

'How To'
How

Quick Start Manual



Heritage Collector Suite
Version 9.0

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www.heritagecollector.com

About This Quick Start Manual

The purpose of this manual is to help you begin using the software without overwhelming you.

Start on page 10 to go through the basic steps of:

1. Starting the program.
2. How to get additional help.
3. Clicking the "Import" icon.
4. Opening a folder with photos.
5. Selecting and importing photos.
6. Entering a photo caption.
7. Selecting the "Sort" collection.
8. Saving imported photos.

Please refer to the Heritage Collector Basics manual and other manuals containing more detailed information and the Software License Agreement.

Additional manuals may be downloaded from our Heritage Collector web site at no charge.

Reading step-by-step manuals is very helpful. However, watching 'How To' video tutorials may be the easiest way to both understand a new concept and then learn how to use it.



System Requirements

Heritage Collector Suite Install

80.0 MG - Includes the Digital Family History Guidebook in PDF

An additional 88.0 MG is needed to install the "How To" tutorials

Heritage Collector Suite Install

204 MG space on hard drive

Includes:

- Heritage Collector Pro
- Digital Family History Guidebook
- Storybook Module
- Calendar
- GPS Module
- "How To" Tutorials

Intel® Pentium® Processor or
Equivalent 32 and 64 bit processors
512 MG Ram - *more recommended*

Video card with high resolution
24-bit color recommended
Resolution 1024 X 768 or greater

Microsoft® Windows® XP, 2000
Vista, 7, 8, 8.1, 10

CD-ROM - DVD drive

Heritage Collector Suite

Installing to Your Computer	4
Installing to an External Drive	5
Where to Use the External Install	5
Run From an External Drive	5
Using Your External Install	5
Getting Help	6
Help While Using the Program	6
Watch "How To" Videos	6
On-Line Help	6
The Help Menu	6
Family Information Manager	7
Starting the Program	7
The Main Menu	8
Quick Start - Importing Photos	10
Creating Folders and Collections	11
Import Files	11
Create a Folder	12
Create a Collection	13
Sample Collection Names	13
Drag, Drop and Paste	14
Copy / Move	14
Move Photos With the Copy / Move Option	14
Add and Edit Information	15
"How To" Do More With Heritage Collector	16

Additional Manuals and Getting Started Tips:
http://www.heritagecollector.com/Steps/Get_Started.htm

Free webinars:
<http://heritagecollector.com/webinars.htm>

Newsletters:
<http://www.heritagecollector.com/Newsletter/Newslist.htm>

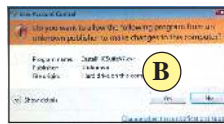
Installing to Your Computer

1. Insert the install DVD.
2. Click the HC Suite button (A) to start installing.



The Storybook, GPS Maps, Calendar and How To tutorial movies will be automatically installed.

3. The next display will appear. Click "Yes" (B).



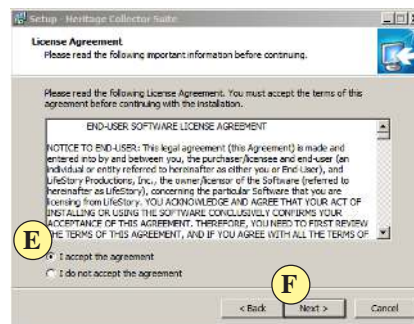
4. Another display will appear. Click "Next" (C).



5. A product key is required to install from a DVD. Type in the key (D) listed on a slip of paper contained in the box.

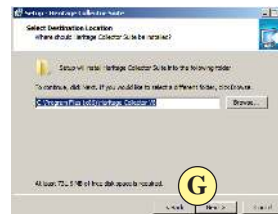


6. A License Agreement will appear. Read the agreement. Click "I accept agreement" (E). Click "Next" (F) to continue installing. If you disagree, click "No" to terminate installation.



7. An information display will appear. Scroll down to read the information. Click "Next" to continue.

8. The program will automatically install on your C drive if you click "Next" (recommended). See instructions on the next page to install to another drive.



9. The "Ready to Install" display lists where the program will be installed. Click "Next" to continue.

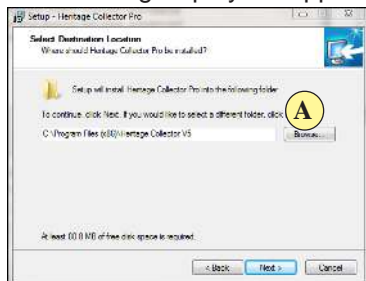
Continue following the few remaining instructions that will appear.

Installing to an External Drive

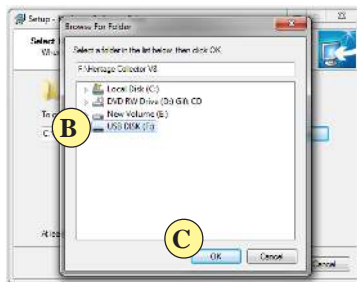
Connect the external hard drive before continuing. Follow the first seven steps for installing listed on the previous page, then:

1. Click “Browse” (A). This will expand the view so you can see all the drives on your computer.

The following display will appear.



Scroll up or down to see the other devices and drives as shown below. For example, if you wanted to install to an external drive with



the letter F, you will see the information shown after clicking on the drive letter (B).

2. Click “OK” (C).

Please Note: It is not recommended to use the option to add an icon to the desktop when installing to an external drive since the drive letter may change.

3. Click “Next” and continue following the rest of the directions.

Run From an External Drive

1. Connect the drive to a computer via the USB port.
2. Click the folder icon or you may need to go to My Computer and double click on the external drive letter.
3. Click on the Heritage Collector icon to start the program.



Using Your External Install

New external drives are small and convenient to take with you.

Plug the external drive into the USB port of a Windows computer and run Heritage Collector just like you were using your home computer.

Where to Use the External Install

- Family Reunions.
- Weddings and Anniversaries.
- Special Occasions.
- Vacations.
- Family History Library.
- Anywhere another computer is available for use.

Getting Help

There's no need to get frustrated!
Help is just a few button clicks away.



Help While Using the Program

Many displays have Help options at the bottom of the display.



Click the "How" button to watch a video to teach you about the display you are viewing.

Click the "Help" button to get information from the manual about the display you are using.

Watch "How To" Videos

Click the "How" at the top of the display. A list of movies will appear you can watch to learn about different features and functions of the program.



The Help Menu

Click the Help menu and a list of several kinds of information will appear.

Help

Overview
Getting Started
Main Menu and Toolbar
How To Videos

Contact Support
Information Manager

Overview - Basics of using Help.

Getting Started - Ideas to make it easier to get started.

Main Menu and Toolbar. Explains how to use the Toolbars and tabs.

How To Videos - Displays a list of "How To" video you can watch.

Contact Support - Makes it easy to create an e-mail support ticket.

On-Line Help




Visit our website for a list of free webinars you can attend and watch.



Free newsletters are available to give you ideas and teach how to do some fun and exciting things.

Family Information Manager

Starting the Program

Click the Heritage Collector  icon on your desktop. This icon also appears with the files and folders listed on an external drive.



The "Family Information Manager" appears when the program begins. Click buttons to display resources.



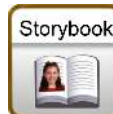
Heritage Collector. Click this button to start Heritage Collector.



Quick Start. Provides access to "How To" movies and information to help you get started.



Share. Displays different ways you can share photos and information.



Storybook. Assists in creating personalized storybooks, greeting cards and more.



Calendar. Tips for creating for creating a family calendar.



GPS. Click this button to learn about GPS maps.



Standard. Learn about the free Standard Heritage Collector version and how to share it with family.



Add-Ons. Modules that may be used with the Heritage Collector Suite Standard version.




"How To." Displays a list of videos.

Display additional information by clicking the other buttons on the Family Information Manager display.

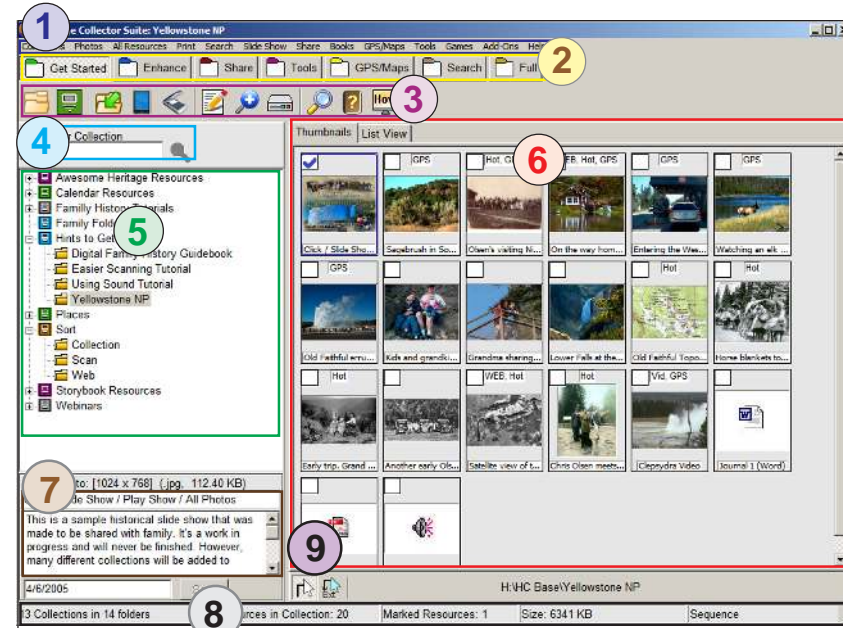
Skip. Clicking the "Skip" button at the bottom left of the display turns off the "Family Information Manager" and allows you to go directly to Heritage Collector each time you open the program. The Family Information Manager can be turned back on by opening the Help menu and clicking the Information Manager link.

Close. Shuts down (closes) the display you are viewing.

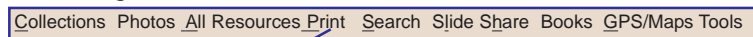
Click the Menu icon at the bottom of the Window display to switch to the Manager. 

The Main Menu

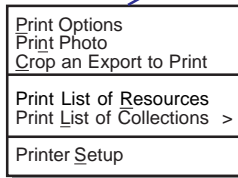
The Main Menu is displayed by clicking the Heritage Collector icon on the Family Information Manager.



1 Drop Down Menus. Access program functions by clicking one of the menu items as shown at the top of the main display. See enlargement below.



Clicking on a menu item will cause the menu to open or drop down as shown.



Right click on a thumbnail.



You may also use a shortcut key combination such as "ALT C" to open the Collections menu, "ALT A" to open the Resources menu, etc.

2 Tab Toolbar. Click one of the six tabs to display a set of icons.



Click the “Get Started” tab to display icons used to create a collection or folder, import photos, connect to a smartphone, scan, and etc.

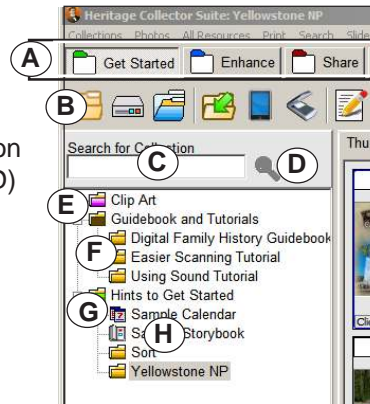
3 Select an Icon From a Toolbar.

The sample at the right shows the Get Started icons (B).

4 Find a Collection. Type a collection name (C) and click the Find icon (D) (magnifying glass).

5 Folder and Collection Icons.

- Folder Name (E)
- Collection (F)
- Calendar (G)
- Story Book (H)



6 Enlarge a Thumbnail / Open a File.

Double click on a thumbnail to view the image full screen, play a video clip or to open a text document.



7 File Information. Displays photo Dimensions, File Type, Size, Caption and Description.

Information listed above each thumbnail indicates the file type and associated information.

- Web Link
- GPS
- Hot Spot



8 Collection Information. Lists number of collections, resources (files) in a collection, marked resources, size of collection and the order (H).

9 Drag Options.

Internal Drag. Move thumbnails to different location (sequence) in a collection or to other collections. External Drag. Copy images to and from other locations.



Quick Start - Importing Photos

Don't worry about getting everything perfectly prepared before you begin. Organization becomes easier once you know about the kinds of photos, videos, and documents you have. Later you can add information, make changes, and move photos into different collections.

- 1. Start the Program.** Click the Heritage Collector icon on your desktop.



C drive. You can select different drives or locations to import photos from.

- 2. The Family Information Manager will appear.** Click the Heritage Collector icon at the upper left of the display.



This would be a good place to stop and watch the How To video, "Importing Photos and Files"

Click the "How" icon or open the Help menu and select "How To Videos."



- 3. Click the Import icon.**

Prepare to begin importing (copying) photos by clicking on the "Import" icon at the top left of your display. The import screen will open. *(Click the "Get Started" tab if you don't see the "Import" icon).*



Refer to the next page for the following references to the options on the "Import Resources" display.

- 4. Open a Folder With Photos.** The top left window (A) displays folders that can be opened so photos can be imported. Typically photos will be in folders on your

- 5. Select Photos to be Imported (B).** Photo file names will appear in the center window. Select one or several photos by holding down the CTRL key while left clicking on photo file names. You may also click the "Select All Files" button to import all the files folder.

- 6. Enter a caption (D) or description (E).** Don't stress, you can enter a caption or description later. Note. *All the photos will have the same caption if you import more than one photo at a time.*

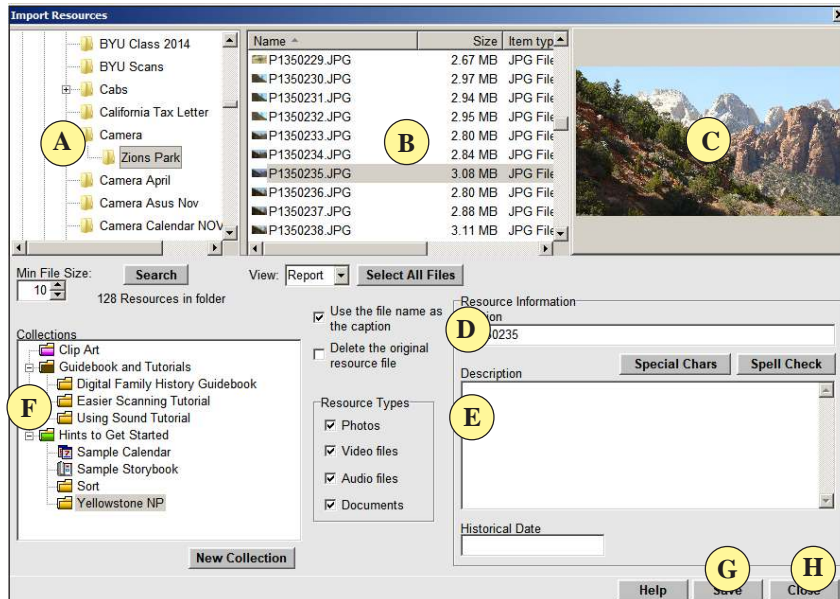
- 7. Select a Collection (F).** The lower left "Collections" window lists collections photos may be imported into. Left click on the "Sort" collection. *Photos may be "moved" to other collections later.*

- 7. Save the Photos (G).** Click the "Save" button at the lower right of the display.

- 8. Click "Close" (H).** This opens the "Sort" collection so you can view, move photos, or add information.

Import Files

Select a file (resource) photo, text document, audio file, video clip, etc., to import (copy). Click the “All Resources” menu and select the Import” option or click on the “Import” Icon.



Creating Folders and Collections

You have just learned how to import photos into the “Sort” collection. Now you need to learn how to organize photos and family history files into folders and collections. There is a difference between what a folder holds and what collections contain.



A folder holds collections.
Collections are stored in folders.



A Collection may contain many different kinds of files such as photos, videos, sound, text, PDFs, and documents. Collections can be moved to other folders.

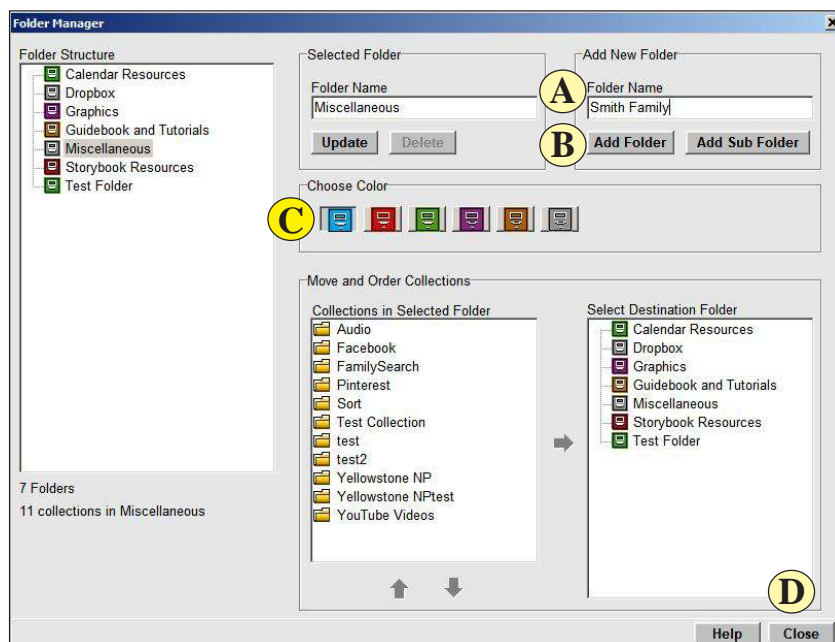


Please watch the How To movie, “Collection vs Folder.”


Visit us at: <http://heritagecollector.com>

Create a Folder

Creating folders will make it easier for you to organize all the photos and files you have copied into collections. Just remember, The only thing you can put in a folder is collections **a folder is a holder of collections.**

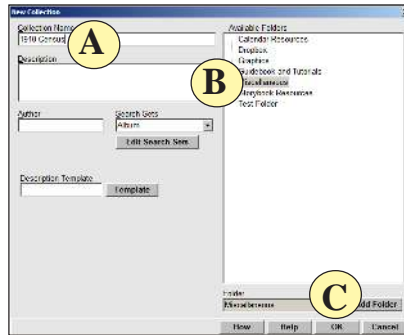


Creating a Folder

1. Click the “Folder” icon on the Getting Started toolbar or open the Collections menu and click the “Folder Manager” option. 
2. Type a new name in the Folder Name box (A).
3. Click the Add Folder button (B).
4. Select a folder color (C). Click on one of the colored folder icons.
5. Click the Close button at the lower right of the display (D).

Create a Collection

Create collections to store and organize your photos, videos, sound files, documents and other kinds of files. *Collections may have unique names making it easier to organize and find collections later.*



1. Click the "Collection" icon to open the "Collections" menu. Click the "New Collection" option.
2. Select "New Collection."
3. Type in a name (A).



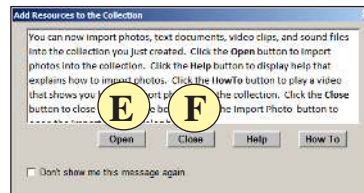
Here are a few suggestions for giving collections descriptive names.

Sample Collection Names

Martin Flat Dry Farm
 Carl Steen Olsen History
 Olsen Citizenship Documents
 Cooper Family
 Mary Smith Growing Up Years
 South Fork Canyon Hike 2012
 Baadsgaard 50th Anniversary
 Smith Family Reunion 2013
 Bill and Mary Jones Wedding
 Grandma Jones 80th Birthday

4. Select a Folder (B). This will cause the collection to be created in the folder selected.

5. Click the "OK" button (C). This causes the program to display the following message window.



Clicking "Open" (E) will automatically start the "Import" process allowing you to immediately start selecting and importing photos and files.

Click "Close" (F) to exit the window. Clicking the "Help" button will display information from the manual. Clicking the "How To" button will display a movie about this function.

You will next see the main thumbnail display. It will not show any thumbnails in the center display because the collection you have just created is blank and ready to import files into.



Click the How button. Watch Creating a Collection movie.

Copy / Move

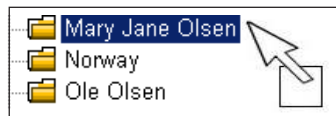
Collections will continue to grow as new photos are added. Adding more photos may cause collections to become large and difficult to manage. Consider dividing collections.

Create new collections and then move (not copy) photos and files into the new collections to reduce the number of images (files) in the original collection. If you are using the "Sort" collection use the "Move" function to keep the Sort collection within a reasonable size.

Drag, Drop and Paste

Left click the thumbnail(s) to be copied or moved and drag one of the images and drop it on a collection listed on the left side of the display.

Left click on a thumbnail and select, "Copy Photo to Clipboard." The image can now be pasted into another program.



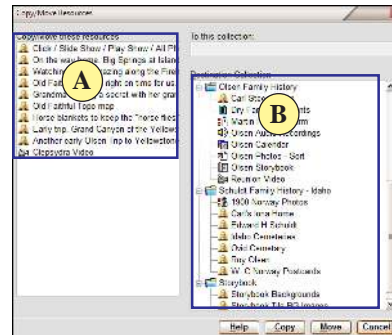
A message will appear after mouse key is released. Select Move, Copy, or cancel.



Select the internal or external drag icon at the bottom of the main display to move thumbnails to different locations (sequence) in a collection or to other collections.

Move Photos With the Copy / Move Option

1. Click photos on the thumbnail display you wish to move or copy.



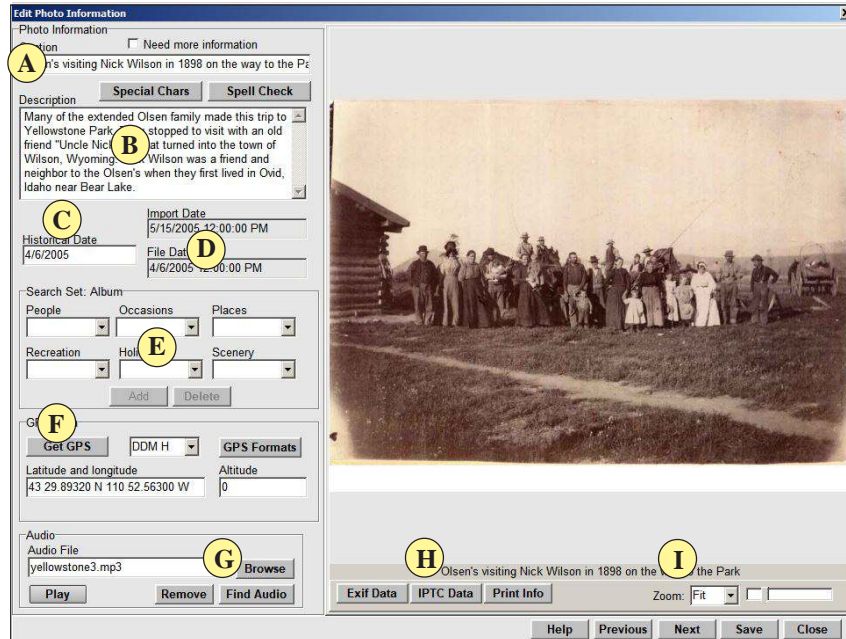
2. Go to the "All Resources" menu and select "Copy / Move." The captions of the images selected will appear in the left window (A).
3. Select the collection to move the photos into by clicking a collection name listed at the right window (B).
4. Click the "Move or Copy" button.

The "**Move**" button moves the photo(s) out of the existing collection and places it into the collection specified.

The "**Copy**" button places a copy of the photo(s) into a collection and leaves the original in the current collection.

Add and Edit Information

Add or modify a photo caption, photo characteristics, date or a sound file. To view and edit photo information, display a collection on the main menu, right click on the thumbnail and click Edit Info.










1. Type a photo caption (A). Leave the word "Untitled" in the caption box if a caption is not entered. Later, search for "Untitled" and update all the photos found.
2. Place the cursor in the Description box (B) and type or paste in information. Several lines of text may be entered.
3. Add or edit a photo date (C). Three date fields are shown. The Historical Date may be edited to reflect the date the photo was taken. The other dates come from the dates in the image file data.
4. Search Set Characteristics (E). Click the down arrow to scroll down until an appropriate word is found. Click on a word.
5. View "Exif or ITPC Meta Data" (H).
6. Click the Save button (I) to finalize and save photo information. You may click the Previous or Next button to view or edit other files in a collection.

Note: Date formats (D) are generated by Windows. Date formats may be changed by going to the "Date and Times" settings in the Windows Control Panel settings.

"How To" Do More With Heritage Collector

Free "How To" videos and manuals are available to view and download.

	Basics Drag / Drop Scanning Folder Options Backup / Restore		Calendar Create Personalize Print Talking Dates
	Using GPS Get Coordinates Make Maps		Storybook Create Personalize Print Talking
	Slide Show Simple Advanced Audio Biographic		Advanced Duplicates External Drive Database QR Codes
	Watch "How To" Movies	Click the "How To" button at the top of the Heritage Collector display to select and watch tutorials movies.	

Go to the following link to download manuals:
http://www.heritagecollector.com/Steps/Get_Started.htm

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