

simpleassets

user guide

Version 0.1

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1. Installation

- ☞ Upload the SimpleAssets files to a folder on a web server supporting PHP 4.
- ☞ For importing, change the file_uploads line in the /etc/php.ini file to file_uploads = On (This file is in the php directory in Windows). Restart Apache.
- ☞ Ensure you have a MySQL server running on your server or network. If MySQL is hosted remotely, modify these settings at the top of the config.php file:
 - \$ip = "localhost"; // use the IP of the machine hosting MySQL
 - \$sql_login = "root"; // enter the MySQL login name to used
 - \$sql_pass = ""; // enter the MySQL password to be used
- ☞ If desired, modify the auto generated database name by replacing the \$sql_db line to
 - \$sql_db = "dbname"; // where dbname is the name of the database to use
- ☞ The organization name can be entered by modifying \$org_name line.

Open your web browser and go to the URL where SimpleAssets is installed. Click **"Install"**.

2. Importing From A Spreadsheet or Database

SimpleAssets supports importing of employee and asset information from virtually any spreadsheet or database capable of exporting CSV (Comma Separated Values).

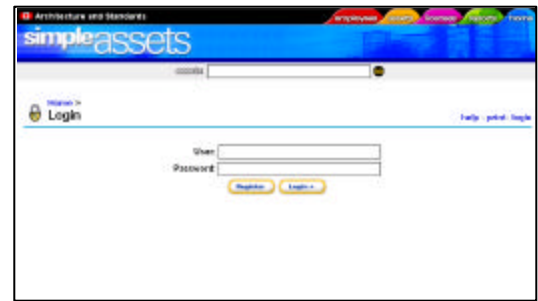
- ☞ Click the **"Import"** button located to the right of the page title in the header.
- ☞ Select either **"Import Employees"** or **"Import Assets"**.
- ☞ **Read the instructions** and **download the sample file** or begin rearranging your existing database or spreadsheet file to the specification given.
- ☞ **Save or Export the file as CSV (Comma Separated Values)** to your hard drive.
- ☞ **Go back to the web page** and click the **"Browse..."** button to locate the file on your hard drive.
- ☞ Click the **"Preview"** button when this is complete and verify that the upload will be successful. Make any necessary changes.
- ☞ **To complete the import**, click the **"Back"** button and redo the **browse** step above.
- ☞ Click the **"Upload"** button to complete the uploading process.

Note: The field names are not case-sensitive and the import engine can re-import spreadsheet reports generated by SimpleAssets despite the variation in field names.

3. Logging In

☞ Go to the URL where SimpleAssets is installed.

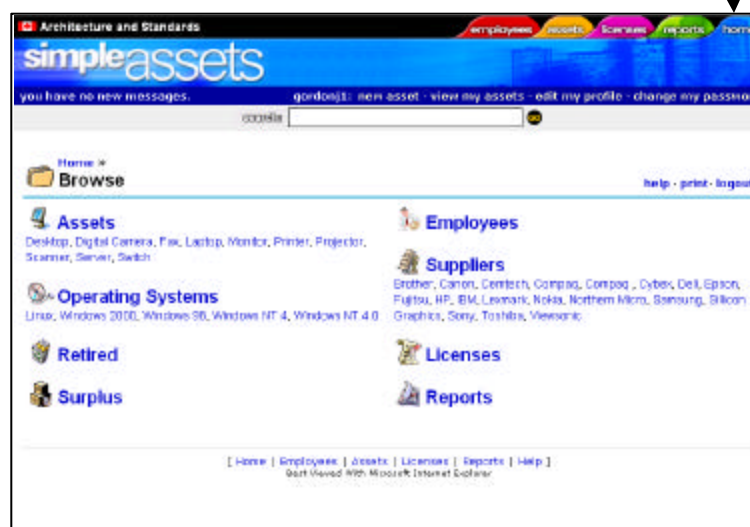
- The initial admin username is 'Admin'.
- The initial admin password is left blank. Please change your initial password as soon as you login.



4. The Home / Browse Page

☞ Click the coloured “Home” tab.

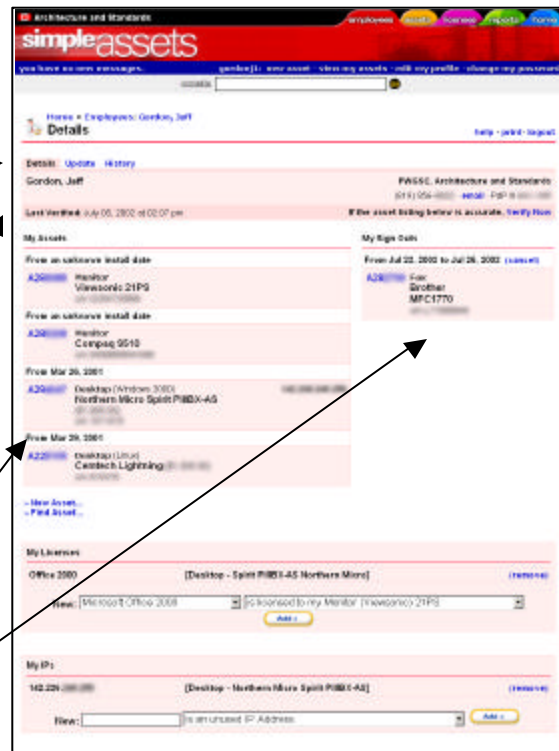
- **Each section** is represented by coloured tabs at the top right side of the page and by detailed links in the centre.
- **The user toolbar**, coloured in blue, includes:
 - A message mailbox (informing you of approvals, denials and general information).
 - Quick links to:
 - “**New Asset**”
 - “**View Your Assets**”
 - “**Edit Your Profile**” (Personal Information)
 - “**Change Your Password**”
- **The Search box** can quickly locate any asset, license or employee. Just type a word related to the item such as “Fax” or the last name of an employee.



5. Viewing Your Own Assets

Click **“View Your Assets”** in the user toolbar.

- **Your Personal Profile** is displayed near the top of the page and can be updated by clicking the **“Update”** tab.
- **Verification** is located directly below your personal profile and indicates the last time you verified your asset and personal information. Please verify your assets regularly.
- Your current and upcoming **Assignments** are listed in the *left column* and include all assets permanently assigned to you.
- Your current and upcoming **Sign Outs** are listed in the *right column*.
- To include past assignments and sign outs in your listing, click the **“History”** tab.
- **Your IPs** are listed at the bottom of the page. Use the empty text box below the IP listing to add new IPs.



6. Viewing Other Employee's Assets

Click on the coloured **“Employees”** tab.

- An employee directory is shown. Past employees can be found under the **“Inactive”** tab. These employees can no longer log in to the system but their information is still available.
- To view an **employee's details and assets**, click their **name**.

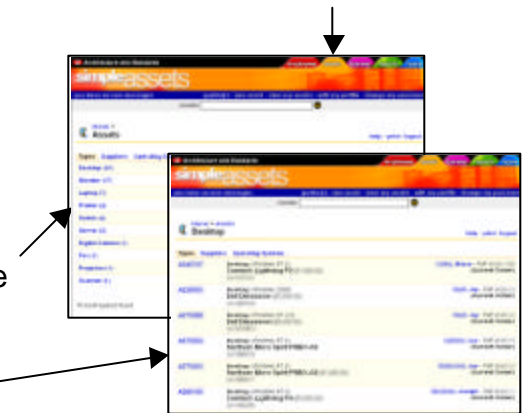


7. Making Changes To Your Own Assets

- ☞ To **add a new asset not in the system**, click **“New Asset”** located in the user toolbar. Once the asset is added, it will automatically become assigned to you as of today’s date.
- ☞ If the **asset exists in the system**, use the steps found in *Section 6 and 8*.

8. Browsing for Assets

- ☞ Click on the coloured **“Assets”** tab.
- ☞ Browse by *Type, Supplier and OS* using the tabs.
- ☞ To get a listing of assets, click a **category item** like *“Desktop”, “Dell” or “Windows 2000”*.
- ☞ Find the asset and click on its **asset tag number**.



9. Viewing Asset Details

- ☞ Locate an asset (by searching, browsing or using the steps in Section 6) and click its **asset tag number**.

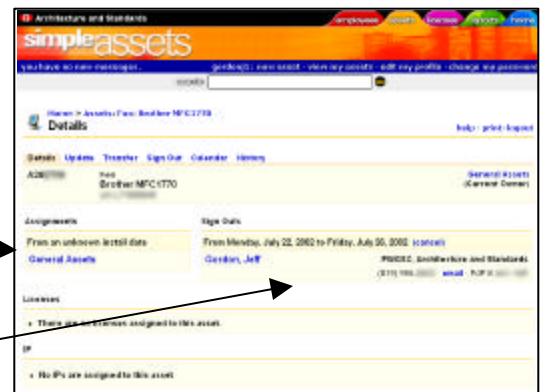
- At the top of the page, the asset’s **basic information** is shown and can be updated by clicking the **“Update”** tab.

- The **current owner and any upcoming transfers to someone else** are shown in the left column.

- Any **ongoing or upcoming sign outs** are shown in the right column

- Past transfers and sign outs can be viewed by clicking the **“History”** tab.

- To view a graphical representation of all transfers and sign outs related to this asset, click the **“Calendar”** tab.



10. Requesting A Transfer or Signing Out An Asset

☞ Locate an asset (by searching, browsing or using the steps in *Section 6*) and click its **asset tag number**.

☞ To **permanently transfer the asset** to or from yourself, click the **“Transfer”** tab. Follow the wizard, which includes selecting a transfer date, which in most cases will be today’s date.

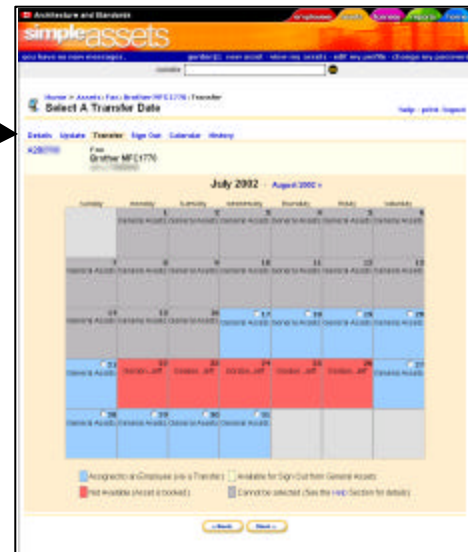
- *An administrator must approve all transfers, and therefore they will not be immediately displayed. SimpleAssets’ Message Mailbox will notify you when your transfer has been either approved or denied.*

☞ To **temporarily sign out the asset**, click **“Sign Out”** and follow the wizard, which includes selecting sign out and sign in dates.

- *Certain dates may be blocked out since an asset can only be signed out to one person per day.*
- The asset must either be signed in when the asset is returned or the sign out must be cancelled before its start date otherwise it is listed as overdue.

☆ To **remove an asset** entirely from your profile, *transfer* it to either:

- **General Assets** (all active shared assets like Servers and Digital Cameras)
- **Surplus** (all inactive assets in storage)
- **Retired** (all assets which are no longer in our possession)



11. Signing In An Asset or Canceling a Transfer/Sign Out

☞ Click on **“View My Assets”** in the user toolbar.

- Locate the desired asset from either your assignments or your sign outs column.
- If the start date of the transfer or sign out has not yet passed, you may cancel the transfer or sign out by clicking the **“cancel”** button.
- If the start date of the transfer or sign out has passed, the cancel button will be unavailable. For sign outs, you’ll have the option to **“sign in”** the item instead. All sign outs must be manually signed in or they become listed as overdue.

12. Licenses

☞ Click the coloured **“Licenses”** tab.

- Licenses are grouped by **manufacturer** and then by product and include the dates of all purchases.
- The information is read only to regular users as administrators handle licenses. Administrators can add licenses by clicking **“New License”** in the user toolbar.



13. Reports

☞ Click the coloured **“Reports”** tab.

- The various **Spreadsheet Reports** provide summary reports of all the information associated with assets, employees, and licenses. These reports can be imported into Microsoft Excel using the import command.
- The **Transfer and Sign Out Reports** lists all transfers and sign outs that have taken place between two dates specified by the user.
- The **Verification Report** provides a list of the last time each employee verified his or her own assets.

14. Help

☞ Click the **“Help”** link located to the right of the page title in the header.

- The **Frequently Asked Questions (FAQ)** page is the best place to start for answers to commonly asked questions and troubleshooting tips.
- The **Download Manual** link will download an online copy of this manual.
- The **Common Processes** page defines the roles of administrators and regular users and provides step-by-step instructions of the business process to be followed by these roles in different situations.
- The **Features** page lists all the currently implemented features in SimpleAssets.
- The **Version Information** pages lists the current version of SimpleAssets installed.

15. Administrator Features

☆ Those users defined as administrators have access to additional features and settings in SimpleAssets such as:

- The “**Approve Transfers**” page, which allows administrators to grant or deny a transfer requested by a user. This decision is made by either clicking “**Approve**” to approve the request or “**Deny**” to deny the request. *All transfer requests initiated by an administrator throughout the system do not need to be approved and are performed immediately.*
- New “**Erase**” tabs and buttons exist on detail pages for employees, assets and licenses as well for certain transfers and sign outs. By clicking these, you will remove all traces of the item in the system. *Be very careful, as the information cannot be recovered.*
- Additional **New** buttons exist in the user toolbar allowing administrators to add new employees and licenses.
- **Additional update features** allow administrators to activate and deactivate employees as well as change their user access level and reset passwords.
- **Additional reports** are included for administrators including access to the **employee spreadsheet report** and a **full report of all IPs** and to whom they are assigned. The **confirmation report** is also enhanced to allow administrators to e-mail requests that employees verify their details.
- A new **Date Mgmt (Date Management)** feature has been added as of Version 0.1. This allows administrators to bypass the transfer tabs and assign employees to assets directly. Simply login as an administrator, locate an asset and click the “**Date Mgmt**” tab