

Getting Started with Asset Manager

Managing Assets

CSE Asset Manager and Service Manager have an enormous number of powerful features, and these short introductory guides cannot cover all of them. The purpose of these guides is to get you started, and lead you to discover more about the features and facilities at your own pace.

If you need help please ask, either by emailing assetmanager@cse-net.co.uk, or telephoning 01993 886688 and asking for Asset Manager support.

To support your exploration of the system further, we have produced a number of application notes that go into greater detail on specific functions. These can be downloaded from our Asset Manager microsite at www.cseassetmanager.co.uk or can be accessed directly within the demo system by going to the Download section.

This guide covers using the system to manage your assets.

Managing Assets

In other steps we have used Asset Manager to look at and discover characteristics of assets held within our database. In this step we look at some simple management features.

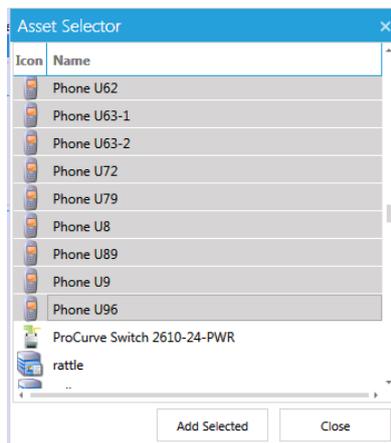
Navigate to *Asset Manager/Assets* and then expand the *General Equipment and Telephony Systems* categories.

The screenshot shows the 'Asset Manager' interface. On the left, a sidebar lists categories: Science Lab Equipment, Sports Equipment, and Telephony Systems (which is expanded). Under 'Telephony Systems', the following assets are listed: Telephone Lines, Telephony Controller, VoIP Devices, Walkie Talkies, Conference Phone, Kitchen Phone, Phone 49 IP 2, Phone CCTV Office, Phone Console, Phone Discovery Centre-1, Phone Discovery Centre-2, Phone L105, Phone L11, Phone L12, Phone L21, Phone L31, Phone L33 RECEPTION, Phone L33-1 ADMIN, and Phone L33-2 ADMIN. On the right, the 'Telephony Systems' category is selected, showing a description: 'Telephones and communications systems.' and statistics: 'This Category including subcategories and assets contains: 4 Category(s) 67 Asset(s)'.

Notice that under this category we have three subcategories listed, but we also seem to have a lot of individual assets displayed under the Telephony Systems category. These are VoIP phones and they are currently in the wrong place. In this exercise we are going to move them and place them under the VoIP Devices category, where they belong.

Click on the *Multiple* tab and then select *Edit*.

Within the Multiple Edit Wizard, click on the *Add* button.



Using the Asset Selector, block select all of the phones. You can block select by clicking on the first occurrence in the list, scrolling down and then pressing the shift key whilst clicking on the last entry in the list.

You can also use the Ctrl key to select individual assets from the list.

After you have made your selections, click *next*.

Tick the *Asset Category* option.

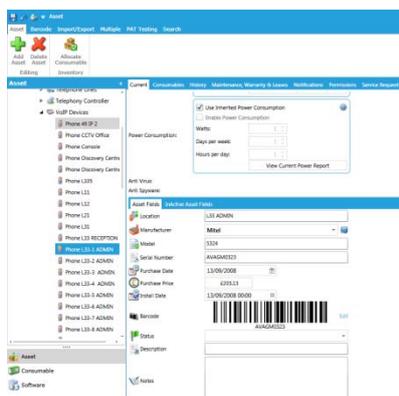
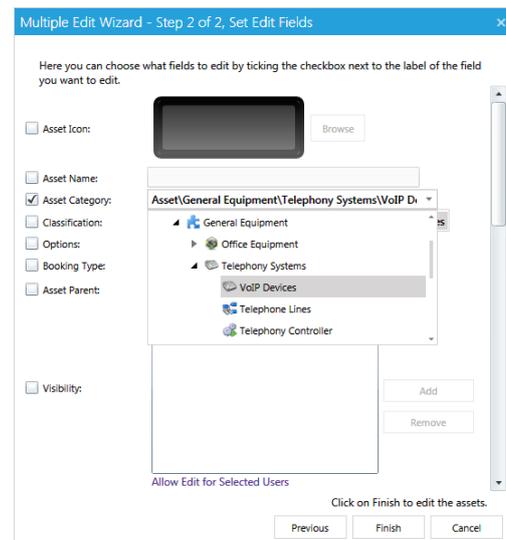
Use the pull down selector to highlight the category that you want to place the selected assets, in this case the VoIP Devices category.

Finally click on the *Finish* button.

Click your browser's refresh button to update and re-load the webpage.

Then navigate back to *Assets/General Equipment/Telephone Systems and VoIP Devices*.

You will see that the selected assets have now been added to that category.



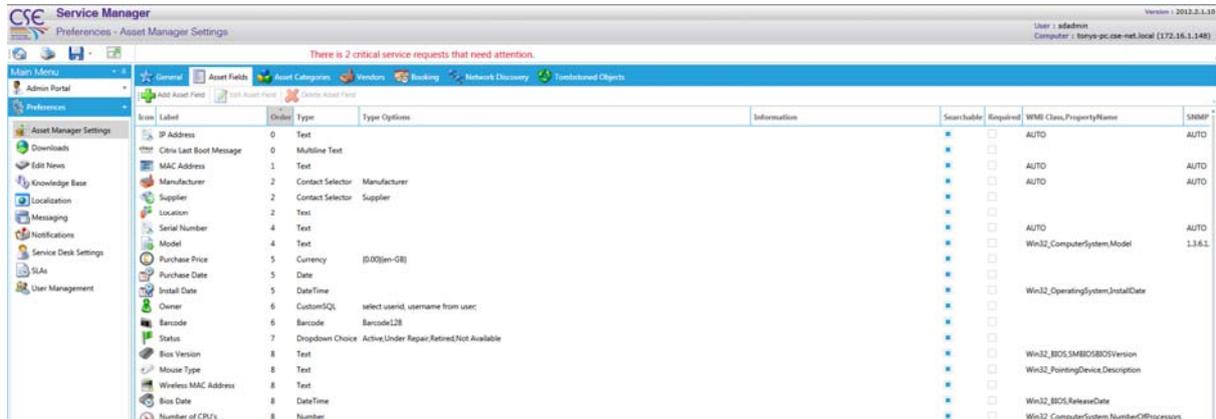
Open up one of the VoIP Device assets and scroll down and examine the asset fields.

Notice anything missing? It would be good if we could see the telephone number that has been assigned to this device.

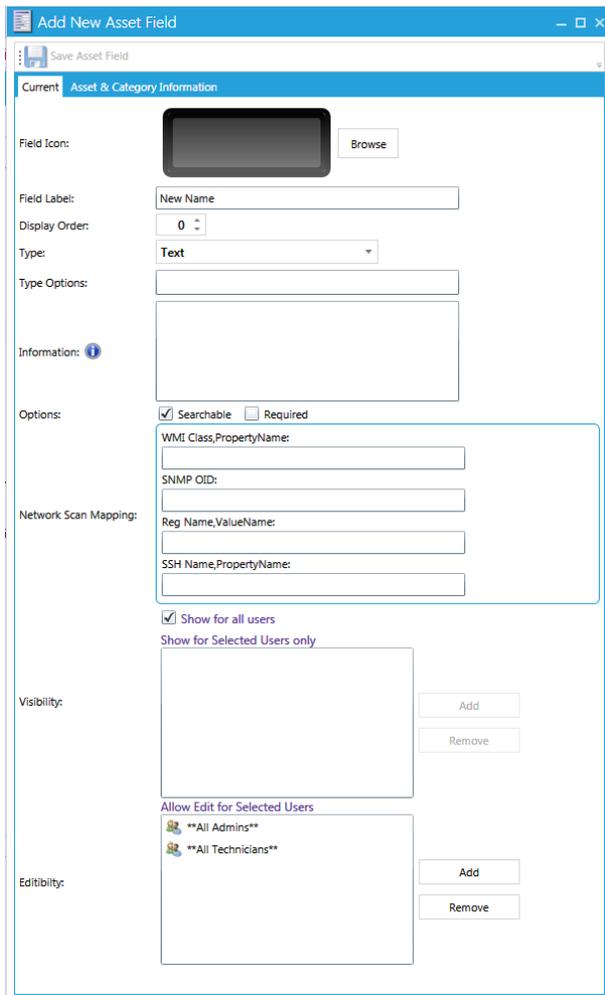
One of the key features of the Asset Manager system is that it gives you total control over what asset fields are associated with particular assets. So the next step is to assign the *Telephone Number* field to these phones.

Navigate to the *Main Menu* and select *Preferences* and then *Asset Manager Settings*.

Click on the *Asset Fields* tab.



If you scroll down the current asset fields, you will notice that there isn't an existing field for telephone numbers: we are going to add one.



Click on the **Add Asset Field** button in the toolbar.

This brings up the *Add New Asset Field* window.

Whilst it might look quite complex at first sight, adding a new Telephone Number field is quite straight forward.

Probably the most complex part of this form is the *Network Scan Mappings*. Basically this section is used to auto populate the field during network scan tasks.

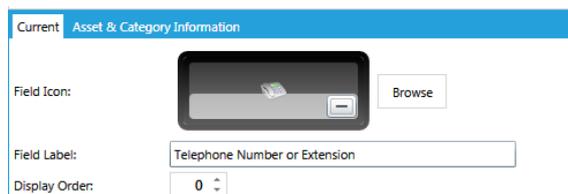
In terms of telephone numbers, this type of information cannot be easily picked up during the scanning process. As such this field needs to be manually entered.

The field icon is displayed against the telephone number field when we open up an asset and examine it. Whilst it isn't required, it does provide a visual reference that helps draw attention.

Asset Manager has comprehensive library of icons already in place, but you can also add your own if you so wish. In this example we will use the browse facility and select an existing icon from the library.

Click on the **Browse** button.

Scroll down the contents of the image library until you find a suitable telephone icon and tick the *Select* box. To complete the selection process, press the **Insert** button.



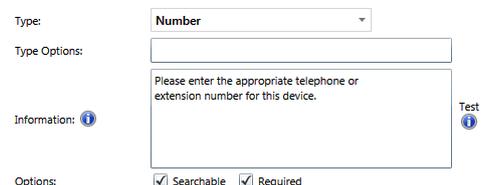
Next we need to enter a name for this asset field in the *Field label* box: here we have used Telephone Number/Extension.

The Display Order value determines the location of this field when examining the asset. A value of zero (0) means that it will be at the top of the list, whilst larger numbers means it is displayed lower down in the list.

Next we can select the asset field *Type*. This is where we define the type of information we want this field to contain: there is quite a choice! Use the drop-down list box to show you the options. Most of the field types available are quite self-explanatory.

In this example we are going to select *Number*. The *Type Options* box that appears below, allows you to enter a default value that will appear. In the case of a telephone number this is inappropriate and we will leave it blank.

The information box allows you to enter custom text that will appear as a help popup against the field whenever an individual asset is viewed. Use the *Test* icon to see what it will look like when in use. Simply place the mouse pointer over the blue information icon.



The *Options* selections allow you to specify if you can perform searches based upon the values contained within this field. You can also specify whether this field is mandatory or not. If you select the *Required* option, you won't be able to save any asset containing this field without specifying a value.

As suggested earlier, a telephone number cannot be easily scanned; it has to be manually entered against each asset, so in this example we are leaving this section blank.

Visibility and *Editability* are security controls for this asset field. You have the ability to control who can see and ultimately who can edit the contents of your asset fields. Whist something as simple as a Telephone Number field really does not need any specific security, there are some situations where you might wish to use this feature.

When you have made all of your selection, click the **Save Asset Field** button.

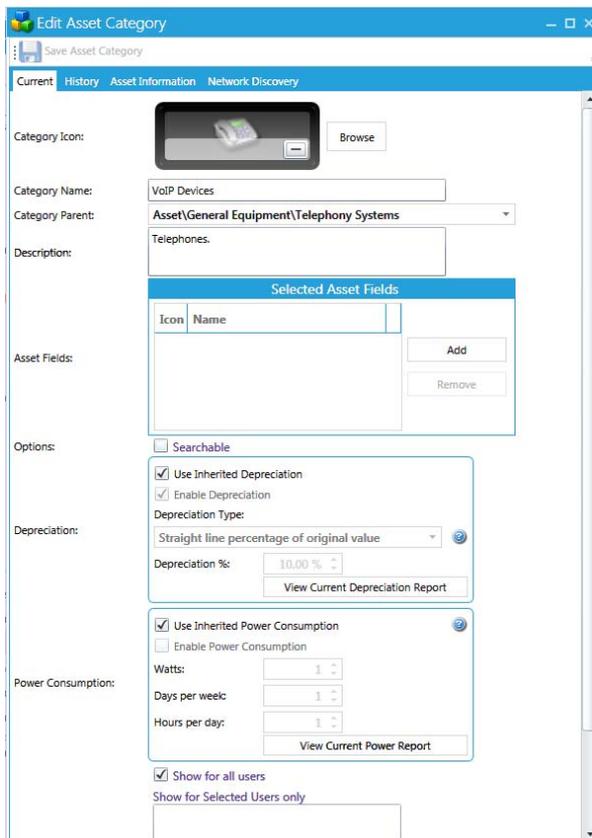
The Asset Fields table will refresh, and you will be able to see the newly added *Telephone Number or Extension* field in the table.

Icon	Label	Order	Type	Type Options	Information	Searchable	Required	WMI Class,PropertyName	SNMP
	IP Address	0	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUTO	AUTO
	Citrix Last Boot Message	0	Multiline Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Telephone Number or Extension	0	Number		Please enter the appropriate telephone or extension number for this device.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	MAC Address	1	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>	AUTO	AUTO
	Location	2	Text			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	Supplier	2	Contact Selector	Supplier		<input checked="" type="checkbox"/>	<input type="checkbox"/>		

The next step is to allocate this field to our *VoIP Devices* category.

Click on the *Asset Categories* tab. Locate the VoIP Devices category from the table displayed and double click on it.

Icon	Name	Description	Asset Fields	Searchable	Visible	Visibility	Updated	Updated By
	General Equipment	Container for general assets and other equipment.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:34:56	Administrator
	Audio/Visual Equipment			<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:27:53	Administrator
	Digital Cameras			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 15:54:06	Administrator
	Televisions			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 15:55:30	Administrator
	Video Cameras			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 15:54:27	Administrator
	Fire and Safety	Container for fire and safety equipment.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:35:23	Administrator
	Fire Extinguishers			<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:28:45	Administrator
	Fixtures and Furniture	Container for chairs/tables etc.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:35:40	Administrator
	Chairs			<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:50:49	Administrator
	Tables			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 13:12:49	Administrator
	Musical Instruments			<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:29:29	Administrator
	Office Equipment	Container for all office and related equipment.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:36:53	Administrator
	CCTV Surveillance			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 13:18:13	Administrator
	Digital Signage Screens			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 15:50:54	Administrator
	Fax Machines			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 10:20:14	Administrator
	Photocopiers			<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:29:49	Administrator
	Science Lab Equipment			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 15:58:17	Administrator
	Sports Equipment			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 16:00:41	Administrator
	Telephony Systems	Telephones and communications systems.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:38:28	Administrator
	Telephone Lines	Incoming telephone lines.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 12:35:43	Administrator
	Telephony Controller	Switching equipment and controllers.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 11:89:16	Administrator
	VoIP Devices	Telephones.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 11:39:30	Administrator
	Walkie Talkies	Hand held point to point comms sets.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 11:40:03	Administrator
	Whiteboards (non-interactive)	Whiteboards/blackboards and flip charts.		<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 11:40:44	Administrator
	ICT Assets	Container for all ICT related equipment.	IP Address, MAC Address,	<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 14:49:12	Administrator
	Documentation	Special category in which to store important documentation related to the ICT system.	Misc. Attachments,	<input type="checkbox"/>	<input checked="" type="checkbox"/>		23/08/2012 10:38:38	Administrator
	CSE Software Maintenance Agreements			<input type="checkbox"/>	<input checked="" type="checkbox"/>		08/09/2012 12:51:15	sdadmin
	Microsoft Agreements			<input type="checkbox"/>	<input checked="" type="checkbox"/>		08/09/2012 12:49:30	sdadmin
	SSL Certificates			<input type="checkbox"/>	<input checked="" type="checkbox"/>		22/08/2012 13:45:29	Administrator



This opens the main asset category details screen.

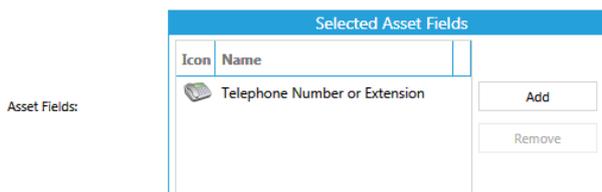
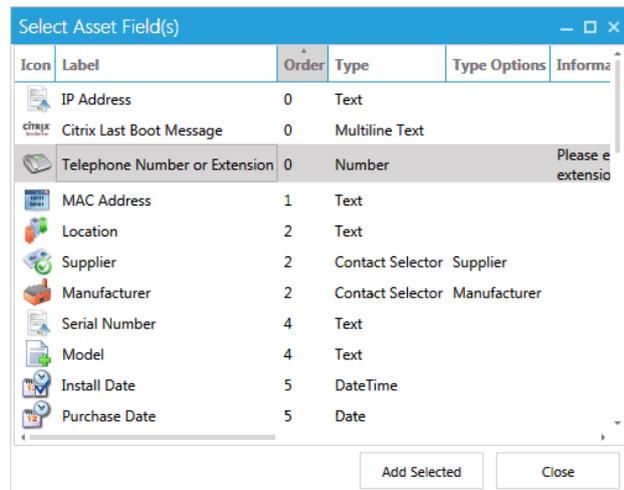
Take a moment to look at some of the attributes that are associated with asset categories.

As with asset fields, you can allocate an appropriate icon, and you can specify whether it is searchable and towards the bottom of the form is the visibility security filter control.

Notice also the *Depreciation* and *Power Consumption* options. Here you can set custom values that will be associated with any asset contained within the category.

However, we want to add the *Telephone Number or Extension* field.

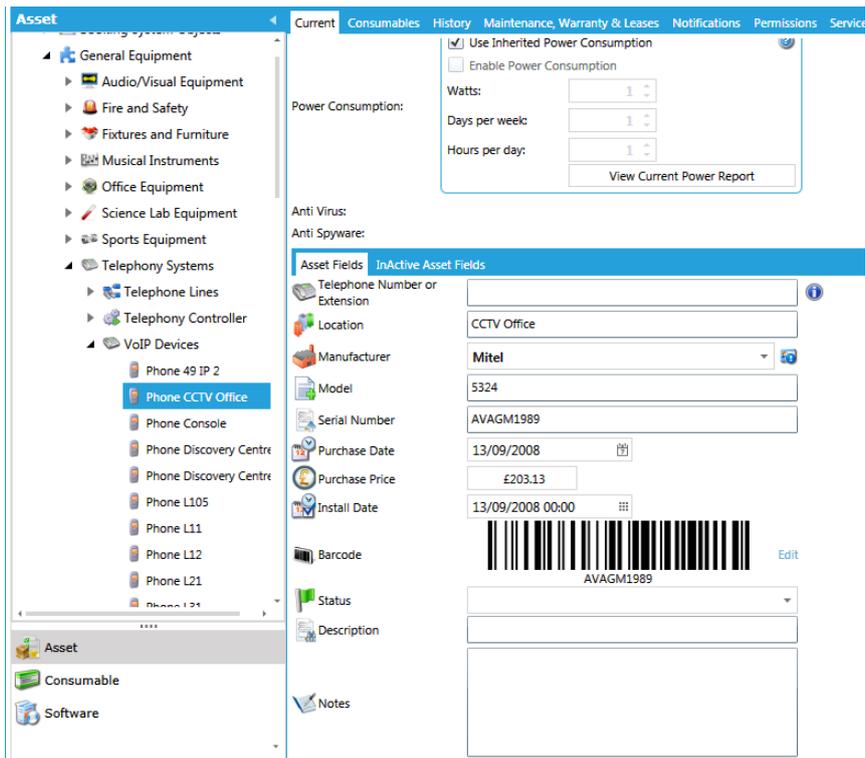
Click the **Add** button. Select the *Telephone Number or Extension* field and click the **Add Selected** button.



This adds the *Telephone Number or Extension* field to the *VoIP Devices* category.

To finish, click the **Save Asset Category** button in the toolbar.

Finally, navigate back to Asset Manager and open up one of the VoIP devices.



Telephone Number or Extension now appears at the top of the asset fields assigned to this device.

Don't enter anything at this stage: just try saving the asset by clicking on the small disk icon found top left of the asset main window.



It won't let you because we specified that this field was required. You must enter a telephone number into the field before you can save this asset.

Now at your own pace...

This has been quite a long exercise, but hopefully it has shown you the flexibility that the system provides in terms of asset categories, how you can move things around, and how you can add your own asset fields and assign them.

Why not take a look at the different data types that can be assigned to fields and experiment with adding and removing fields from various categories. Have a look at some of the various tabs such as *History* and see how the system logs all changes made.

Try deleting some fields and categories and explore how the system manages these functions. Hint – after deleting some objects – checkout the *Tombstoned Objects* tab under Asset Manager Settings.

You don't need to worry about breaking or damaging the demo system. It automatically reverts itself back to a default starting point each night.