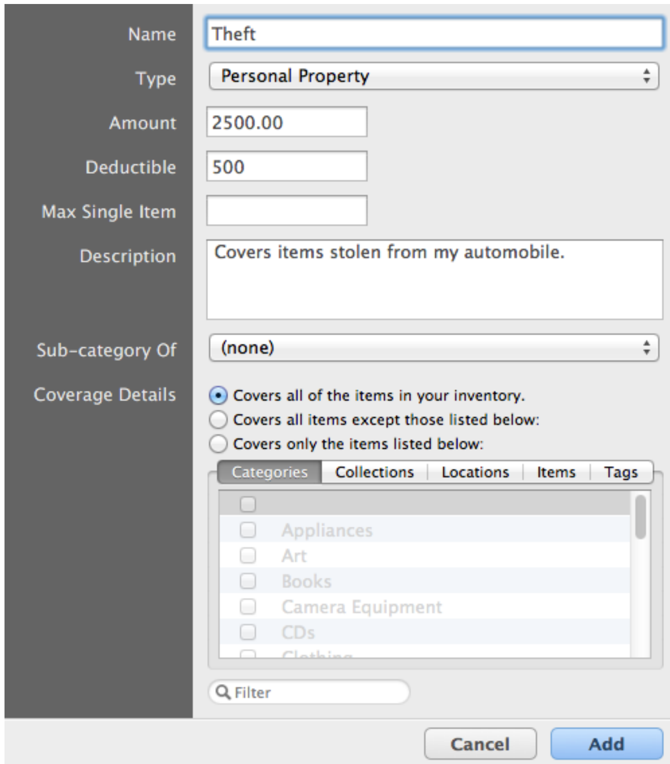
This will bring up the *Coverage Panel*, which for the basic coverage types looks like this:



The *Coverage Panel* has the following fields when a basic coverage type is selected:

Field Name	Purpose
Amount	The total value of the coverage provided by your policy for this coverage entry.
Deductible	The amount in deductible the policy holder must pay when filing a claim before the any money is paid out by the insurer.
Description	A description of the coverage entry.
Max Single Item	The maximum coverage value for a single item. Leave this field blank if it does not apply.
Name	The name you wish to give the coverage entry.
Type	The type of coverage provided by the coverage entry. The available types depend on the type of policy you are adding the coverage to.

If you select a property related coverage type from the type field in the *Coverage Panel*, some additional fields will be shown:



The *Max single item value* field is where you enter the maximum value for which any single item is covered under this policy. Leave this field blank if your policy has no maximum single item value.

The *Sub-category of* field is used for adding coverage sub-categories, which will be explained in the next sub-section.

The remaining options on the *Coverage Panel* let you choose which items are covered under this coverage entry.

The first option, *Covers all of the items in your inventory*, includes all items you have defined in your inventory.

The next option, *Covers all of the items in your inventory except those listed below*, lets you select categories, collections, locations, individual items, and tags that are excluded from being covered under this coverage entry.

The final option, *Covers only the items listed below*, lets you explicitly select the categories, collections, location, individual items, and tags that are covered under this coverage entry.

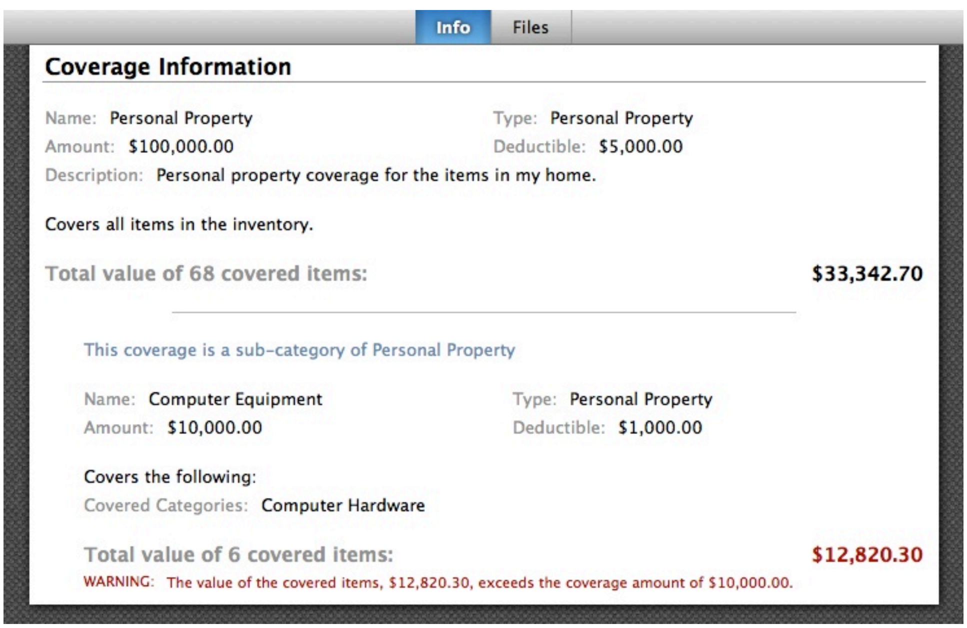
Once you have setup the coverage entry, click the *Add* button to add the coverage entry to your policy.

Coverage Sub-categories

Property related coverage can be complex. For example, you may have $200,000 worth of personal property coverage from you homeowner's insurance policy but only up to $10,000 worth of computer equipment is covered and $5,000 worth of jewelry is covered. Such restrictions are typical and are handled in Home Inventory with coverage sub-categories.

The Value of items in a sub-category are included in the overall value calculation of the parent coverage entity. As an example, let's say you create a coverage entry called My Property that covers all of the items in your inventory except items in the category Computer Hardware. All the items covered by My Property add up to a total of $100,000. Next, you create another coverage entry called My Computers that only cover items in the category Computer Hardware and make it a sub-category of My Property. If you own $25,000 worth of computer equipment, My Property will now show the total value of the items it covers as $125,000 because the items in My Property's sub-categories that are not already covered directly by My Property are included in the overall coverage by My Property.

Sub-categories appear indented below the coverage entry to which they belong in the *Coverage Information Area*:



Coverage Warnings

If the value of the items covered by a given coverage entry exceeds the amount of coverage provided or if the value of any individual items exceed the maximum value allowed for a single item by a coverage entry, a warning is listed in red at the bottom of the coverage entry.

Editing Coverage

To edit a coverage entry, select the coverage entry in the *Policy Coverage* section of the *Policy Information Area* (the background of the coverage entry will turn blue when it is selected) and click the *Edit* button in the *Bottom Button Bar*:

This will bring up the *Coverage Panel* where you can make changes to the coverage entry.

Removing Coverage

To remove a coverage entry, select the coverage entry you wish to remove in the *Policy Coverage* section of the *Policy Information Area* and either press the delete key on your keyboard or click the *Remove* button in the *Bottom Button Bar*:

You will be asked to confirm the removal before the coverage entry is permanently removed from your inventory.

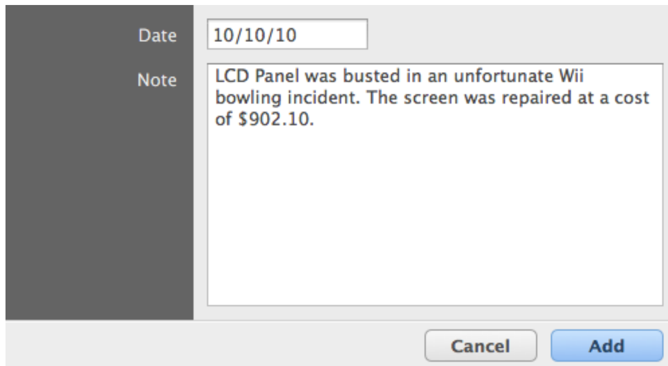
Policy Notes

As with items, locations, and collections, you can add notes to your policies.

Adding a Note

To add a note, click the *Note* button in the *Bottom Button Bar* in the policy information area:

This will bring up the *Note Panel*:



Type your note in the *Note Box*. When you have finished, click the *Add* button to add the note to your policy.

Removing a Note

You can remove a note from a policy by first clicking on the note in the *Policy Information Area* to select it (the note's background will turn blue when it is selected). Press the delete key or click the *Remove* button in the *Bottom Button Bar*:

You will be prompted to confirm the note's removal before it is permanently removed from your inventory.

Editing a Note

You can edit a note by double-clicking on the note in the *Policy Notes* section of the *Policy Information Area* or by clicking on it once to select it (the note's background will turn blue when it is selected) and then clicking the *Edit* button on the *Bottom Button Bar*:

This will bring up the *Note Panel* with the information for the selected note. Make your changes and then click the *Update* button to save.

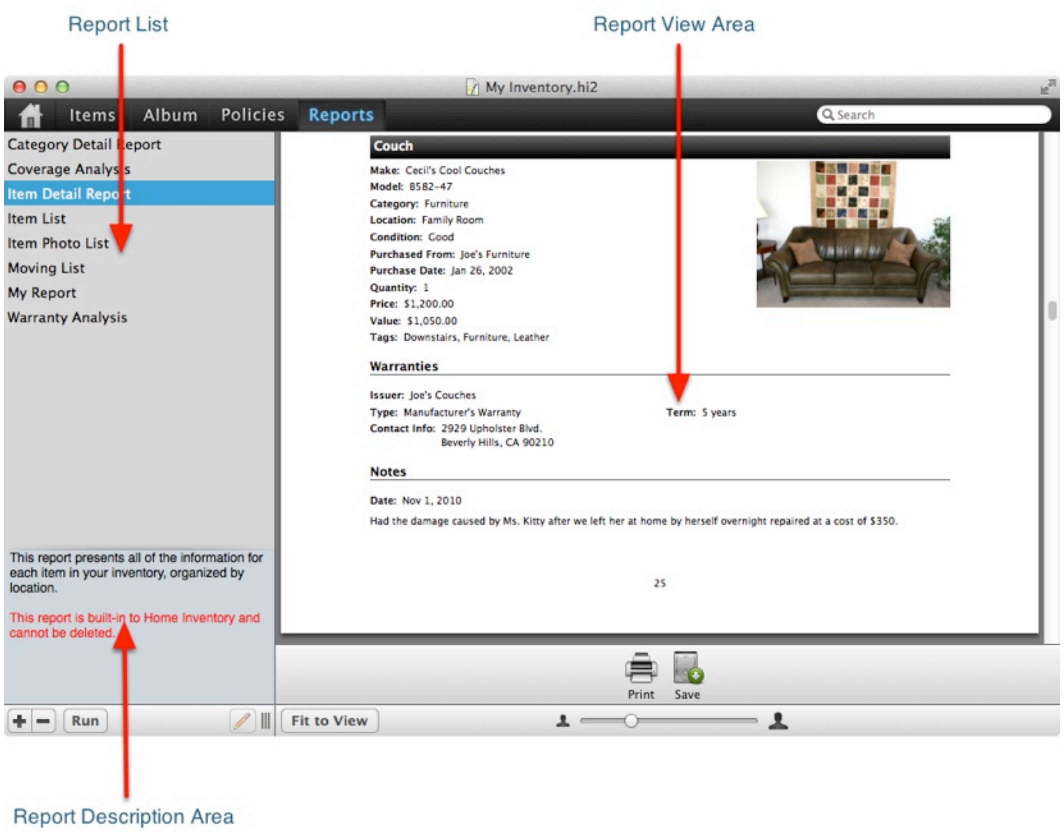
Policy Files

You can attach files (scanned copies of your policy, claims filings, etc) to your policy so they are always available on your computer. The process is the same as attaching files to an item and makes use of the *File View*. You can find out more information about using the *File View* in the File Attachments chapter.

Reports

About the Report View

Reporting is another important feature offered by Home Inventory. Home Inventory's *Report View* allows you to create, run, print, and save reports all from one place. Click the *Reports* button in the *Toolbar* to switch to the *Report View*:



Report Description Area: Displays a description of the selected report.

Report List: The list of available reports.

Report View Area: When you run a report, the results are displayed in the *Report View Area* from where you can view, print, and save the report.

Report Types

Home Inventory offers five distinct report types, each of which can be customized to fit your needs by clicking the + button beneath the *Report Description Area* to create your own custom reports. Each report type is described in detail in the remainder of this section.

Detailed Item Report

Detailed item reports show all the basic information for the items in your inventory and can include item photos, receipts, warranty information, and notes. With a detailed item report, you can choose whether it contains all the items in your inventory or a subset from select categories, collections, or locations, those items with specific tags, and individual items.

Items in a detailed item report can be organized into sections by location, collection, or category. Each section may have an optional summary that shows a breakdown of the items and the total number and value of the items in the section.

Detailed item reports also have an optional summary at the end of the report that shows a breakdown by location, collection, and category and gives the total number and value of the items in the entire report.

Item List Report

An item list report shows the name, quantity, serial number and value of each item on a single line. You can choose whether the report contains all the items in your inventory or a subset from select categories, collections, or locations, items with specific tags, as well as individual items.

Items in an item list report can be organized into sections by location, collection, or category. Each section will show the total number and value of the items in the section.

The total number and value of all the items in the report is printed at the end of the report.

Coverage Analysis Report

A coverage analysis report includes all the information about the insurance policies you have defined in your inventory. The report can include all the policies you have defined or only selected policies. The information included for each policy is made of the basic information section for the policy, all coverage entries, and any notes that may have been added to the policy.

Coverage warnings are shown with each coverage entry if the value of the items covered exceeds the coverage amount. Also, each item that exceeds the maximum single item coverage specified for the coverage entry, if one is given, is listed individually.

The report can optionally list each item covered by a given coverage entry individually as well as include a section that lists all the items not covered under any policy listed in your inventory.

Moving List Report

A moving list report offers a simple in/out checklist of your items that can be used to indicate which items are moved out of one location and into another. This helps to ensure all of your items successfully leave their original location and arrive at their new location. You can choose whether the report contains all of the items in your inventory or a subset from select categories, collections, or locations, items with specific tags, as well as individual items.

Items in a moving list report can optionally be listed by location, collection, or category.

Photo Contact Sheet

A contact sheet is a page of images arranged in rows and columns. The report can contain all your item photos or only those of items from select categories, collections, locations, containing certain tags, as well as select individual items. The photos can be organized by location, collection, or category.

Warranty Analysis

This report is divided into two sections. The first section lists the items that are currently covered under a warranty, sorted by the warranty coverage expiration date for each item. The second section details all of the items in your inventory that are out of warranty coverage. This section is sorted by item name.

In order for an item to appear in a warranty analysis report, it must have a valid purchase date and one or more warranty entries.

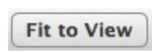
Running Reports

To run a report, select the report in the *Report List* and click the *Run* button beneath the *Report Description Area* or simply double-click on a report in the *Report List*. The Report is displayed in the *Report View Area* where it can be viewed, printed, and saved.

Adjusting the Size of the Report in the Report View Area

You may wish to change size of the generated report in the *Report View Area*. You can do this by adjusting the *Report Size Slider* directly beneath the *Report View Area*:

Click the *Fit to View* button beneath the *Report View Area* to automatically size the generated report so that a page of the report fits nicely on the screen:



Printing a Report

To print a report after you have generated it, click the *Print* button in the *Bottom Button Bar* or select *Print* from the *File* menu:

Saving a Report

To save a report that you have generated, click the *Save* button in the *Bottom Button Bar*:

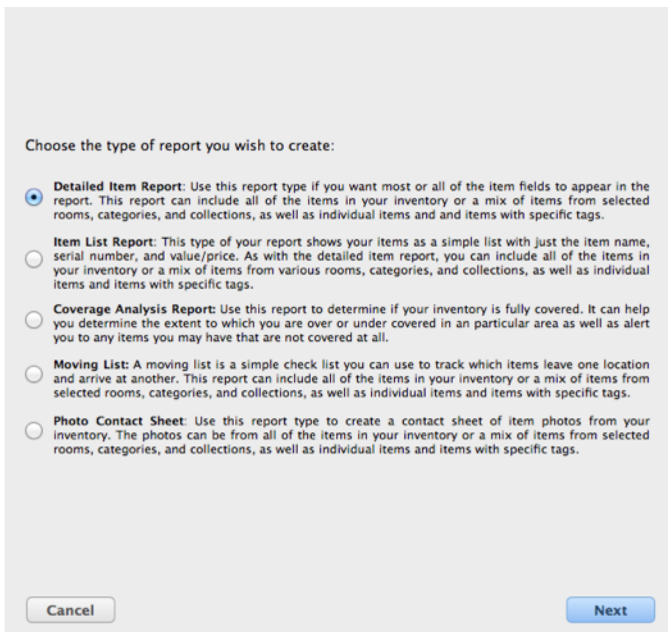
This will bring up a file browser for you to choose the name and location for the report to be saved as. Reports are saved in PDF format.

Adjusting the Page Setup for a Report

If you wish to adjust the page size and orientation used for generating a report, select the *Page Setup...* option from the *File* menu and set the page settings accordingly before you run your report.

Creating Your Own Custom Reports

You can create your own custom reports that can be saved and run over again. To create a custom report, click the + button under the *Report Description Area* to bring up the *Create Report Panel*:

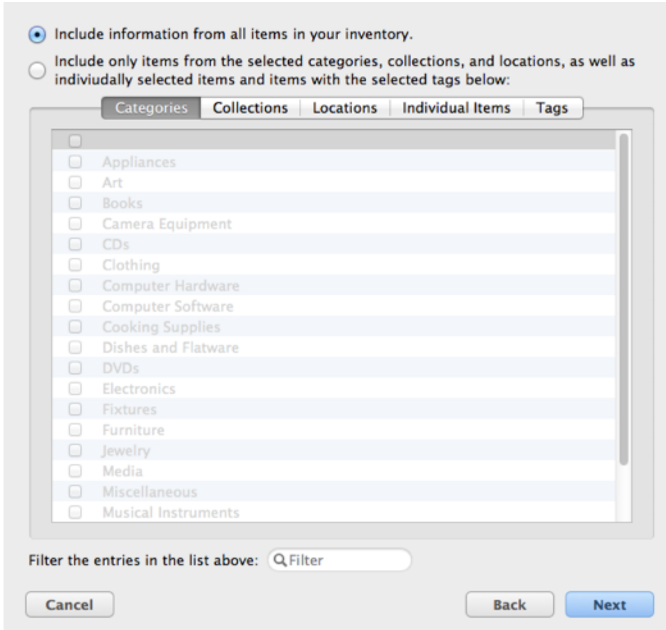


Choose one of the five standard report types (Detailed Item Report, Item List Report Coverage Analysis Report, Moving List, and Photo Contact Sheet) and click the *Next* button.

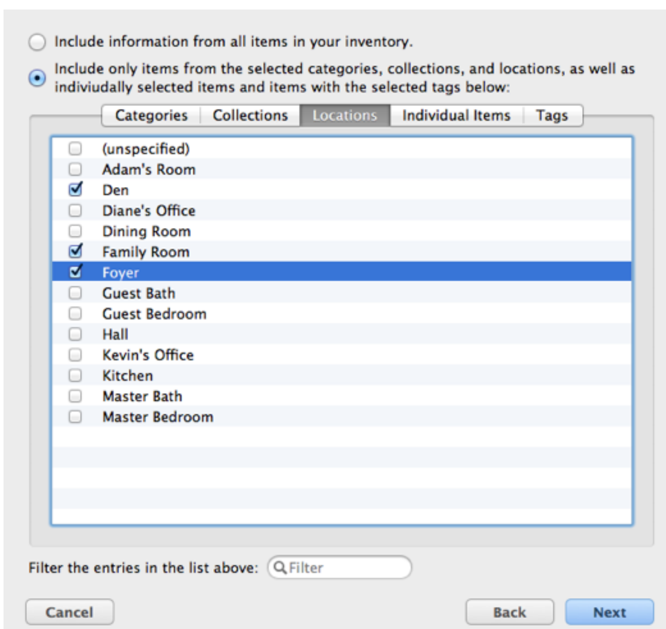
The next five sub-sections will guide you through the customization options for each of the five report types. The remaining sub-sections apply to all custom reports.

Creating a Custom Detailed Item Report

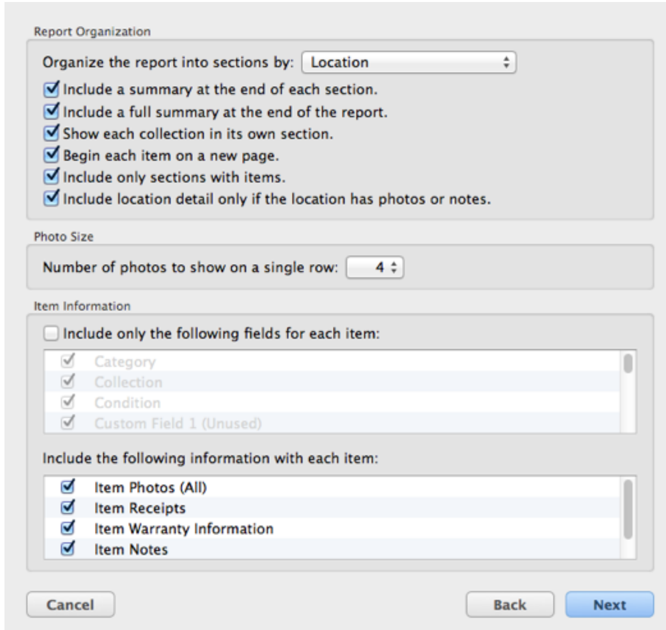
If you chose to create a custom Detailed Item Report, you will be asked to choose which items from your inventory will appear in the report:



The default option, *Include information from all items in your inventory*, will create a report from all items in your inventory. If you wish to include only selected items, click the *Include only items from the selected categories, collections, and locations, as well as individually selected items and items with the selected tags below* option. The table below will be enabled where you can choose the categories, collections, locations, individual items, and tags for the items to be included:



Once you have made your selection(s), click the *Next* button to choose how your report will be organized:



The first section, *Report Organization*, tells Home Inventory what additional information should appear in the report, how it should be organized, and how it is formatted:

- The *Organize the report into sections* popup lets you select if your items will be organized by location, collection, or category, or merely list all items alphabetically if the *None* option is chosen.
- Select *Include a summary at the end of each section* to include a summary of the quantities and values of the items in each section, broken down by category and/or location.
- Select the *Include a full summary at the end of the report* option to include a summary of the quantities and values of the items in the report, broken down by category, location, and collection.
- The *Show each collection in its own section* option will breakout items that are part of collections into separate sections at the end of the report, organized by collection.
- The *Begin each item on a new page* option will start each item in the report on a new page.
- Select the *Include only sections with Items* option to only include locations, categories, or collections that have items defined to them.

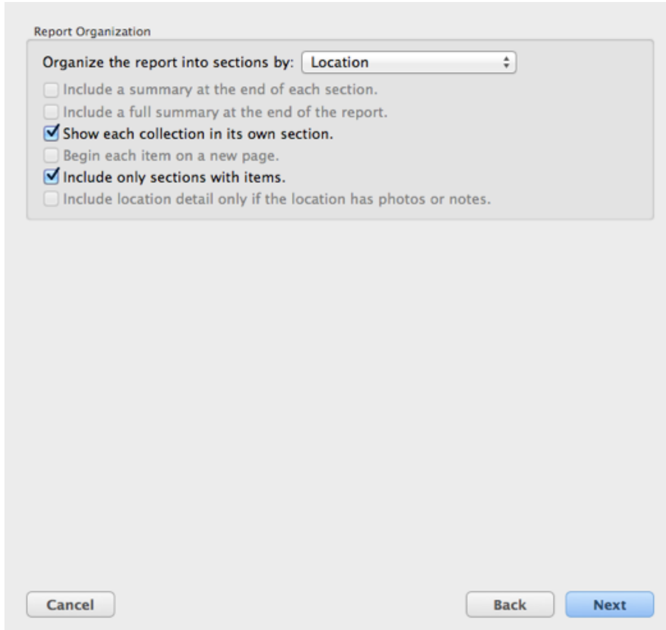
- Select *Include location detail only if the location has photos or notes* to include a page at the beginning of each section in a report organized by location with the location details only if the location has photos or notes attached to it.
- The *Photo Size* section allows you to choose the maximum number of photos that are shown horizontally across the width of the report page. This option only applies if *Item Photos (All)* is checked in the *Include the following information with each item* section.
- Select *Include only the following fields for each item* checkbox if you only wish to show only certain item fields in your report. Next, check the item fields in the list below that you wish to be included in your report. These fields will be shown for each item in which they appear in the field layout for that item. Unchecked item fields will not be shown in the report at all. If *Include only the following fields for each item* is unchecked, all of the fields in the field layout that applies to an item will be shown.
- The final section, *Include the following information with each item*, lets you choose what additional information appears in the report for each item. Your options are: *Item Photos (All)* to include all of the item's photos in a separate subsection with the item, *Item Receipts* to include each item's receipts, *Item Warranty Information* to include the warranty entries for each item, *Item Notes* to include the notes for each item, and *Main Item Photo* to show each item's main photo to the right of the item's basic information.

Click the *Next* button to move on to configure the cover page.

Creating a Custom Item List Report

As with a detailed item report, you will be asked to select whether all items or selected items will appear in the report. Refer to the prior sub-section Creating a Custom Detailed Item List Report.

Next, you will be asked how the report is organized:

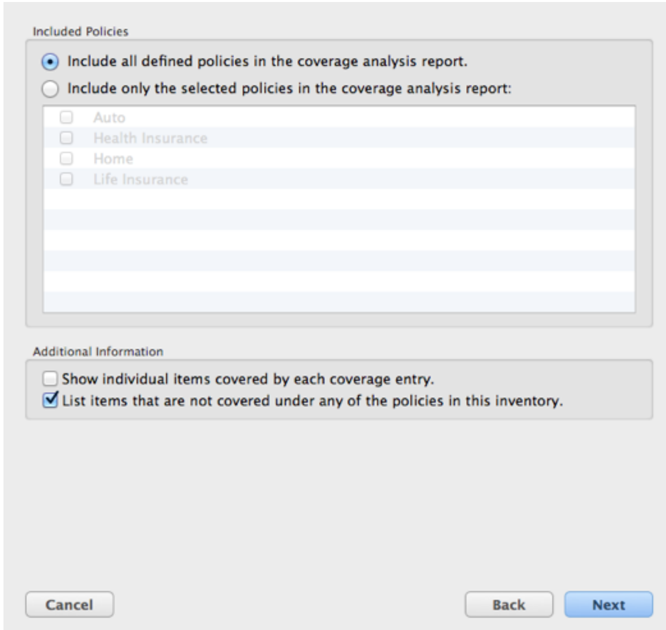


- The *Organize the report into sections* popup lets you select if your items will be organized by location, collection, or category, or merely list all items alphabetically if the *None* option is chosen.
- The *Show each collection in its own section* option will breakout items that are part of a collection into separate sections at the end of the report, organized by collection.
- Select the *Include only sections with Items* option to only include locations, categories, or collections that have items defined in them.

Click the *Next* button to move on to configuring the report's cover page, which is discussed later in the section.

Creating a Custom Coverage Analysis Report

When you create a custom coverage analysis report, you will be asked which policies to include and what additional information should be included in the report:



Select the *Include all defined policies in the coverage analysis report* option to include all of the policies. To include only selected policies defined in your inventory, select the *Include only the selected policies in the coverage analysis report* and then select the policies to include from the list.

Click the *Show individual items covered by each coverage entry* checkbox if you want all of the items covered by a property coverage entry listed with that coverage entry in the report.

Click the *List items that are not covered under any of the policies in this inventory* checkbox to include a list of all the items not covered under any property coverage entry.

Click the *Next* button to setup the report's cover page, discussed later in this section.

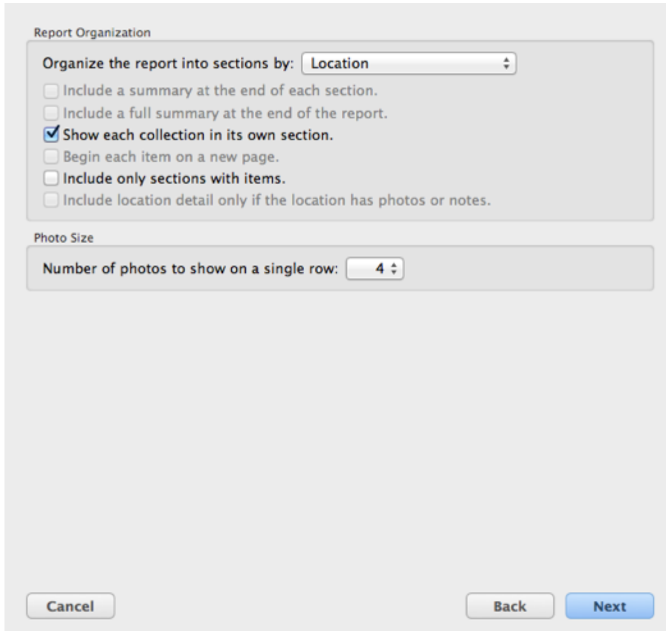
Creating a Custom Moving List

You will be asked to choose which items will be included in the report and how the report will be organized. Please refer to the sub-section Creating a Custom Detailed Item Report When you are finished, you will be asked to setup the cover page for your moving list report, which is covered later in this section.

Creating a Custom Photo Contact Sheet

You will be asked to select whether all items or specific items will appear in the report. Refer to the sub-section Creating a Customer Detailed Item Report.

Next, you will be asked how the report is organized:



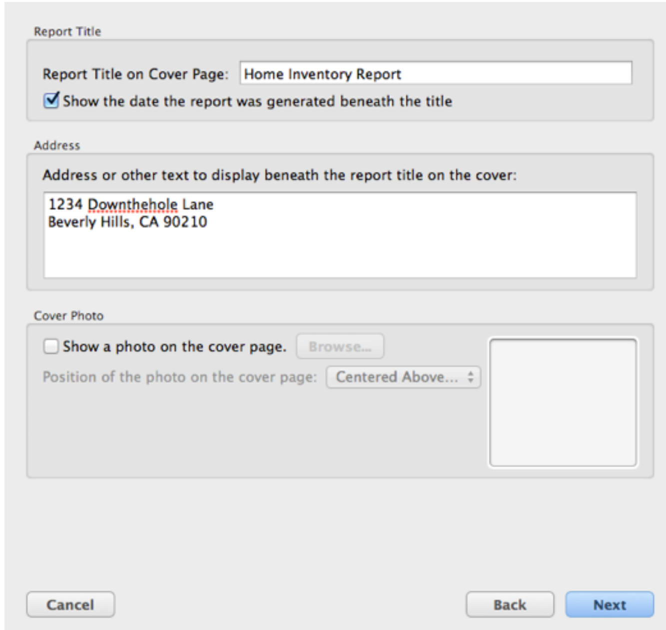
- The *Organize the report into sections* popup lets you select if your items will be organized by location, collection, or category, or merely list all items alphabetically if the *None* option is chosen.
- The *Show each collection in its own section* option will breakout items that are part of a collection into separate sections at the end of the report, organized by collection.
- Select the *Include only sections with Items* option to only include locations, categories, or collections that have items defined in them.

The *Photo Size* section allows you to choose the maximum number of photos that are shown horizontally, across the width of the report page.

Click the *Next* button to move on to configuring the report's cover page, which is discussed later in the section.

Setting up the Cover Page of a Custom Report

The report cover page options let you setup the appearance of the report cover page:



If you do not want a cover page, make sure all fields are blank and checkboxes are unchecked. To create a cover page:

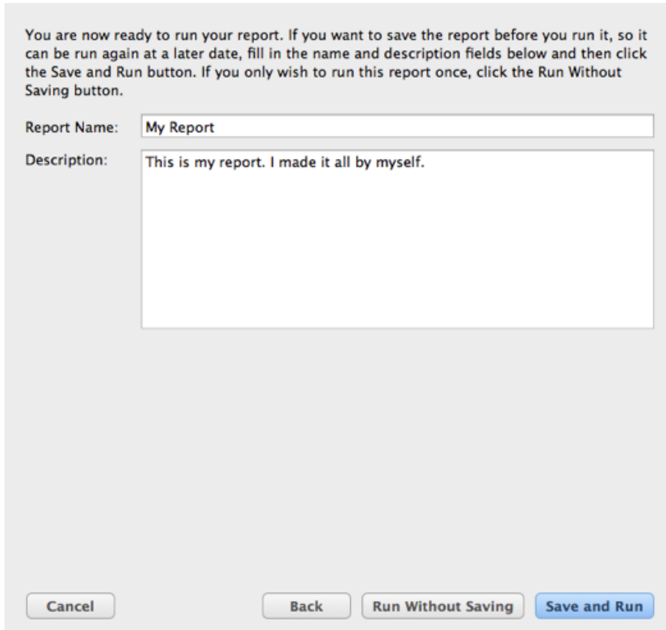
- Enter the title of your report in the *Report Title on Cover Page* box. The title will appear in the center of the cover page.
- Select the *Show the date the report was generated beneath the title* checkbox if you want the date the report is generated to appear on the cover page directly beneath the title.
- If you wish to display any other text, such as an address, beneath the title on the cover page, enter it in the *Address or other text to display beneath the report title on the cover* box.

To add a photo to your cover page, simply drag and drop the photo from Finder or another application into the image well in the bottom right or click the *Show a photo on the cover page* checkbox and then click the *Browse* button to choose the image file. Select the position of the photo on the cover page from the *Position of the photo on the cover page* popup. The position options include: centering the photo above the title or placing the photo in the top-left corner, top-right corner, bottom-left corner, or bottom-right corner of the cover page.

Click the *Next* button to go to the final configuration dialog to generate and save your report.

Running and Saving Your Custom Report

The final step in creating a custom report is to run and save the report:



If you do not want to save the report, simply click the *Run Without Saving* button. Home Inventory will run the report and display it in the *Report View.*

If you want to save the report so you can run it again at a later date, give the report a name and optional description in the appropriate boxes and click the *Save and Run* button. Home Inventory will save and run the report and display the results in the *Report View*.

Editing a Custom Report

To edit the settings in a custom report, click the *Edit Report* button beneath the report list:

Only custom reports may be edited. Built-in reports cannot be edited.

Removing a Custom Report

To remove a custom report, select the report in the *Report List* and click the - button directly beneath the *Report Description Area*. You will be prompted for confirmation before the report is removed.

Advanced Drag and Drop

Drag and drop is used to move or copy something from one location to another. You initiate a drag and drop operation by clicking on the object you wish to move or copy and, while still holding down the mouse button, drag it to another location and release the mouse button. Some drag and drop operations have already been discussed, but there are several others in Home Inventory that can make it easier to build and maintain your inventory.

Copying Photos and Receipts Among Items

To copy a photo or receipt between items, select the item and drag and drop the photo or receipt from the *Item Information Area* to the new item you wish to copy it to in the *Item List*. If the item you wish to copy the photo or receipt to is not in the same location, category, or collection as the item you are copying the photo from, you will need to set the *Navigation Popup* to *All Items* in order to copy the photo or receipt using drag and drop.

Copying File Attachments, Notes, and Warranty Information

As with photos and receipts you can also drag and drop file attachments, notes, and warranty information from the selected item to another item in the *Item List* to copy the file attachment, note, or warranty entry to that item.

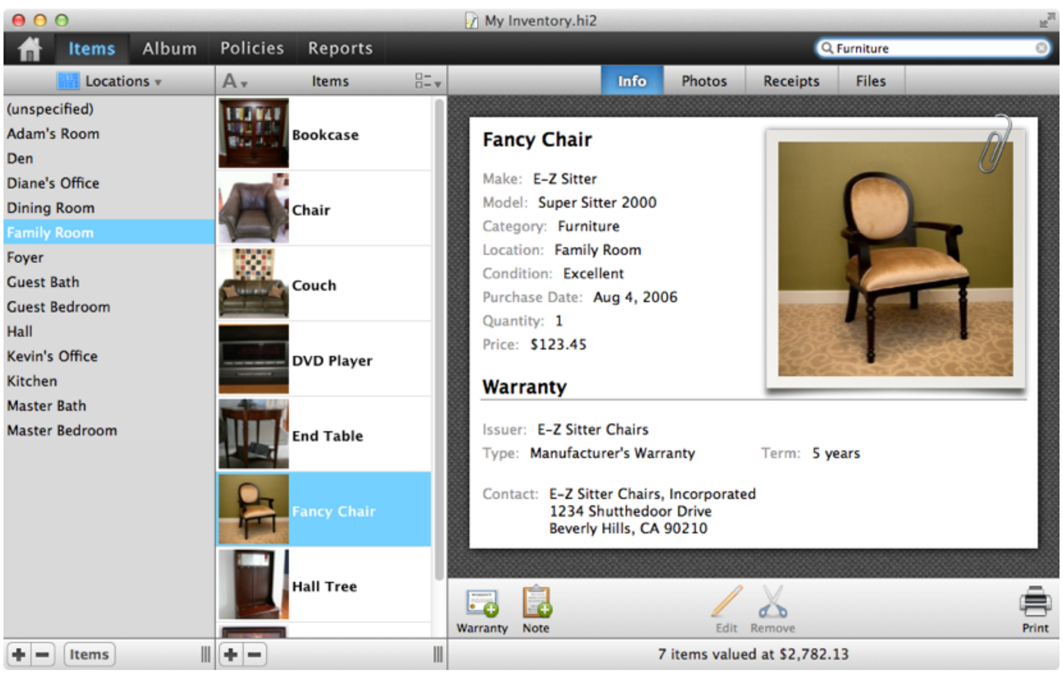
Attaching Photos and Receipts in the Album View

You can attach a photo or receipt in the *Album View* by dragging and dropping it from the *Album View Area* to the item in the *Item List*.

Searching Your Inventory

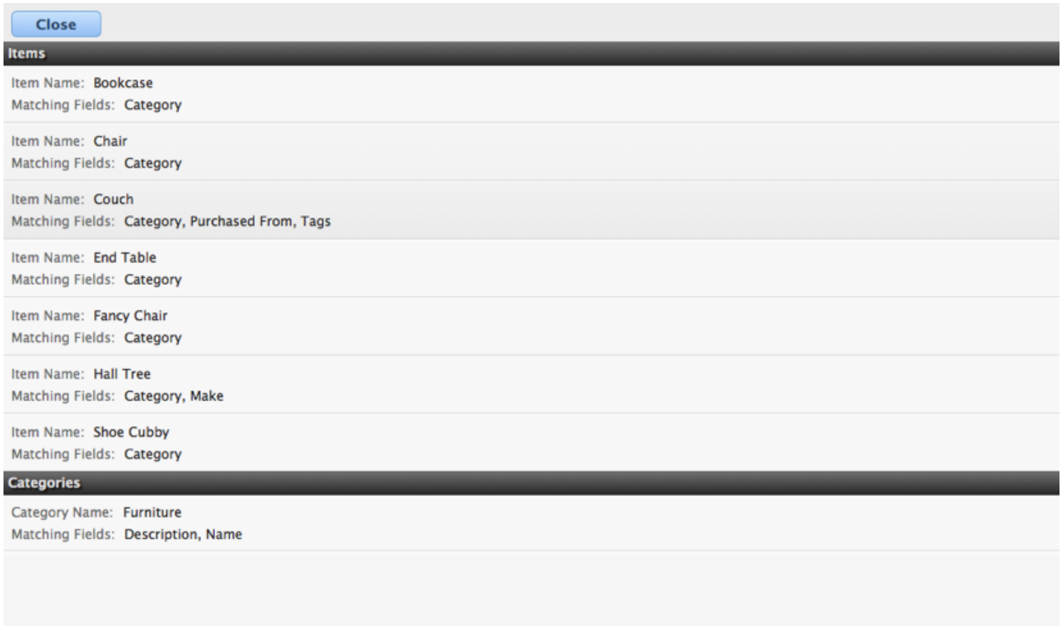
Performing a Search

To begin a search, type in whatever you are searching for (it can be all or part of a word or group of words, a number, a date, etc) in the *Search Box* in the upper right corner of the *Inventory Window* and press the return key on your keyboard:



Search Results

Home Inventory will display the search results in the *Results Window*:



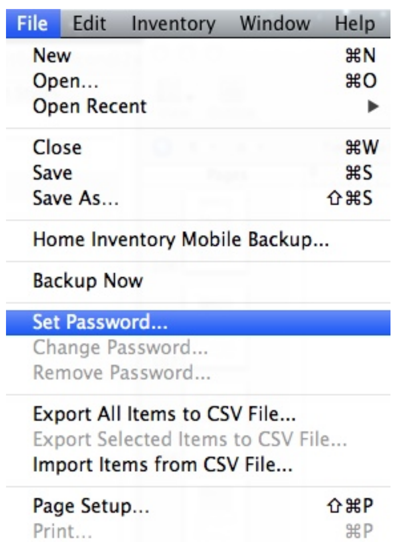
The search results are broken into sections. In the example above, the search yields one item, two locations, and one policy that match the search criteria. To view one of the matching results, click on it. In the above example, if you click on the Acme Insurance Co policy result, Home Inventory will show you that policy in the *Policy View*. To close the *Search Results Window* without viewing any result, click the *Close* button or hit the *Escape* key on your keyboard.

Password Protection

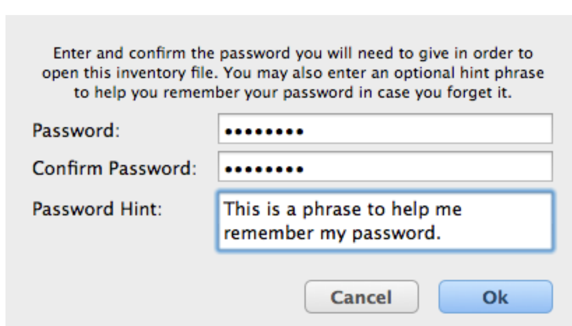
Your inventory likely contains sensitive information that you may not want others who use your computer to view. You can protect your inventory file from being opened by unauthorized users by giving it a password.

Adding Password Protection to an Inventory File

To set a password for your inventory file, select the *Set Password...* option under the *File* menu:



This will bring up the *Set Password Panel*:



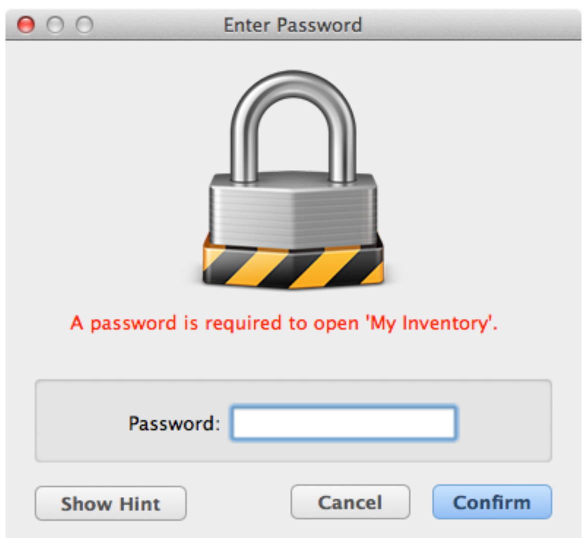
Enter the password you wish to use to protect your inventory file in the *Password* box and then enter it again in the *Confirm Password* box. You can also enter an optional hint phrase in the *Password Hint* box. A hint phrase is a sentence you create to help you remember your password in case you forget it later on.

When you are finished, click the *Ok* button. From now on, you will be required to enter the password to open this inventory file.

Please Note: *It is strongly recommended that you make use of a hint phrase as Binary Formations will not be able to recover your password if you forget it.*

Opening a Password Protected Inventory File

Whenever you try to open an inventory file that is protected with a password, Home Inventory will prompt you with the following window:

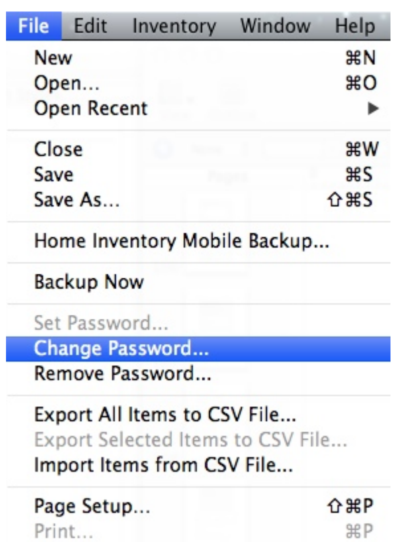


You must enter the correct password in the *Password* box and click the *Confirm* button to open the inventory file. If the correct password is not entered, Home Inventory will not open the inventory file.

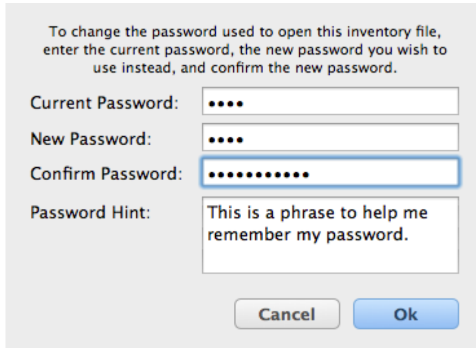
If you cannot remember your password and you supplied a hint phrase when you set or changed your password, click the *Show Hint* button to show the hint phrase:

Changing the Password for an Inventory File

To change the password used to protect an inventory, select the *Change Password...* option under the *File* menu:



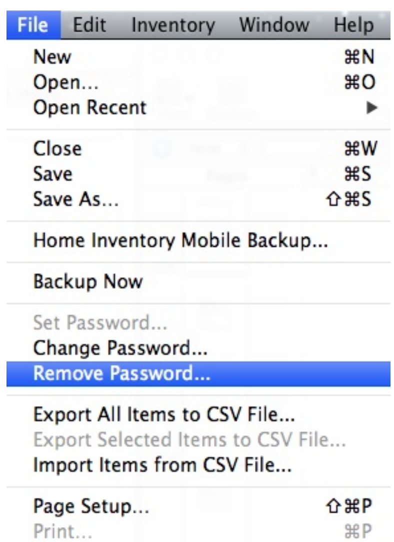
This will bring up the *Change Password Panel*:



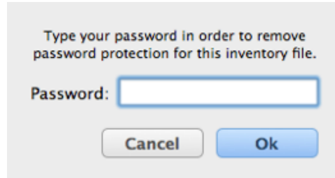
Enter the current password used to open the inventory file in the *Current Password* box. Next, enter the new password you would like to use in the *New Password* box. Finally, confirm the new password by re-entering it in the *Confirm Password* box and then click the *Ok* button. After you save the inventory file, the new password you entered will be applied. You can also use the *Change Password Panel* to add or change your password hint phrase.

Removing Password Protection for an Inventory File

If you wish to remove the password protection from a password protected inventory file, select the *Remove Password...* option from the *File* menu:



This will bring up the *Remove Password Panel*:



Enter the password you used to open the inventory file in the *Password* box and click the *Ok* button. Once you save the inventory file, a password will no longer be required to open it.

Password Protection Considerations

If you decide to password protect an inventory file, please be careful to choose a password that you can remember. If you forget your password, you will be unable to open your inventory file and Binary Formations, LLC cannot bypass or remove the password for you.

Backing Up Your Inventory

Backing up your inventory data is critical for making sure you have it when you need it. Home Inventory offers several backup options to help keep your inventory data safe.

Home Inventory Mobile Backup

Home Inventory Mobile Backup is a helper app that lets you backup your inventory file(s) to your iPhone, iPad, and iPod Touch. You can also view the items in your inventory in Home Inventory Mobile Backup, as well as restore a backed up inventory file to your Mac when needed.

Home Inventory Mobile Backup supports backing up and restoring through iTunes and by connecting to Home Inventory on your Mac over WiFi. Since the Home Inventory Mobile Backup app will be updated at a different pace than Home Inventory for the Mac, the instructions on how to use Home Inventory Mobile Backup are included in the app itself.

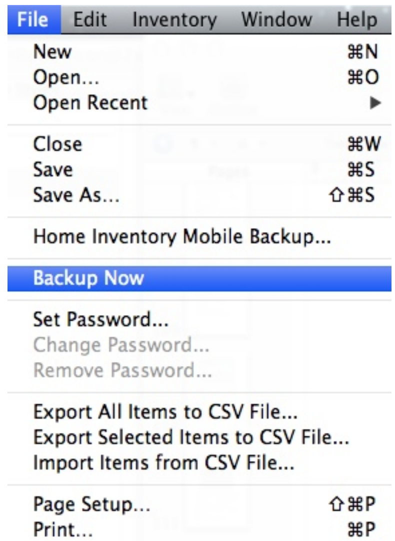
You can download Home Inventory Mobile Backup from the App Store in iTunes.

Local Backups

Home Inventory's local backup feature can be used to create a backup of your inventory in another location on your Mac's hard drive, external hard drive, or a USB drive. If you use a sync service, such as Dropbox (http://dropbox.com) or SugarSync (http://sugarsync.com), you can configure the backup folder to reside in the sync folder.

The Backup Now Menu Option

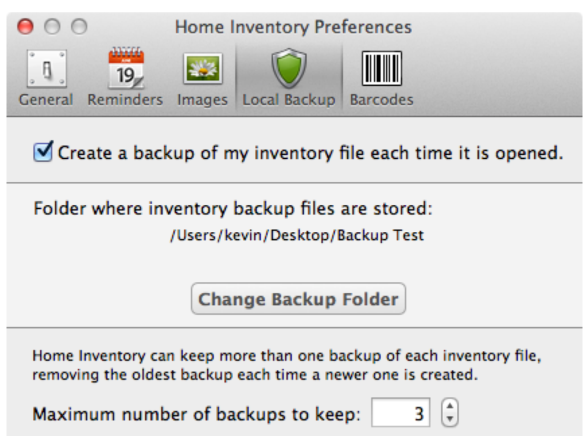
To create a local backup in the configured location, simply select *Backup Now* from the *File* menu:



Home Inventory will immediately begin backing up your inventory file to the specified backup location.

Configuring Local Backups

To configure the local backup feature, open the Home Inventory *Preferences Panel* by selecting *Preferences...* from the *Home Inventory* menu. Next, select *Local Backup* from the *Preferences Panel* toolbar to show the options for the local backup feature:



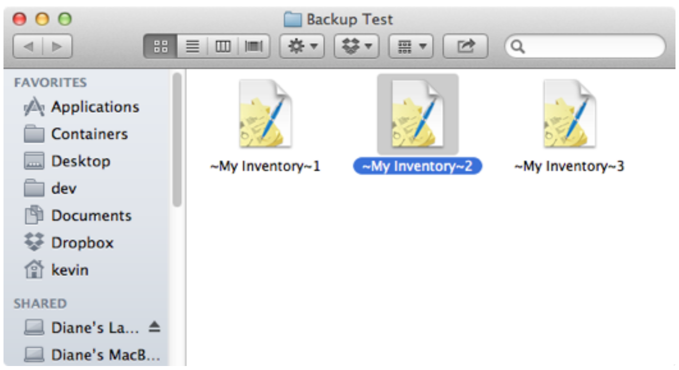
You can select the folder Home Inventory will use for backups by clicking the *Change Backup Folder* button. This will bring up a file browser you can use to pick the folder you wish to store your backups.

When Home Inventory creates a local backup of your inventory file, it can keep copies of previous backups. The *Maximum number of backups to keep* option specifies how many local backup copies are kept. Once this threshold has been reached, Home Inventory will remove the oldest backup copy before making a new one.

To help guard against potential file corruption, you can select *Create a backup of my inventory file each time it is opened* checkbox to make Home Inventory automatically backup an inventory file each time it is opened. Home Inventory will take more time to open an inventory file if this feature is enabled due to the time it takes to create a backup.

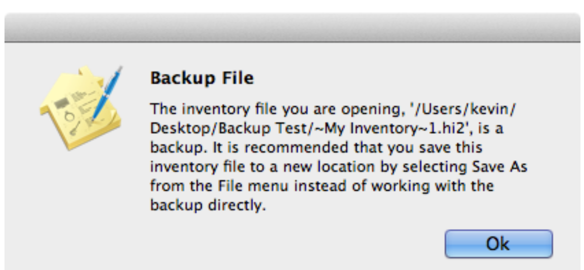
Restoring a Local Backup

To restore a local backup, navigate to the folder where your local backups are stored:



When Home Inventory creates a local backup of an inventory file, it uses the name as the original inventory file, but places a ~ at the front and ~ followed by a number at the end. The number indicates the 'age' of the backup, where the smaller the number, the newer the backup. In the example above, there are three backups of an inventory file called *My Inventory*. *~My Inventory~1* is the newest backup that was made, whereas *~My Inventory~3* is the oldest backup that was made.

You can restore a local backup by double-clicking on its icon. Home Inventory will recognize the inventory file as a backup and suggest that you save a copy to a new location:



Importing and Exporting Items

Home Inventory allows you to add item information from an external file through a process called importing. Typically this file is created by another application, perhaps another home inventory product or a spreadsheet, and offers a convenient way to exchange data between two different programs without having to re-enter it manually.

You can also export your item information from Home Inventory to an external file in a standard format that can be imported by other applications.

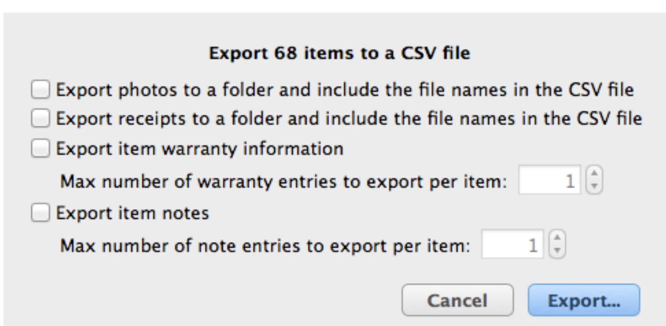
CSV Files

CSV stands for **C**omma **S**eparated **V**alue and is the file format used by Home Inventory for both importing and exporting item information. CSV files are a simple, text-based format, that can be read and written by most spreadsheets, databases, and many other programs.

Exporting Items from Home Inventory

To export items, go to the *Item View*. From here you can export all of the items in your inventory or export only the items currently selected in the *Item List*. Both options are under the *File* menu.

This will bring up the *Export Panel:*



The *Export Panel* presents you with several options. If you check the *Export photos to a folder and include the file names in the CSV file* or *Export receipts to a folder and include* *the file names in the CSV file* checkboxes, Home Inventory will save the item photos and receipts, respectively, to a folder on your computer and include the complete path to these files in the CSV file. This is necessary since CSV files are text-based and cannot contain images or rich text information. Photos will be placed in a folder called *Exported Photos* and receipts will be placed in a folder called *Exported Receipts*. Both folders will be placed inside the folder the CSV file resides in.

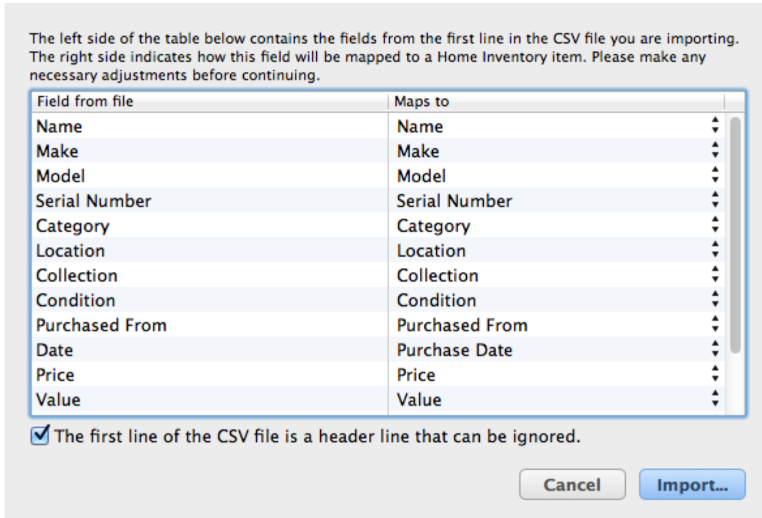
The remaining two options determine whether warranty information and item notes are exported. CSV files have a fixed number of columns. To overcome this limitation, Home Inventory allows you specify the maximum number of warranty and note entries that will be exported for a single item. To export item warranties, click on the *Export item warranty information* checkbox and select the maximum number of warranty entries you want to export in the box below. To export item notes, click on the *Export item notes* checkbox and select the maximum number of note entries you want to export in the box below.

Once you have finished configuring the export options in the *Export Panel*, click the *Export...* button. If you are exporting photos or receipts, Home Inventory will bring up a browser window for you to you to choose a folder on your hard drive to place the exported data. Home Inventory will create a folder called *Home Inventory Export* inside of your chosen folder. The CSV file itself, *Exported Inventory.csv*, will be created in the *Home Inventory Export* folder, as will the folders for the exported photos and receipts, *Exported Photos* and *Exported Receipts*.

If you are not exporting photos and receipts, Home Inventory will ask you to choose the name of the export file and its location. Once you have done this, it will export your items to the file name and location you have chosen.

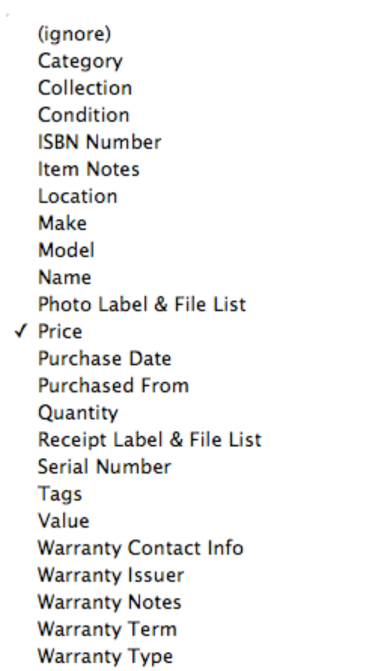
Importing Items into Home Inventory

To import items from a CSV file, select *Import Items from CSV File...* under the *File* menu. This will bring up a file browser where you can select the CSV file you want to import. Next, Home Inventory will bring up the *Import Panel*:



The most prominent part of the *Import Panel* is the *Field Map Table*. Home Inventory reads the CSV file you are importing and shows the fields from the first line of the file in the left column and its best guess how that information maps to an item in Home Inventory in the column on the right. Since there are no guarantees what kind of data is in a CSV file and the order in which it will appear, you will need to carefully look through the field map to make sure the fields for each entry in the CSV file properly line up to information in a Home Inventory item.

To change how a field maps to a Home Inventory item, click on the column on the right to select a field from the available field list:



Choose the Home Inventory item field you wish the data to be imported to. If you do not want this particularly field to be imported or if the field does not match any of those offered by Home Inventory's standard field list or any of the custom fields you have defined in your inventory, select *(ignore)*.

Typically, the first line of a CSV file contains headers for each of the fields that describe the purpose or type of information in the field. If this is not the case for the CSV file you are importing, un-check the *The first line of the CSV file is a header that can be ignored* checkbox.

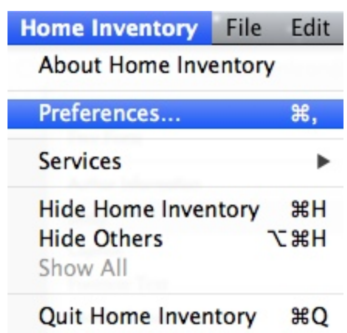
Once you have configured the import options, click the *Import* button to begin the import operation. Due to the security sandbox in OS X, you may be prompted for permission to one or more directories where you have stored photos or receipts if you are importing photo or receipt data.

Image Storage in Home Inventory

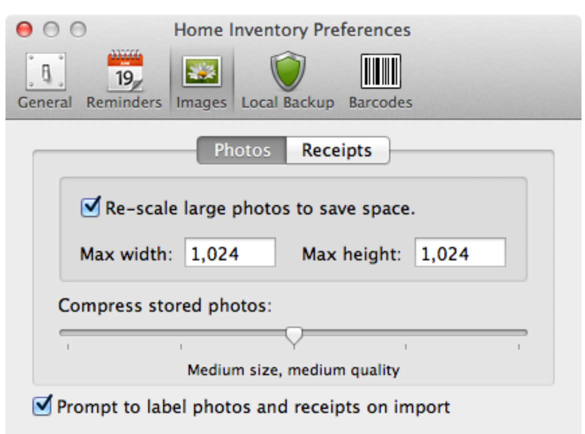
You are likely to have many photos and receipts stored in your inventory file by the time you complete your inventory. These images take up space. To help conserve space, Home Inventory will scale down larger images and compress all images before storing them. In most cases, the default scaling and compression settings used by Home Inventory will work fine. However, you can change these settings to better suit your needs.

Changing the Image Storage Settings

To change the image storage settings, select *Preferences...* from the *Home Inventory* menu:



Click the *Images* button at the top of the *Preferences Panel*:



Home Inventory allows different settings for photos and receipts. To change the settings used for photos, make sure the *Photos* tab is selected. To change the settings used for receipts, make sure the *Receipts* tab is selected. It is important to note that any changes you make only affect photos and receipts you import after the changes were made and not any images previously imported into your inventory.

Adjusting the Image Scaling

If the *Re-scale large photos/receipts to save space* option is checked, Home Inventory will automatically scale down imported images larger than the specified *Max width* or *Max height* so the image fits within the specified bounds. This automatic scaling is turned on by default..

You can adjust the *Max width* and *Max height* values to a larger size if you wish store larger versions of the images you import into Home Inventory to retain more detail and clarity, though typically this is not needed. You can also set these values lower if you wish to scale down imported images even further to keep your inventory file as small as possible. Be careful not to scale down imported images so small that it is difficult to discern any detail. This is especially a concern for receipt images, where the text can easily become illegible.

Un-check the *Re-scale large photos/receipts to save space* option to turn off image re-scaling altogether. Be aware, however, that with this option turned off, your inventory file can grow very large, very quickly as you import new images.

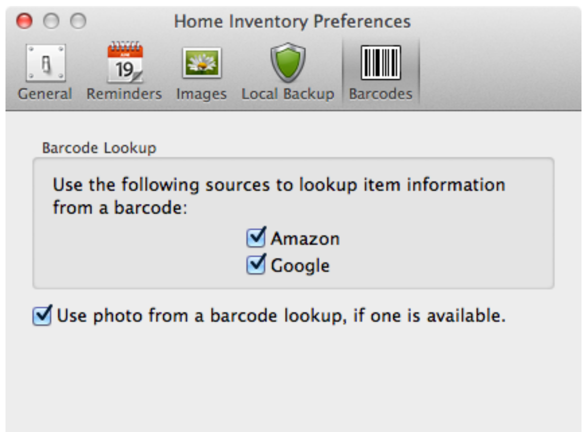
Adjusting the Image Compression

All images imported into Home Inventory are compressed before being stored so that they take up less space in your inventory file. As the amount of compression used increases, the amount of space required to store the image decreases, as does the quality of the image. Too much compression can leave an image looking fuzzy. Too little compression will result in a high-quality image that takes up a lot of space in your inventory file.

Typically, you will not need to adjust the compression for photos or receipts. However, if you do find the need to adjust the compression level, you can do so by moving the *Compress stored photos/receipts* slider. Moving the slider to the left adds more compression, resulting in images that take up less space but with lower quality. Moving the slider to the right uses less compression, resulting in images that take up more space but with a higher quality.

Barcode Lookup Preferences

The *Barcodes* section of the Home Inventory *Preferences Panel* allows you to configure the online sources and other options used when Home Inventory retrieves item information from a barcode lookup. Select *Preferences...* from the *Home Inventory* menu to open the *Preferences Panel*:



When a barcode is entered through the manual barcode entry feature or sent via the *Home Inventory Photo Remote* helper app, Home Inventory consults the sources in the *Barcode Lookup* section to try and find information about the item. Currently, only two sources are offered: Amazon and Google. Home Inventory will first try to lookup information using Amazon. If the item information cannot be found on Amazon, it will consult Google's Product Search. If you do not wish to use a particular source in a barcode lookup operation, click the checkbox to the left of its name to uncheck it.

The *Use photo from a barcode lookup, if one is available* option determines whether or not the associated item photo found via a barcode lookup is attached to the item in Home Inventory. For insurance purposes, it is recommended that you do not enable this option. Having a photo you took of your items in your home can help establish proof of possession. Stock product photos found online do not aid in this purpose.

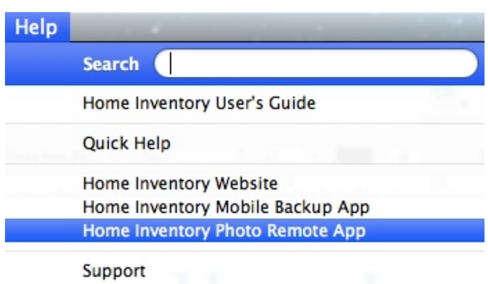
Home Inventory Photo Remote

Home Inventory Photo Remote is an app for your iPhone and camera-enabled iPod Touch that connects to Home Inventory on your Mac using your wireless network and lets you add photos to inventory items using the built-in camera. Photo Remote turns your iPhone into a wireless camera for Home Inventory so you can add photos without being in front of your Mac. Home Inventory Photo Remote can also add new categories, collections, locations, and items to your inventory, so you can build a quick outline of your inventory and fill in the details later.

NOTE: *The Home Inventory Photo Remote app requires a wireless network to connect to your Mac. If you do not have a wireless network, refer to the* *Setting up a Wireless Network* *section at the end of this chapter to learn how to set one up with just your Mac.*

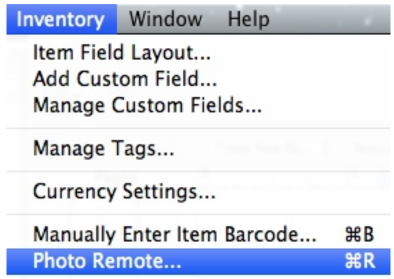
Downloading Home Inventory Photo Remote

Home Inventory Photo Remote is a free app available in the App Store in iTunes. There is also a direct link to the app in the App Store on the Home Inventory Photo Remote page on the Binary Formations website. You can get to this page by selecting *Home Inventory Photo Remote App* from the *Help* menu in Home Inventory:

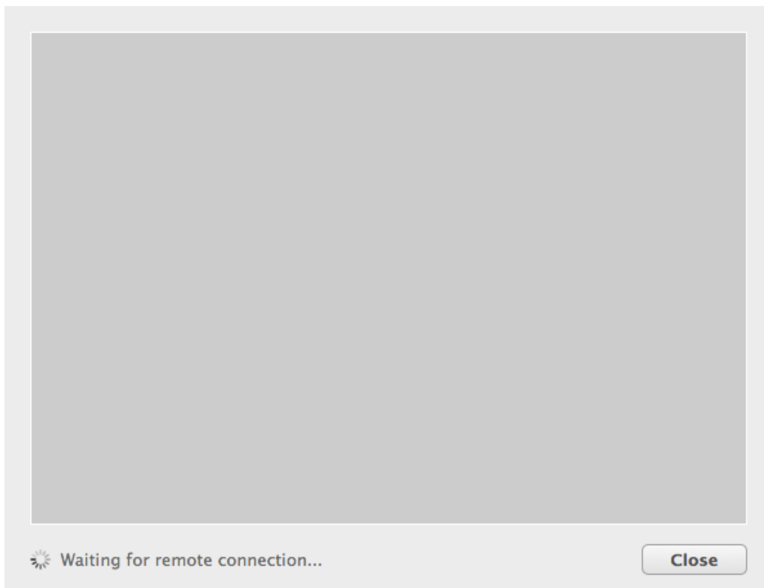


Using Home Inventory Photo Remote

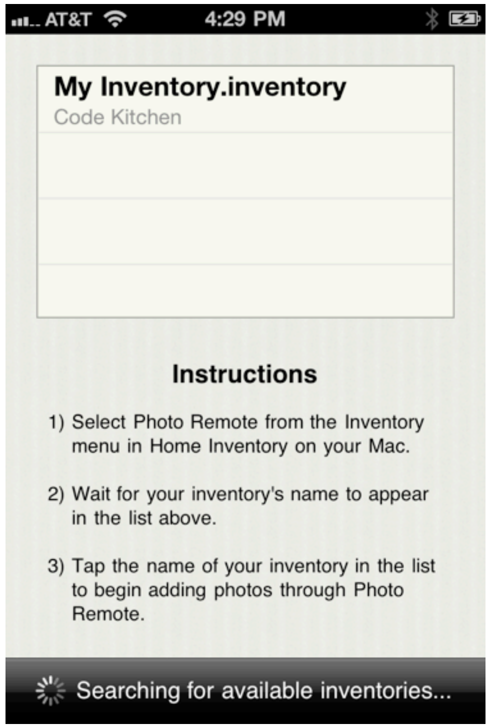
To begin using the Home Inventory Photo Remote application, you must first open an inventory file if one is not already open. Next, select *Photo Remote...* from the *Inventory* menu:



This will bring up the *Photo Remote Window*:



Notice the status text at the bottom of the window that tells you Home Inventory is waiting for a connection from Home Inventory Photo Remote on your iPhone/iPod Touch. To connect to Home Inventory, launch the Home Inventory Photo Remote app on your iPhone. After the app is loaded, you will be presented with following screen:



This shows you a list of inventories in Home Inventory that your can connect to using the Photo Remote app. In most cases, you will only see one inventory in this list. To connect to Home Inventory and begin using the Home Inventory Photo Remote app, tap the name of the inventory you wish to work with.

Browsing Your Inventory

Once you have connected to an inventory, the Home Inventory Photo Remote app will take you to the *Browse Screen*:

From this screen, you can browse inventory items by category, collection, or location, or view all of your items in a single list, just like in Home Inventory. To begin browsing items, tap the appropriate button on the *Browse Screen*.

If you tap *Items By Category*, you will be shown a list of all the categories in your inventory. If you tap a category, you will be shown a list of all of the items belonging to that category.

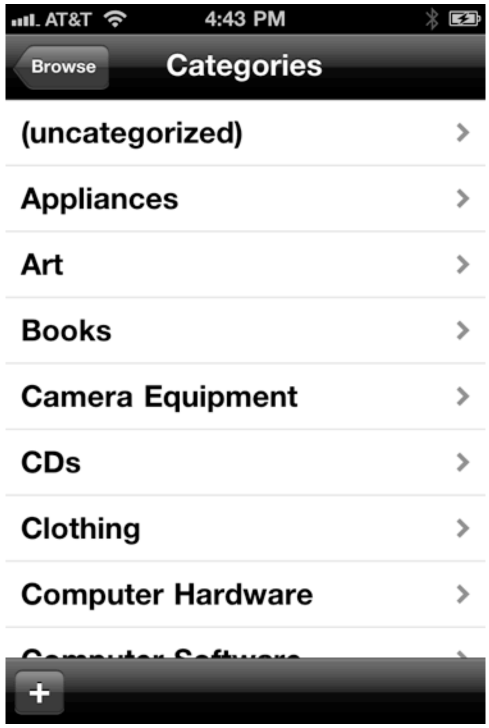
If you tap *Items By Collection*, you will be shown a list of all the collections in your inventory. If you tap a collection, you will be shown a list of all of the items belonging to that collection.

If you tap *Items By Location*, you will be shown a list of all the locations in your inventory. If you tap a location, you will be shown a list of all of the items in that location.

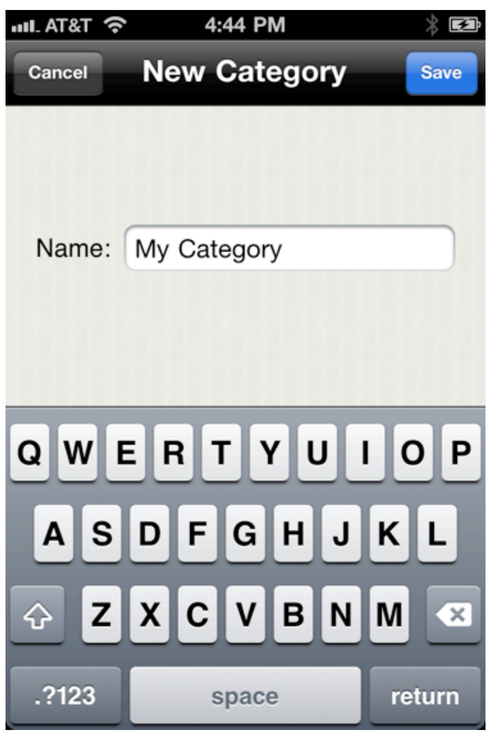
Finally, if you tap *All Items*, you will be shown a list of all of the items in your inventory.

Adding a New Category, Collection, or Location

To add a new category, collection, or location to your inventory using the Home Inventory Photo Remote app, tap the add (+) button in the bottom left corner of the category, collection, or location list screen:



This will bring up the *Add Screen*:



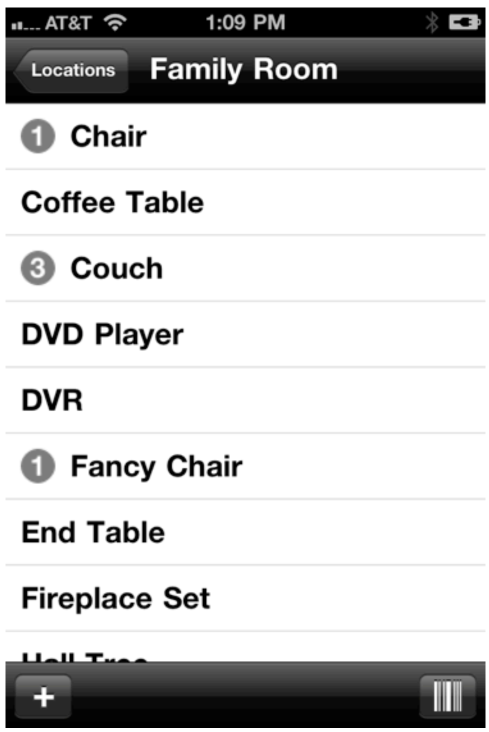
Give the new category, collection, or location a name and tap the *Save Button* in the top right corner of the screen to add it to your inventory.

Adding New Items

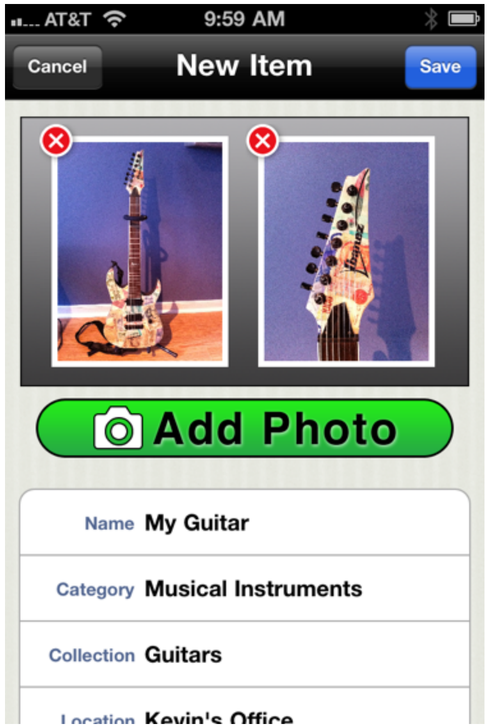
There are two ways to add new items to your inventory using the Photo Remote. You can either enter the item manually or scan the UPC, ISBN, or EAN barcode on the item or its packaging and have Home Inventory lookup the item online and automatically fill in the information.

Adding a New Item Manually

To manually add a new item to your inventory, tap the add (+) button in the bottom left corner of the *Item List* (this could be the list of items for a specific category, collection, or location or the All Items list):



This will bring up the *Add Item Screen:*



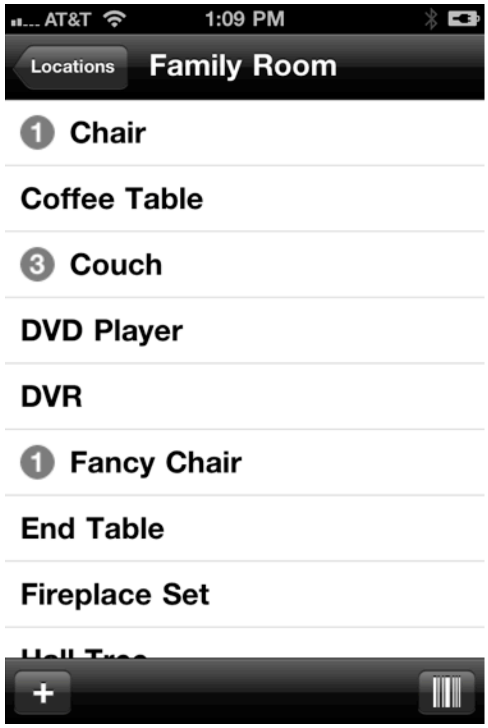
Tap on any of the item fields (such as *Name*, *Category*, *Collection*, *Serial Number*, etc.) to change its value. To add a photo for your new item, tap the *Add Photo* button. If you want to remove a photo before, tap the red circle with the white X in the top, left corner of the photo you wish to remove.

You must give each new item you create a name, but all other fields are optional. When you are done adding information for your item, tap the *Save Button* in the upper right corner to add the item to your inventory.

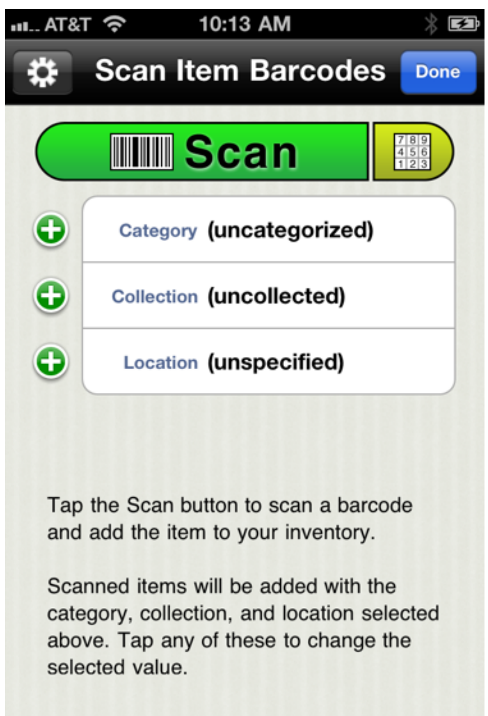
Adding a New Item Using Barcode Scanning

An alternative approach to adding items to your inventory is to use the barcode scanning feature in the Photo Remote to "scan" the UPC, ISBN, or EAN barcode that is often found on the item or its packaging. This feature is currently only supported on the iPhone 3GS, iPhone 4, and iPad 2 as these devices have internal cameras of a high enough quality to accurately interpret a barcode.

To add an item using barcode scanning, tap the barcode button in the bottom-right corner of the *Item List*:



This will bring up the *Barcode Scan Screen*:

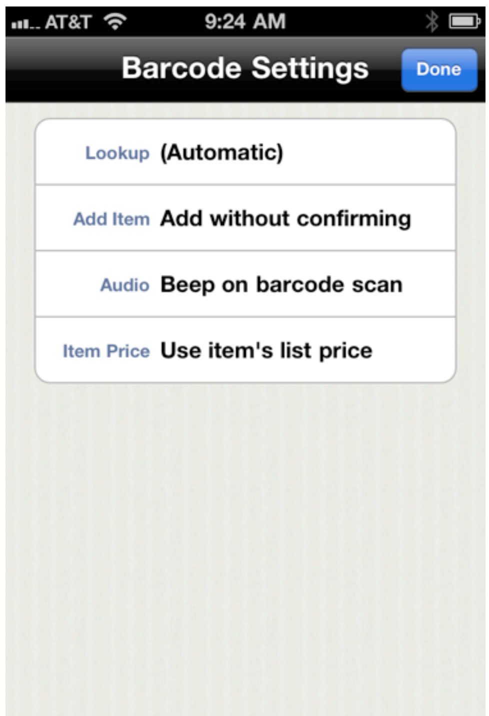


You can set the category, collection, and location to place the items you scan, as well as add new categories, collections, and locations without having to navigate to other parts of the Photo Remote app.

Tap the big, green *Scan* button to scan a barcode using the camera on your mobile device. If you are having trouble getting a clean scan using the camera or if your mobile device does not have a camera, tap the yellow *Manual Scan* button to the right of the *Scan* button to enter the barcode manually.

Barcode Scanner Settings

There are several options available that control the process of adding items using the barcode scanning feature. Tap the gear button in the top-left corner of the *Barcode Scan Screen* to view and modify the current settings:



Tap a setting in on-screen list to change it. The available settings are:

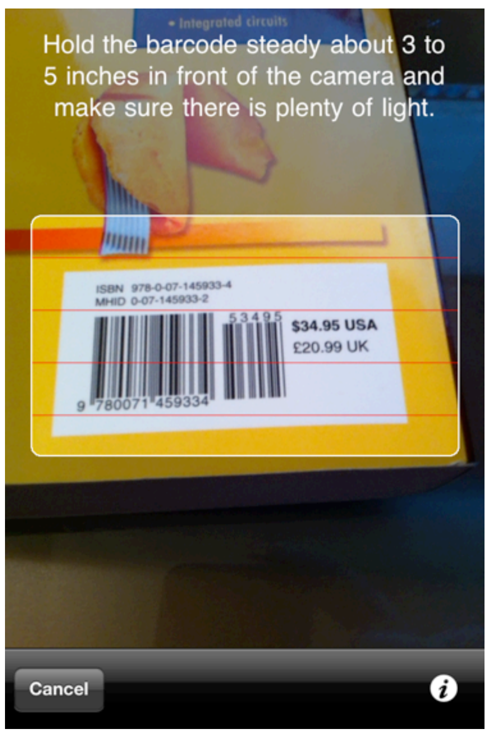
- **Lookup:** This is the online source Home Inventory uses to lookup item information associated with a barcode. With the default setting of *(Automatic)*, Home Inventory will try to choose the source that best fits the *Region* setting in the *Language & Text* section of your Mac's *System Preferences*.
- **Add Item:** This setting determines whether or not you will be asked for confirmation before a scanned item is added to your inventory. In some cases identifying numbers are recycled and used for other products. It is also possible the lookup source has incorrect information or the Photo Remote mis-read the barcode. Requiring

confirmation lets you verify that Home Inventory was able to retrieve the correct item information be it is placed in your inventory.

- **Audio**: This setting determines whether or not an audible beep is played through your iPhone's speaker when a barcode is scanned.
- **Item Price:** Home Inventory has no way of determining how much you paid for an item, but you can use this setting to tell Home Inventory to use the list price (if it is available) returned for the item by the lookup source as the item's price when it is added to your inventory.

Scanning a Barcode

When you are ready to scan a barcode, tap the green *Scan* button at the top of the *Barcode Scan Screen* to bring up the *Barcode Scanner*:



Scanning a barcode is relatively easy: simply point the device's camera at the barcode at a distance where it is clear and legible. Keep the following tips in mind to help make sure the camera is able to get an image clear enough to accurately interpret the barcode:

- Make sure there is plenty of light so the barcode can be clearly seen with a lot of contrast between the black lines and white spaces in between.
- Keep the surface of the barcode as parallel to the camera as possible.

- Hold the camera at a distance of three to five inches away from the barcode.
- Keep the camera as steady as possible. If you are also holding the item or packaging in your hand, keep it steady as well.
- Wait a second or two to give the algorithm time to process the image and the camera time to focus.
- If you are using an iPhone 4, you can shake your iPhone gently to force the camera to refocus.
- Barcode scanning works best with medium and large-size barcodes. It can be difficult or impossible to obtain an in-focus image of smaller barcodes with enough resolution and contrast to accurately interpret the barcode.
- Some products may have multiple barcodes. Home Inventory can only lookup UPC, ISBN, and EAN barcodes.
- Some products, such as books, may have both a UPC and ISBN or EAN barcode. In these cases, you will most likely need to scan the ISBN or EAN barcode in order for Home Inventory to be able to retrieve the item's information.

Once a barcode has been scanned, the Photo Remote will send it to Home Inventory, which will then try to lookup the barcode (your Mac will need to connected to the Internet for this to work). If Home Inventory is able to successfully lookup the barcode it will either add it to your inventory immediately or ask you to confirm it via the Photo Remote, depending on the *Add Item* setting.

When viewing an item in Home Inventory that was added using barcode scanning, Home Inventory will place a button in the top-right corner of the *Item Information Area* with the name of the lookup source used to retrieve information about that item. You can click this button to be taken to the source's webpage for that item to get more information about the item or, in some cases, purchase or sell the item online.

NOTE: Home Inventory relies on third party services to lookup item information from a barcode scan. Binary Formations LLC cannot guarantee the accuracy of this information or the availability of any or all of these services for use by Home Inventory.

Adding an Item Photo

To add a photo to an item, tap the item in the item list (this could be the list of items for a specific category, collection, or location or the All Items list) to bring up the *Camera Screen*:

When you take your photo, you will be asked if this is the photo you wish to use:

Tap the *Use Button* to add the photo to the item you selected or tap the *Retake Button* to return to the *Camera Screen* to retake the photo or cancel the operation.

The number of photos attached to a given item is indicated immediately to the left of the item in the item list. This can be a helpful in determining which items have photos and which ones you do not.

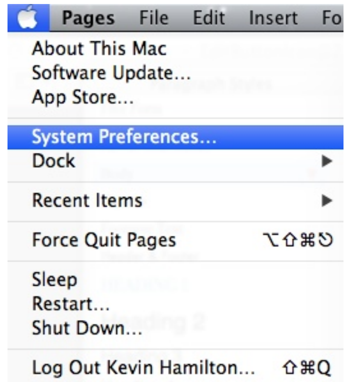
Setting up a Wireless Network

If you do not have a wireless network, you can use your Mac to create one so you can use the Home Inventory Photo Remote app.

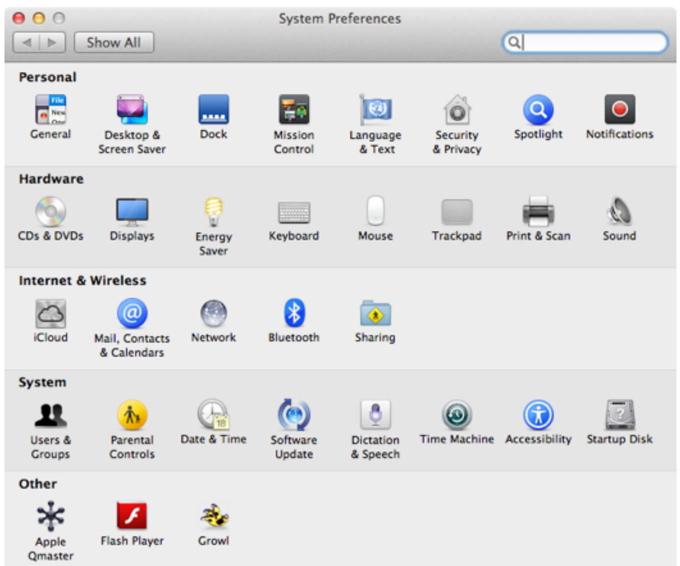
Creating a Wireless Network on Your Mac

To create a wireless network on your Mac, take the following steps:

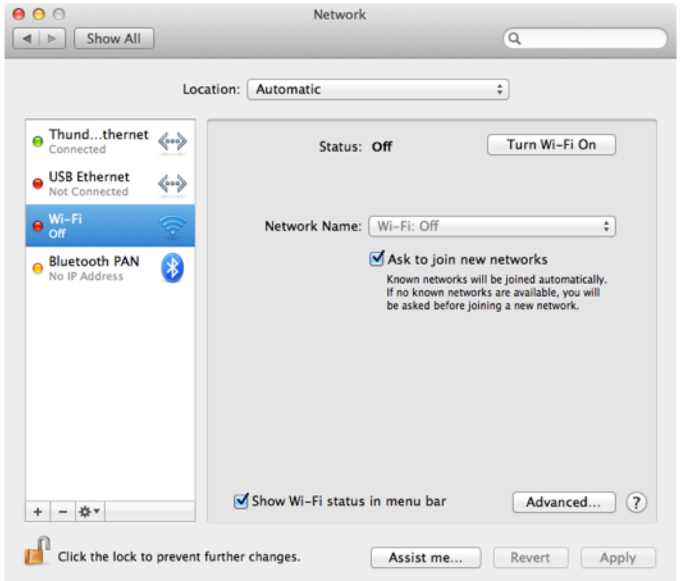
1) Open the *System Preferences* panel by selecting *System Preferences* from the Apple menu:



2) Click on *Network* in the *Internet & Wireless*:

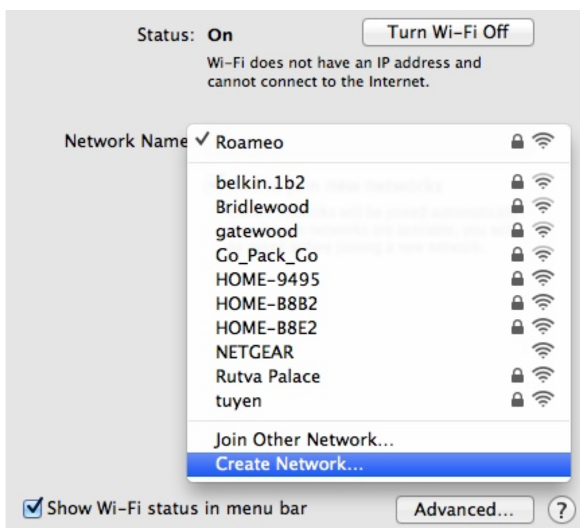


3) This will bring up the network settings. Select *Wi-Fi* from the list on the left:



4) Click the *Turn Wi-Fi On* button to turn on your Mac's built-in wireless adapter.

5) Click the pop-up next to *Network Name* and select *Create Network* from the bottom of the list:



6) Enter a name for your network. If you want to require a password to connect to the network (this is highly recommended), select a security option and enter a password (if the default *Security* option of *40-bit WEP* is selected, your password must be exactly 5 characters long; the more secure *128-bit WEP* option requires a password exactly 13 characters in length).

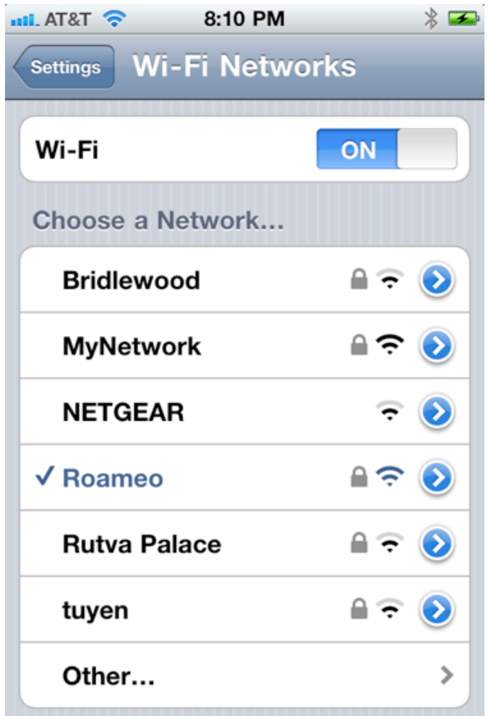
7) Once you have named your network and (optionally) given it a password, click the *OK* button to start the network.

Connecting to a Wireless Network on Your iPhone/iPod Touch

To connect your iPhone or iPod Touch to the wireless network you just created, take the following steps:

1) Tap the *Settings* icon to bring up the *Settings Screen*:

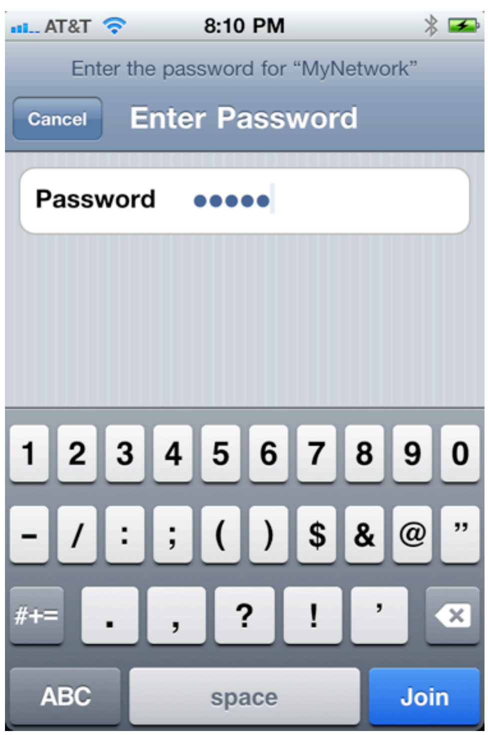
2) Tap the *Wi-Fi* option on the *Settings Screen* to bring up the *Wi-Fi Networks Screen*:



3) If the *Wi-Fi* slider at the top of the screen is set to *OFF*, slide it to the right to turn it *ON*.

4) Locate the name of the wireless network you created in the previous section from the list and tap it (it may take a few moments for it to show up).

5) If the network you created requires a password, enter it and press the *Join* button:



Appendix A: Keyboard Shortcuts

Key	Function
esc (Escape)	Closes any modal sheet or overlay view, such as the PDF Receipt Viewer or Scan View.
Command + B	Show the manual barcode entry view.
Option + Command + N	Add a new item, report, or policy, depending on the view.
Shift + Command + N	Add a new category, collection, or location, depending on which is currently shown in the left navigation list.
Command + R	Begin a Photo Remote session.
Command + ?	Show the Home Inventory User's Guide.