BluePlum

GearUp

PRODUCT MANUAL

Version 1.0

The Blue Plum Software Inc.

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1 Copyright and Contact Information

Copyright Notice

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This manual may not be copied in whole or in part without express written permission from The Blue Plum Software Inc. Your rights to the **GearUp** software are governed by the license agreement accompanying the software.

Document Accuracy

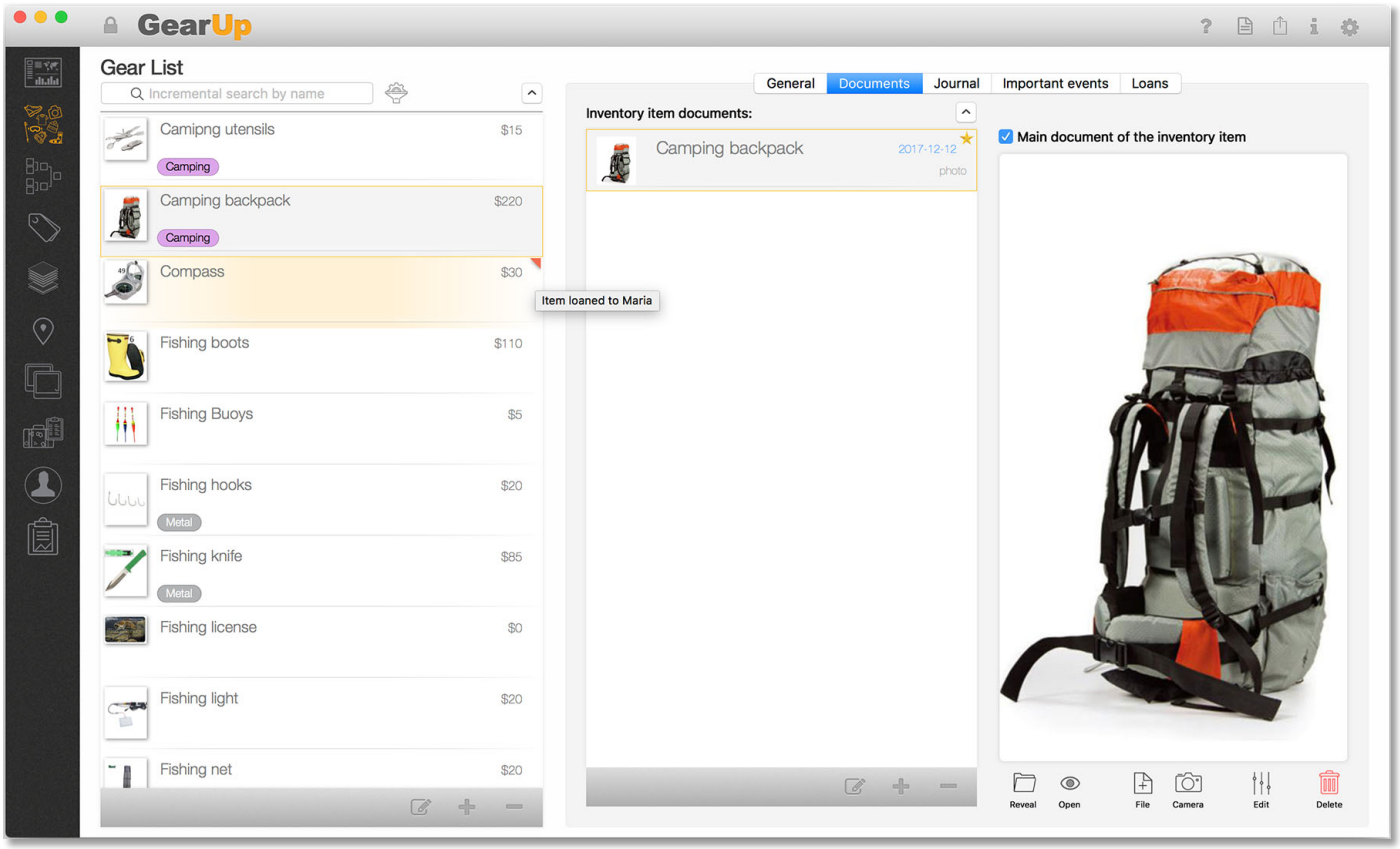
The Blue Plum Software Inc. makes a good-faith effort to ensure this manual is accurate and up-to date. Some mistakes may make their way in, however. Please send any corrections or suggestions for improving this manual to info@theblueplum.com.

Technical Support

If you are experiencing any problems using **GearUp**, please visit the support section of the theblueplum.com website. You may also contact The Blue Plum Software's Product Support directly by sending an email to info@theblueplum.com.

2 Getting Started

Welcome to the Blue Plum Software's **GearUp** application!



About this guide

The purpose of this document is to help you familiarize yourself with the **GearUp** application.

Audience

This document is written for users who are new to **GearUp** and are just getting started. If you have used other Blue Plum Software applications in the past, you may already be familiar with some of the concepts explained in this document.

Organization of this guide

Please note that this document is written for the latest version of **GearUp**.

This document explains the features and functionality of **GearUp** and how you can use the application. There is conceptual information as well as task-oriented steps throughout the document. If you are not sure where to begin, please review the "Getting started" section.

2.1 System Requirements

- OS X El Capitan (version 10.11) or later.
- 2.0 GHz Intel Core 2 processor or higher.
- 2 GB RAM and minimum 200 MB hard-disk space.
- Internet connection (in case you want to backup your data to a cloud storage)

2.2 Installation

If you're familiar with installing apps from the Mac App Store, you will find that **GearUp** is installed in the usual way.

1. Click "Download on the Mac App Store".

2. Click the price, and then click Buy App.
3. There is no step three.

After downloading, **GearUp** is automatically installed in the Applications folder, and its icon appears in Launchpad.

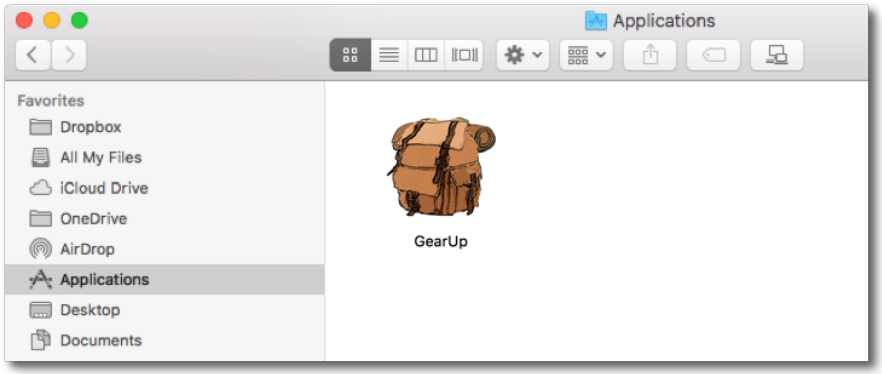
2.3 Running GearUp for the first time

Set your system's default currency first

Regardless weather you are a new or an existing **GearUp** application user, you need to make sure that your local currency is set correctly. To see how to set your systems' local currency, read the section **Error! Reference source not found.** of this manual.

*Starting **GearUp***

To open the **GearUp**, double-click its icon in the Applications folder.



2.4 Trial version of GearUp

A trial version of the **GearUp** can be downloaded from the application's web site:
http://theblueplum.com/mac/gearup

The trial version lets you see and try all the application features using a sample database, as you would normally have after a period of usage.

The trial version is for demonstration purposes only and cannot be upgraded to a full version.

Limitations:

- Trial version of the software won't let you save any changes you make in its sample data.
- You cannot perform backup or restore operations

2.5 Buying GearUp from the Mac App store

To buy the full version of the application directly from the Apple Mac App store, click on the following link (or copy the URL and paste it to your web browser).
https://itunes.apple.com/us/app/gearup/id1313117297?ls=1&mt=8

3 Tutorials

3.1 Basic terms and definitions

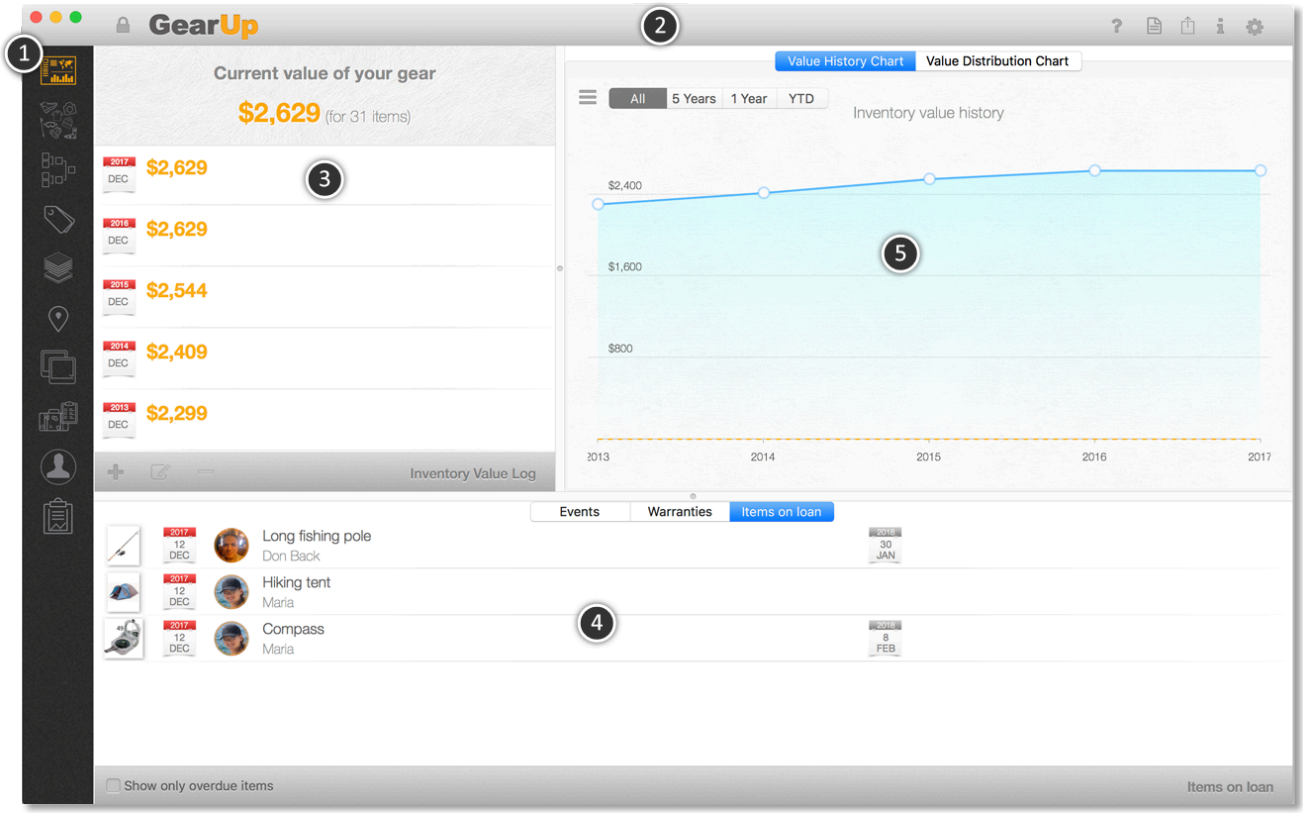
3.1.1 Organization of your data within the application

Your application data contains several main entities:

- Categories – It contain all categories you can assign to an item. When you add a new item, to make a better data organization, assign it to a category. Later on, you will be able to use a category as filtering criteria in other views and reports.
- Collections – If you have a collection of something, you can define a collection entity and assign all relevant items to that collection. You will be able to assign an item to one collection only. If you need categorization that requires assigning an item to multiple categories, use tags instead.
- Tags – To let you organize your items in a better way, create a number of tags before you start adding your items to the application. Tags let you assign a single item to multiple categories. For example, if you have tags called 'Electronics' and 'Mobile devices', you can tag your phone with both of these tags. The application lets you perform filtering of views and reports based on tags.
- Locations– If you keep items at multiple locations, create location records for each of them. That way you can assign items to a particular location.
- Value logs – you can assign an initial value of an item, a purchase price, but its value will usually decrease over time. It is a good practice to update estimated values of your items periodically – once a year, when you renew your insurance policies, is usually often enough. A single value log will keep values of all your items logged at a certain month and a year. If you define annual depreciation rate for your item, the application will automatically suggest its new estimated value at the time when you are creating a new value log.
- Item documents – you can add multiple document entities to each of your items. A document entity will have a name, description, type and an associated photo/file.
- Journals – add a journal entry to an item each time something important happens with it. An item maintenance log for example.
- Events – If an item needs a periodic maintenance, bill payment etc., create an event record with a scheduling information. You can add the created event to Mac's notification center to make sure you will get notified even if the GearUp application is not running.
- Packing Lists – you probably pack different items for different types of trips. Create your reusable packing lists to help you prepare for your trips.
- Contacts – this is an address book -like section that lets helps you keep track of items you loan to other people.
- Loans – this section lets you track items loaned to your contacts.

3.2 Main application window

Once you start the application you will see the main '**dashboard'** view of your data. It gives you a quick overview of your current net worth state, a history chart of your net worth changes and a table with a list of your monthly net worth records:



1 - Sidebar command bar

Sidebar command bar contains buttons that let you choose different sections of the application.

Dashboard – displays the application start page with the most important information.

Items – lets you manage (add/edit/delete) your inventory items.

Categories – lets you manage (add/edit/delete) your property rooms.

Tags – lets you manage category tags.

Collections – lets you manage (add/edit/delete) your collection entities.

Locations – lets you manage (add/edit/delete) gear locations.

Photo album – photo album lists all your items' photos and documents.

Packing Lists – lets you manage (add/edit/delete) all your packing lists.

Contacts – manage your contact list to help you track loaned items.

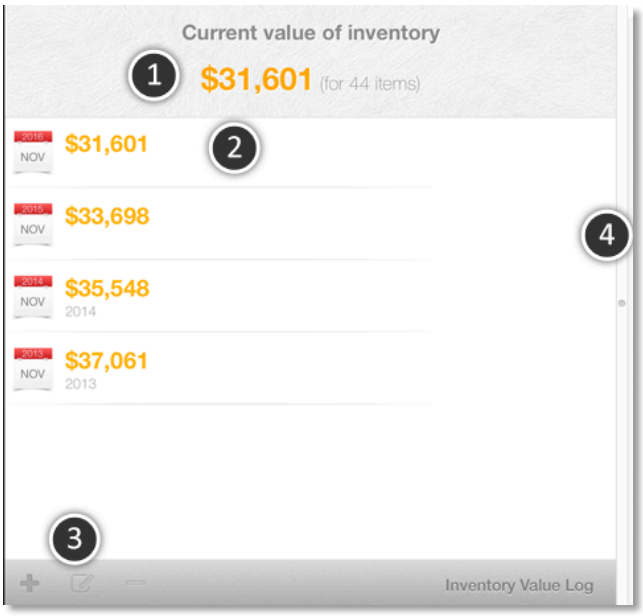
Reports – this section lets you generate multiple inventory reports.

2 - Application title bar

Application title bar contains buttons that let you:

- Lock the application ( ) with a password.
- Help button ( ) – downloads this manual from our web site.
- Backup/restore application data ( ) to/from a single compressed file.
- Report a bug to us, tweet or post a Facebook comment ( ).
- Display application version information ( ).
- Display application settings ( ).

3 – Inventory value logs table



This table contains a list of all your gear item value logs. In this section you can add, edit or delete a value log. Each value log contains a list of items with their estimated values for the given time.

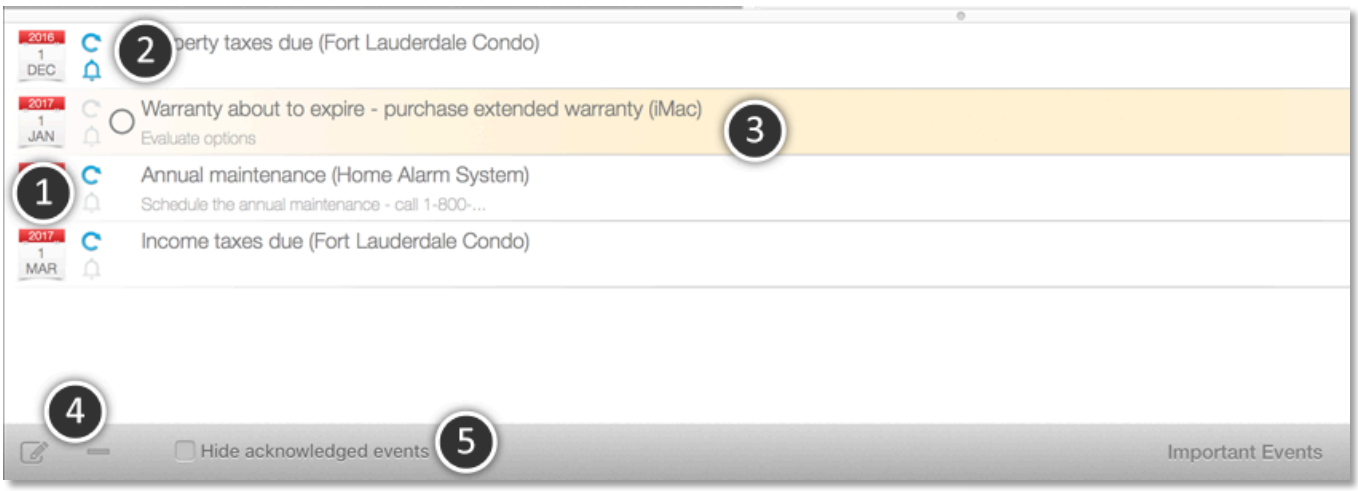
1 – Total value of your items based on the most recent value log. If no value log was added, a total purchase price of all your items will be displayed.

2 – A single row contains log's time (a month and a year) and total inventory value.

3 – Add, Edit and Delete buttons related to your log entries.

4 – A vertical slider that lets you change relative size of application sections.

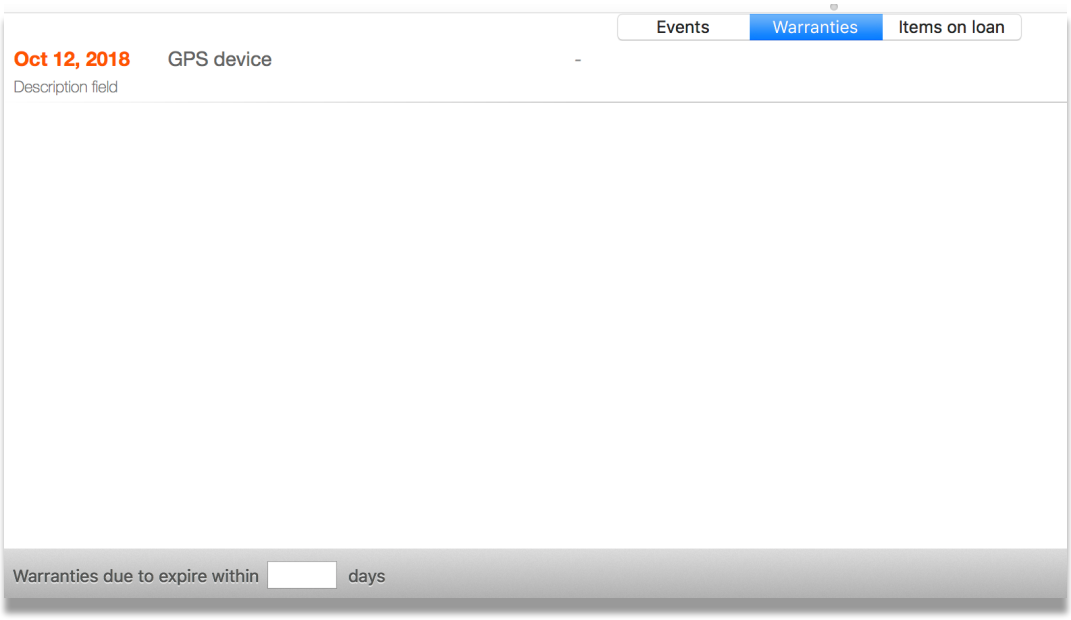
4.1 – Events table



Events in this table are sorted by their due date[1] – most recent first. An event has a name and description[3], as well as flags marking it as recurrent , tied to Mac's notification center[2] , and whether it is acknowledged or not . You can edit or delete[4] events from this table. To add a new event, you need to select an inventory item first and create it from there.

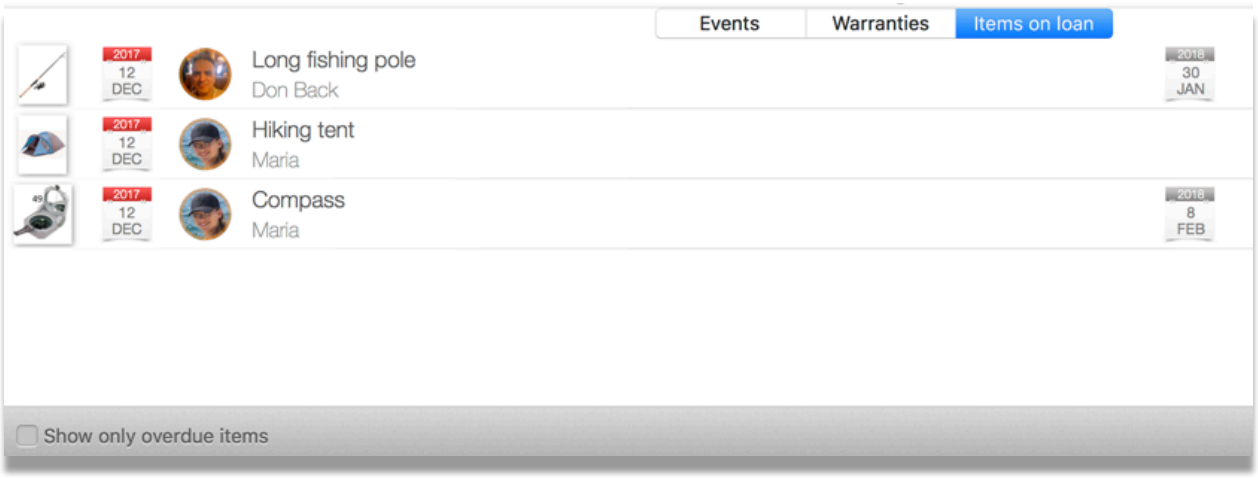
You can also hide already acknowledged events so they won't show up in this table[5].

4.2 – Warranty table



A warranty table lets you see a list of warranties due to expire in the near future.

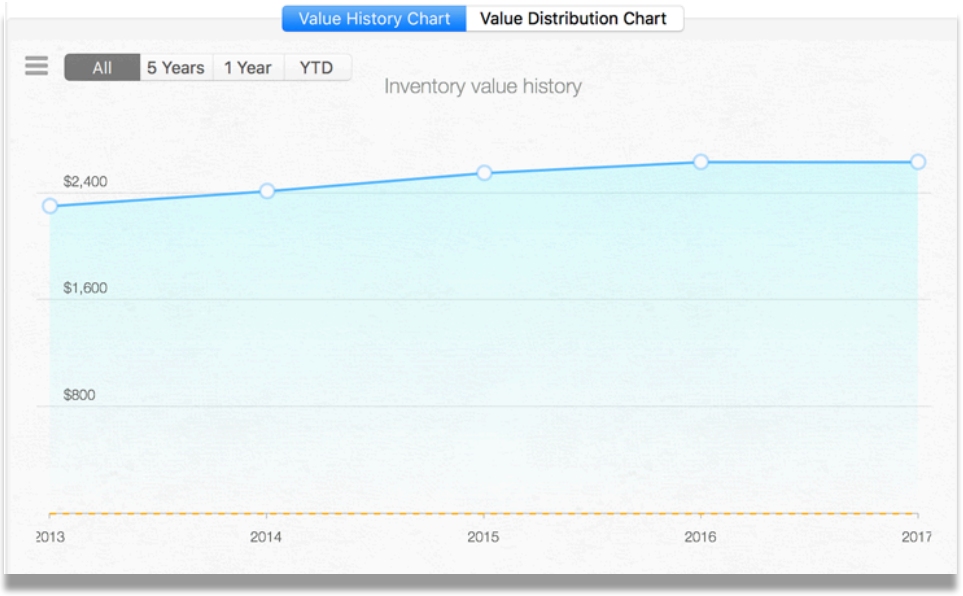
4.3 – Items on loan table



Here, you can see a list of items that you loaned to someone. If a return date has been specified, it will show up at the right side of table.

Each row in this table will contain item's image, date it was loaned, image and name of who it was loaned to, and, optionally, a date when the item needs to be returned to you.

5 – Chart area

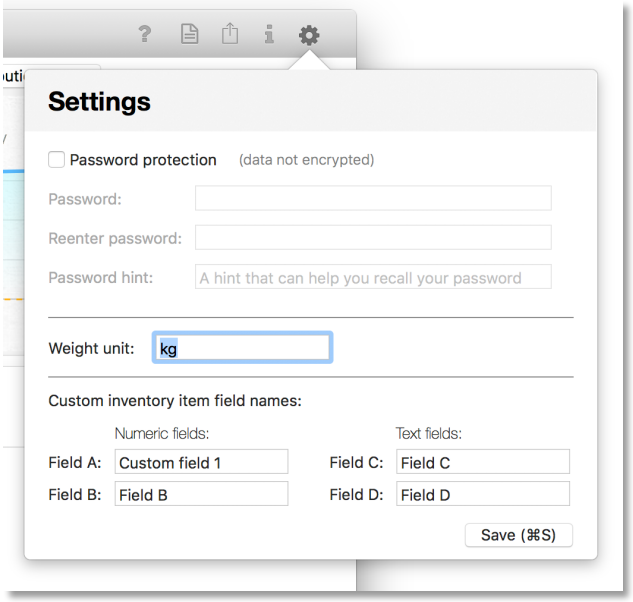


The chart area displays historical values of inventory logs, and a pie chart showing value distribution of your items.

To change what is displayed in the chart, select the chart menu ☰ that will open a chart settings form.

3.3 Application preferences

To change application preferences, select the 'Preferences/Settings' button at the top-right side of the application window:



The Settings form lets you add a password protection to your application, set a default unit for measuring weight of your items and define custom fields in case you need some.

Fill in all the fields and click on the '**Save'** button to add a password protection to your application. Password protection will prevent other people who have access to your computer to view your information.

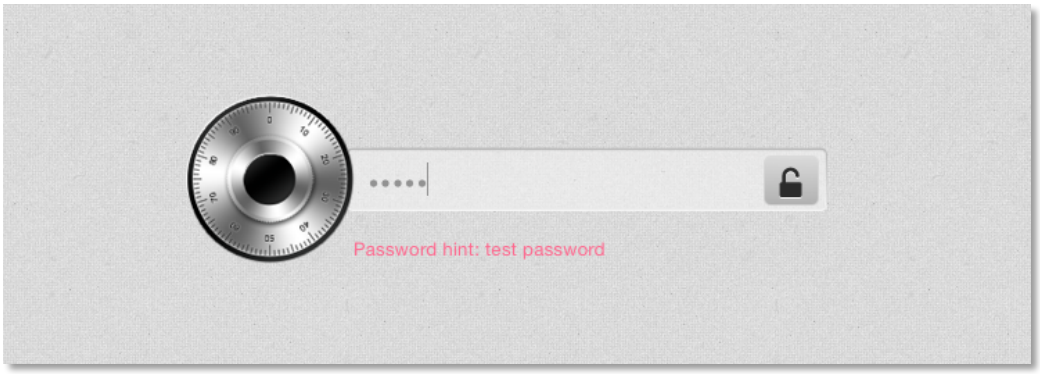
If you enable password protection, the application will prompt you for a password each time it starts, or if you decide to lock it yourself.

Note: *Keep in mind that the data file stored on your disk is not encrypted.*

To lock the application, select the lock button in application's title bar:

Once you lock the application you will see the password prompt screen:

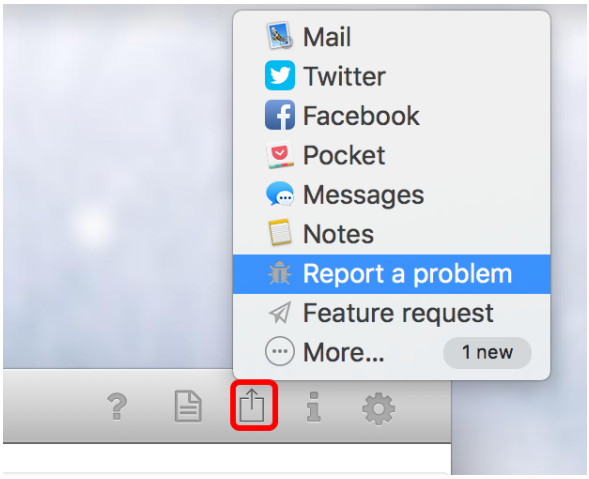
To enter the application, type in your password and press enter or click on the unlock button. If you fail to type in the right password more than 2 times, the application will display your password hint:



If you forget your password and the hint cannot help you, you can launch Apple's ***Keychain Access*** application and search for **'GearUp'** password. You will need your system's administrator's password in order to recover the application password.

3.4 Customer feedback

If you discover a problem in the application or just wish to contact us with feature suggestions for future versions, click on the feedback button in the application title bar:

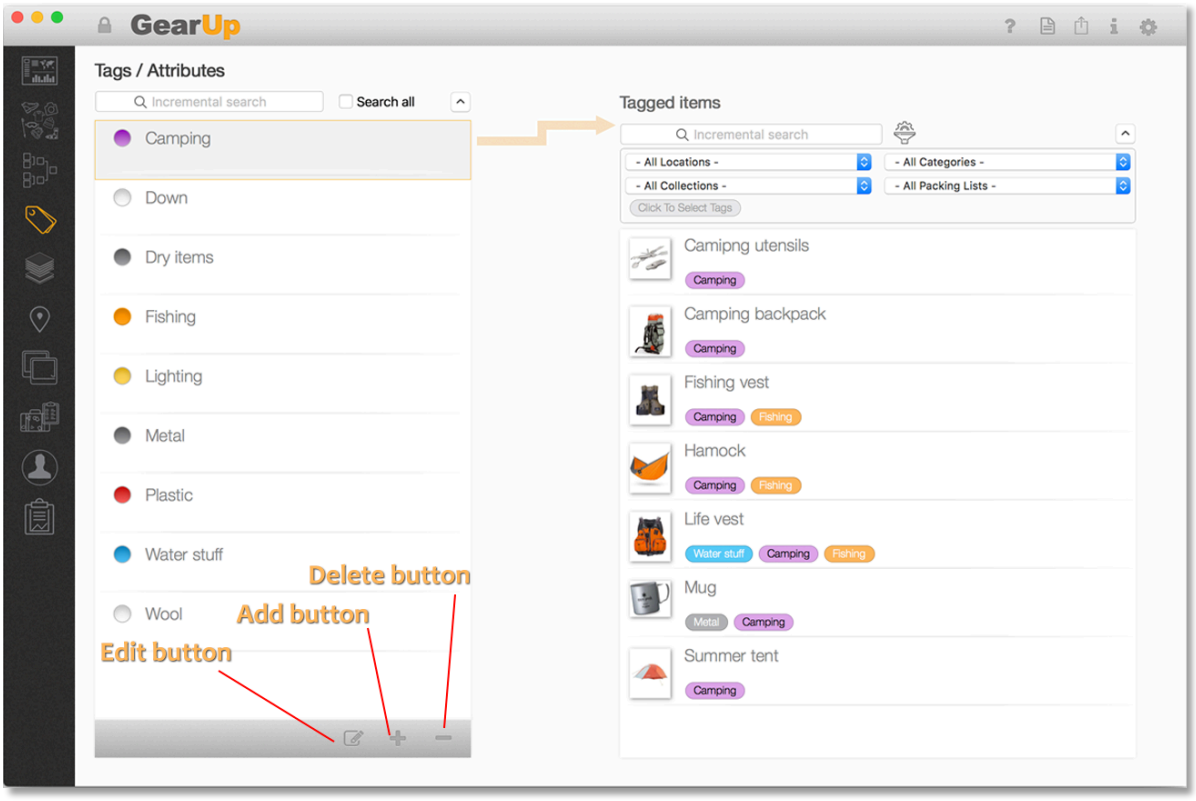


If you decide to, you can tweet about the application or post a Facebook message from the application as well.

3.5 Managing tags, collections, categories and locations

Adding, editing and deleting of tags, collections, categories, packing lists, contacts and locations is performed in a similar way. To manage any of these, select the appropriate sidebar command button.

The following example will show how to add, edit and delete tags. To display the Tags view, select its sidebar button:



All tags will be displayed in a table. If you have many records in a table and want to search for a particular one quickly, type in several letters of a tag name into the 'incremental search' field, and the application will display only tag records that match you input

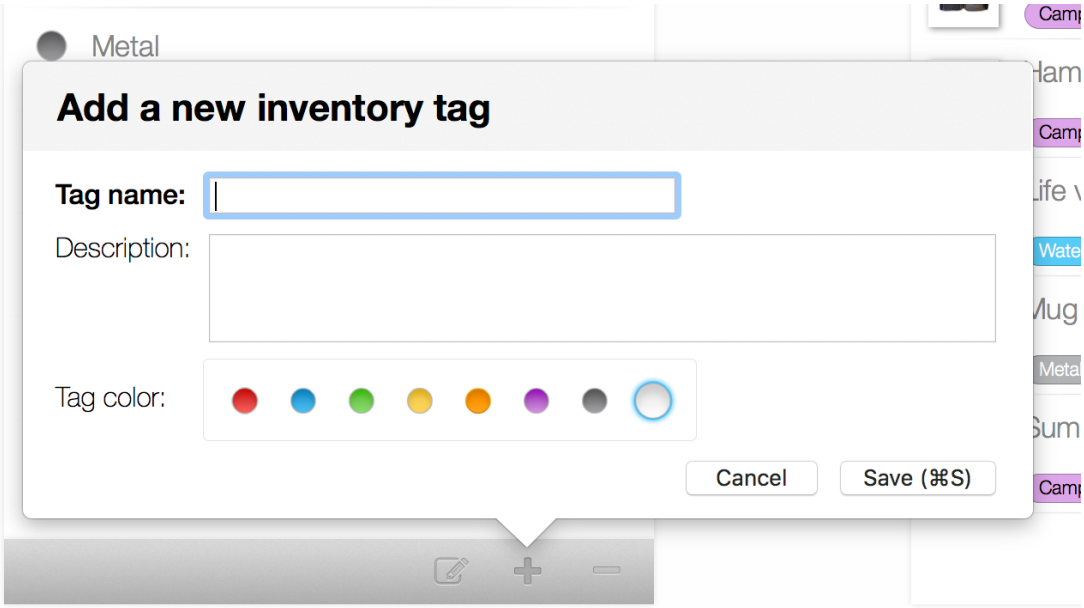
All records in the table are sorted by their name. To switch from ascending to descending sorting order and back, select the button at the top right corner of the table:

After you select a record in the table, on the right side of the table, the application will display a list of items containing the selected tag. If, for example, you want to display only tagged items stored at a particular location, you can use the item table's filter located above the item list.

Currently selected record has a light-gray background. The light orange background marks a record that your cursor is currently hovering over.

Adding a new tag

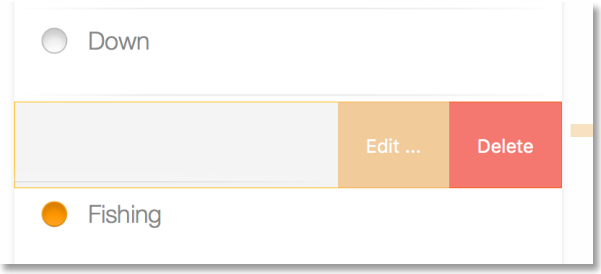
To add a new location, click on the 'Add' button. A new form will pop up and you will be able to enter new tag's information. Once you are done, click on the 'Save' button.



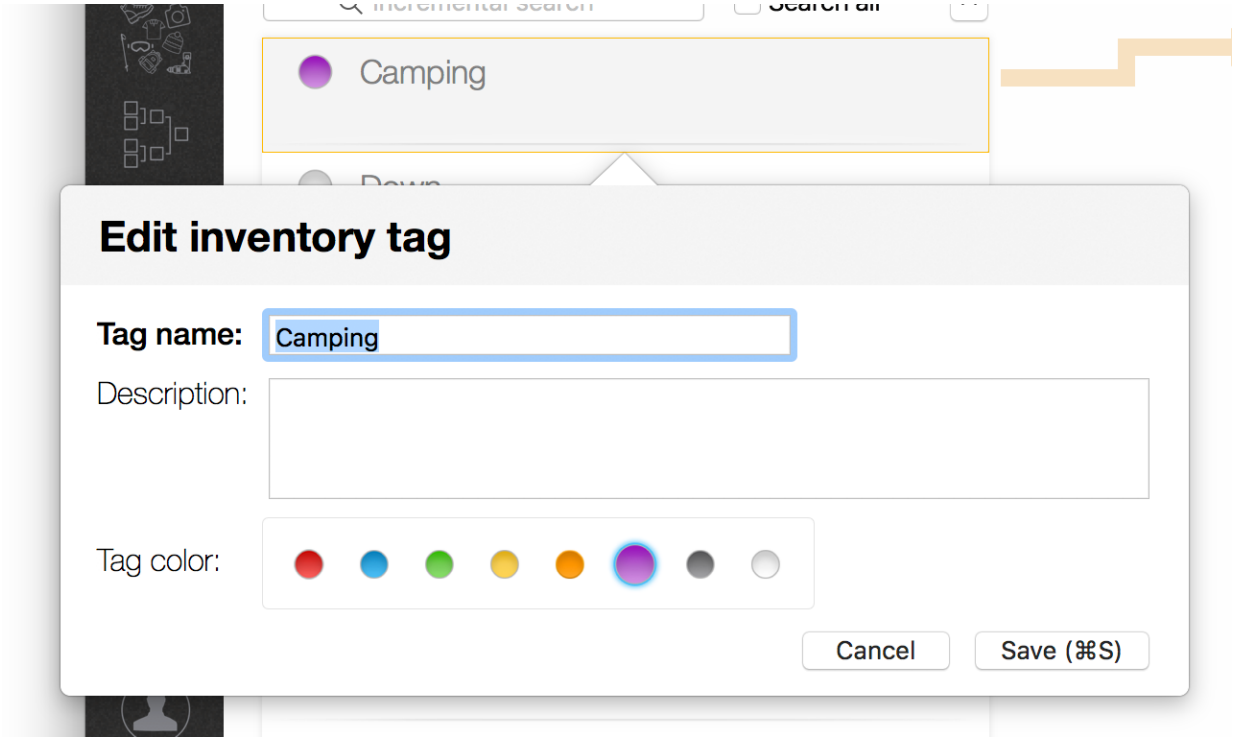
Editing existing tag

There are several ways to edit an existing tag:

- Double-click on the tag row
- Select the tag row and select the 'Edit' button
- Do a brief two finger swipe (if you have a trackpad) from left to right to display row buttons, select the 'Edit' button afterwards (see the image below).
- Do a full two finger swipe from left to right to open the edit form immediately.

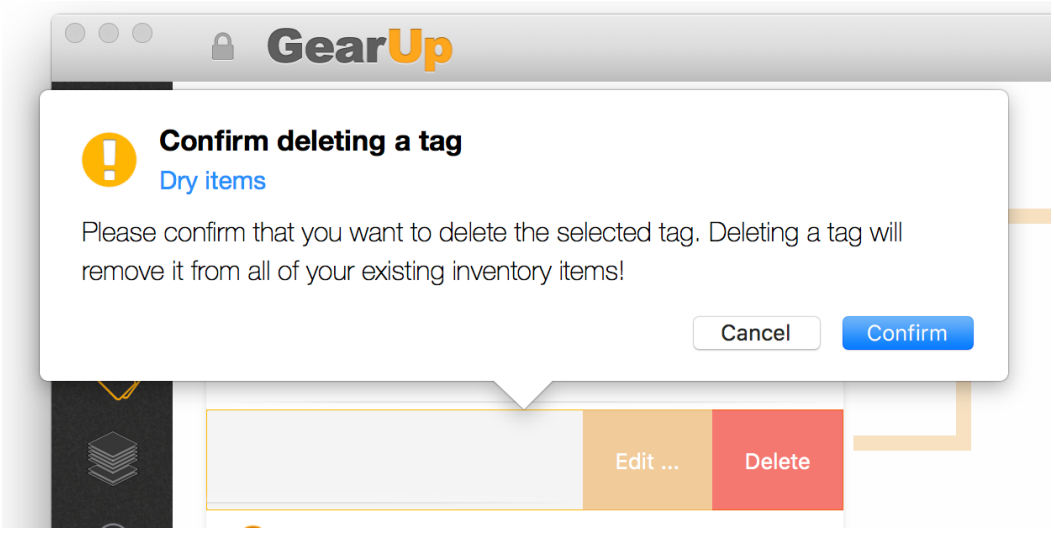


After that, a tag edit form will appear. Make your changes and click on the 'Save' button when you are done:



Deleting tags

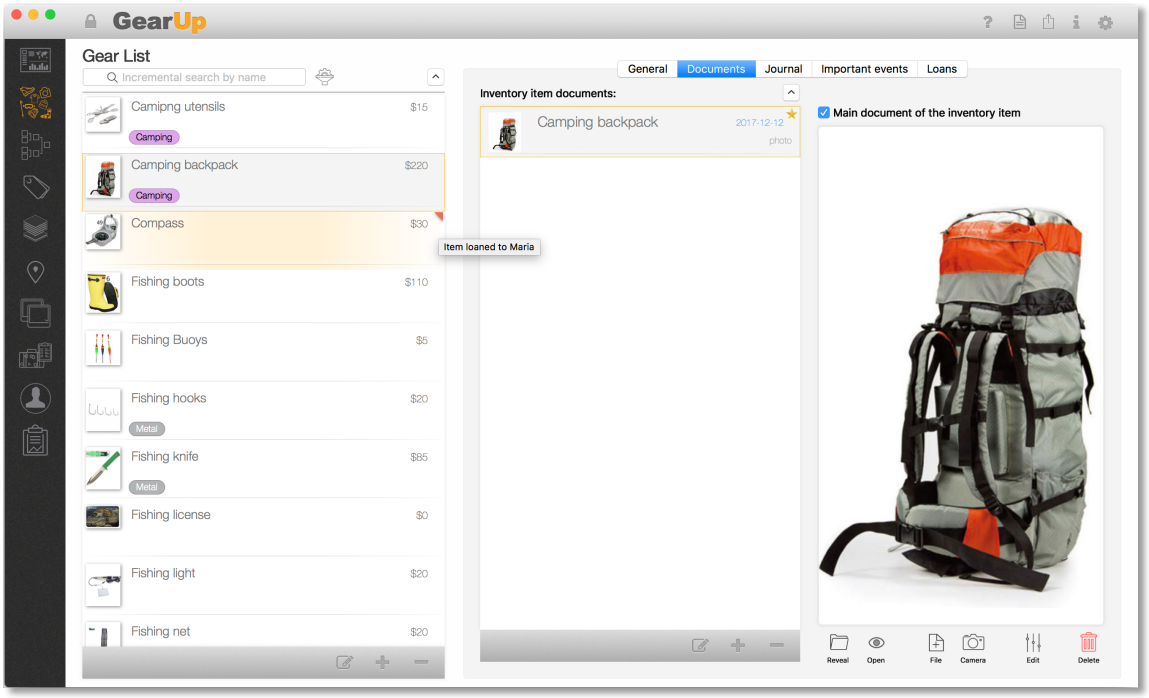
To delete a tag, select it, click on the 'Delete' button or do a two finger swipe from right to left. A warning message will ask you to confirm your action before the record is deleted.



After you delete a tag from your inventory, all gear items tagged with the deleted tag will be updated as well.

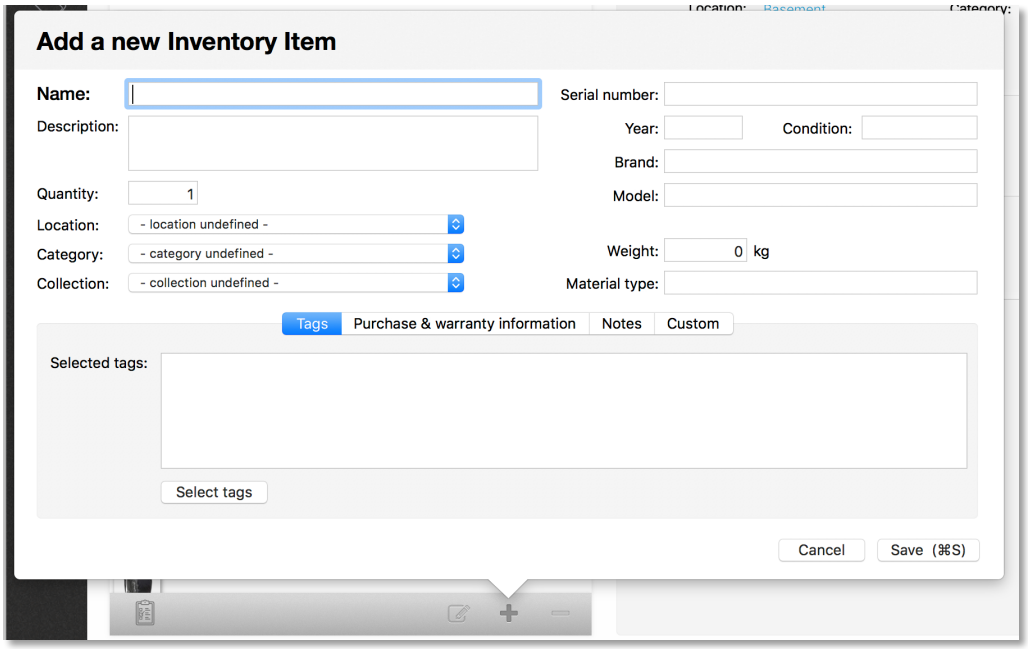
3.6 Adding new gear items

After you have added your locations, categories, collections, contacts and tags, you can start adding your items. Select the 'Items' sidebar button:



The item view is made up of a table containing all your items and selected item's details.

To add a new item, select the 'Add' button at the bottom of the items table.



In the 'Add a new Inventory Item' form you can type in all information you have for that item. You need to add at least the item's name. Without that field you won't be able to save the new record.

The following is a list of all properties you can add for an item:

Name – name of the inventory item (mandatory)
Description – description of the item
Quantity – quantity of the same item you have in your home (default is 1)
Collection – select a collection from the drop-down menu or leave a default, undefined value
Location – select a location from the drop-down menu or leave unassigned
Category – select a category from the drop-down menu or leave unassigned
Serial number – serial number of the item
Year made – year when the item was made
Condition – describe the item's condition
Brand – name of the company that made the item
Model – name of the item's model
Weight – In case you need to know how heavy your packed stuff will be, set the weight of each item here.
Material type – describe the item's material

Tags section
Selected tags – select a tag from the drop-down list and click on the 'Add' button to mark the item with that tag. You can add more than one tag to an item.

Purchase & warranty information section
Purchase date – select a purchase date from a pop-up calendar or type in the date.
Purchased from – type in a where you purchased the item from.
Purchase price – purchase price in the system's currency. If you have used another currency, please re-calculate the amount.
Warranty issuer – if you have a warranty, enter a name of the issuer
Warranty contract – warranty contract number
Warranty term – warranty term in months. The application will use the purchase date as a start date.
Track value over time – check this if you want to track the value of this item. If you do, the item will appear in the value log form.
Depreciable item – check that option if the item depreciates over time. If you do, depreciation rate field will appear.
Annual depreciation rate – type in annual depreciation rate. When you start logging item's value, the application will use this amount to estimate the remaining value of the item for you.

Notes section
Additional notes – any additional note related to the item that you want to add.

Once you are done typing in item's information, click on the Save button.

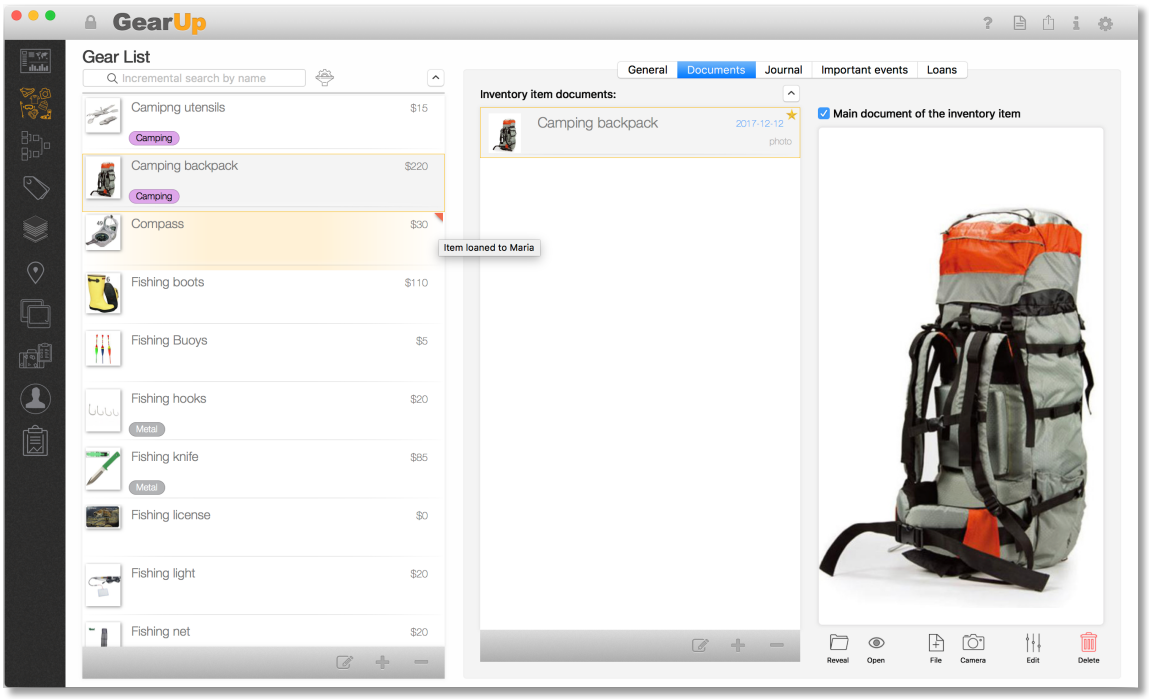
Note: The pop-up form's behaviour is set to disappear if you click outside of its content. If you do that, it will disappear as if you have clicked on the 'Cancel' button and your changes will not be saved.

After you save the item, it will appear selected in the item's table. At this point you will be able to add item's journal, events and photos/documents.

3.7 Working with items

3.7.1 Adding photos and other documents

To add a new photo for a selected item, select the ‘Documents’ tab in the item’s detail area:



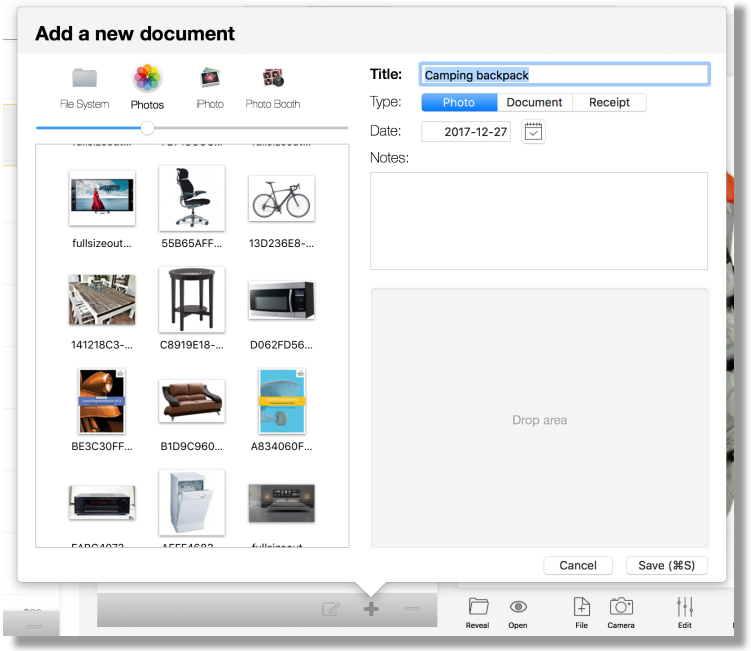
You will see another table – a table that lists all documents related to the selected item. If you select one of the documents, a preview will appear on the right side of the table.

To add a new document, select the ‘Add’ button at the bottom of the table. A small popup menu will appear. You will have three options to choose from:

- Add new … - add a new document record and select a file (photo, ...)
- Add from a camera … - add a new document record based on an image you are going to take from a camera.

Add new …

This option will just let you add a new document record with its name and description, but it won’t add a photo:



Once you save the document you will be able to add it a photo or another file at some later time.

File System – choose a photo/file from a standard 'File' open form.

Photos – choose a photo from Mac's Photos application library

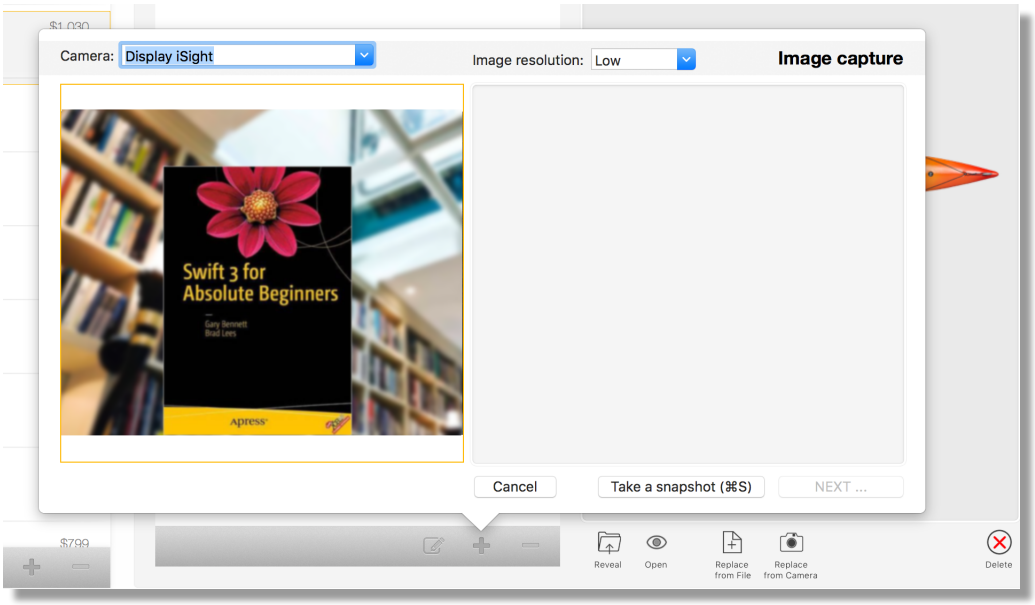
Photo – choose a photo from Mac's Photo section

Photo Booth – chose photos taken with the Photo Booth application

Add from a camera …

To take a photo from your Mac's camera or another camera attached to your Mac, select the 'Add from camera' option. It will display a form that will let you choose a camera (in case you have more than one attached to your Mac) and it will let you take snapshots from the selected camera.

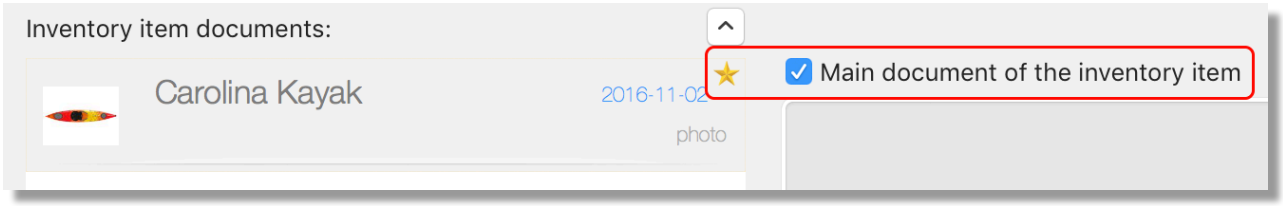
Before you take a snapshot make sure to select the resolution level of the snapshot. High resolution photos take more storage space.



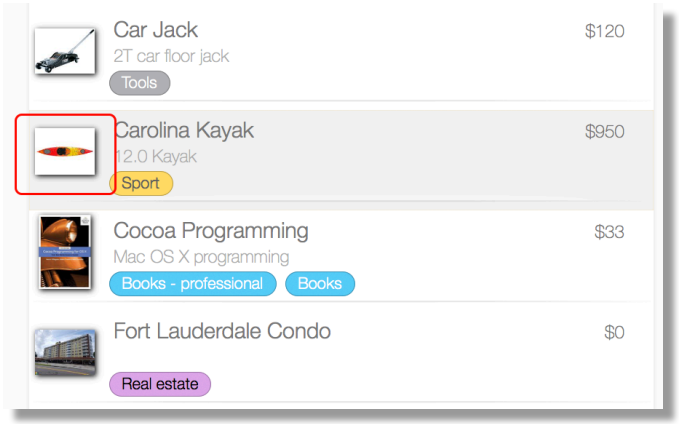
Once you take a snapshot and you want to keep it, click on the 'NEXT …' button to open the 'Documents' form. The same form as in two previous cases will open, but this time, your image from the camera will appear in the preview area.

Setting the main document of an selected item

By default, first document you add for an item will become the main one. The main document will be marked with a star:



A thumbnail photo of the main document will appear in the inventory item list as its thumbnail image:



Revealing files in the Finder

You can access any photo or document that you have stored to your inventory. When you select a document record of an item, you will be able to reveal it in a Finder window if you click on the 'Reveal' button:

When you click on that button, a Finder window will open with your file/photo selected in it.

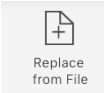
Note: *Make sure not to change the file's name since that is the only way the application can link your item to that file.*

Opening a document

You can use an external application that has been registered to open a document by clicking on the 'Open' button:

If, for example, you selected user manual in a PDF file, clicking on the 'Open' button would open your default PDF viewer/editor application.

Replacing a document's file

To replace a file associated to the item's document, select the 'Replace from File' button: 

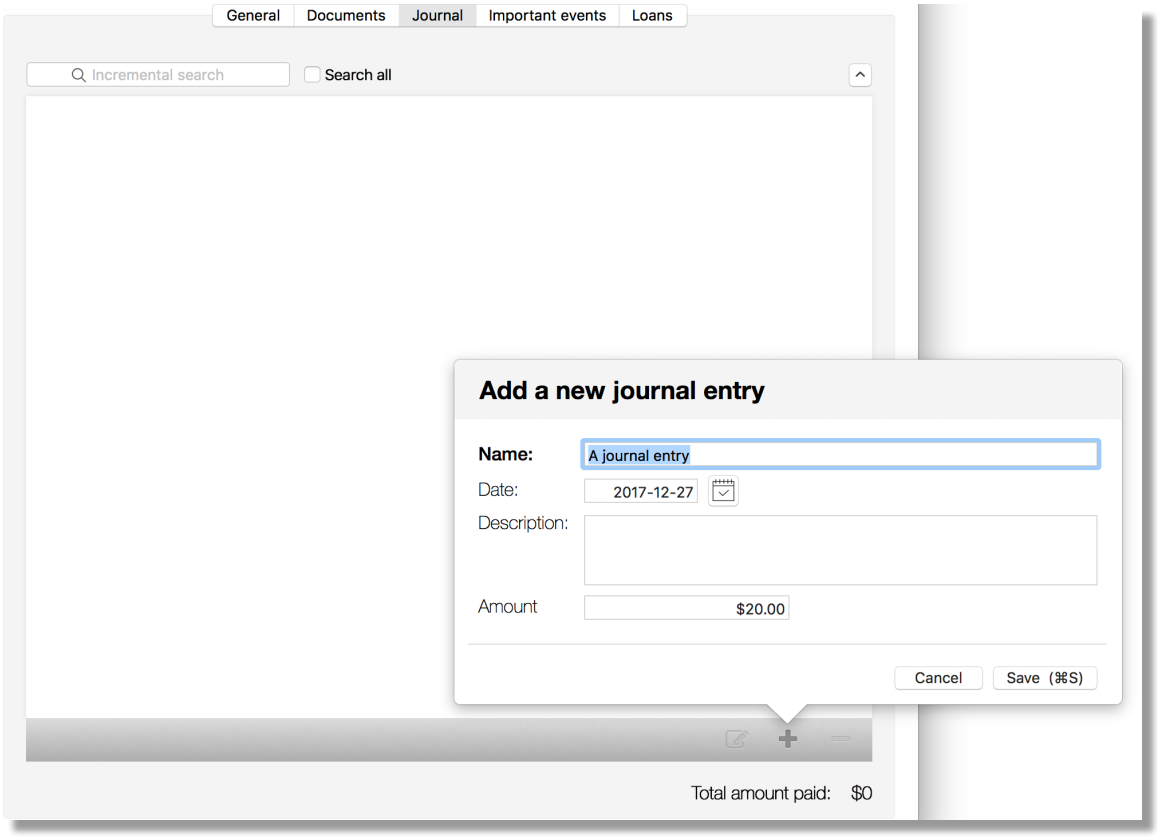
It will open again the standard 'File open' dialog that will let you choose another file. Once you select that file, it will replace the old one. To do the same, but choose a snapshot from a camera, select the 'Replace from Camera' button:

Deleting a document's file

To delete a file associated to item's document, but keep the document record itself, select the 'Delete' button:

3.7.2 Adding journal entries

If you need to keep a journal related to an item (bike maintenance for example), you can do that from the 'Journal' tab of the item detail view.

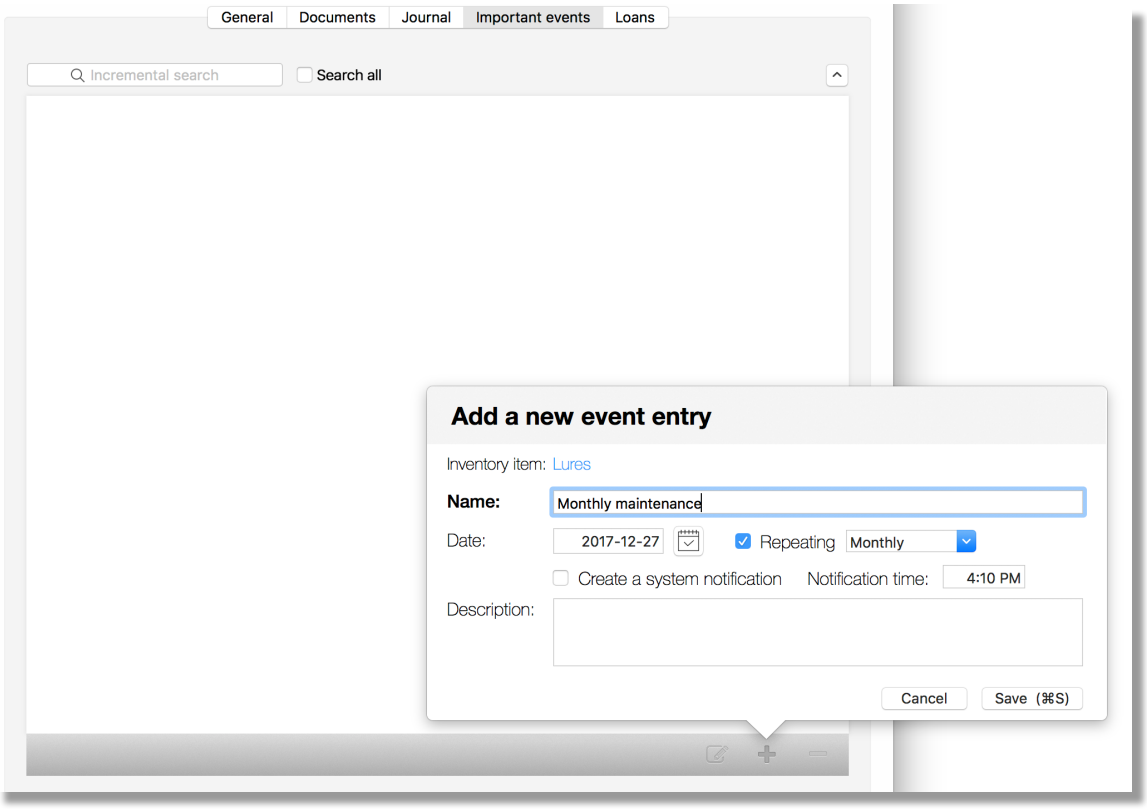


To add a Journal record, select the item (1), the Journal tab (2) and click on the 'Add' button (3). Once you are finished editing the journal entry, click on the 'Save' button (4).

3.7.3 Adding events

To add an event, select the 'Important events' tab of the item detail view.

Added events will be visible in the table of events related to a selected item and in the events table of the dashboard view. The dashboard view will display events from all of your items.



To add a new event, select the 'Add' button at the bottom of the events table:

Name – name of the event (mandatory)

Date – due date of the event

Repeating – Check this if your event is recurring. If you do, you will need to specify event period (monthly yearly, …)

Create system notification – check that option if you want to create a system notification as well. If you do, Mac's notification center will display event's notification at the specified time and date.

Notification time – a time of the notification in case 'Create a system notification' was checked.

Description – generic text field that lets you write more details related to your event.

Each event row will contain three icons beside the event date:

Icon marking recurring events. For non-recurring events the icon will be grayed out.

Icon marking events that have the 'system notification' option checked.

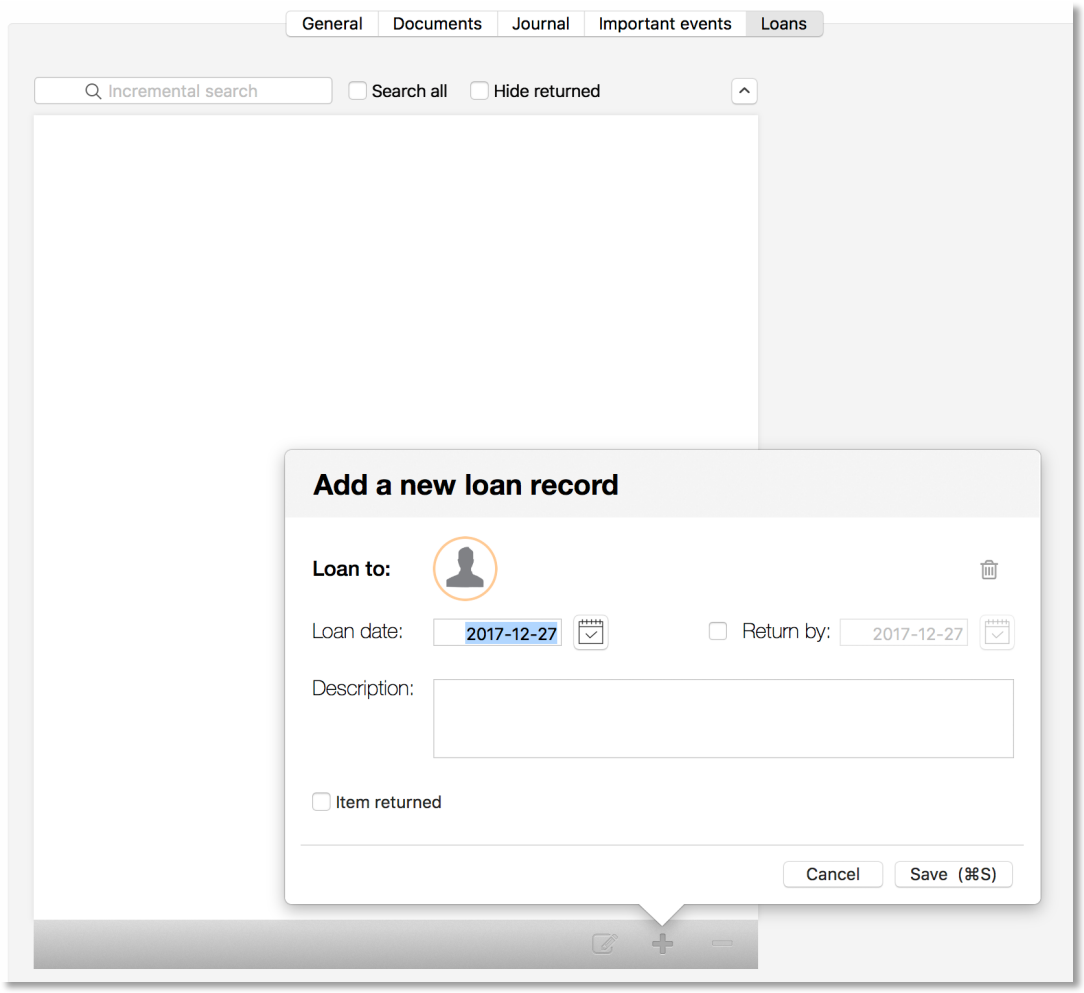
Icon marking acknowledged event. Unacknowledged events will not have the checkmark icon.

Acknowledged events can be filtered out from the main events dashboard table.

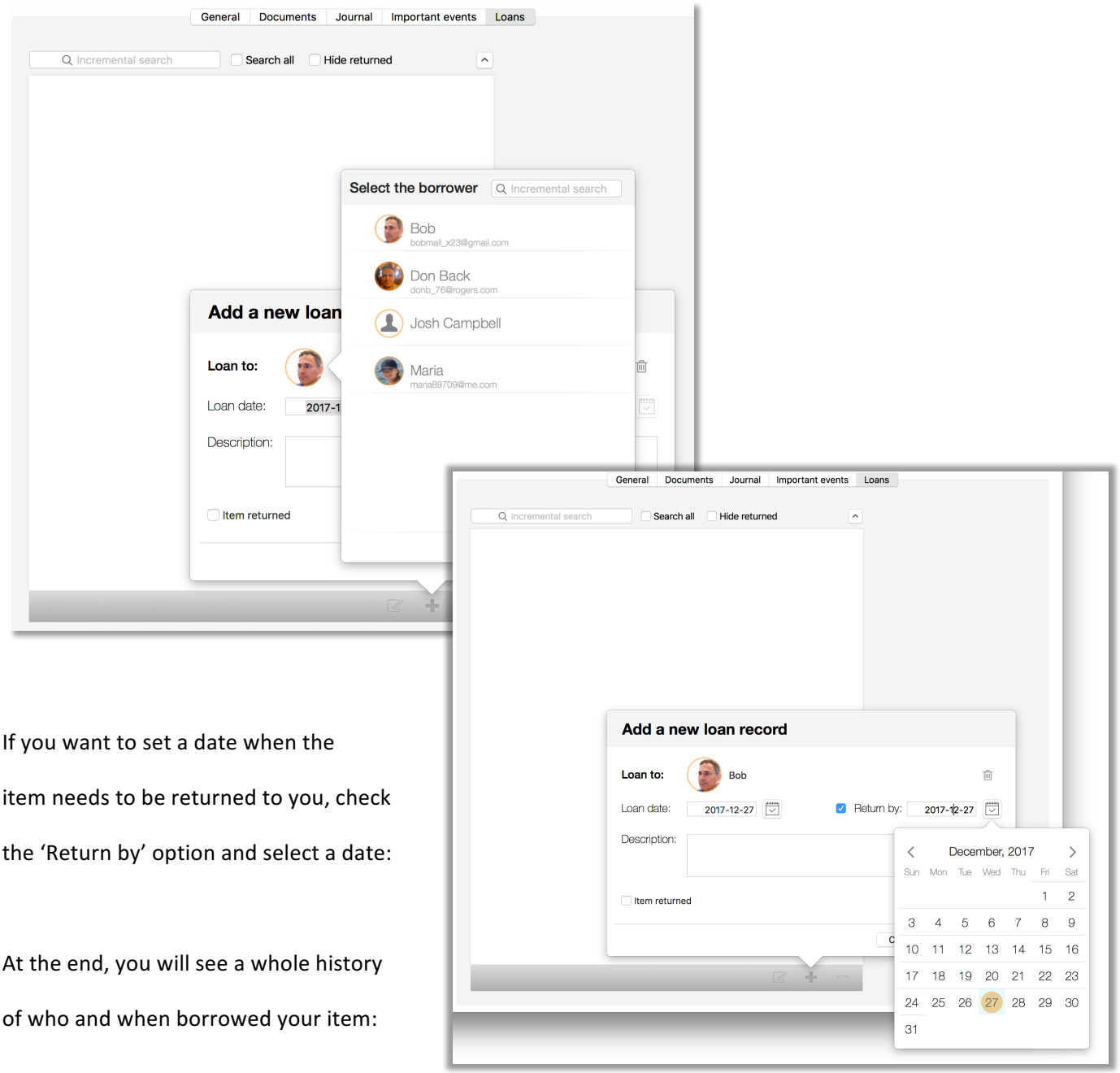
3.7.4 Tracking loans

To keep track of items you loaned to someone, go to item's 'Loans' tab. When you loan an item to someone, create a new 'Loan' record for that item.

Click on the '+' button at the bottom of the table to show the 'new loan' form:

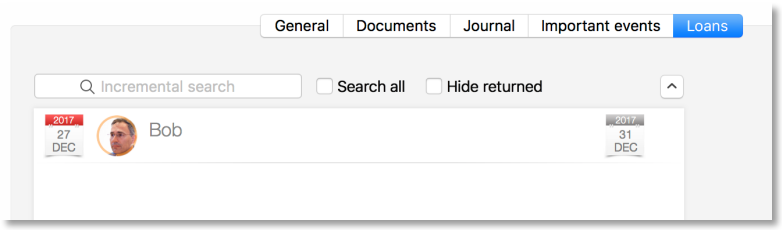


To let you add your loans easier, before you create a loan record, make sure to populate your 'Contacts' with names of people who can borrow your items. That way, when you add a new loan record, click on the 'Loan to' icon to display a list of your contacts and select a borrower from it:



If you want to set a date when the item needs to be returned to you, check the 'Return by' option and select a date:

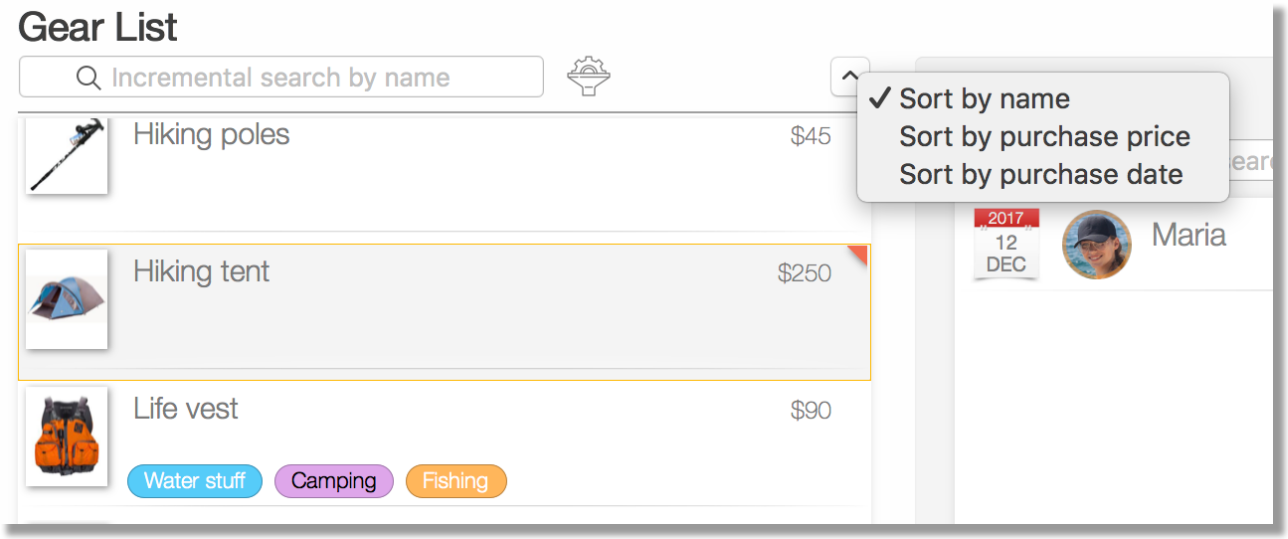
At the end, you will see a whole history of who and when borrowed your item:



Once you get your item back, check the 'Item returned' field. You can do that from the loan record's context menu as well.

3.7.5 Sorting of inventory items

To change the sorting criteria of inventory items in their table, right mouse-click on the sort order button located at the top right corner of the table:



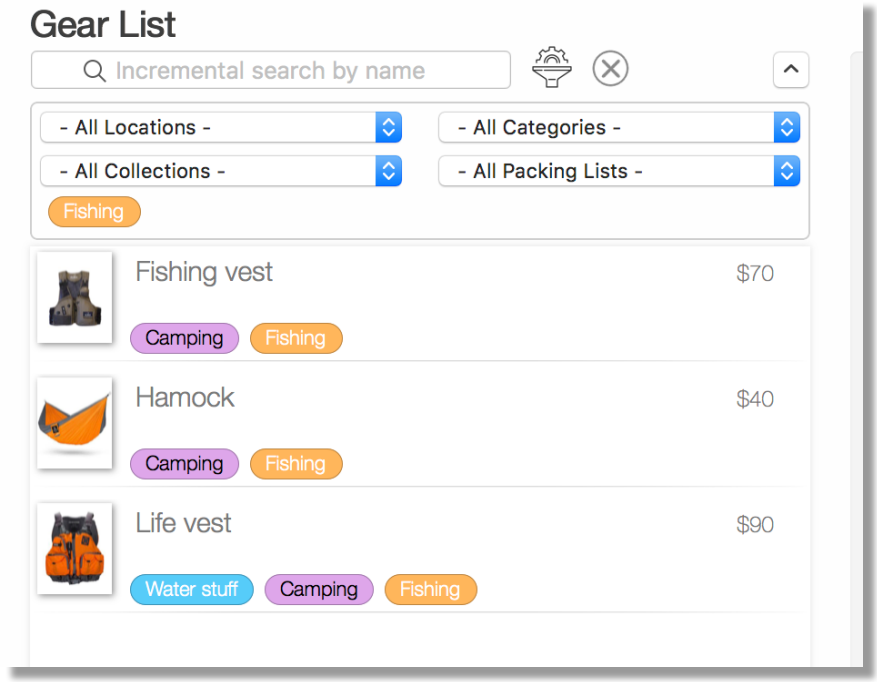
After you select the sorting criteria you want, the menu will disappear. If you left-mouse-click on the sort order button, you will switch between ascending and descending sorting orders.

3.7.6 Filtering of inventory items

To search a specific item or display only items related to a single location, category, collection or tags, you need to apply a filter. To expand/collapse the 'filter' section, click on the 'filter' button.

If you are just going to search for an item based on its name or description, type in portion of that name in the 'incremental search by name' field, and the application will narrow down a list of displayed items to ones that match your input.

To apply a filter, select the 'Filter' button and define your filter:



Your item list will filter out unwanted items as soon as you change any of filtering options. In the above example, the list displays only items tagged with 'Fishing' tag. If you select a location from the 'Location' drop-down list, further filtering will happen – only items tagged with the 'Fishing' tag from that selected location will be displayed in the list.

To specify a tag, click on the tag section and choose all the tags you want to have in your filter.

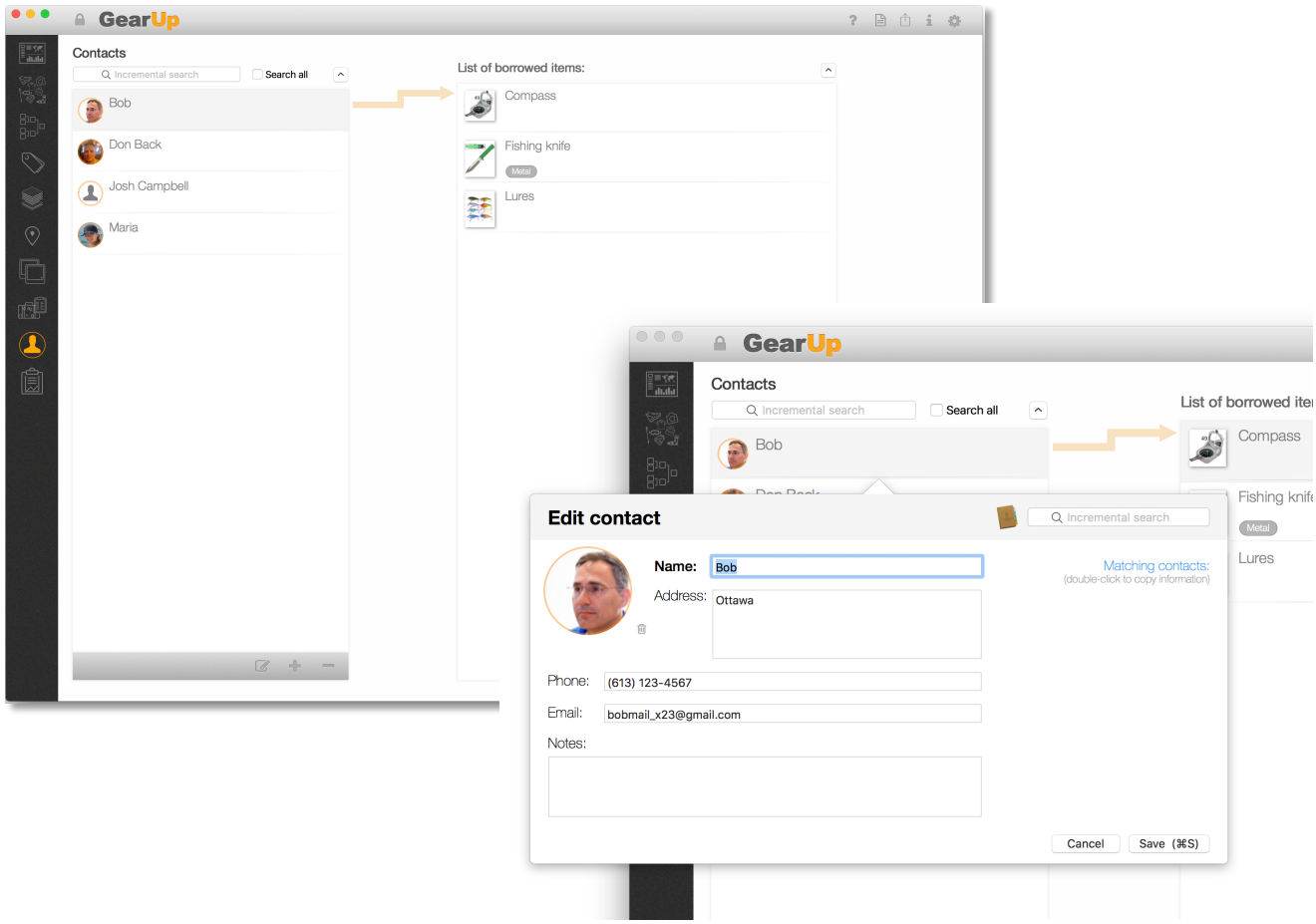
Now, you can return to the list and keep working only on items that are displayed.

If you want to remove all filters, click on the 'Clear All' button.

3.8 Managing contacts

Contacts section will display a list of your contacts and items they have borrowed from you. When you select a contact from the table on the left, items you lent to that contact will show up in a table on the right.

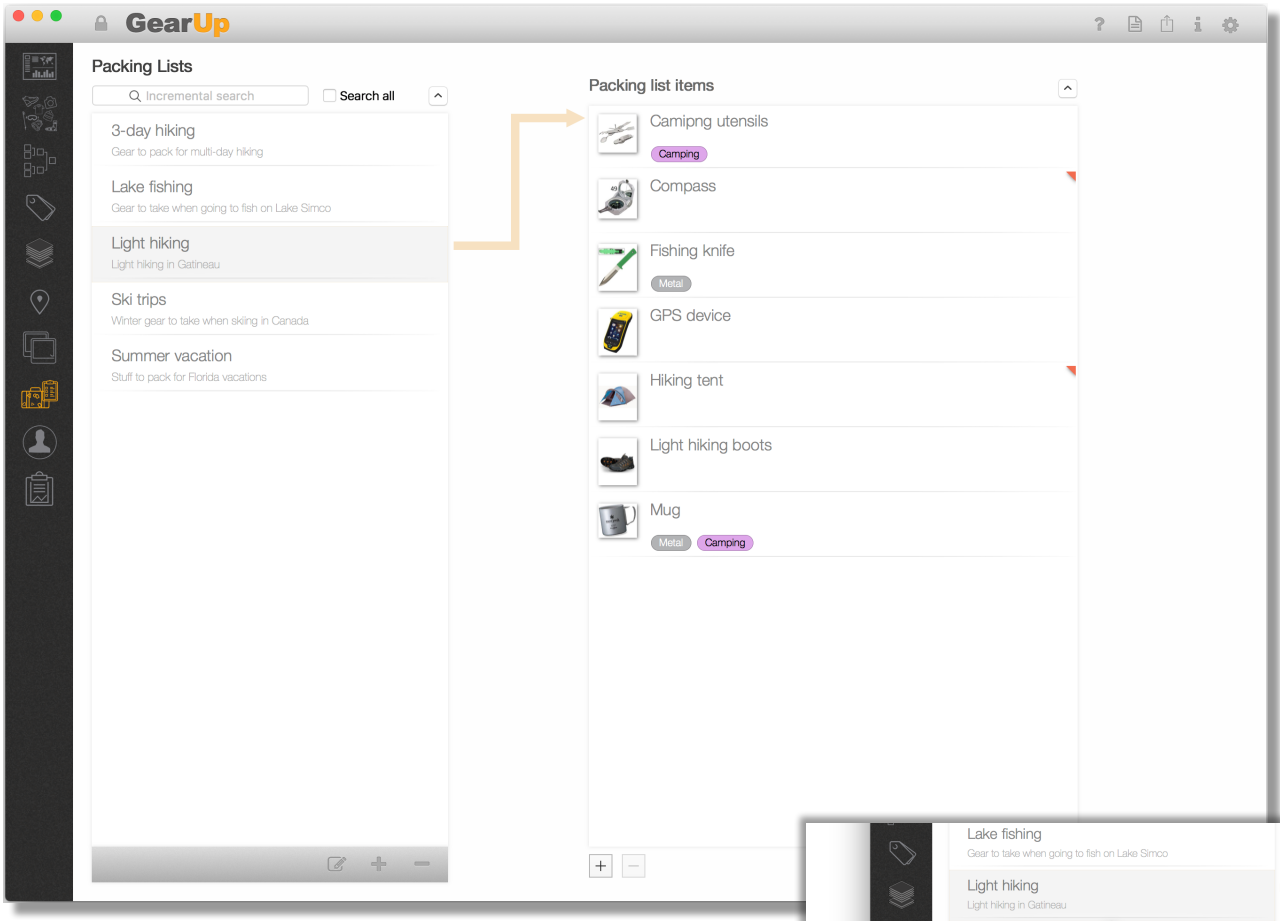
When you add a new contact, you can import it from your Mac's address book. To import a contact from the mac's address book, type in first several letters of the contact name. Matching records will be listed bellow. After that, you can select one of them and import relevant data to application's contact list.

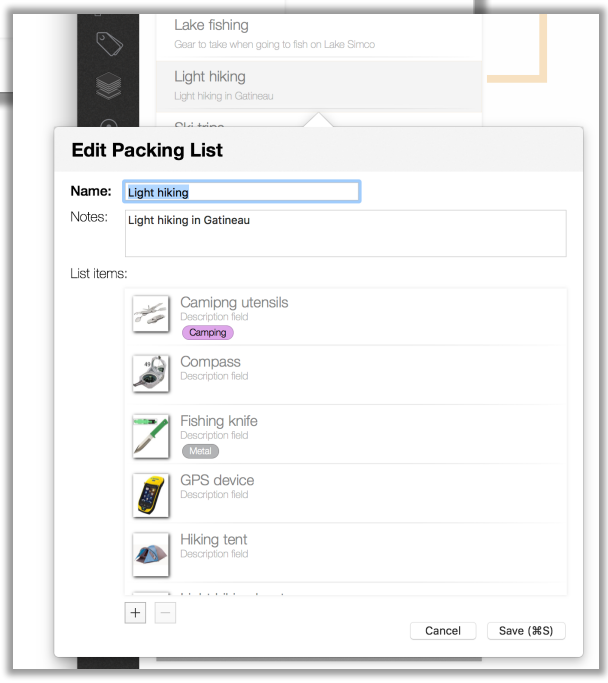


To change contact's photo, click on the contact's photo area.

3.9 Packing Lists

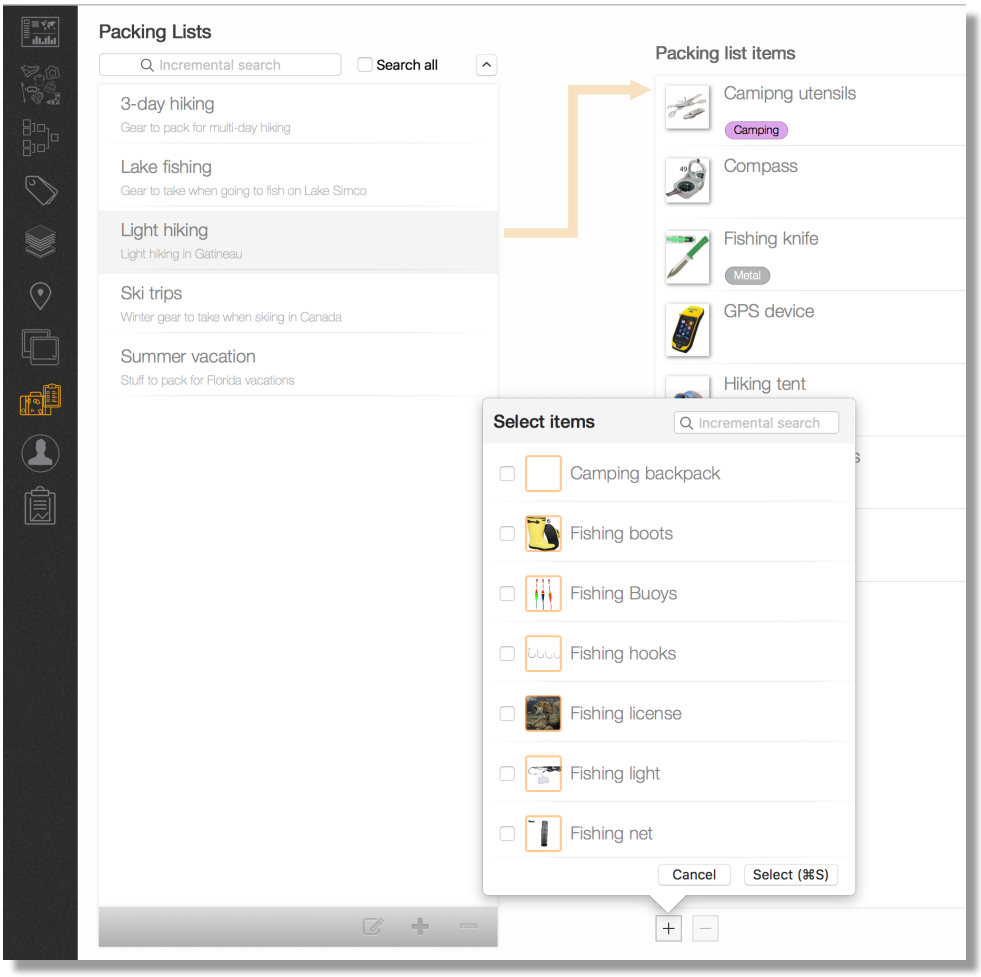
Packing lists view shows all of your packing lists. Select a list on the left to see items belonging to that list.





You can add your items to a packing list in several ways:

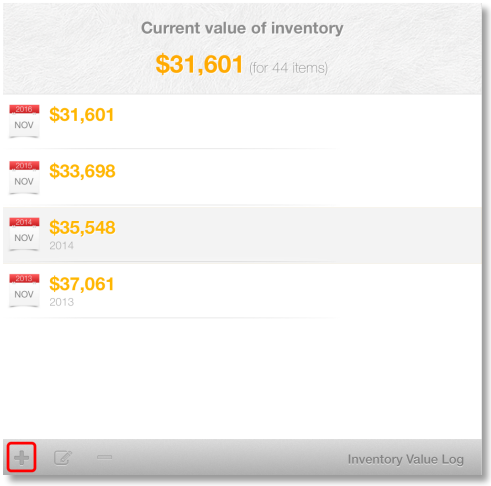
- At the time you edit the list (see the image on the right)
- By selecting the '+' button below the item list (see the image below)
- From the item list view by selecting one or more items and selecting the packing list button.


Packing Lists
Incremental search
Search all
3-day hiking
Gear to pack for multi-day hiking
Lake fishing
Gear to take when going to fish on Lake Simco
Light hiking
Light hiking in Gatineau
Ski trips
Winter gear to take when skiing in Canada
Summer vacation
Stuff to pack for Florida vacations
Packing list items
Camipng utensils
Camping
Compass
Fishing knife
Metal
GPS device
Hiking tent
Select items
Incremental search
Camping backpack
Fishing boots
Fishing Buoys
Fishing hooks
Fishing license
Fishing light
Fishing net
Cancel
Select (⌘S)

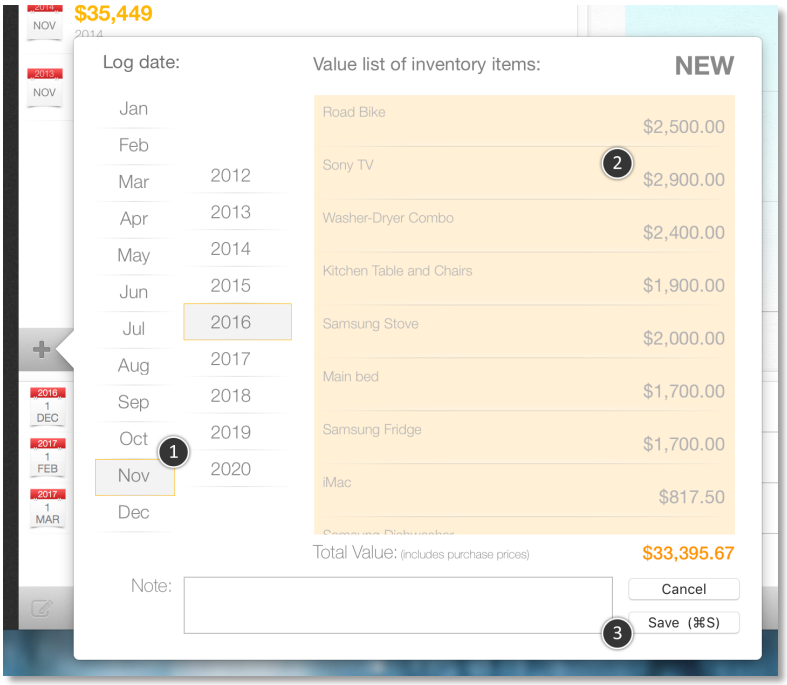
3.10 Periodic inventory value logging

It would be a good idea to update estimated values of all your items from time to time. A good time for such an exercise would be when you need to update or pay your home insurance policy.

Our application lets you do that really easy. On the Dashboard view, select the 'Add' button of the 'Inventory Value Log' table:



The form that will pop up will contain all inventory items for which you have selected the 'Track value over time' option. By default, that option is turned on when you create a new inventory item.



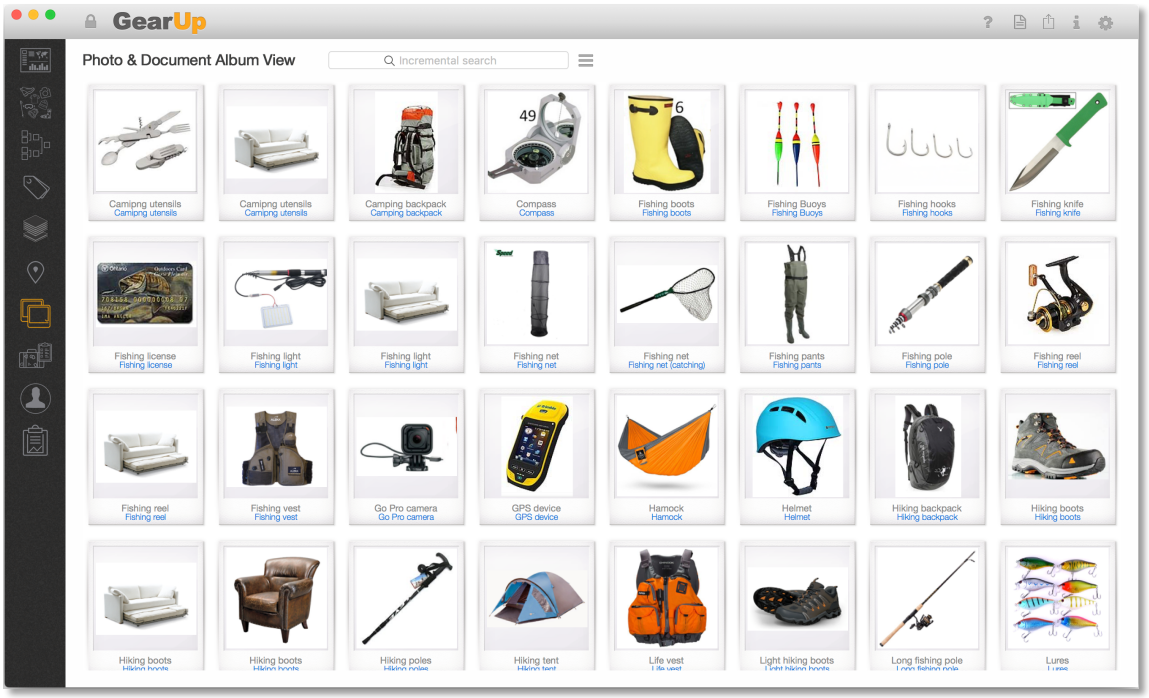
First, select the month and year (1) of the log (you cannot select a day since logging you inventory value more often than once a month is not necessary).

Next, for each inventory item that you think needs to change, update the estimated value (2). Items for which you have set an annual depreciation rate will already have a new value.

Once you are done, click on the Save button to create the new value log record. A new row in the value log table will appear and a new data point in the value history chart will be added as well.

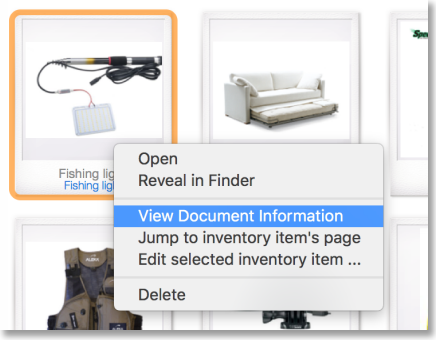
3.11 Photo & Document Album View

To display the photo album view, select the 'photo album' sidebar button:



All photos, documents and receipts will be visible in the album. Each item in the album is made up of the file's thumbnail image, document's name and inventory item's name that contains the image's document:

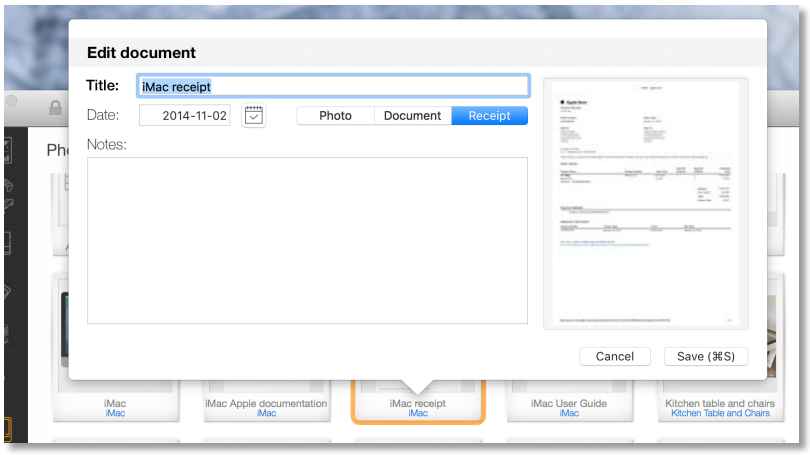
When you select one document in the photo album and right-mouse click on it, you will get a context menu with several options:



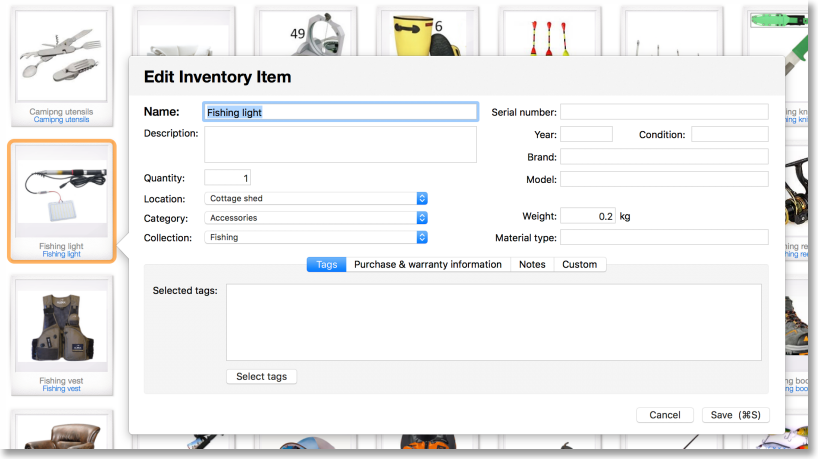
Open – opens the selected document's file in the default application registered to open such files.

Reveal in Finder – open a Finder window with the file selected in it.

View Document information – opens the selected document record:



View Inventory Item information – opens the inventory item's record related to the selected document:

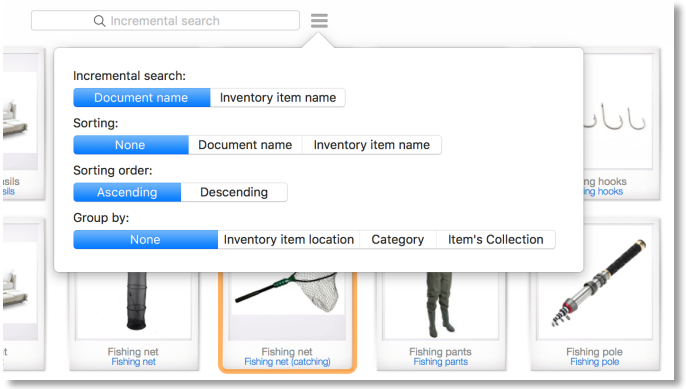


Delete – deletes the selected document and its associated file.

3.11.1 Filtering and grouping of documents in the photo album

To find a specific document, start typing part of its name in the 'incremental search' field. By default, the filtering is performed against the document name. To filter by inventory item's name, select the album's menu: ☰

By default, all documents will be displayed without grouping. To group them by a category, select the album menu: ☰



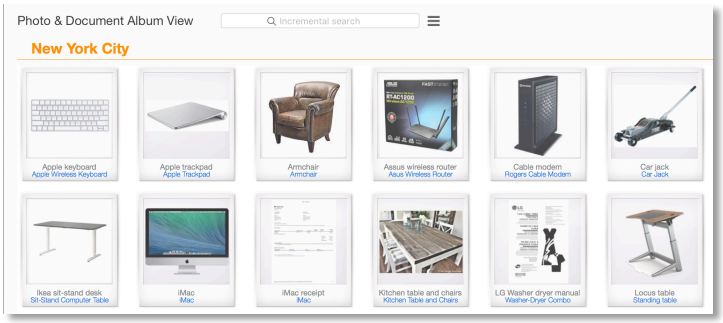
Incremental search – switch between document and inventory names when doing the incremental search.

Sorting – choose the way documents are sorted in the photo album.

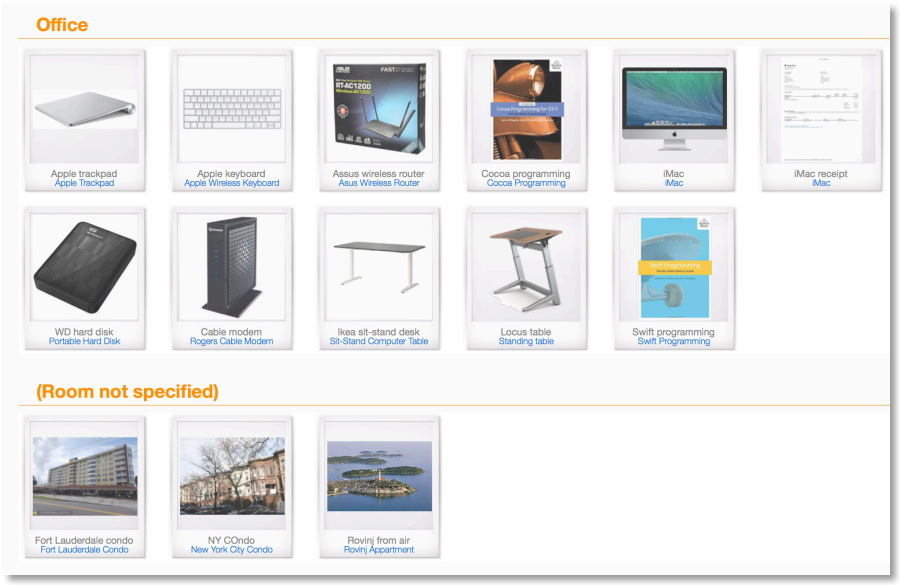
Sorting order – switch between ascending and descending order.

Group by – choose to group by location room or nothing at all.

When documents are grouped by a location, location's name will be displayed first and all documents/images from that location will follow:



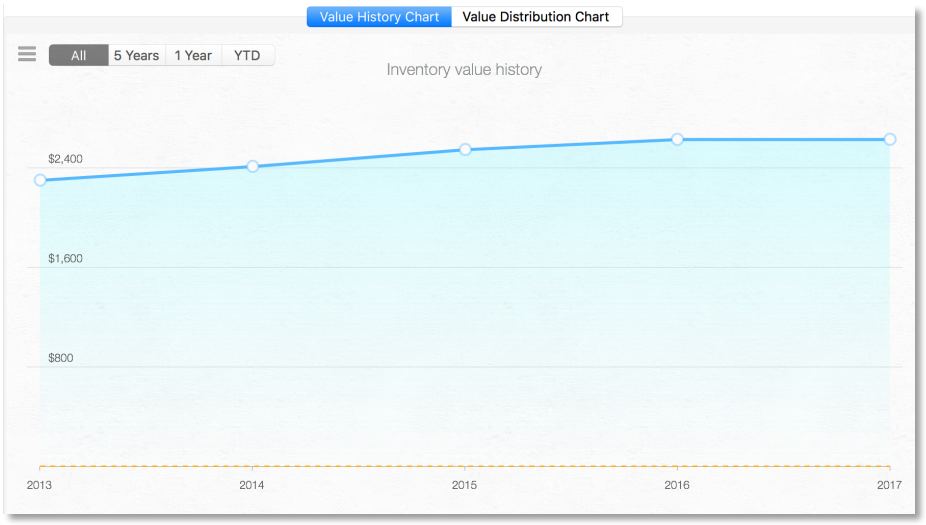
When documents are grouped by a room, a room name will be displayed first and all documents/images from that room will follow:



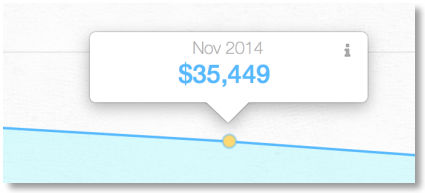
When documents are grouped, sorting is performed within each group.

3.12 Inventory value history chart

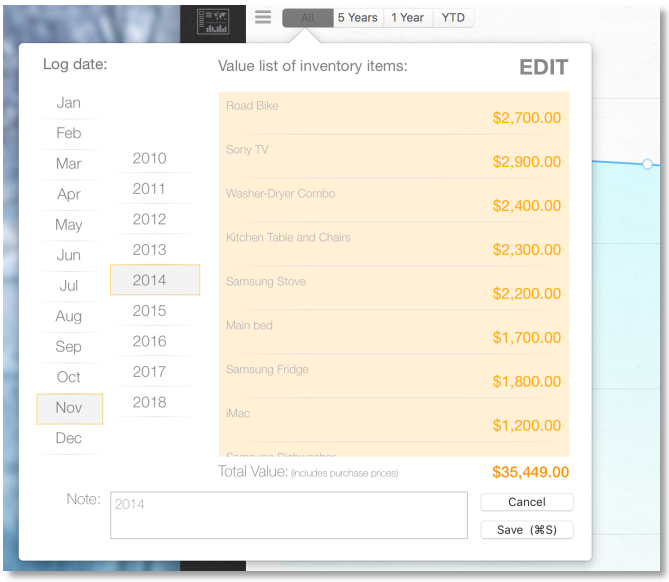
To display a full-sized value history's chart, select the 'Chart' sidebar button:



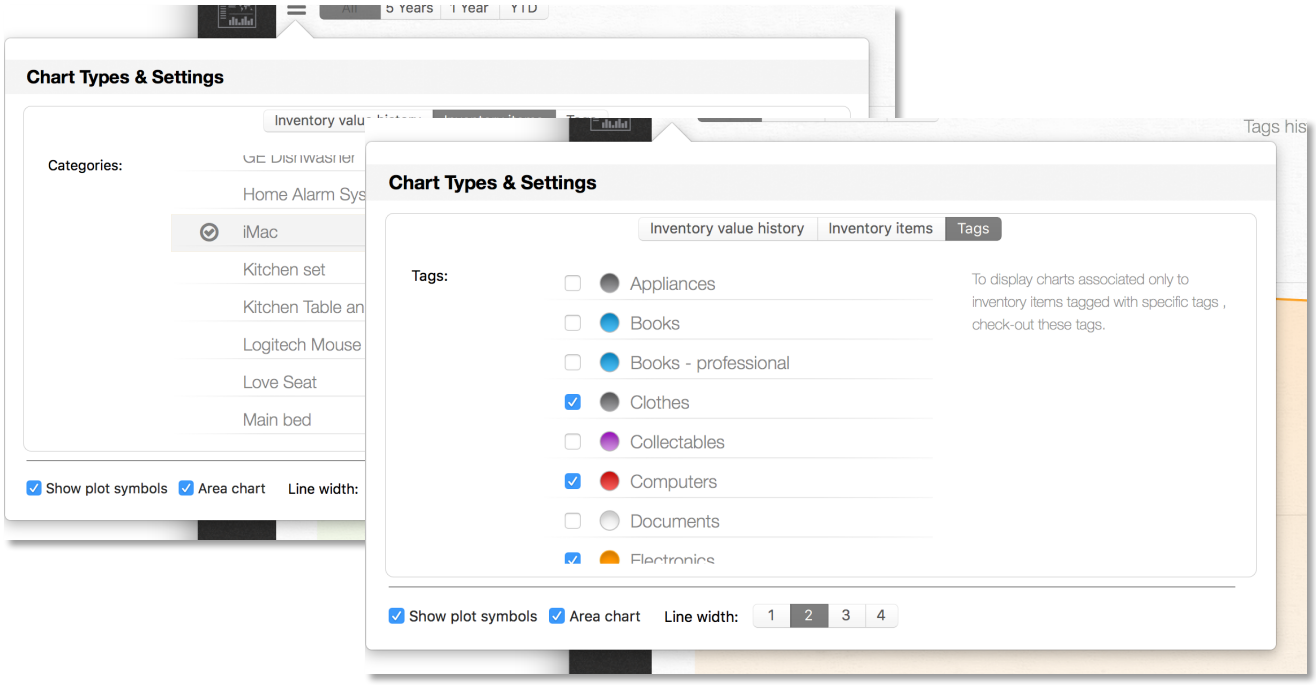
The chart displays changes in value of your complete item inventory. To see more details about a single value log, select the data point (a circle on the line chart):



To see the whole log for that period, select the small 'I' button in the top right corner of the popup.



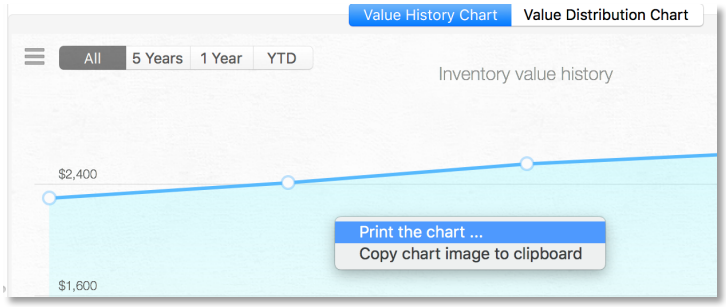
To change what gets displayed on the chart, select the chart's menu:



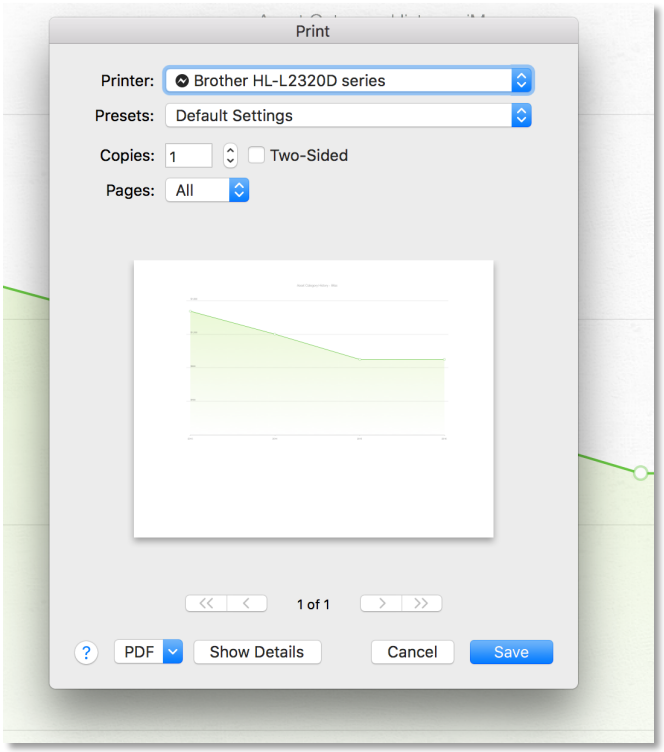
You can choose to display the whole inventory value history, value history of individual inventory items or a value history of items tagged by at least one of specified tags.

3.12.1 Chart printing and clipboard

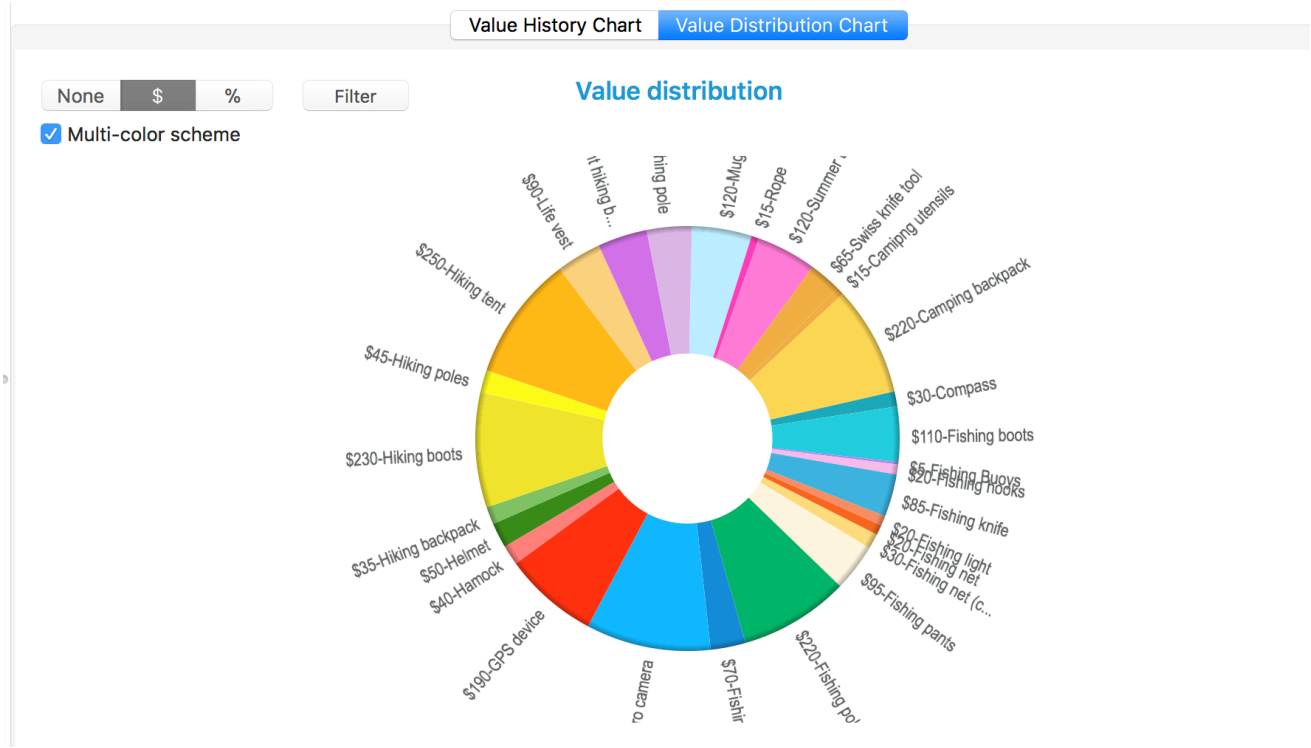
If you click on the chart with a right mouse button, you will see a small context menu that will let you print the chart or copy it as an image to the Mac's clipboard. After you copy it to the clipboard, you will be able to paste it to any other application that would accept images from a clipboard.



After you select to print the chart:

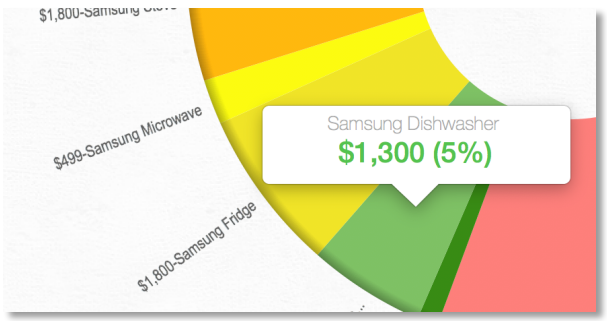

Print
Printer:
Brother HL-L2320D series
Presets:
Default Settings
Copies:
1
Two-Sided
Pages:
All
1 of 1
PDF
Show Details
Cancel
Save

3.13 Inventory value distribution chart



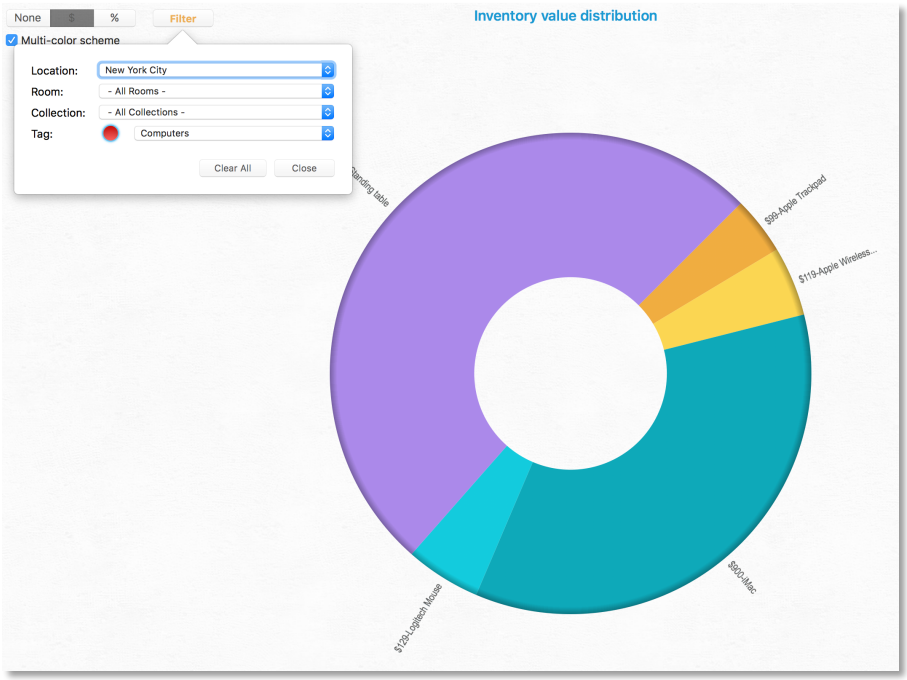
The value distribution chart is a pie chart showing what part of your total inventory (by default) each inventory item represents.

You can select each segment of the pie chart to see more details – current estimated value of the selected item and percent of the total inventory value:

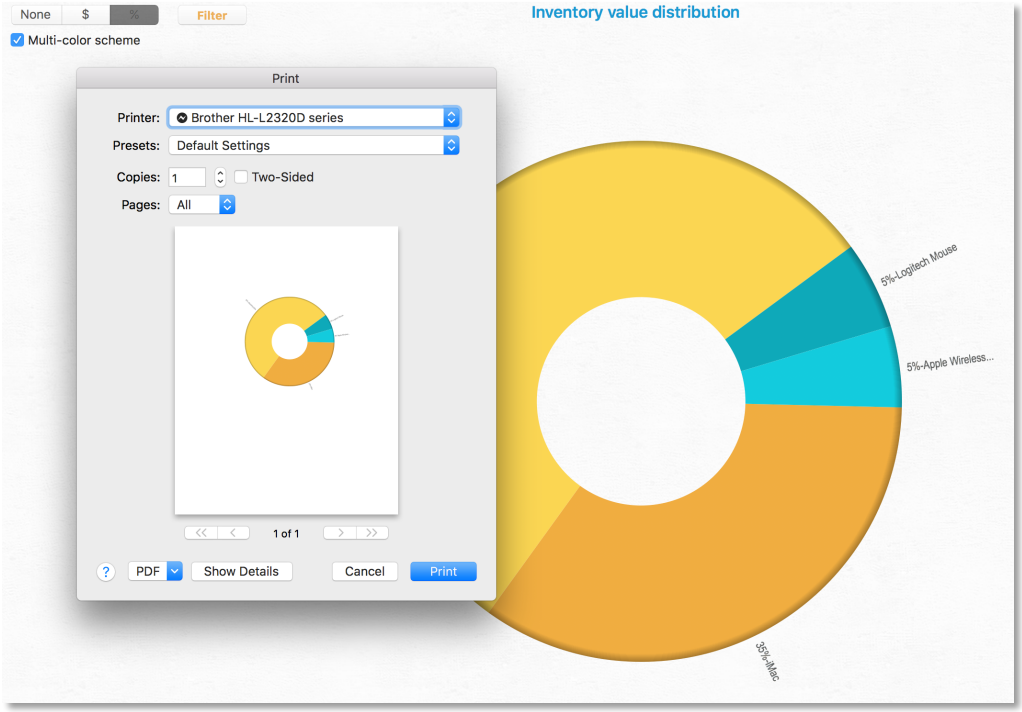


To filter the represented items, select on the filter button and set the filtering criteria.

For example, the following chart displays value distribution of New York items tagged with the 'Computers' tag:



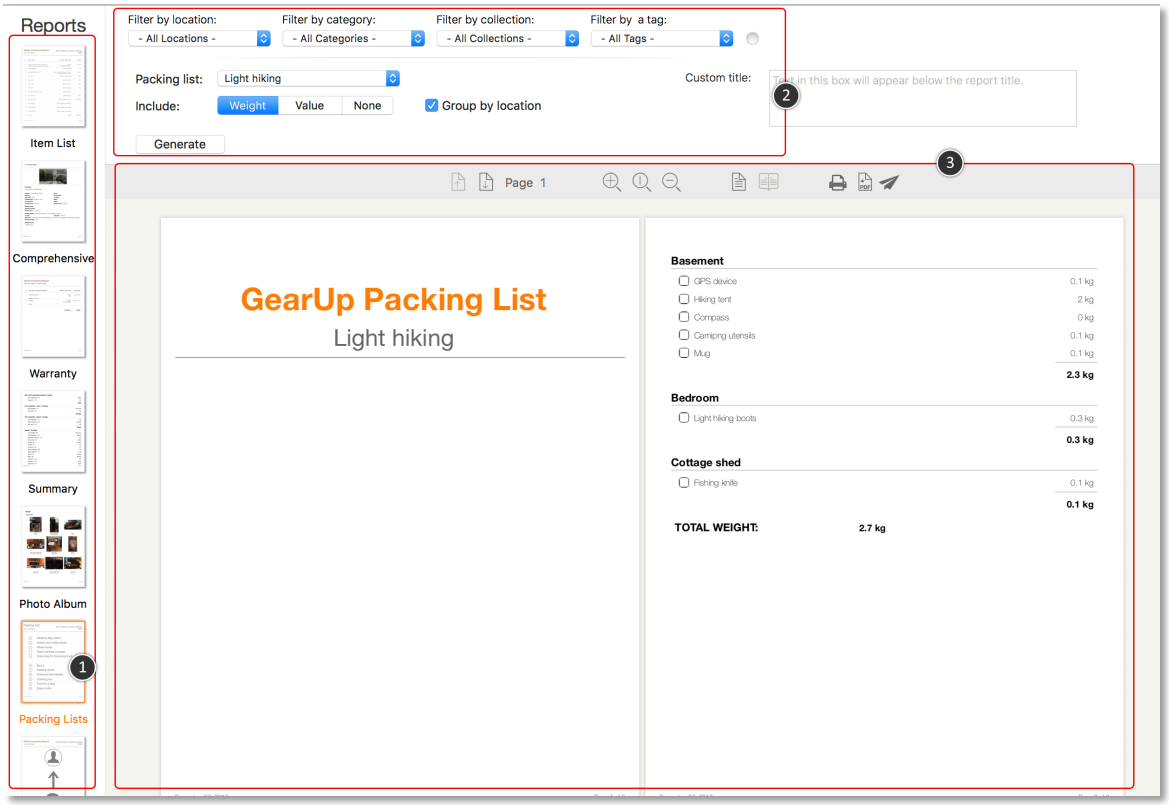
You can print the chart or copy it to a clipboard the same way as the line chart described in the previous section:



3.14 Reports

To get to the Reports view, select the 'Reports' sidebar button:

The Reports view is made up of 3 main areas: report selection (1), filtering and parameters (2) and the report preview (3):



Each report type will display the same filtering options, but it can display different parameters.

You can generate reports for all your inventory items or, for example, set a filter to include only items from a single location. Once you set your filters and parameters, click on the 'Generate' button to create the report.

Each report will be generated as a PDF file that you can save to a disk, print or send to someone by email.

The following is a list of commands you can use for generated reports:

- Page down

- Page up.

- Zoom out

- Zoom to actual size

- Zoom in

- Single page view

- Double page view

- Print the report

- Save the report to a disk

- Send the report by email

3.14.1 Sending generated reports by email

When you click on the 'Send by email' button, Apple's default Mail application will open and a new email message will be created. The message will already contain the attached report and your email address will be set in the 'From' field.

Note: Some email applications (other than Apple's Mail) may not accept report's attachment. In that case, you will need to save the report to your disk first, and then attach it to an email.

3.15 Backing up and restoring your data

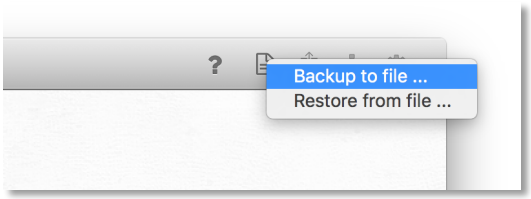
3.15.1 What is Data Backup?

Data backup involves storing of your GearUp data file and all related images/documents from your computer to another location. In this way, if there is ever any loss of data on your primary machine, you still have your data in order to restore the file. In the world of computers, loss of data can be devastating, and while there are possibilities for recovery of data after a disaster it is far easier to restore your file from a backup than to attempt to find your data on a crashed hard drive.

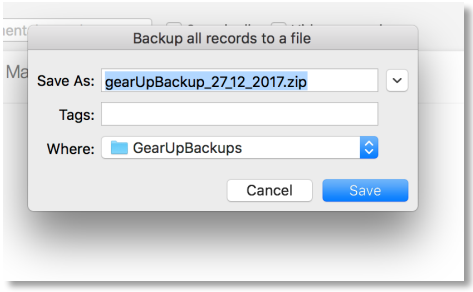
Data backup is easy to do and can save you great amounts of time as well as ensure that your data is secure in the case of disaster.

3.15.2 Backing up your data

Click on the '**Backup and Restore**' toolbar button ( ) and select '**Backup to file …**' menu command:



After you click on the menu you will have to choose your backup location folder and the file name. The application will suggest a file name that consists of the 'gearUpBackup' string and the current date. If you want, you can change it to something else. To finish creating the backup file, click on the '**Save**' button:

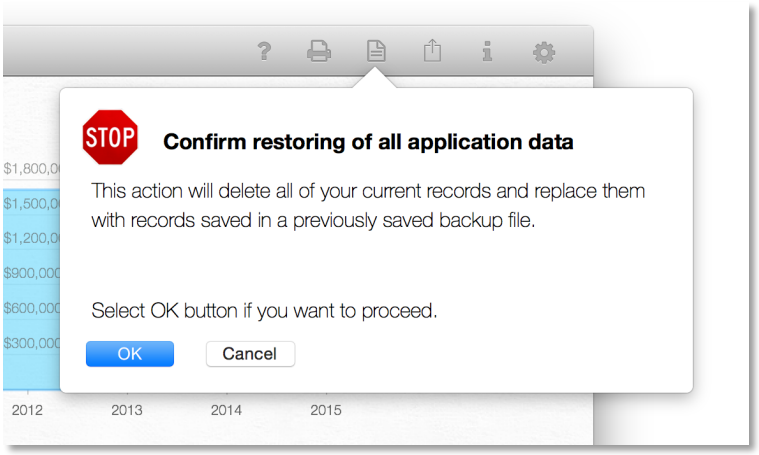


Note: It is advisable to keep your backup files in a cloud storage. You can use any of a number of currently available cloud storage providers: iCloud Drive from Apple (http://icloud.com), OneDrive from Microsoft (http://onedrive.com), Dropbox (http://dropbox.com), etc.

3.15.3 Restoring your data from a backup file

Click on the '**Backup and Restore**' toolbar button ( ) and select '**Restore from file …**' menu command:

Before you can proceed you need to read and acknowledge a warning message. Once you restore your data from a backup file, all of your current data will be overwritten by the data from the backup file:



Once you click on the '**OK**' button you will be able to choose a backup file to restore from.

Select a file from your backup location and hit the '**Open**' button. You will see a notification message when the application finishes restoring your data.