

Quick Start Guide For The



IT Asset Inventory

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1) Overview

Purpose:

The IT Asset Inventory Management solution aims to make small to medium sized organizations more productive and secure by providing a central database of IT asset information. The purpose of the Quick Start Guide is to provide you with the "out of the box" set up and features of the IT Asset Manager. The IT Asset Manager can be used "as is" or can be customized to fit your specific needs. Your need for assistance is going to be directly related to how much experience you have with FileMaker Pro. This document assumes that you have a basic knowledge of FileMaker Pro and that you have already installed FileMaker Pro and FileMaker Server (if applicable). Productive Computing does provide user and developer training sessions. If you have additional questions about any features, customization options, training sessions or FileMaker set up, please contact us at sales@productivecomputing.com.

FileMaker Software:

The IT Asset Manager Solution comes with a single FileMaker file built using FileMaker. In order to properly run the file, you will need version 7 or later of FileMaker for each user. The product assumes you own a copy of 7 or later. If more than one person is going to use the solution simultaneously, it is strongly recommended that you acquire and install FileMaker Server software and properly "host" the file within your environment. The FileMaker Server software can help you improve the security, availability and performance of your Filemaker Pro databases. The proper installation and configuration of FileMaker Server is beyond the scope of this document. Go to www.filemaker.com for more information on the proper installation and configuration of FileMaker Server software or contact us for a configuration estimate.

We also strongly recommend using FileMaker Pro Advanced when customizing the solution. FileMaker Pro Advanced includes all the abilities of FileMaker Pro plus a suite of advanced development and customization tools. Please visit www.filemaker.com to learn more about the benefits of using FileMaker Pro Advanced.

When you are ready to purchase your FileMaker licenses, please contact Productive Computing for a competitive price quote.

Installation:

Single User (Requires FileMaker Pro software):

If there is only going to be one user of the solution, you need to first place the FileMaker file in the desired location. Please open the solution by double clicking the "IT_Asset_Inventory_Manager.fp7" file first. You can also create a FileMaker opener to launch this file or navigate to the file by using FileMaker's file open options.

Single User Runtime (FileMaker Pro software not required):

If you do not own FileMaker, we can provide you with a complete build a runtime that will enable you to use the solution without the need to purchase FileMaker Pro. This is provided on a request only basis. Please contact us to request this option.

Multiple Users (Requires FileMaker Pro and optional FileMaker Server Software)

If there is going to be more than one person using the solution, it is best to use FileMaker Server. Once you have moved and hosted the file in FileMaker Server, then the "IT_Asset_Inventory_Manager" file is displayed. FileMaker openers can also be created in order to provide a "quick launch" to open the solution. Productive Computing can assist with creating openers. Please contact us at sales@productivecomputing.com for more information.

2) Getting Started

Use of the IT Asset Manager assumes a basic knowledge of FileMaker Pro for which there are countless resources on the web (www.filemaker.com). At this time, this product does not come with a limited Quick Start Guide as the main purpose of this product is to give experienced users and developers a tool for tracking their organization's IT Assets. We have built the IT Asset Manager with a user friendly interface, allowing new users to quickly understand how to use this product after a few minutes of review.

You can use the IT Asset Manager as a stand alone solution or as a starting foundation by building your own customized solution. The solution is completely unlocked giving you the flexibility to modify any fields and layouts to meet your specific needs or add the IT Asset Inventory Manager to your existing FileMaker solution without having to recreate the "IT Asset Management Wheel".

Main Menu Area



1. Preferences area where you enter your company information and upload your Network Schematic
2. Navigational tabs to select the desired area in the solution such as Hardware, Software, Users, Passwords and Network Schematic
3. Select print icon to print details of Hardware Assets
4. Select print icon to print Software Table of Contents
5. Select print icon to print Network Schematic

Hardware Area

Hardware / Computers / Devices

1 Find
New
Delete

Print Asset Tag

Main Menu
Hardware
Software
Users
Passwords

Asset No: 200
 Record ID: 1

Detail View
List View

4 Type: Workstation

Network Name: My Network

Location: San Diego Office

Manf. & Model No: Apple MacBook Pro


Serial Number: 456789

Internal IP Address: 192.168.1.6

DHCP: Static

User: Joe Smith

Notes:



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9 **Record Info**

Created:	05-21-09
Creator:	Melinda DePalma
Modified:	05-21-09
Modified By:	Melinda DePalma

Picture 2

Service Log

Date	Issue
12/15/2008	- Replace Logic Board

Purch From: Apple Store **7** OS: OS X 10.5

Price: \$2,500.00 CPU: 3 GB

Date Purch: 05/01/2005 RAM: 200GB

Warranty Exp: 05/01/2009 HDD: Video Mem

Connected Hardware

Installed Software

Passwords

Support Phone: 1-800-MY-APPLE

ID	Hardware Description	Location	Type

1. Buttons to Find a record, add a New record or Delete an existing record
2. Select Print icon to print a label for the selected Asset Tag
3. Assign an Asset Number and keep track of the Record ID number. The Asset number can be modified and the Record ID number cannot be changed.
4. Enter your system information in the various fields such as Type, Network Name, Location, Manufacturer/Model Number, Serial Number, Internal IP Address, DHCP, User and Notes.
5. Log all Service information for all hardware
6. Keep track of all "Connected Hardware", "Installed Software" and "Passwords" for each hardware device
7. Log all purchase and specification information such as Purchased From, Price, Date Purchased, Warranty Expiration, OS, CPU, RAM, HDD, Video Memory
8. Two picture fields to upload any screenshots associated to each hardware device
9. Record information tracks who and when a record was created and last modified
10. View all hardware records as a List view or Detail view

Software Area

Software Find New Delete Total Purchase Price: \$849.99 (for found set)

Main Menu Hardware Software Users Passwords

Record ID	Asset No	Title	Serial Number	CD Key	Date Purchased	Purchase Price	List View
1	100	FileMaker Pro 9.0	123456789	123	01/01/2008	\$499.99	Print Asset
3	101	MS Office Pro 2007	ABC123456FG	456	03/15/2008	\$350.00	Print Asset Tag

1. Navigational buttons to select the desired area such as Main Menu, Hardware, Software, Users or Passwords
2. Buttons to Find a record, add a New record or Delete an existing record
3. Line items for each Software including the Asset Number, Title, Serial Number, CD Key, Date Purchased and Purchase Price
4. Select the trash can icon to delete a software record
5. Select the print icon to print an asset tag label

Users Area

Users Find New Delete

Main Menu Hardware Software Users Passwords

ID	First Name	Last Name	Phone / Extension
1	Joe	Smith	(760) 510-1200 xt115

1. Buttons to Find a record, add a New Record or Delete an existing record
2. Navigational Buttons to select the desired area such as Main Menu, Hardware, Software, Users or Passwords
3. Line items for each user including First Name, Last Name and phone number
4. Select the trash can icon to delete a user record

Password Area

Passwords Find New Delete

Main Menu Hardware Software Users Passwords

ID	Application	Hardware / User	Username	Password	Comments
1	1	FileMaker Pro 9.0	1 Joe's Workstation	joe.smith	password1

1. Buttons to Find a record, add a New record or Delete an existing record
2. Navigational buttons to select the desired area such as Main Menu, Hardware, Software, Users or Passwords
3. Line items for each Password including the Application, Hardware/User, User Name, Password and Comments
4. Select the trash can icon to delete a password record

3) Contact Us

Successful use of our products require a working knowledge of FileMaker. The IT Asset Inventory Manager comes fully unlocked allowing you to customize the solution according to your needs. Implementing customizations require knowledge of FileMaker scripting, relationships and calculations. If you need additional support for scripting, customization or setup, then you can contact us via the avenues listed below.

Phone: 760-510-1200

Email: support@productivecomputing.com

Forum: www.productivecomputing.com/forum

However please note that assisting you with customizations is billable at our standard rate. We bill on a time and materials basis so you are only billed for the time it takes to assist you. We will also be happy to provide you with a free estimate. We are ready to assist and look forward to hearing from you!