
AssetPal

Secure Web-Based Asset Management System

User Manual

Version 1.4.2

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2 Introduction

What is AssetPal?

AssetPal is an easy, comprehensive and secure **web-based** asset management system that facilitates asset tracking and sign in/out.

System Features

- Multi-department asset management where each department manages their own assets.
- Support fingerprint or password sign out/in of items for user verification.
- Items can be set to be sign out/in within the department or by any department.
- Each item can have more than 1 unit. The system tracks the number of units signed out and the balance.
- Email notification to department head when an item is sign out/in.
- Tracks the purchase information and warranty period of items.
- Tracks the sign out/in records of items.
- Tracks the service maintenance performed on items.
- Tracks the number of items at each location.
- Tracks the update history of items.
- Custom fields for items are available.
- Each user can log in to check the items they borrowed.
- iPad supported

Minimum System Requirements

Hardware:

- Computer that can run Windows XP and above smoothly.
- Super VGA (800 x 600) or higher-resolution video adapter and monitor
- (OPTIONAL) USB Fingerprint Scanner for fingerprint verification
- (OPTIONAL) USB Barcode scanner to scan IDs.

Browsers supported:

- Microsoft Internet Explorer 8 and above
- Apple Safari 5 and above

NOTE: Fingerprint verification only supported in Microsoft Internet Explorer.

3 Setting Up the System

The steps to setup the system is as follows:

- Change organization information
- Add departments
- Add Item types
- Add locations
- Add vendors
- Configure email settings
- Configure SMS settings
- Configure the email and SMS message templates
- Configure the logo image
- Configure the custom fields
- Configure other options
- Add users
- Add items

The above tasks are done by the administrator.

Change Organization Information

To change your organization information

- Sign into your account as an administrator
- Select the **System** tab
- Click **License**
- Change your organization information
- Click **Save**

Add Departments

Each department manages their own assets in the system.

To add a department:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Departments**
- Click **New**
- Enter the department name
- Select the Department Head who will manages the department items
- Click **Save**

Add Item Types

You can group your items into item types. The system can show you the number of units of an item type, the number signed out and the balance.

To add an item type:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Item Types**
- Click **New**
- Enter the name of the item type
- Enter the maximum an item of this type can be signed out
- Click **Save**

Add Locations

You can add a list of locations where your items are kept. The system can show you the number of items at each location, the number signed out and the balance.

To add a location:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Locations**
- Click **New**
- Enter the name of the location
- Click **Save**

Add Vendors

You can add a list of vendors where items are purchased from.

To add a vendor:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Vendors**
- Click **New**
- Enter the vendor information
- Click **Save**

Configure Email Settings

To configure the email account for sending email:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Email**
- Enter the email server and account information
- Click **Save**

Configure SMS Settings

The system can be configured to send out SMS alerts. A SMSProdigy.NET account and virtual private hosting are required.

To configure the SMS account for sending email:

- Sign into your account as an administrator
- Select the **System** tab
- Click **SMS**
- Select the options required
- Enter the SMSProdigy.NET account information
- Click **Save**

Configure Email and SMS Templates

To configure the email or SMS message templates:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Templates**
- Enter the template contents
- Click **Save**

The fields that can be added into the templates are:

Field	Description
<USER_NAME>	Name of the user
<USER_ID>	The account sign in User ID of the user
<USER_PASSWORD>	The account sign in password of the user
<SIGN_IN_URL>	The URL of the account sign in page
<ACTON>	Item Sign In or Item Sign Out
<DATE>	The date which an item is being sign in/out
<ITEM_ID>	The Item ID of the item that is being sign in/out
<ITEM_NAME>	The name of the item that is being sign in/out
<UNITS>	The number of units of the item that is being sign in/out
<ITEM_DUE_DATE>	The due date of the item that is being sign out
<ITEM_UNITS_DUE>	The number of items that are due for return
<BALANCE>	The number of units left to sign in
<REMARKS>	The item sign in/out remarks

Customize the Logo Image

You can configure the logo displayed on the web pages.

- Sign into your account as an administrator
- Select the **System** tab
- Click **Options**
- Click **Browse** to select the JPG image on your computer you want to use.
- Click **Open**.
- Click **Change**

Configure Item Custom Fields

You can configure up to 10 item custom fields.

- Sign into your account as an administrator
- Select the **System** tab
- Click **Options**
- Enter the names for the custom fields.
- Click **Save**.

Configure Other Options

To configure more options in the system:

- Sign into your account as an administrator
- Select the **System** tab
- Click **Options**
- Configure the other options available
- Click **Save**.

Installing the USB Fingerprint Reader Driver and Component

In order to use fingerprint verification during sign in/out of items, the USB fingerprint scanner driver and component needs to be installed on the Windows computer.

To install the fingerprint driver:

- Download and run <http://www.aquariussoft.com/downloads/fs80setup.exe>
- Connect the USB fingerprint reader to a USB port

Next install the fingerprint ActiveX component:

- Download http://www.aquariussoft.com/downloads/AQSOFT_FP_COM.zip
- Unzip the file into an empty folder
- Run setup.exe

Add User

The system supports 3 user account types:

- **Administrators** can perform all tasks
- **Managers** are department managers who can perform item sign out/in for members.
- **Members** are users who can sign out items.

To add a user:

- Sign into your account as an administrator
- Select the **Users** tab
- Click **New**
- Enter the user information
- Click **Save**.
- Click **Send Account Info** beside the user to send the account information to the user

Enrolling User Fingerprints

To enroll a user fingerprint for verification during item sign in/out:

- Sign into your account as an administrator
- Select the **Users** tab
- Search for the user to enroll
- Select the **Fingerprint** action
- Click Add Fingerprint to enroll a fingerprint

You can enroll up to 2 fingerprints per user.

Add Item

To add an item:

- Sign into your account as an administrator
 - Select the **Items** tab
 - Click **New**
 - Enter the item information
 - Click **Save**
- 

4 General Tasks

Signing In to Your Account

To sign into your account:

- Go to the sign in page of your account.
- Click **Sign In**
- Sign in with your ID and password
- If you forgot your password, click the **Retrieve Password** link and enter your email address. Your account information will be sent to your email address.

Change Your Account Password

To change your account password:

- Sign into your account
- Select the **Users** tab
- Search for your name and click **Edit**
- Click **Change Password** and enter your new password
- Click **Save**

View My Borrowed Items

To view your borrowed items:

- Sign into your account
- Select the **Items** tab
- Click **My Borrowed Items** to see the list of items you have not return
- Click **Details** to see the item information

View All Items

To view the items in the system that you are allowed to see based on your department:

- Sign into your account
- Select the **Items** tab
- Click **All Items** to see the list of items you have not return
- Click **Details** to see the item information

View User Borrowing Records

To view a user borrowing records:

- Sign into your account
- Select the **Users** tab
- Search for the user you want
- Click **Records**

5 Administrator/Manager Tasks

Sign Out an Item by its Item ID

To sign out an item by its item ID:

- Sign into your account as an administrator or manager
- Select the **Sign Out/In** tab
- Select **Item ID**
- Enter the item ID and click **OK**
- The item information will be displayed
- Click **Sign Out**
- Enter or search for the user ID of the user who is signing out the item
- Enter the number of units to sign out
- Click **OK**

Sign In an Item by its Item ID

To sign in an item by its item ID:

- Sign into your account as an administrator or manager
- Select the **Sign Out/In** tab
- Select **Item ID**
- Enter the item ID and click **OK**
- The item information will be displayed
- Click **Sign In**
- Enter or search for the user ID of the user who is signing in the item
- Enter the number of units to sign out
- Click **OK**

Sign In an Item by User ID

To sign in an item by user ID:

- Sign into your account as an administrator or manager
- Select the **Sign Out/In** tab
- Select **User ID**
- Enter the user ID and click **OK**
- The item signed out by the user will be displayed
- Click **Sign In**
- Enter the number of units to sign out
- Click **OK**

Generate Reports

The system provides the following reports:

- Items with sign out remarks
- Items with sign in remarks
- Items signed out

To generate a report:

- Sign into your account
- Select the **Reports** tab
- Click the report you want to generate and enter the information required.