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## User Guide

### Introduction

This guide will include how to install, setup, log into, create a new user, and use all of the functions of the application. The guide will include instructions for setup on a single server.

However, MongoDB and MariaDB offer the ability to distribute work across servers.

Additionally, the application can be run on multiple machines at the same time. These machines can then be load balanced.

The standard installation noted in this guide will include a single instance of MariaDB, a single instance of MongoDB, the runnable spring boot jar which includes an embedded tomcat server instance, and an instance of Nginx to proxy the spring boot application to the standard https port and provide a secure TLS connection with an appropriate certificate.

The application has been tested on Windows 10 and CentOS 7 but should run on any system that can run the full openjdk 11.

### Installation and Using the Application

#### Prerequisites:

The following applications must be installed on the server prior to the installation of the application.

- OpenJDK 11 - <https://openjdk.java.net>
  - This can either be installed from prebuilt images using instructions at <https://openjdk.java.net/install/> or installed from a site that maintains installers such as <https://adoptopenjdk.net/installation.html>.
- MongoDB v4.2.8 - <https://www.mongodb.com/>

- Follow standard download and installation instructions on the website and be sure to record the port and credentials for later use.
- MariaDB v10.5.4 - <https://mariadb.org/>
  - Follow standard download and installation instructions on the website and be sure to record the port and credentials for later use.
- Times New Roman Font
  - If installing on a Linux system, the Times New Roman font used by Jasper Reports may not be available by default. These can be installed in various ways depending on the operating system used. For Centos 7, the package msttcorefonts can be downloaded from various sources such as <http://mscorefonts2.sourceforge.net/>.
- Nginx (optional) - <https://nginx.org>
  - The spring boot application can be configured to directly use an existing TLS certificate and the standard port 443 if desired. Or a proxy web server can be used to redirect the spring boot application running on any other port to the standard port and add TLS security.
  - Follow standard download and installation instructions. Configure Nginx for your server's TLS certificate and configure a location on the server that proxies the spring boot application. An example is below. Note that the port can be changed in the application.yml file, but is 8778 by default.

```
server {
    server_name beta.irotsoma.com; # managed by Certbot
    #root          /usr/share/nginx/html;

    # Load configuration files for the default server block.
    include /etc/nginx/default.d/*.conf;

    location / {
        proxy_set_header X-Forwarded-For $proxy_add_x_forwarded_for;
        proxy_set_header Host $http_host;
        proxy_set_header X-Forwarded-Proto $scheme;
        proxy_pass http://127.0.0.1:8778;
    }
}
```

## Spring Boot Jar

The installation package contains a jar file and a config folder. These files ideally should be placed in the same directory. Spring Boot can be configured to use other folders if needed, but this is out of the scope of this guide.

The jar file is directly executable and should be given appropriate permissions to be executable and can either be run directly from the command line or with the command “java -jar <jar filename>”.

## Configuration

Spring Boot offers a wide variety of settings that can be changed in the application.yml file contained in the config folder. This section will show the most common settings for this application, but any applicable Spring Boot settings can be used to customize the installation. Note that as this is YAML, the indentations make a difference in the hierarchy and must be maintained. This can be converted to a flat properties file if desired as long as it is named application.properties.

```
server:
  port: 8778

spring:
  datasource:
    url: jdbc:mariadb://localhost/homeinventory
    username: homeinventory
    password: insecurepassword
  data.mongodb:
    host: localhost
    port: 27017
    database: homeinventory
    username: homeinventory
    password: insecurepassword
  servlet.multipart:
    max-file-size: 100MB
    max-request-size: 100MB
    enabled: true

logging:
  level:
    root: INFO
    com.irotsoma: INFO
    org.springframework: INFO
  file:
    path: ./logs

jasper.reporting:
  groupByRoomCategoryReportPath: ./config/reports/Home_Inventory_room_category.jrxml
  groupByPropertyCategoryReportPath: ./config/reports/Home_Inventory_property_category.jrxml
  groupByPropertyRoomReportPath: ./config/reports/Home_Inventory_property_room.jrxml
  groupByRoomReportPath: ./config/reports/Home_Inventory_room.jrxml
  groupByCategoryReportPath: ./config/reports/Home_Inventory_category.jrxml
```

- server:
  - port: set the port that Spring Boot application will run on. If using a proxy server like nginx, this is the port you will configure to proxy.
- spring:
  - datasource: these options apply to the relational database
    - url: a jdbc URL for the appropriate database. The current system only supports mariadb so the prefix should always be jdbc:mariadb: followed by the hostname (port if nonstandard) and database name. Spring Boot also offers

separate configuration properties rather than using a URL. See Spring Boot documentation for details.

- username: Database username that has access to the database. Permissions required to create tables, modify tables, create indexes, and all dml functions.
- Password: password for above username
- data.mongodb: These options apply to the MongoDB instance used for attachment storage.
  - host: hostname of the server running the MongoDB instance or localhost if local
  - port: MongoDB port, default is 27017
  - database: the database/collection name to use
  - username: username that has access to database/collection specified above
  - password: password for the above user
- servlet.multipart: by default, Spring Boot limits file uploads to 3MB. If you wish to allow larger attachments, set these:
  - max-file-size: maximum file size
  - max-request-size: maximum size of entire request
- logging: (optional) these options can be configured to allow various logging levels for various components for help in troubleshooting issues. Set to DEBUG or TRACE and submit the logs when submitting a support request.
- jasper.reporting: these options set the location and filename of the detailed inventory reports with different groupings. By default, all files are stored in the reports folder under the config folder as shown in the screenshot above.

## Language and Locale

The application supports multiple language and locale settings. By default, these are selected based on the settings of your browser. However, if needed, they can manually be selected in the top right of the navbar. These settings will adjust the language of the user interface as well as the format of currency and numbers.



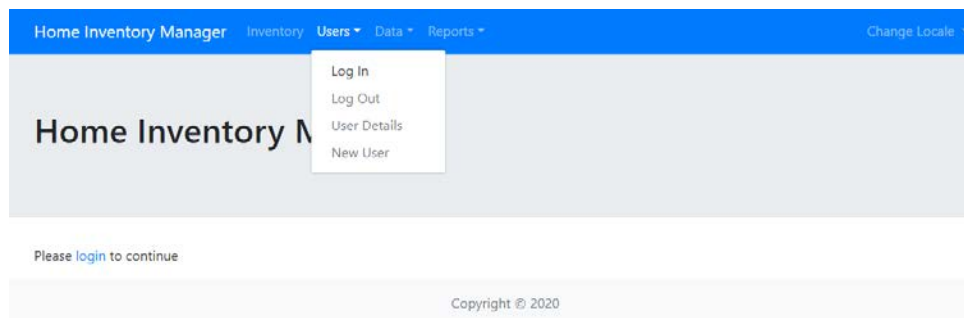
Currently supported languages are:

- US English
- Chinese (Simplified)

Note that while only a subset of languages is supported, currency and number support is included by default for most locals and can be activated for the session by adding the locale to the url. For example: [https://beta.irotsoma.com/?locale=fr\\_FR](https://beta.irotsoma.com/?locale=fr_FR) will activate French standard formatting which will use the Euro symbol for currency. The comma symbol for decimal separator, and a space for the grouping separator on numbers.

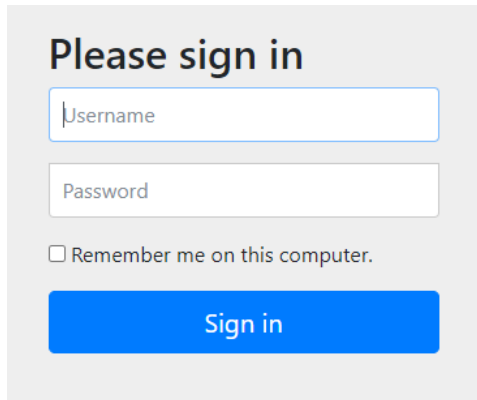
## Login/Logout

1. Click the login link or select login from the Users menu.





2. Enter your username and password. Selecting, “Remember me on this computer.”, will remember the user for up to 24 hrs or until the user manually selects “Log Out” from the User Menu

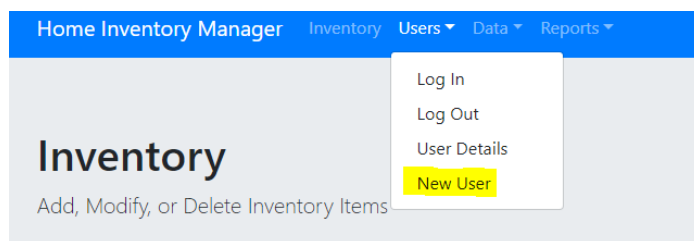
A sign-in form with a light gray background. At the top, it says "Please sign in" in bold. Below this are two input fields: "Username" and "Password". Under the "Password" field is a checkbox labeled "Remember me on this computer.". At the bottom is a blue button with the text "Sign in" in white.

3. To log out, select Log Out from the Users menu. This will return the user to the sign-in page and log the user out of the system.

### Add New Users (administrators only)

Administrator users can add new users to the system. For all other users, this option will be disabled.

1. Select “New User” from the Users menu.



2. Enter a username (must be unique across the system)
3. Enter a password for the user. By default, the password must follow these rules
  - a. Length 8-30 Chars
  - b. 1 Uppercase
  - c. 1 Lowercase

- d. 1 Numeric
  - e. 1 Special
  - f. No Whitespaces
4. Reenter the password to confirm
5. Select one or more roles for the user. Note: select both options if the user needs to use the system and can create users. This is the default functionality of the initial admin user after installation.
- a. `ROLE_USER` allows for normal use of the system including adding inventory items, updating all data, viewing all reports. It does not allow creating new users.
  - b. `ROLE_ADMIN` allows for creating new users.

The screenshot shows the 'New User' form in the Home Inventory Manager application. The form is titled 'New User' and is located below a blue navigation bar. The navigation bar contains the text 'Home Inventory Manager' and several menu items: 'Inventory', 'Users', 'Data', and 'Reports'. There is also a 'Change Locale' dropdown menu. The form itself has a light gray background and contains the following fields:

- Username:** A text input field.
- Password:** A text input field.
- Confirm Password:** A text input field.
- Roles:** A dropdown menu with two options: `ROLE_USER` and `ROLE_ADMIN`.

At the bottom of the form is a blue 'Submit' button.

## User Details / Change Password

The user details screen can be used to view settings of the user as well as change the currently logged in user's password. To change the password:

1. Select “User Details” from the Users menu.
2. Select the “Change Password” link.

The screenshot shows the 'User Details' page. At the top is a blue navigation bar with the text 'Home Inventory Manager' and a menu with 'Inventory', 'Users', 'Data', and 'Reports'. A 'Change Locale' link is on the right. Below the navigation bar is a large grey header area with the title 'User Details'. Underneath is a 'Details' section with two rows: 'Username' with the value 'admin' and 'Password' with a yellow 'Change Password' button. Below that is a 'Roles' section with two rows: 'ROLE\_ADMIN' and 'ROLE\_USER'. At the bottom of the page is a footer with the text 'Copyright © 2020'.

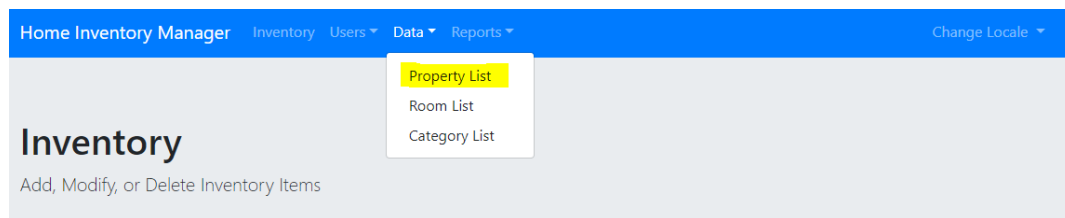
3. In the popup enter the new password and reenter it to confirm then press submit.

The screenshot shows a 'Change Password' popup dialog. The dialog has a title bar with a close button (X). It contains two input fields: 'Password' and 'Confirm Password'. At the bottom right of the dialog are two buttons: 'Submit' (in blue) and 'Cancel' (in grey). The background of the application is dimmed, showing the 'Change Password' link from the previous screen.

## Properties

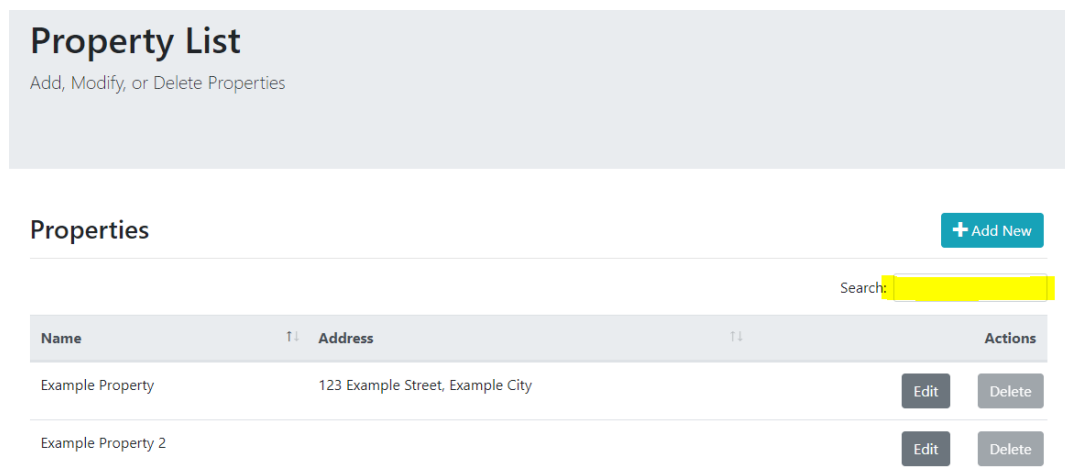
The system can be set up to allow the user to enter one or more real-estate properties/homes. It is suggested that the user enter all properties/homes that they wish to track as the first task when initially logging into the system.

1. Select “Property List” from the Data menu to view a list of properties, add new properties, or edit existing properties.



## Filter

1. To filter the list of properties, type in the search field. Both names and addresses can be filtered on. Note, the address column only includes street address and city and only these can be filtered on.



## Sorting

1. Properties can be sorted on either Name or Address by clicking on the header. Note addresses are sorted on the full string of street address and city.

## Property List

Add, Modify, or Delete Properties

### Properties

[+ Add New](#)

Search:

Name	Address	Actions	
Example Property	123 Example Street, Example City	<a href="#">Edit</a>	<a href="#">Delete</a>
Example Property 2		<a href="#">Edit</a>	<a href="#">Delete</a>

### Add New

1. To add a new property, select the “Add New” button.

## Property List

Add, Modify, or Delete Properties

### Properties

[+ Add New](#)

Search:

Name	Address	Actions	
Example Property	123 Example Street, Example City	<a href="#">Edit</a>	<a href="#">Delete</a>
Example Property 2		<a href="#">Edit</a>	<a href="#">Delete</a>

2. In the Edit Property screen, add a name and optionally fill out the address fields.

Note: Names must be unique. An error will occur if another record already exists with the same name.

## Edit Property

Name

Address

Street

City

State/Province

Postal Code

Country

Submit

3. Press submit to create the record.

## Edit

1. Select the Edit button on the row to edit the record.

## Property List

Add, Modify, or Delete Properties

### Properties

+ Add New

Search:

Name	Address	Actions
Example Property	123 Example Street, Example City	<div>Edit</div> <div>Delete</div>
Example Property 2		<div>Edit</div> <div>Delete</div>

2. Edit the fields that need to be changed and press submit to update the record. Note:  
Names must be unique. An error will occur if another record already exists with the same name.

## Edit Property

### Name

### Address

Street

City

State/Province

Postal Code

Country

## Delete

1. To delete an existing property, press the delete button on the appropriate row. Press OK on the popup to confirm.

Note: if a record is being used in an inventory item, the button will be disabled. First, delete the inventory items using the record.

## Property List

Add, Modify, or Delete Properties

### Properties

Search:

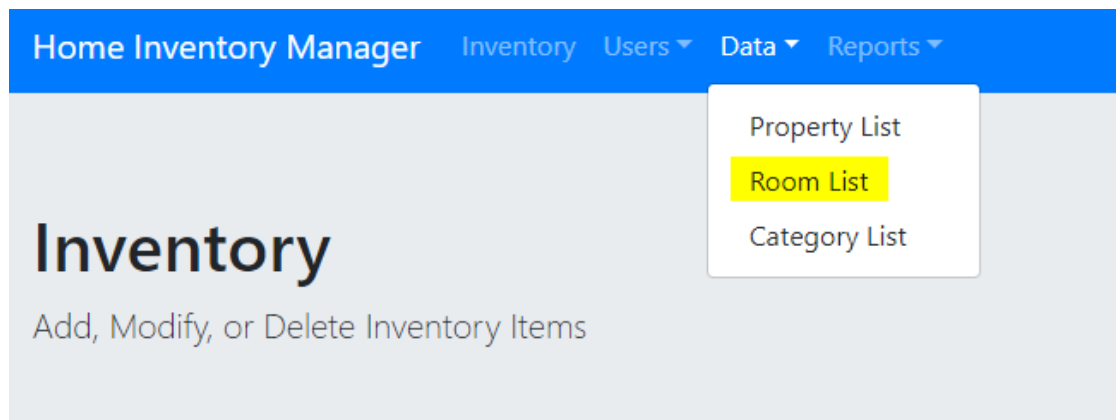
Name	Address	
Example Property	123 Example Street, Example City	<div><div>Edit</div><div>Delete</div></div>
Example Property 2		<div><div>Edit</div><div>Delete</div></div>

This record is used in at least one inventory item. Delete those items first.

## Rooms

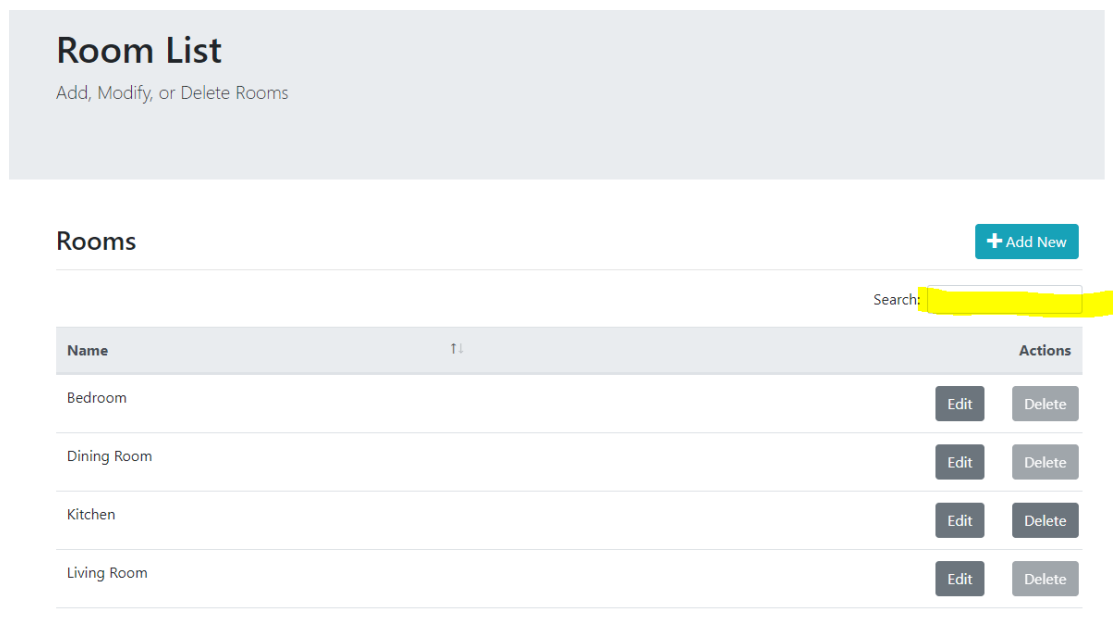
The system can be set up to allow the user to enter one or more rooms to allow for grouping of inventory items.

1. Select “Room List” from the Data menu to view a list of rooms, add new rooms, or edit existing rooms.



## Filter

1. To filter the list of rooms, type in the search field.



## Sorting

1. Rooms can be sorted on Name by clicking on the header.



## Room List

Add, Modify, or Delete Rooms

Rooms

+ Add New

Search:

Name	Actions
Bedroom	<div>Edit</div> <div>Delete</div>
Dining Room	<div>Edit</div> <div>Delete</div>
Kitchen	<div>Edit</div> <div>Delete</div>
Living Room	<div>Edit</div> <div>Delete</div>

### Add New

1. To add a new room, select the “Add New” button.

## Room List

Add, Modify, or Delete Rooms

Rooms

+ Add New

Search:

Name	Actions
Bedroom	<div>Edit</div> <div>Delete</div>
Dining Room	<div>Edit</div> <div>Delete</div>
Kitchen	<div>Edit</div> <div>Delete</div>
Living Room	<div>Edit</div> <div>Delete</div>

2. In the Edit Room screen, add a name, and click Submit to create the record. Note:  
  
Names must be unique. An error will occur if another record already exists with the same name.

## Edit Room

Name

### Edit

1. Select the Edit button on the row to edit the record.

## Room List

Add, Modify, or Delete Rooms

### Rooms

Search: 

Name	Actions
Bedroom	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Dining Room	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Kitchen	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Living Room	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

2. Edit the name and press submit to update the record. Note: Names must be unique.

An error will occur if another record already exists with the same name.

## Edit Room

Name

## Delete

1. To delete an existing room, press the delete button on the appropriate row. Press OK on the popup to confirm.

Note: if a record is being used in an inventory item, the button will be disabled. First, delete the inventory items using the record.

### Room List

Add, Modify, or Delete Rooms

#### Rooms

+ Add New

Search:

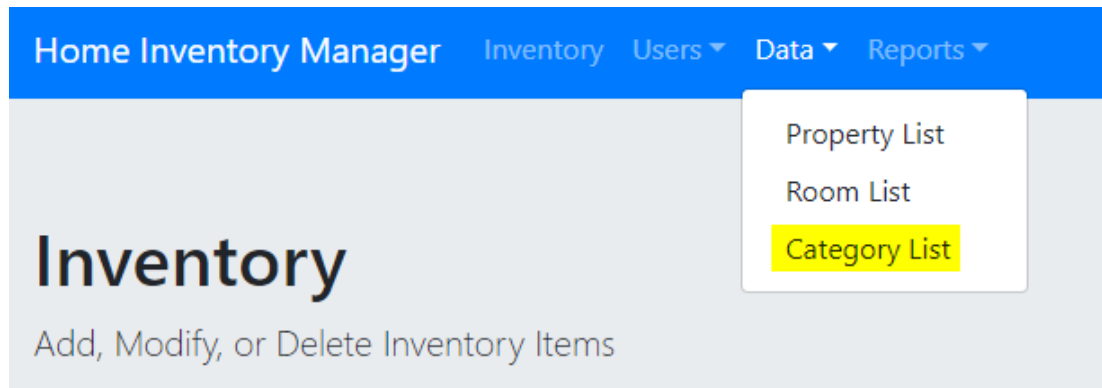
Name	Actions
Bedroom	<div><div>Edit</div><div>Delete</div></div>
Dining Room	<div><div>Edit</div><div>Delete</div></div>
Kitchen	<div><div>Edit</div><div>Delete</div></div>
Living Room	<div><div>Edit</div><div>Delete</div></div>

This record is used in at least one inventory item. Delete those items first.

## Categories

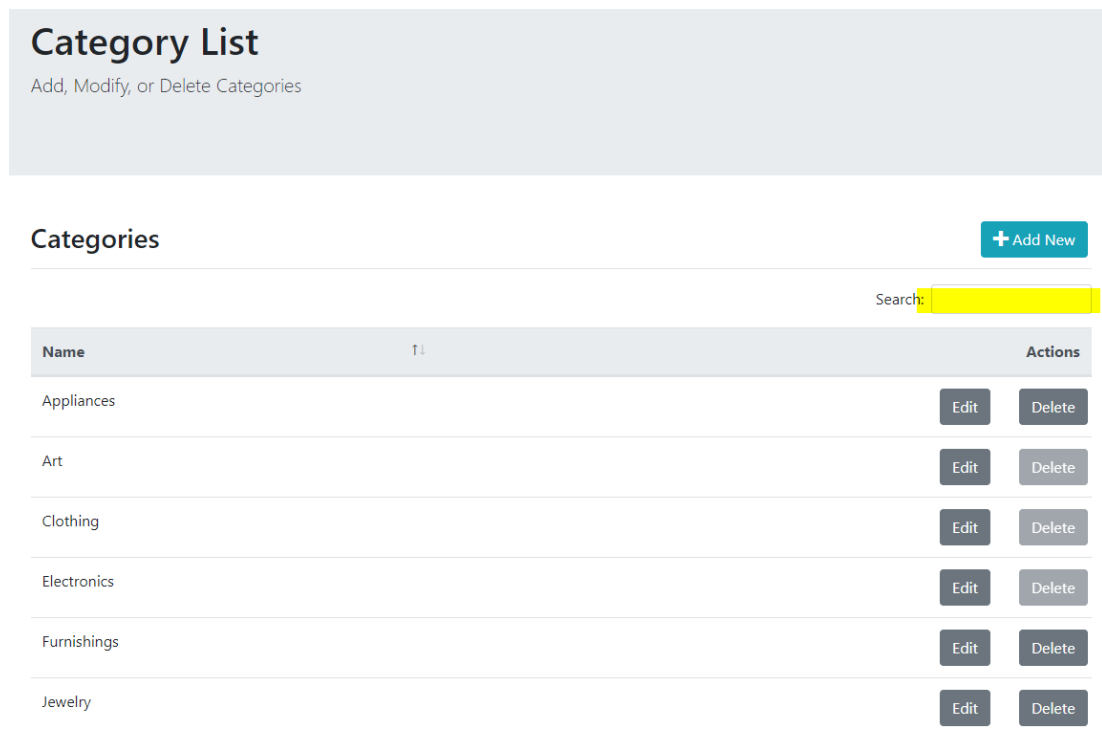
The system can be set up to allow the user to enter one or more item categories to allow for grouping of inventory items.

1. Select “Category List” from the Data menu to view a list of categories, add new categories, or edit existing categories.



## Filter

1. To filter the list of categories, type in the search field.



## Sorting

1. Categories can be sorted on Name by clicking on the header.

## Category List

Add, Modify, or Delete Categories

### Categories

[+ Add New](#)

Search:

Name	Actions
Appliances	<a href="#">Edit</a> <a href="#">Delete</a>
Art	<a href="#">Edit</a> <a href="#">Delete</a>
Clothing	<a href="#">Edit</a> <a href="#">Delete</a>
Electronics	<a href="#">Edit</a> <a href="#">Delete</a>
Furnishings	<a href="#">Edit</a> <a href="#">Delete</a>
Jewelry	<a href="#">Edit</a> <a href="#">Delete</a>

### Add New

1. To add a new category, select the “Add New” button.

## Category List

Add, Modify, or Delete Categories

### Categories

[+ Add New](#)

Search:

Name	Actions
Appliances	<a href="#">Edit</a> <a href="#">Delete</a>
Art	<a href="#">Edit</a> <a href="#">Delete</a>
Clothing	<a href="#">Edit</a> <a href="#">Delete</a>
Electronics	<a href="#">Edit</a> <a href="#">Delete</a>
Furnishings	<a href="#">Edit</a> <a href="#">Delete</a>
Jewelry	<a href="#">Edit</a> <a href="#">Delete</a>

2. In the Edit Category screen, add a name, and click Submit to create the record. Note:  
Names must be unique. An error will occur if another record already exists with the same name.

## Edit Category

Name

[Submit](#)

### Edit

1. Select the Edit button on the row to edit the record.

## Category List

Add, Modify, or Delete Categories

### Categories

[+ Add New](#)Search: 

Name	1	Actions
Appliances		<a href="#">Edit</a> <a href="#">Delete</a>
Art		<a href="#">Edit</a> <a href="#">Delete</a>
Clothing		<a href="#">Edit</a> <a href="#">Delete</a>
Electronics		<a href="#">Edit</a> <a href="#">Delete</a>
Furnishings		<a href="#">Edit</a> <a href="#">Delete</a>
Jewelry		<a href="#">Edit</a> <a href="#">Delete</a>

2. Edit the name and press submit to update the record. Note: Names must be unique.

An error will occur if another record already exists with the same name.

## Edit Category

Name

[Submit](#)

### Delete

1. To delete an existing category, press the delete button on the appropriate row. Press OK on the popup to confirm.

Note: if a record is being used in an inventory item, the button will be disabled. First, delete the inventory items using the record.

## Category List

Add, Modify, or Delete Categories

### Categories

[+ Add New](#)

Search:

Name	TL	Actions
Appliances		<a href="#">Edit</a> <a href="#">Delete</a>
Art		<a href="#">Edit</a> <a href="#">Delete</a>
Clothing		<a href="#">Edit</a> <a href="#">Delete</a>
Electronics		<a href="#">Edit</a> <a href="#">Delete</a>
Furnishings		<a href="#">Edit</a> <a href="#">Delete</a>
Jewelry		<a href="#">Edit</a> <a href="#">Delete</a>

This record is used in at least one inventory item. Delete those items first.

## Inventory

The primary function, once the setup of the data is complete, is to enter and maintain items in the inventory. This function is done on the home page when logged in. It can be reached by selecting either the name of the application or Inventory in the navigation bar.

1. Select “Inventory” from the Data menu to view a list of inventory items, add new items, or edit existing items.

Home Inventory Manager **Inventory** Users ▾ Data ▾ Reports ▾

## Inventory

Add, Modify, or Delete Inventory Items



## Filter

1. To filter the list of items, type in the search field. The items are filtered on Name, Category, Room, and Property names.

### Inventory

Add, Modify, or Delete Inventory Items

Inventory

+ Add New

Show  entries

Search

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<div>EditDelete</div>
Example Item 2	Art	Bedroom	Example Property 2	<div>EditDelete</div>
Example Item 3	Clothing	Dining Room	Example Property	<div>EditDelete</div>

Showing 1 to 3 of 3 entries

Previous1Next

## Sorting

1. Items can be sorted on Name, Category, Room, or Property name by clicking on the appropriate header.

### Inventory

Add, Modify, or Delete Inventory Items

Inventory

+ Add New

Show  entries

Search

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<div>EditDelete</div>
Example Item 2	Art	Bedroom	Example Property 2	<div>EditDelete</div>
Example Item 3	Clothing	Dining Room	Example Property	<div>EditDelete</div>

Showing 1 to 3 of 3 entries

Previous1Next

## Pagination

The inventory items will be limited by the number of entries selected in the dropdown at the top left of the table. Buttons for navigating pages are included at the bottom left of the table. The current items being viewed as well as the total number of items are shown at the bottom left.

### Inventory

Add, Modify, or Delete Inventory Items

### Inventory

+ Add New

Show 10 entries

Search

Name	Category	Room	Property	Actions	
Example Item	Electronics	Living Room	Example Property	Edit	Delete
Example Item 2	Art	Bedroom	Example Property 2	Edit	Delete
Example Item 3	Clothing	Dining Room	Example Property	Edit	Delete

Showing 1 to 3 of 3 entries

Previous1Next

## Add New

Note: attachments cannot be added through the Add New screen. The item must be saved first, and the user must then edit the item as shown in the Edit section below.

1. To add a new item to the list, select the “Add New” button.

## Inventory

Add, Modify, or Delete Inventory Items

### Inventory

+ Add New

Show 10 entries Search

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<div>EditDelete</div>
Example Item 2	Art	Bedroom	Example Property 2	<div>EditDelete</div>
Example Item 3	Clothing	Dining Room	Example Property	<div>EditDelete</div>

Showing 1 to 3 of 3 entries

Previous1Next

- In the Edit Inventory Item screen, add a name for the item. Note: Names must be unique. An error will occur if another record already exists with the same name.

## Edit Inventory Item

Name

Description

Category

Electronics

+

Room

Living Room

+

Property

Example Property

+

Estimated Value

\$

Purchase Price

\$

Purchase Date

mm/dd/yyyy

Manufacturer

Serial Number

Submit

- Optionally enter a Description for the item.

## Edit Inventory Item

Name

Description


Category

Room


Property

Estimated Value

Purchase Price

Purchase Date

Manufacturer

Serial Number

4. Select a category for the item or press the plus sign button to add a new one without losing your place. A popup will be shown allowing you to add the new category when pressing the plus button and the category will show up in the list.

## Edit Inventory Item


Name

Description


Category

Room

Property

Estimated Value

Purchase Price

Purchase Date

Manufacturer

Serial Number

5. Select a room for the item or press the plus sign button to add a new one without losing your place. A popup will be shown allowing you to add the new room when pressing the plus button and the room will show up in the list.

### Edit Inventory Item

Name

Description

Category

Electronics

+

Room

Living Room

+

Property

Example Property

+

Estimated Value

\$

Purchase Price

\$

Purchase Date

mm/dd/yyyy

Manufacturer

Serial Number

Submit

6. Select a property for the item or press the plus sign button to add a new one without losing your place. A popup will be shown allowing you to add the new property when pressing the plus button and the property will show up in the list.

## Edit Inventory Item

Name

Description

Category  + Room  + Property  +

Estimated Value  Purchase Price  Purchase Date

Manufacturer  Serial Number

7. Enter the estimated value of the item, the purchase price, or both. Note that entering one is required but entering both are recommended to take advantage of the estimated value report. Estimated Value is the current value estimate of the item after appreciation or depreciation is considered. Purchase Price is the price paid for the item.

Note that no conversion is done when changing locales and the amounts are not meant to be used across regions. The user should enter the appropriate currency for their region.

## Edit Inventory Item

Name

Description

Category  + Room  + Property  +

Estimated Value  Purchase Price  Purchase Date

Manufacturer  Serial Number

8. Optionally enter the purchase date. This will help with estimating appreciation/depreciation in a future version of the software, so it is recommended.

## Edit Inventory Item

Name

Description

Category  + Room  + Property  +

Estimated Value  Purchase Price  Purchase Date

Manufacturer  Serial Number

9. Optionally enter the manufacturer and serial number. These items will be helpful in the case of a loss and are recommended if available.

## Edit Inventory Item

Name

Description

Category

 +

Room

 +

Property

 +

Estimated Value

Purchase Price

Purchase Date

Manufacturer

Serial Number

10. Press submit to verify and add the record.

## Edit

1. Select the Edit button on the row to edit the record.

## Inventory

Add, Modify, or Delete Inventory Items

### Inventory

Show  entriesSearch 

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Example Item 2	Art	Bedroom	Example Property 2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Example Item 3	Clothing	Dining Room	Example Property	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Showing 1 to 3 of 3 entries

Previous  Next



2. Edit the fields that need to be modified and press submit to validate and save the record. Please see the Add New section above for details on all fields other than attachments. Please see the following sections for details on attachments.

## Edit Inventory Item

Name  
Example Item

Description  
This is an example.

Category: Electronics Room: Living Room Property: Example Property

Estimated Value: \$ 1,000.22 Purchase Price: \$ 2,000.00 Purchase Date: 01/01/2020

Manufacturer: ACME Serial Number: 123AB45

Attachments [+ Add New](#)

Name	Actions
test2mb	<a href="#">Preview</a> <a href="#">Download</a> <a href="#">Delete</a>
test2	<a href="#">Preview</a> <a href="#">Download</a> <a href="#">Delete</a>
test	<a href="#">Preview</a> <a href="#">Download</a> <a href="#">Delete</a>

[Submit](#)

## Delete

2. To delete an existing item, press the delete button on the appropriate row. Press OK on the popup to confirm.

## Inventory

Add, Modify, or Delete Inventory Items

### Inventory

+ Add New

Show 10 entries Search

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<div>EditDelete</div>
Example Item 2	Art	Bedroom	Example Property 2	<div>EditDelete</div>
Example Item 3	Clothing	Dining Room	Example Property	<div>EditDelete</div>

Showing 1 to 3 of 3 entries

Previous1Next

## Attachments

The list of current attachments on an item can be viewed in the Edit Inventory Items screen by pressing the Edit button on the inventory list screen.

Note: It is not required to press submit to save changes to attachments. Changes are permanently saved immediately when adding or deleting attachments.

## Inventory

Add, Modify, or Delete Inventory Items

### Inventory

+ Add New

Show 10 entries Search

Name	Category	Room	Property	Actions
Example Item	Electronics	Living Room	Example Property	<div>EditDelete</div>
Example Item 2	Art	Bedroom	Example Property 2	<div>EditDelete</div>
Example Item 3	Clothing	Dining Room	Example Property	<div>EditDelete</div>

Showing 1 to 3 of 3 entries

Previous1Next

## Edit Inventory Item

Name

Example Item

Description

This is an example.

Category

Electronics

Room

Living Room

Property

Example Property

Estimated Value

\$ 1,000.22

Purchase Price

\$ 2,000.00

Purchase Date

01/01/2020

Manufacturer

ACME

Serial Number

123AB45

Attachments

+ Add New

Name	Actions
test2mb	<button>Preview</button> <button>Download</button> <button>Delete</button>
test2	<button>Preview</button> <button>Download</button> <button>Delete</button>
test	<button>Preview</button> <button>Download</button> <button>Delete</button>

Submit

## Add New

1. To add a new attachment to an existing inventory item, press the “Add New” button.

## Edit Inventory Item

Name

Description

Category  + Room  + Property  +

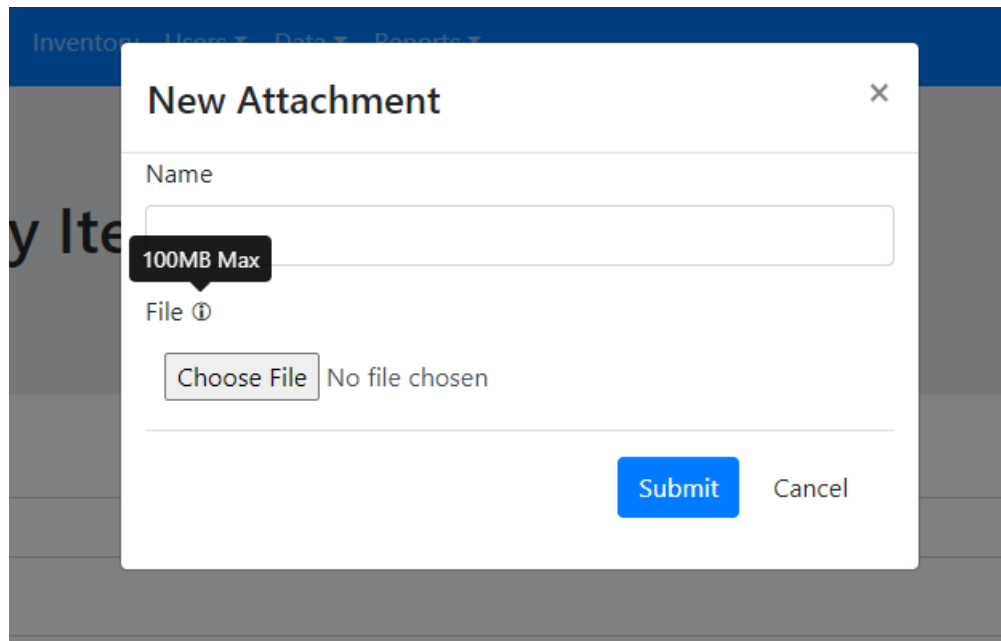
Estimated Value  Purchase Price  Purchase Date

Manufacturer  Serial Number

Attachments + Add New

Name	Actions
test2mb	<input type="button" value="Preview"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
test2	<input type="button" value="Preview"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>
test	<input type="button" value="Preview"/> <input type="button" value="Download"/> <input type="button" value="Delete"/>

2. A popup will be shown allowing for entering a name and selecting a file. Note the information icon next to the File label will show the max file size when hovered over. The new item will show in the list once the upload is complete.
- Note: Depending on your internet speed and the size of the file, this may take some time. Please be patient while the file uploads. The popup will disappear once the upload is complete.



The screenshot shows a web application interface with a dark blue header containing navigation links: 'Inventory', 'Users', 'Data', and 'Reports'. A modal dialog box titled 'New Attachment' is open in the center. The dialog has a close button (X) in the top right corner. It contains a 'Name' label followed by a text input field. A black tooltip with the text '100MB Max' points to the input field. Below the input field is a 'File' label with a document icon. Underneath is a file selection area with a 'Choose File' button and the text 'No file chosen'. At the bottom right of the dialog are two buttons: a blue 'Submit' button and a grey 'Cancel' button.

### Preview

If the item is of a type that can be previewed in the browser, the Preview button will be enabled. Currently, this includes images in the PNG, JPEG, or GIF format. To preview an image:

1. Press the Preview button on the appropriate row.

## Edit Inventory Item

Name  
Example Item

Description  
This is an example.

Category: Electronics Room: Living Room Property: Example Property

Estimated Value: \$ 1,000.22 Purchase Price: \$ 2,000.00 Purchase Date: 01/01/2020

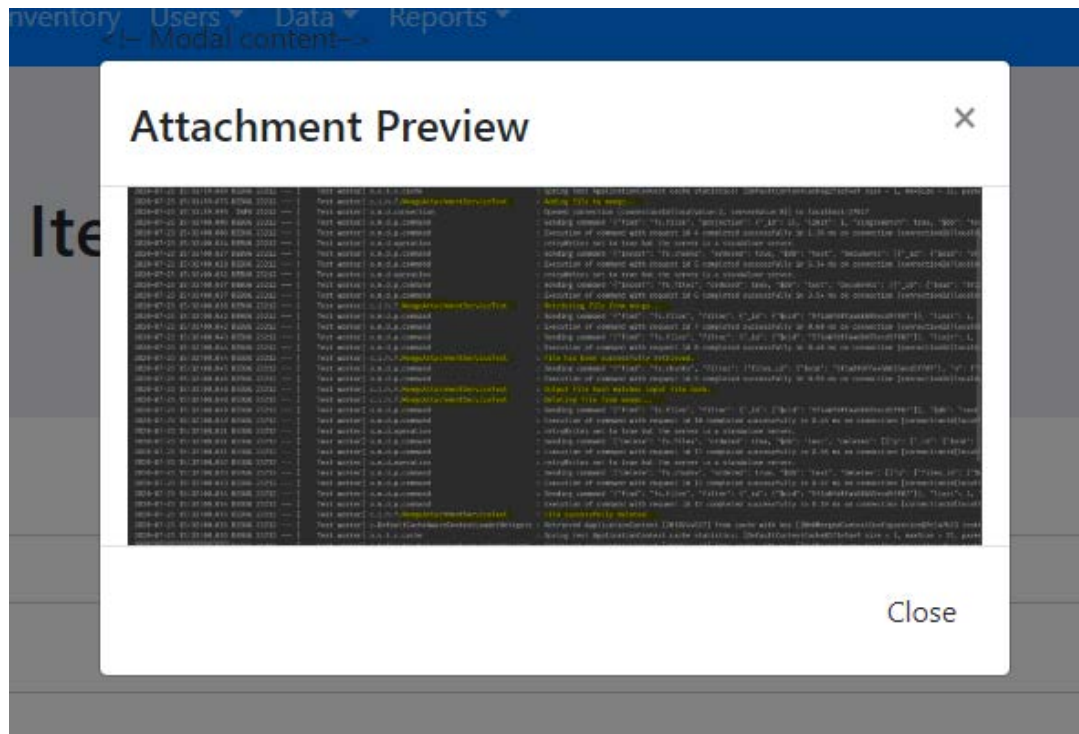
Manufacturer: ACME Serial Number: 123AB45

Attachments

Name	Actions
test	<div>This attachment type can not be previewed.</div> <div>Download</div> <div>Delete</div>
nopreview	<div>Preview</div> <div>Download</div> <div>Delete</div>
test2	<div>Preview</div> <div>Download</div> <div>Delete</div>
test2mb	<div>Preview</div> <div>Download</div> <div>Delete</div>

Submit

2. A popup will appear with the item selected as a small image.






## Download


1. To download an attachment, press the download button on the appropriate row. The item will be sent to your browser for download. See your browser's user guide for information on how to access downloaded files.

## Edit Inventory Item


Name





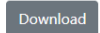





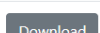




Description


Category   Room   Property  

Estimated Value  Purchase Price  Purchase Date  

Manufacturer  Serial Number

Attachments  Add New

Name	Actions
test	  
test2	  
test3	  
test2mb	  
nopreview	  

 Submit

## Delete

1. To delete an attachment, press the delete button on the item and press OK on the confirmation popup.

Note: files are deleted permanently from the database and cannot be recovered.



## Edit Inventory Item

Name  
Example Item

Description  
This is an example.

Category: Electronics + Room: Living Room + Property: Example Property +

Estimated Value: \$ 1,000.22 Purchase Price: \$ 2,000.00 Purchase Date: 01/01/2020

Manufacturer: ACME Serial Number: 123AB45

Attachments + Add New

Name	Actions
test	Preview Download Delete
test2	Preview Download Delete
test3	Preview Download Delete
test2mb	Preview Download Delete
nopreview	Preview Download Delete

Submit

## Reports

### Estimated Value Report

The estimated value report is used to help the customer and the agent talk about how much coverage the customer should have on their personal items. This report is not meant to record the actual value and is not used in the claims process to value items for a claim payout. It is not meant to be an exact indicator of how much coverage you should have. In many cases, the coverage requirements will be higher than these numbers.

Note that this report will only be useful if as estimated value and purchase prices are entered on all items in the inventory.

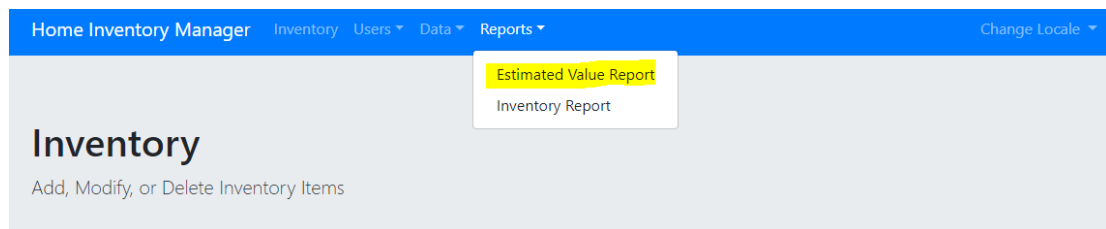
The Estimated Value amount is calculated by taking the estimated value of each of the items and totaling them. If the estimated value field is not populated, the purchase price field will be used instead but may lower the accuracy of this estimate.

The Estimated Replacement Value is calculated by taking the greater of the value and purchase price of each item and totaling them. If either field is not populated for any items, this may lower the accuracy of this estimate.

Together these values can be used by an agent to help the customer better estimate the coverage amount the customer should purchase.

The report is accessed by:

1. Selecting the Estimated Value Report from the Reports menu.



2. Values are displayed as amounts in the currency appropriate to the locale (for US English it is American Dollars). Note that no conversion is done when changing locales and the amounts are not meant to be used across regions. The user should enter the appropriate currency for their region.

## Estimated Value Report

Estimated Value \$2,655.77

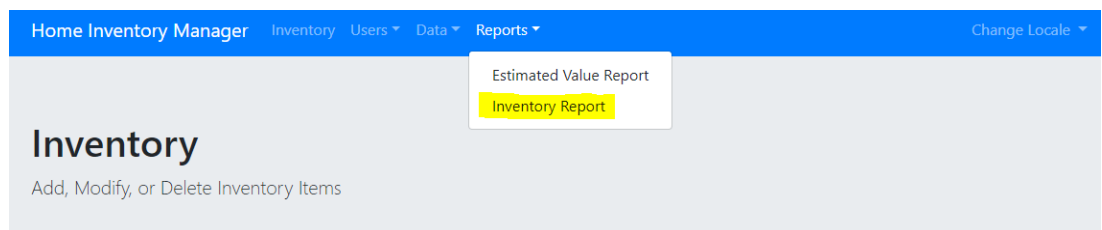
Estimated Replacement Value \$4,100.00

NOTE: this information is for estimation purposes only and is dependent on correct information entered by the user. This information will be most useful if both estimated value and purchase price are populated.

## Inventory Report

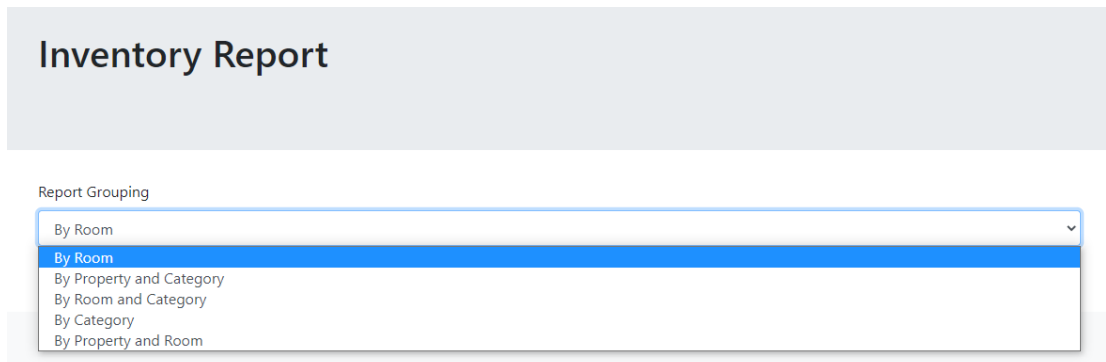
The inventory report is a comprehensive list of all items in the user's inventory. This report is meant to be used in the case of a loss, to better help with the claims process. It is not a list of items that will necessarily be replaced or the amount that will be paid on a claim. It is meant only as a supplement to list items that the claim adjudicators should consider and for the customer to track items.

1. To access the Inventory Report, select "Inventory Report" from the Reports menu.



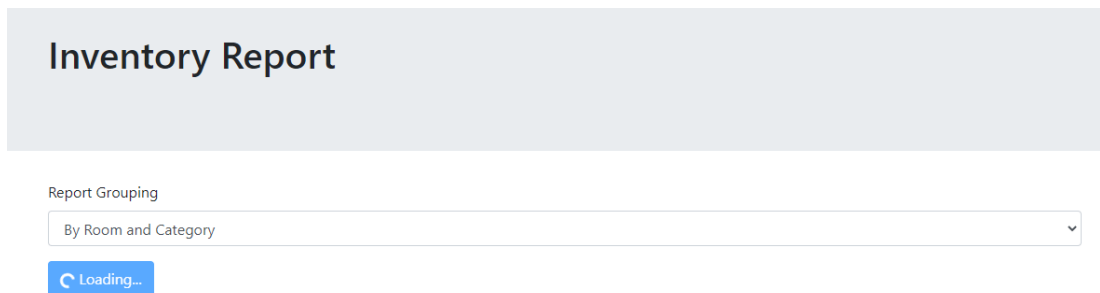
2. Select the grouping you would prefer on from the dropdown and press submit.

The groupings allow the user to better sort items that may or may not have been affected by a claim event. For example, if only one room was damaged, the By Room report will be helpful in determining which items are usually stored in that room and may have been affected. The By Property and Room or By Property and Category reports may be useful if more than one property is being tracked in the application.



The screenshot shows the 'Inventory Report' header. Below it, a 'Report Grouping' dropdown menu is open, displaying the following options: 'By Room' (highlighted in blue), 'By Property and Category', 'By Room and Category', 'By Category', and 'By Property and Room'. The dropdown is set against a light gray background.

3. The report may take some time to retrieve, especially the first time it is retrieved. In this case, the Submit button will change to “Loading”. Please be patient while this process finishes. It may take some time if the inventory contains many items.



The screenshot shows the 'Inventory Report' header. Below it, a 'Report Grouping' dropdown menu is open, displaying the following options: 'By Room and Category' (highlighted in blue). Below the dropdown, there is a blue button with a circular arrow icon and the text 'Loading...'.

4. If the web browser can view PDF files, the report will be shown in the browser. If the web browser does not support viewing PDF files, it will be downloaded. See your browser’s user guide for information on how to access downloaded files.

This screenshot shows the By Room report.

Note: Reports are currently shown with the dates in US English and with price and value columns formatted as US Dollars. This does not mean the value was converted to dollars, this is a current limitation to the system and will be enhanced in a future version.

Home Inventory						
Friday 24 July 2020						
Name	Category	Purchase Date	Purchase Price	Value (est.)	Manufacturer	Serial Number
Bedroom						
Example Item 2	Art	Jan 1, 2019		\$100	ACME	agfdagwe342
Dining Room						
Example Item 3	Clothing	Jan 1, 2018	\$2,000	\$1,555.55	ACME	asdfasd
Living Room						
Example Item	Electronics	Jan 1, 2020	\$2,000	\$1,000.22	ACME	123AB45
Friday 24 July 2020						
Page 1 of 1						

## Tracking and Recovery

In general changes to items in the database are tracked and items are “soft deleted”. The exception is attachments which are permanently deleted and only the time and date of the deletion is recorded.

In most cases, deleted database entries can be recovered if necessary, but there is no guarantee that data can be recovered. If an item was deleted accidentally, please contact support. If you wish to have an item recovered, do not create a duplicate item in the system. It is ok to recreate an item if it was deleted if you do not request recovery from support. Note that attachments cannot be recovered.

## Known Issues

- The Inventory Reports are not translated or formatted based on locale. These will be enhanced in a future version.

- The Inventory Report uses a font that does not support UTF characters and thus does not support Chinese. These will be enhanced in a future version.
- The login screen is not translated. This is a limitation of the Spring Security component and will be replaced in a future version.
- The Purchase Date field is not appropriately formatted for locale.