

## TechAtlas Update Inventory Guide

### Opportunity Online Hardware Grant

Libraries participating in the Bill & Melinda Gates Opportunity Online hardware grant process can follow this guide for quick and simple steps to updating the public access computer (PAC) inventory using TechAtlas for Libraries. This updated inventory is required after eligible libraries have installed new computers using grant funds.

### Log In

Go to TechAtlas to update your computer inventory to include the new purchases made with the Opportunity Online grant funds.

To log in to TechAtlas for Libraries, point your web browser to the following address:

<http://webjunction.techatlas.org>

Log in using your email and password. Contact your state library or intermediary, if you don't remember this information. Note there is also a TechAtlas for non-profits website. Your login information will not work on that site.

### Guided Start Dashboard

An Opportunity Online grant-eligible library has a TechAtlas account marked for participation in the grant. Upon logging into an account setup for participation in the grant, users are directed to the Guided Start Dashboard. If you do not see the Guided Start Dashboard, contact your intermediary or state library before proceeding.

The Guided Start Dashboard lists two tasks.

1. Update Library Profile
2. Inventory Computers

TechAtlas Guided Start Dashboard	
Click the two numbered links below to complete each of the required tasks to determine your library's eligibility for the Bill & Melinda Gates Foundation Opportunity Online hardware grant.	
When you have completed the required tasks, you can click the <b>Explore TechAtlas</b> link to access other technology planning functionality in TechAtlas that is provided at no charge by WebJunction.	
<a href="#">1. Update Library Profile</a>	Complete
<a href="#">2. Inventory Computers</a>	In Progress
<a href="#">Explore TechAtlas</a>	Comprehensive set of tools for library technology planning.

## Update Library Profile

This first step is marked Complete because you updated the information during the first inventory process. Unless the primary contact information has changed or you want to enter a new email/password, you do not need to update the Profile, instead go to step **2. Inventory Computers** on the Guide Start Dashboard.

**NOTE:** The email address is used for your account login. Changing the email address will change the login information. Please enter a valid email address. TechAtlas and your state library or intermediary will use this information to contact you regarding the grant program.

If changes are needed:

1. Click on step **1. Update Library Profile**.
2. Update information as needed.
3. Click **Save**.

## Inventory Computers

Libraries must provide complete, up-to-date computer inventory information in TechAtlas to indicate the current status of PAC after making purchases using grant funds.

To update your computer inventory:

1. Click **2. Inventory Computers** on the Guided Start Dashboard.
2. Delete computers that have been removed.
3. Add any new PACs that have been purchased; even if they weren't purchased with grant funds.
4. Identify which PACs were purchased with Opportunity Online grant funds
5. Mark the inventory as **Complete**.

For grant purposes, only *public access computers*\* need to be inventoried.

**NOTE:** If you already inventoried your new computers, you will still need to update the Computer Profile of PACs to reflect that the computer was purchased with grant funds. Then check the **Inventory Complete** check box to indicate you have completed the inventory update process. See Step Three and Step Four.

**\*public access computers:** *In the Opportunity Online hardware grant program, a "public access computer" (PAC) is a computer available to the public that provides software applications and/or Internet access. Computers for use by staff only are not deemed "public access computers" in this program. Computers that only run inter-library catalogues are also not eligible. However, computers that run online databases (such as business, research, or educational databases) for patron use are eligible and should be included in participating libraries' TechAtlas inventories.*

## Step One: Select Computers to Delete

Use the **Select Computers to Delete** tool in TechAtlas to quickly delete computers from your inventory that are no longer in operations.

1. Once you have selected step **2. Inventory Computers** on the Guided Start Dashboard, you are placed on the Computer Inventory page.
2. Click the **Select Computers to Delete** link on the top right of the Computer Inventory page. The Delete Computer Details page displays.
3. Mark the checkbox in the **Select** column for the Computer Name of any computer you have removed from operations in your library.
4. Click **Delete Selected Computers**.
5. A warning message displays *“Are you sure you want to delete the selected computers from your TechAtlas inventory?”*
  - Click **OK** to proceed with deleting the computers
  - Or-
  - Click **Cancel** to return to the Delete Computer Details page.

## Step Two: Add Newly Purchased Public Access Computers

New computers can be added to your inventory using one of the three TechAtlas inventory tools. Instructions on using these tools are provided in the **TechAtlas Inventory Tools** section of this document. Remember to inventory all PACs, not just those purchased with Gates grant funds.

- **Local Inventory Tool:** run the automated script on each new computer individually to gather comprehensive technology data about the new computer.
- **Manual Inventory:** enter only the basic required technology data in a web-form.
- **Network Tool:** running this automated script will overwrite all existing computer inventory data and replace it with current data, plus add inventory data for new computers not previously inventoried. This option is far more time consuming, duplicates work and inventories non-PACs which do not need to be inventoried for this grant process.

**NOTE:** It is highly recommended you use either the Local or Manual Tool to avoid additional work.

## Step Three: Identifying Public Access Computers Purchased With Grant Funds

Regardless of which inventory tool you use to collect current data on your PACs, you must identify which computers were purchased with Opportunity Online grant funds. The Manual Inventory web-form automatically requires this information. Using the Local or Network Tools requires an additional step.

1. On the Computer Inventory page, click **View/Edit** for a computer purchased with Opportunity Online grant funds. The Computer Profile page opens.

2. Select **Yes** for the **Opportunity Online Grant Funds** field, if this computer was purchased with those grant funds.

The default is set to No for all computers in your inventory, so you only need to edit PACs purchased with Opportunity Online grant funds.

3. Click **Save**.

### **Step Four: Mark Inventory as Complete**

When you have finished inventorying all PACs in your library, the final step is to mark the inventory process as complete. This is the crucial step in notifying your grant intermediary you have finished updating your computer inventory and must be completed by the reporting deadline.

1. Review the computer inventory data to insure it is correct and complete.
2. Mark the **Inventory Complete** checkbox at the bottom of the Computer Inventory page.
3. An Inventory Status Update page will display and confirm “Your inventory has been marked as Complete” and once the Computer Inventory page refreshes today’s date will display next to Inventory Complete.
4. Browse to the Guided Start tab where the status for 2. Inventory Computers now displays as **Complete**.

**NOTE:** When a library with multiple branches marks the Inventory Complete checkbox, it will mark ALL of the branches as complete. If you are updating multiple branches, please make sure they have all been updated before checking the box.

Once both steps 1 and 2 on the Guided Start Dashboard are marked Complete, you are **finished** with the required tasks in TechAtlas. No further notification will be provided by TechAtlas.

Your grant intermediary can review a status report to confirm your inventory is complete. Your grant intermediary may contact you if you are approaching the reporting deadline and the status of Inventory Computers is still not marked Complete.

TechAtlas will provide the Gates Foundation with your computer inventory data after the reporting deadline has passed.

## TechAtlas Inventory Tools

Complete **Step One: Select Computers to Delete** before running the Inventory Tools. The directions below include the steps for completing **Step Two: Add Newly Purchased Public Access Computers** and **Step Three: Identifying Public Access Computers Purchased With Grant Funds**.

### Local Tool

**Estimated completion time:** Less than 1 minute per computer depending upon your internet connection plus travel time moving from one computer to the next.

1. Log on to the PACs with administrator rights, browse to the TechAtlas website using **Internet Explorer** and login to your account.
2. From the Guided Start Dashboard select **2. Inventory Computers**.
3. Click the **Inventory Computers** button on the Computer Inventory page.



4. Select **Advanced** from the Inventory Paths options and click **Continue**.

<input type="radio"/> <b>Wizard.</b> A step-by-step guided process to help you choose the most appropriate inventory tool.
<input type="radio"/> <b>Manual.</b> This option allows you to enter basic inventory details in a simple web form.
<input checked="" type="radio"/> <b>Advanced.</b> For more technical users - select from all of the available inventory tools.

5. Scroll to the bottom of the TechAtlas Computer Inventory Tool page and click **Local Tool**.

<input type="button" value="Network Tool"/>	<input checked="" type="button" value="Local Tool"/>	<input type="button" value="Manual Tool"/>
<small><b>Please Note:</b> The Network Tool can produce warning messages from anti-virus, firewall, and popup blocker software installed on your computer. It is safe for you to ignore these messages and let the script run.</small>	<small><b>Please Note:</b> The Local Tool can produce warning messages from anti-virus, firewall, and popup blocker software installed on your computers. It is safe for you to ignore these messages and let the script run.</small>	<small>The Manual Tool should not produce any warning messages from security software on your computers.</small>

6. Choose **Save** on the “Do you want to open or save this file?” window and save the file in a shared folder.
7. Click **Open** on the Download Complete window.
8. Choose **Run** if you see the “Are you sure you want to run this software?” popup window. If you do not see the Run option after saving, browse to the location where you saved the file and double-click on it.
9. Wait while the inventory data is collected.
10. Click **OK** when a message displays that the inventory process is complete.
11. Review the inventory details and edit, as needed.
12. Click **Upload** on the TechAtlas Inventory page.
13. Click **Continue** on the Upload Computer Inventory page.

14. Make the appropriate selections from Inventory Wizard prompts.
15. When all computers have been inventoried, return to the Computer Inventory page to review the list of computers.
  - a. Click **View/Edit** by each computer to review the Computer Profile information.
  - b. By default, all computers are marked **Yes** for **Public Access Computer**. Make sure to correctly mark non-PACs as **No**.
  - c. By default, all computers are marked **No** for Opportunity Online Grant Funds. Make sure to correctly mark this as **Yes** for computers purchased with these grant funds.
  - d. Click **Save**.

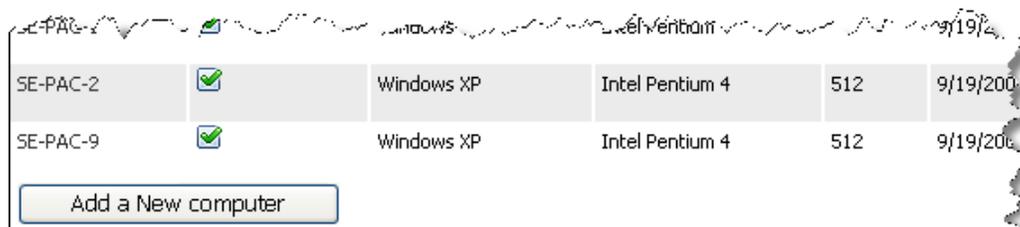
## Manual Tool

**Estimated completion time:** Time to gather required data, then less than 1 minute per computer. This process can be done for multiple computers at any branch while working at any computer.

1. From the TechAtlas Guided Start Dashboard select **2. Inventory Computers**.
2. Click the **Inventory Computers** button on the Computer Inventory page.
  - Select **Manual** from the Inventory Paths options and click **Continue**.

– or –

  - Click the **Add a New computer** button under the list of computers for a specific branch -**Computers at (name of branch)**.



SE-PAC-2	<input checked="" type="checkbox"/>	Windows XP	Intel Pentium 4	512	9/19/2006
SE-PAC-9	<input checked="" type="checkbox"/>	Windows XP	Intel Pentium 4	512	9/19/2006

Add a New computer

3. On the New Computer Profile page under Required, enter data:
  - **Pick an Operating System Family**
  - **Computer Name**
  - **OS** (Operating System)
  - **Public Access Computer** (Yes/No)
  - **Date Acquired**
  - **Opportunity Online Grant Funds** (Yes/No)
4. Under the Optional section of the page:

- Edit the **Library Location** to properly identify in which branch the computer is located.

Required ( \* denotes a required field)

Pick an Operating System Family

\* Computer Name

\* OS (Operating System)

\* Public Access Computer  Yes  No

\* Date Acquired  Example: 03/07/2005

\* Opportunity Online Grant Funds  Yes  No

Optional

Library Location  

Computer Type

Computer Make & Model

CPU

CPU Speed

5. Click **Save**.

6. Make appropriate selections from Inventory Wizard prompts to continue.

### Copy a Profile

Another way to manually enter a new computer's inventory data is to copy an existing computer profile. This is especially timesaving when creating profiles for nearly identical computers, such as multiple computers purchased at one time with grant funds. This procedure is helpful when using the Manual Inventory Tool for several similar computers.

1. On the **Computer Inventory** page, identify the computer profile to be copied, and click on the **View/Edit** link in the Details column of the computer profile that you wish to copy.

Name	PAC	OS	CPU	RAM	Acquired	Updated	Details	Events
CENC06917	<input checked="" type="checkbox"/>	Windows XP	AMD K-6	448	10/31/2003	5/8/2007	<a href="#">View/Edit</a>	<a href="#">View</a> <a href="#">Add</a>
CENC06918	<input checked="" type="checkbox"/>	Windows XP	AMD K-6	448	10/31/2003	5/8/2007	<a href="#">View/Edit</a>	<a href="#">View</a> <a href="#">Add</a>
CENC06919	<input checked="" type="checkbox"/>	Windows XP	AMD K-6	448	10/31/2003	5/8/2007	<a href="#">View/Edit</a>	<a href="#">View</a> <a href="#">Add</a>

2. The **Computer Profile** screen appears.
3. Scroll to the bottom of the page.
4. Click the **Duplicate this computer profile** button.

**Duplicate this computer profile**

- In the list of computers on the **Computer Inventory** page, you will now see a new computer added. The name will be the same as the name of the computer copied, with “\_Copy” appended to the end of the name.

Name	PAC	OS	CPU	RAM	Acquired	Updated	Details	Events
CENC06917_Copy	<input checked="" type="checkbox"/>	Windows XP	AMD K-6	448	10/31/2003	6/19/2008	<a href="#">View/Edit</a>	<a href="#">View</a> <a href="#">Add</a>
CENC06917	<input checked="" type="checkbox"/>	Windows XP	AMD K-6	448	10/31/2003	6/19/2008	<a href="#">View/Edit</a>	<a href="#">View</a> <a href="#">Add</a>

- Click on the **View/Edit** link for the copied profile.
- Change the **Computer Name** field to the correct computer name.
- Change any other fields that may be different for this computer.
  - Confirm the **Public Access Computer** field is properly marked Yes/No for this computer.
  - Confirm the **Opportunity Online Grant Funds** field is properly marked Yes/No for this computer.
- If you wish to make another duplicate of the profile, click on the **Duplicate this computer profile** button to save changes and duplicate at the same time. You are returned to the **Computer Inventory** screen and can repeat these steps as many times as needed.
  - If this is the final duplication, click the Save button to return to the Computer Inventory screen.

## Network Tool

**Estimated completion time:** Less than 1 minute for 1 computer or 80 minutes for 80 computers. You must have a Windows 2000 or 2003 domain server in order for this tool to work.

**NOTE:** turn on all network computers and make sure they are connected to the network.

- Log on with administrator rights to a computer on the domain, browse to TechAtlas using **Internet Explorer** and login to your account.
- From the Guided Start Dashboard select **2. Inventory Computers**.
- Click the **Inventory Computers** button on the Computer Inventory page.
- Select **Wizard** from the Inventory Paths options and click **Continue**.
- If you have a domain server running Windows 2000 or 2003 and all the computers are running a version of Windows you will be led to the Network Tool. Otherwise you may be directed to the Manual or Local Tools.
- Select **Network Tool** on the Inventory Wizard page.
- Choose **Open** and **Run** options as you see them on popup windows.
- Click **OK** to start the inventory scan. **Wait**.
- Click **OK** when a message displays that the inventory is complete.

10. Review the list of workstations displayed and edit as needed.
11. Click **Upload**
12. Click **Continue** on the Upload Computer Inventory page.
13. Make appropriate selections from Inventory Wizard prompts. You may need to use the Local and/or Manual Tool to inventory some computers not included in the Network inventory.
14. When all computers have been inventoried, return to the Computer Inventory page to review the list of computers.
  - By default, all computers are marked **Yes** for Public Access Computer. Make sure to correctly mark non-PACs as **No**.
  - Edit **Date Acquired** to reflect your best estimate of the date a computer was manufactured or a new computer was purchased.
  - By default, all computers are marked **No** for Opportunity Online Grant Funds. Make sure to correctly mark this as **Yes** for computers purchased with these grant funds.
15. Click **Save**.

Return to **Step Four: Mark Inventory as Complete** to finish inventory update process.

## Additional Resources and Support

For more in depth and detailed instructions of using the TechAtlas inventory tools, refer to [Using TechAtlas Inventory Tools: An Introductory Guide](#).

Contact your state library or grant intermediary for:

- Assistance in retrieving your account login and password information
- Information regarding your library's grant eligibility or other grant related inquiries

For TechAtlas technical support and general usage questions, please send a message to WebJunction's dedicated TechAtlas support e-mail address:

[techatlas@webjunction.org](mailto:techatlas@webjunction.org)