

# IT Inventory

# Manual

V1.3 R1



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## **System Requirements**

IT Inventory requires a PC running Windows 2000 or later, we recommend a modern processor, at least 256MB memory (preferably 512MB) and 150MB of free hard disk space.

## **Licence**

The licence distributed with this product permits you to use IT Inventory on an unlimited number of computers within your organisation. However should you choose to run IT inventory across your network it will only allow one concurrent connection, hence only one person can use IT Inventory at any one time. Please refer to our full Terms & Conditions available on our website for further information.

## **Installation**

Before you can use IT Inventory you need to install the software on your computer. This can be done either on a stand alone computer or on your server and run across your network.

### **Stand Alone Computer Installation**

Should you choose to install IT Inventory on a single computer this will be the only computer that can access the data you enter. Please insert the CD into your CD/DVD Drive and follow onscreen instructions during the quick installation process. We recommend installing using default options, once complete you will be able to launch IT Inventory from a shortcut in the Start Menu located within a 'Bransoft' program group.

### **Network Installation**

IT Inventory can be installed on your network server and then accessed by any number of computers within your organisation (providing they can access your server). In order to perform the installation on your server you need to physically be at your server and install as per 'Stand Alone Computer'. When you are prompted for an installation directory it is important you consider the following points:

- You need to install IT Inventory into a folder that is, or can be, shared out across your network so that your workstations can access the program directory, your users need to have full read/write access permissions to this folder.
- We recommend your workstations access the above shared area via a mapped drive letter on their workstation as this will allow the program to perform faster.
- We strongly recommend backing up the IT Inventory program directory on a regular basis, you may choose to install IT Inventory within a shared area that is regularly backed up or add the IT Inventory program directory to your backup selection.

Once IT Inventory has been installed on your server you need to visit each of your workstations and browse to the IT Inventory program directory on the server (via your mapped drive letter). Run '\_Workstation Setup.exe' from within the program directory, this will create the 'Bransoft' program group and a shortcut to IT Inventory.

If required, please seek further advice from your network administrator.

## **Running IT Inventory**

To run the program click on the IT Inventory shortcut in the Start Menu located within a 'Bransoft' program group.

The first time you run IT Inventory you will see the following box.

Please enter your name in this box, perhaps in the form 'Mr J Smith'. This is only used when you print out from IT Inventory. The system will print this name along with the date and the time it was printed.



Please be patient when you run IT Inventory for the first time as loading the program for the first time takes a few moments longer.

IT Inventory is designed to run best using a screen resolution of 1024 x 768, the product will work correctly if you are using a different screen resolution however, if you are using a smaller screen resolution such as 800 x 600 you may need to use the scrollbars to see the whole screen.

Every two weeks you will see a message reminding you to backup your data, if your server automatically backs up the program directory you can click 'Ignore' to this message. Please refer to the online support for more information about backing up.

## **Using IT Inventory**

IT Inventory is designed to meet the needs of a varied range of users, therefore you can choose whether or not to record certain types of information. The only sections you need to complete are the Category and Description. Please note that some reports will not function correctly if certain data is missing.

## **Fields used to Hold Information**

The boxes within IT Inventory that are used to contain information are called fields, each field is labelled to show what type of information should be stored within that particular field. Often similar fields are grouped together into sections. Within a database your items are called 'Records'.

### Details of Item

The Category is very important as this is used within the program to distinguish between certain types of item. This field has a list of categories you can choose from. You can click Edit from the bottom of this list should you prefer different categories however it is very important you do not change 'Computer' and 'Software' as these are used within reports. For most items the description is very important however for computers you may feel 'Desktop Computer' or 'Laptop Computer' is sufficient as all other details such as manufacturer, model and specification are captured in other fields. The Manufacturer field also has a drop down list where you can choose a Manufacturer, this list automatically includes all manufacturers you have previously entered, if you need to add a new manufacturer simply type in the name into the field, this new manufacturer will now appear in the list ready for next time. When entering the Serial number it is important you are consistent in the way you type them in when it comes to spaces and dashes etc. We recommend you type in the serial number exactly as it is displayed on the item. The Status is simply Active or InActive, all items should be Active unless they are no longer in possession by the school. Current Location works just like Manufacturer where all previously used locations will be displayed in the list, if you have a laptop that is assigned to a member of staff we recommend you put the staff name in the current location. When equipment moves around school we recommend the current location is updated accordingly, this enables the



equipment to easily be found during an Audit, we appreciate that in 'real life' updating this location is easier said than done. For computers you may or may not choose to enter the computer specification however this information is very useful for identifying which computers will soon need replacing, the name is designed to record the network name given to the device. Please use abbreviations for CPU such as P4-3.0 and XP-Prof for the Operating System. We recommend RAM is entered in MB (Megabytes), for example 1GB = 1024MB and HDD should be entered in GB (Gigabytes). For Software items we strongly recommend you complete the Software Licence which tells you the number of computers you are permitted to install that software on to. The two My Category fields are for your own disposal, we felt you may want to split your items into your own groups. We have suggested using My Category 1 to split your software up into curriculum areas, by clicking on Edit at the bottom of the lists you can record your own groups if you wish.

#### Purchase Information

This information especially Date, Cost and Supplier along with Serial Number is very useful for insurance purposes should an item become damaged or stolen. The PO (Purchase Order) number again is useful if you want to cross-reference items back to your school purchasing system. The Supplier field again works just like Manufacturer where previously entered Suppliers will be displayed in the list. Especially for hardware items and subscription services we recommend you enter the number of years (or months or a combination of the two) they last, by using the purchase date this will work out when the warranty/subscription will expire.

#### Item Includes

This section allows you to list smaller items that were included within the main item, for example a desktop computer may include a keyboard and mouse. We recommend you list the monitor as a separate item in your inventory as this will have it's own serial number. Please list each item on a separate line. When you are searching for items in this section, for example a keyboard (enter keyboard on the first line), you will find all items in your inventory that included a keyboard regardless of which line you typed keyboard onto.

#### Decommission Details

When items are being decommissioned you can simply search for the particular item (see later for further information on searching for records), this is much easier than looking through paper records. Select a reason for decommission and complete the date, you can also record an income or details of a receipt should this be relevant. Don't forget to set the Status to InActive, the red button will do this for you. You also have a notes box for any further information relating to the decommission of this item.

#### Software Installed on this Computer

If you have recorded all your software within your inventory (it must be categorised as 'Software') you can assign it to computers, this allows you to see what software is installed on which computers and helps you to keep track of your licences. When editing a Computer item (Category must be 'Computer') you can list the software that is installed on this computer, to do this simply choose the software from the list (you may need to scroll down the list to find the blank line which allows you to add a new software title, once you have added a software title a new blank line will appear, you can list unlimited number of software titles to your computer. Click on the red cross to remove a particular title. Please ensure a software title is only listed once for each computer.

#### Support for this Item

This section allows you to add details for quick reference for the company who can provide further support for this item, in most cases this will be the Supplier or Manufacturer. To add a company to the item click on the down arrow next to Company Reference, is your company listed? If so select the company name and the unique reference will be inserted and all information held for that company will be displayed below. Click on the green button to add a new company or if you wish to edit company details click on the orange button. Please note when you edit a company's details the details will automatically change for all items that have that company selected.

#### Notes

The notes box is available for any other specific information you wish to record for each item.



## **Standard Tools**

### **List & Form View**

The main screen for IT Inventory is the one where all information is shown for a single item in your inventory, this is called the 'Form' view. The other popular view is a list view where the most popular fields are shown across the top of the screen and information from multiple items in your inventory is shown on one screen, if you have a lot of items you will be able to scroll down this list. A list is similar to a spreadsheet. The first of the standard tools toggles between list and form view. When you are in list view you can click on the green arrow on the left hand side to toggle to form view, this will show the item in your inventory which was alongside the green arrow you clicked.

### **Find**

The find or search functionality of a database is very powerful especially if you have hundreds or even thousands of items in your inventory. The find functionality will find records that match the search criteria in which you type in. When you click on 'Find' you will be taken to a screen just like the form view but without any information. For example if you want to find a particular item in your inventory and you know the serial number you can click on find and then type in the serial number in to the appropriate field, click on 'Continue' or press 'Enter' to display items that match your search criteria. When you have performed a Find always look at the number of records you have found, this is called your 'Found Set', this is shown just below the navigation arrows and has a green background, it will look something like 'Record 1 of 10'. When you have searched on a serial number you would only expect to find 1 item however if you searched on 'Desktop Computer' you would expect to find multiple items, if you are looking for one item in particular you will need to scroll through the items to find the one you want. When performing a find you can enter information into more than one field, for example you may search for 'Desktop Computer' in the description field and 'ICT Suite' in the current location field, this will display all your desktop computers in the ICT Suite.

### **Print**

When you are in the Form view you will print the information on screen, you will be asked if you want to print the current record or the records being browsed, if you select current record just one page will print showing the information on screen. If you select records being browsed this will print one page for each record in the found set. The found set is shown in the record ## of ## (the later number is the number of records in the found set). Alternatively if you are in List view a list will be printed.

### **Edit**

In order to change information on a record (or item) you must first go into Edit mode, when complete click on 'Finished'.

### **New**

To add new items to your inventory click on New, this will create a new record or item and allow you to enter information, when complete click on 'Finished'.

### **Delete**

To delete a record click on Delete, please note that this cannot be un-done. This delete function should only be used in rare occasions to permanently delete a record from the program. If an item is no longer within school you should still keep a record of it within your inventory, you should simply mark it as InActive and complete the decommission details. Deleting the record is just for when a record has been created by mistake. The item displayed will be the one that is deleted.

### **Actions**

This button takes you to the Actions Menu where a range of actions can be carried out, most of them relate to the item you were previously viewing. Please note the Actions button is only available in form view. Please see later for more information on Actions.

### Reports

This button takes you to the Reports Menu where a range of reports can be carried out, most reports summarise items in your inventory. Please note the Reports button is only available in form view. Please see later for more information on Reports.

### About

The about button takes you to the About screen where you can see contact details for Bransoft along with the version number of the software you are using.

### Exit

The Exit button closes down the program, alternatively the standard windows cross in the top right corner of the screen can be used. All information is saved automatically, a save button is not required.

## **Navigation Tools**



The navigation area provides you with several pieces of information along with a number of tools, At the top the total number of records or items that you have in your database is shown, in this example there are 6 records in your database. At the bottom it shows how many records you have in your current found set and also which record you are viewing, in this example you are on record 1 of 4.

The arrows are used to navigate around the found set of records, the first button will take you to the first record, the second button takes you to the previous record, the next button takes you to the next record and the last button takes you to the last record in the found set.

When you have finished looking at the records in the found set and you want to see all records again you need to click on the 'Show All' button.

In the top left corner of the navigation tools there is a button labelled 'O', this button is used to omit the current record from the found set, in this example after you clicked omit you will just have 3 records in the found set and what was the second record will become the first. This does not delete the record in any way, it simply hides it. This could be useful if you want to print a specific list of items and the items you have found include some that you don't want to print out, you can simply omit the ones you don't want to include.

There are two ways to sort the items in your inventory, the first is to go to the list view where you can sort the found set on any column by clicking on the column heading, the first time you click it will sort the items in ascending order, click again and it will sort the items in descending order. For some fields it will also sort them in a custom order based on a list of pre-defined values. If the field you want to sort your records by is not in the list view then you can use the sort button to select the field names you want to sort on. To do this move the fields you want to sort on to the right hand side, select whether you want them ascending or descending and click on sort.

## **Actions Menu**

### Find Active Items

This buttons simply returns you to the form view and performs an automatic search on Active items.

### Print List of Software on this Computer

Providing the item you were looking at on the form view had a category of 'Computer' you can print a list of software that has been assigned to this computer. This is particularly useful if the computer needs all the software re-installing and you needed to know what software should be on it.



#### Print List of Computers this Software is Installed on

Providing the item you were looking at on the form view had a category of 'Software' you can print a list of computers that this software has been assigned to. This is particularly useful if you need to identify where software is installed to check it is required before you purchase further licences.

#### Duplicate this Item

In our experience schools often have multiple items that are very similar, this action duplicates the item previously being viewed and allows you to change the unique pieces of information. If the item was a computer you also have the option to duplicate the software list that was installed.

#### Add this Software Title to Multiple Computers

If you have installed a new piece of software to your computers you will now need to add this software title to you inventory and also add it to the computers you have installed it on. Once you have added your new software title to IT Inventory you can run this action which shows you a list of all your active computers and you can select the ones you have just installed the software title onto. This is much quicker than adding it manually to each computer.

#### Remove this Software Title from Multiple Computers

If you have removed a piece of software from your computers you will now need to remove this software title from the computers in which it was installed on. To do this you need to find the software title you want to remove and run this action which shows you a list of computers your software title was installed on, you can then select the computers you removed the software title from. This is much quicker than removing it manually from each computer.

#### Re-enable Screen Resolution Check

When IT Inventory opens you may have seen a message warning you about using a screen resolution other than 1024 x 768, if you clicked Ignore to this message then the message will not appear again, however if for any reason you wanted to see the message again click on this button.

#### Re-enable Backup Reminder

When IT Inventory opens you may have seen a message reminding you about performing a backup, if you clicked Ignore to this message then the message will not appear again, however if for any reason you wanted to see the message again click on this button.

## **Reports Menu**

When running most reports you will see the report on screen first to check it is what you want, you can scroll through the pages of the report using the book icon (see right). When you are happy click on Continue located below the book icon and you will then be given the option to print out your report.



#### Print List of Active Items by Current Location

This report will find all your active items and then group them together by Current Location. This is particularly useful if you are checking your Inventory and want to walk around school confirming equipment is in the correct location.

#### Print Computer Specification for Records being Browsed

Before running this report you need to have found the computers you want to include in your report, for example click on Find and select 'Computer' from the Category field, we also suggest you click 'Active' so only active computers are found. Once you are happy with the found set of records run this report. This report is particularly useful for comparing specification of computers to identify which need replacing.



#### Print List Showing Current Location for Records being Browsed

Before running this report you need to have found the items you want to include in your report. Once you are happy with the found set of records run this report. This report is particularly useful for listing which member of staff has which laptop computer.

#### Print Software List

This report prints a list of all your Software items showing how many licences you have purchased and how many computers each piece of software has been installed onto. This is very useful to keep track of your software licences.

#### Print List of Computers and Software Installed on them

This report shows in table format your software titles along the top in columns and your computers down the left hand side in rows. The number 1 is used to mark which software title is installed on which computers. This is very useful for identifying which computers your software is installed on. Please note this report is very comprehensive and may take a few minutes to complete.

#### Print List of Items showing when the Warranty / Subscription will Expire

This report can show the dates of when the Warranty or Subscription is going to expire, it can also show the items that are going to expire within the next month, in case an action is required.

## **Additional Support**

Please refer to our website ([www.bransoft.co.uk](http://www.bransoft.co.uk)) for online support, you can also go directly to our support website by clicking on the orange 'Online Support' button which can be found on the 'About' screen.

Alternatively please contact Bransoft directly by email ([info@bransoft.co.uk](mailto:info@bransoft.co.uk)) or telephone (01457 821212) for further support.

If you have any comments or suggestions to improve this product we would like to hear from you.