

Getting Started with Asset Manager - Reporting System

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 standard reports and how they can be customised.

Admin Portal Menu/Reports

One of the key features of the system is its reporting system. It is here that you can create and manage your own specific set of reports. The system allows you to create, share, and schedule any reports that you have created. You will find the reports under the *Admin Portal* menu.

The system has two types of reports available: these are *Template* and *Custom* reports.

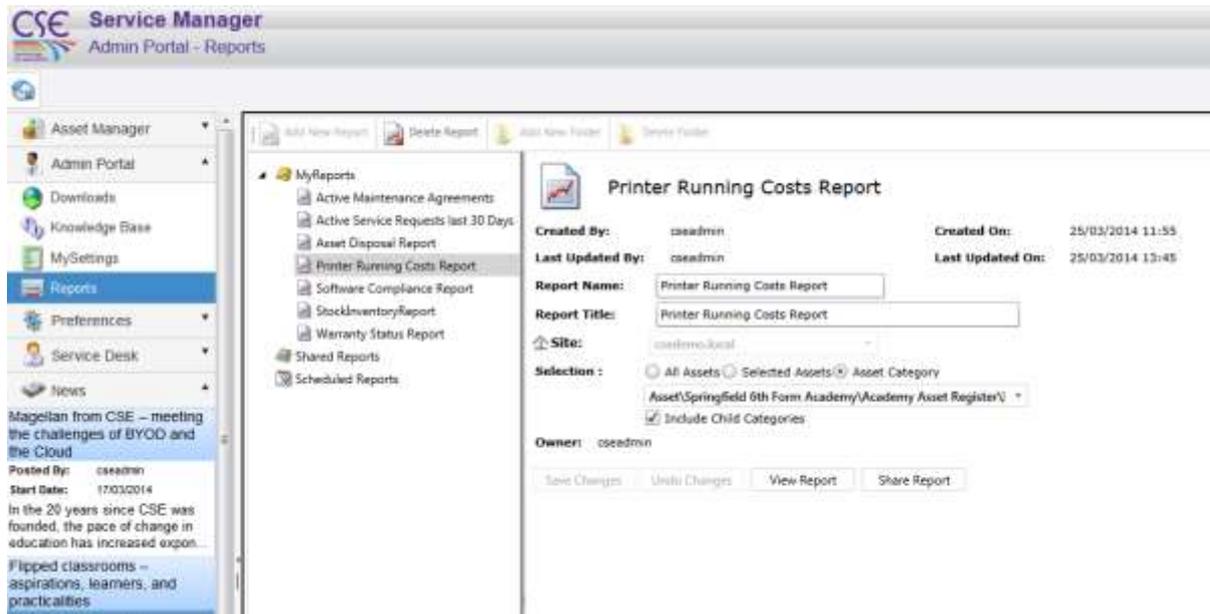
Template Reports

You will find that the template reports cover most of your day-to-day requirements for generating management information on all aspects of your system's status. This includes a number of specialised financial tools that have been developed following consultations with school financial managers.

The demo system has been populated with a wide range of reports to illustrate its capabilities to deliver the information you want, when you want it. The term 'template' could be seen to infer that the report is fixed and cannot be altered, but this is not the case. Each template report can be customised and saved as a specific report in its own right, so a single template report can be used to create several specific reports. For instance, the demonstration includes two *cost of ownership* reports, one that focuses on servers, the other on printers. Both of these were generated using the same template report and customising them.

Cost of Ownership: Printers

To access this report, double-click on *Printer Running Cost Report*.



This opens the report's main details page, and all you need to do to run the report is click the *View Report* button.

Asset Number	Asset Name	Asset Life Span
338	MEL Doccent	5 year(s), 2 month(s), 1 week(s), 4 day(s), 13 hour(s), 59 min(s)

Currency Asset Fields	
Name	Cost
Purchase Price	£1,300.00
Total	£1,300.00

Power Consumption (240 Watts)		11 month(s), 4 day(s), 12 hour(s)
CO ₂ (kg)	Energy(KWh)	Cost
906.8702292	1800	£319.86
Total		£319.86

Consumables			
Name	Purchase Order	Consumable	Cost
Black Toner Cartridge for Lexmark X925	A1A2A3	Black Toner Cartridge for Lexmark X925	£84.84
Magenta Toner Cartridge for Lexmark X925	A1A2A3	Magenta Toner Cartridge for Lexmark X925	£121.14
Total			£205.98

Lease, Maintenance, Warranty			
Description	Type	Expires	Cost
Lexmark Ected Warranty	Warranty	Expires in 15 days	£250.00
Total			£250.00

Asset Total Cost Of Ownership :	£2,075.84
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The report is then rendered by the system and displayed within the *Report Viewer*. As you can see, the report itself is very detailed, and includes not only details of the printer's purchase price, but

also energy consumption (estimated) year-to-date, CO₂ emissions, any associated costs from consumables, and maintenance, warranty, and lease costs.

The *Report Viewer* has a number of controls contained within the toolbar and at the bottom of the screen is a slider control allowing you to zoom in and out of the main display. This feature is very useful when the rendered report contains multiple columns and is wide.

The page controls in the toolbar allow you to skip quickly between pages of your report. Give it a try, and move between a few pages of the report.

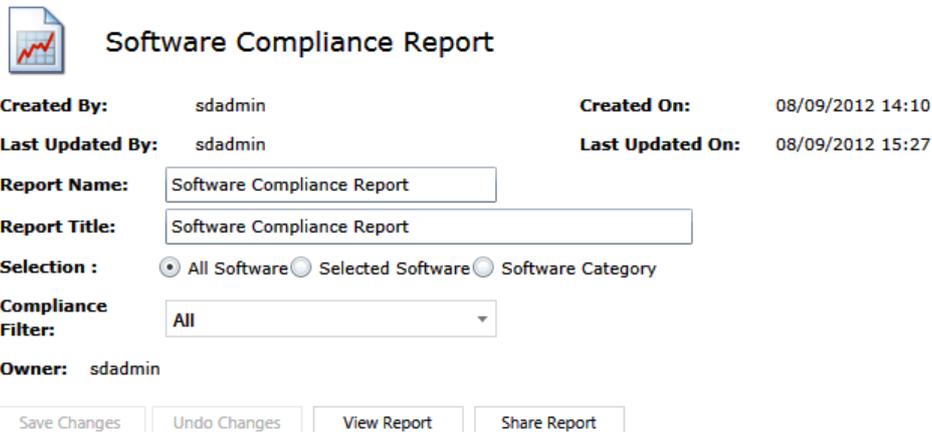
Finally there are the *Print Preview*, *Print*, and *Save* buttons. *Print Preview* allows you to check what the report will look like when committed to hard copy. The *Print* function will send the report to your locally attached printers, even if you are working from home. If you want, give it a try and print the report out on your own printer, but remember this report is quite large!

The *Save* function allows you to write the report to file. The system supports many different types of format. Among the most useful are RTF (Rich Text Format), which can be read straight into Microsoft Word, CSV, which can be read by Microsoft Excel, and PDF, which is a very useful format for distribution to others in the management team. Try saving the report in PDF format on to your local system, and then load it using Adobe Acrobat Reader.

You can probably see the value of this report. Whilst you may have an overall idea of the costs involved in supporting printing within your organisation, this type of report will enable you to report on the costs of ownership down to individual assets. You can clearly see which printers are the most expensive to operate, and more importantly the reasons why. This can help you determine whether certain devices are economically viable, and help you to determine whether a more economical device could save you money in the long term.

Software Compliance Report

Next, run the *Software Compliance Report* by double-clicking its entry in the table.



Software Compliance Report

Created By: sdadmin **Created On:** 08/09/2012 14:10
Last Updated By: sdadmin **Last Updated On:** 08/09/2012 15:27

Report Name:
Report Title:

Selection : All Software Selected Software Software Category

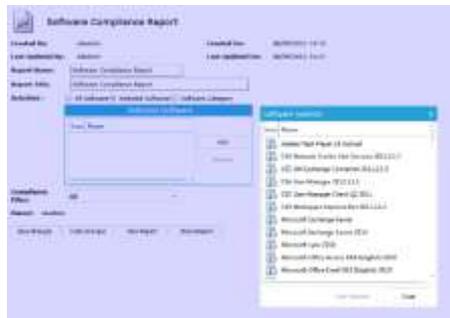
Compliance Filter:

Owner: sdadmin

Again, this opens the main report's details. This time rather than running the report immediately, let's look at the customisation options available.

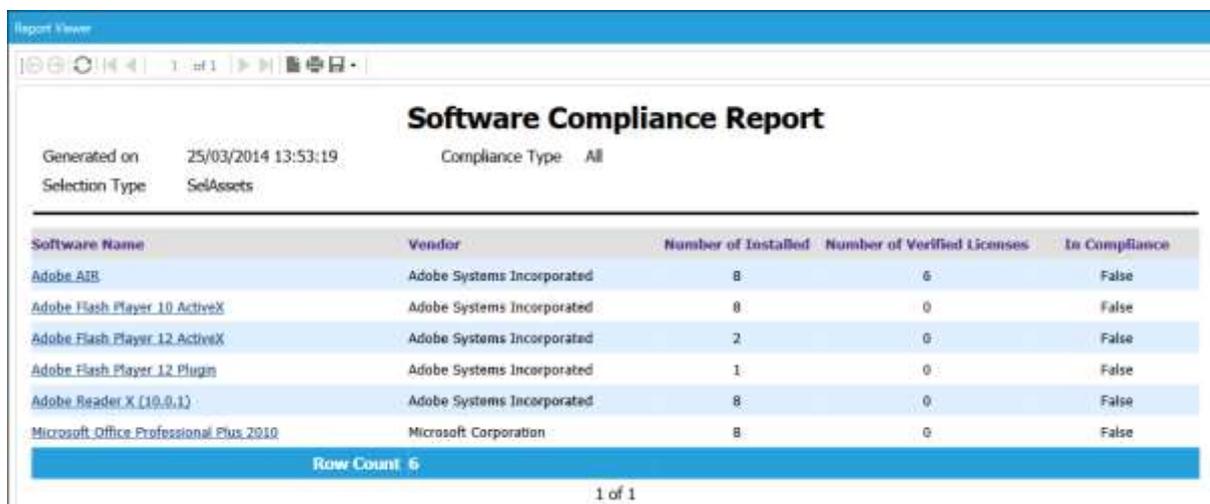
First, you can change both the *Report Name* and *Report Title*.

Using the *Selected Software* option you can narrow the focus of the report, making the results more precise. Click the selected software *Add* button.



This allows you to select specific software titles one at a time, so when the report is run, it is completely focused on the individual software items you have selected.

Give it a try using the first six software items in the list. Then run the report by clicking the *View Report* button.



Report Viewer

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Software Compliance Report

Generated on: 25/03/2014 13:53:19 Compliance Type: All
Selection Type: SelAssets

Software Name	Vendor	Number of Installed	Number of Verified Licenses	In Compliance
Adobe AIR	Adobe Systems Incorporated	8	0	False
Adobe Flash Player 10 ActiveX	Adobe Systems Incorporated	8	0	False
Adobe Flash Player 12 ActiveX	Adobe Systems Incorporated	2	0	False
Adobe Flash Player 12 Plugin	Adobe Systems Incorporated	1	0	False
Adobe Reader X (10.0.1)	Adobe Systems Incorporated	8	0	False
Microsoft Office Professional Plus 2010	Microsoft Corporation	8	0	False

Row Count: 6

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Now reset the report back to *all software* and change the compliance filter to *IsNotCompliant*. Now run the report again.

Software Name	Vendor	Number of Installed	Number of Verified Licenses	In Compliance
Adobe AIR	Adobe Systems Incorporated	8	6	False
Adobe Flash Player 10 ActiveX	Adobe Systems Incorporated	8	0	False
Adobe Flash Player 12 ActiveX	Adobe Systems Incorporated	2	0	False
Adobe Flash Player 12 Plugin	Adobe Systems Incorporated	1	0	False
Adobe Reader X (10.0.1)	Adobe Systems Incorporated	8	0	False
Microsoft Office Professional Plus 2010	Microsoft Corporation	8	0	False

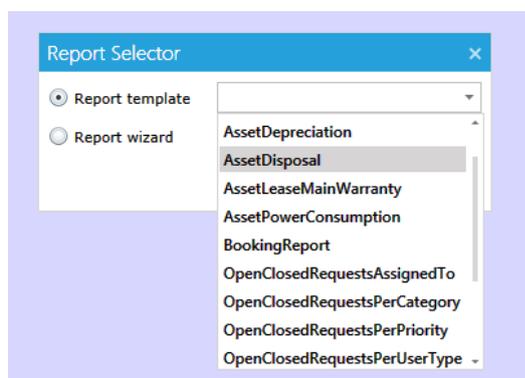
Row Count: 6
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The report now changes focus and displays the software which is not currently compliant with the terms and conditions of your licences.

These exercises have demonstrated some of the features of the template reports, and how they can be used and customised to generate some very powerful management reports. Now let's move on to creating your own report using the templates provided.

Creating your own report

Click the top icon called *MyReports* and then click *Add New Report* in the toolbar at the top of the screen. This brings up the *Report Selector*: we are going to build this report using a standard *Report Template*. Now click and expand the list box.



Select the *Asset Disposal* option from the list, then click the **Select** button. This loads the template into the main report frame.



AssetDisposal

Created By: sdadmin **Created On:** 09/09/2012 13:06

Last Updated By: **Last Updated On:**

Report Name:

Report Title:

Date Filter: **From Date:** **To Date:**

Delete Code Filter:

Owner: sdadmin

Now change the *Report Name* and *Report Title* fields, change the *From Date* to 1 January 2012, leave the *To Date* (it will be today's date) and finally change the *Code Filter* to 'Lost'.

Asset Disposal - Lost Items

Created By: cseadmin **Created On:** 25/03/2014 14:01

Last Updated By: cseadmin **Last Updated On:** 25/03/2014 14:02

Report Name:

Report Title:

Site: cseadmin.local

Date Filter: **From Date:** **To Date:**

Delete Code Filter:

Owner: cseadmin

Now run the report.

Asset ID	Asset Number	Asset Name	Asset Category	Serial	Manufacturer	Purchase Date	Purchase Price	Expected Value	Delete Code	Delete Reason/Sold Price	Collected Date	Delete By
266	381	STARFLAP-65	Asset/Springfield i95 Form Academy	CHD0VHL-1	1	28/07/2009 09:00:06	6794.55	67.84	Lost	Car broken into last night Police case number 12/997	25/03/2014 12:59:57	cseadmin
272	177	ENDEVOR-62	Academy Asset Register/LCT i95 Form Academy	YC2C119-2	2	28/01/2009 08:00:06	2298.00	88.00	Lost	Stolen	28/03/2009 14:00:25	cseadmin
285	185	ENDEVOR-61	Academy Asset Register/LCT i95 Form Academy	YC2C119-2	2	28/01/2009 08:00:06	2298.00	88.00	Lost	Lost on field trip - dropped into lake	28/03/2009 14:00:26	cseadmin
							Total: 11,882.55	67.84		68.00		

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This generates a report detailing all assets recorded as 'lost' since 1 January 2012. Once again this demonstrates how the system can generate useful management financial reports by simply using the built-in templates.

Please feel free to explore the system and create and run different types of reports using the built-in templates. Experiment with the various options and filters and see how they affect the outcomes.

Bespoke reports

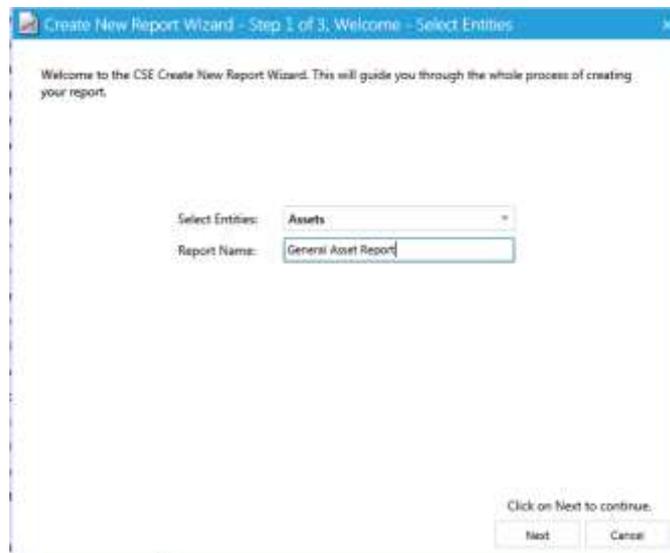
The second type of report is completely bespoke in nature. The *Report Wizard* allows you to create individual reports that drill down within the Service Manager database and extract your own datasets. The system also supports several formatting features, including graphs where appropriate.

As bespoke reports are completely open, the following exercises are aimed at demonstrating the general principles: feel free to explore the many features at your own pace.



Click *MyReports* and then *Add New Report*. This time check the *Report Wizard* option and click the *Select* button.

Now use the *Select Entities* drop-down selector to pick the main focus of the report. In this example, select *Assets*, give your report a name and then click *Next*.

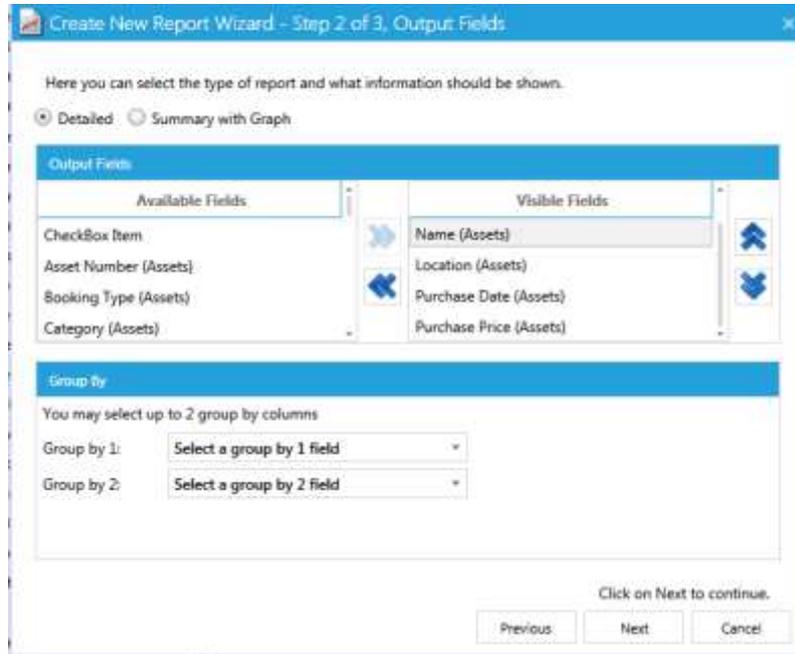


Now we can select the report type. The options are *Detailed* and *Summary with Graph*, but in this instance we will leave it selected with the detailed option.

The next step is to pick the fields that we want to display within the report itself. The *Available Fields* column contains all data fields that have been assigned to your assets. This list also includes any custom fields that you might have added yourselves. Simply select the field you want by clicking it and then move it into the *Visible Fields* by clicking on the *right facing arrow* icon. If you make

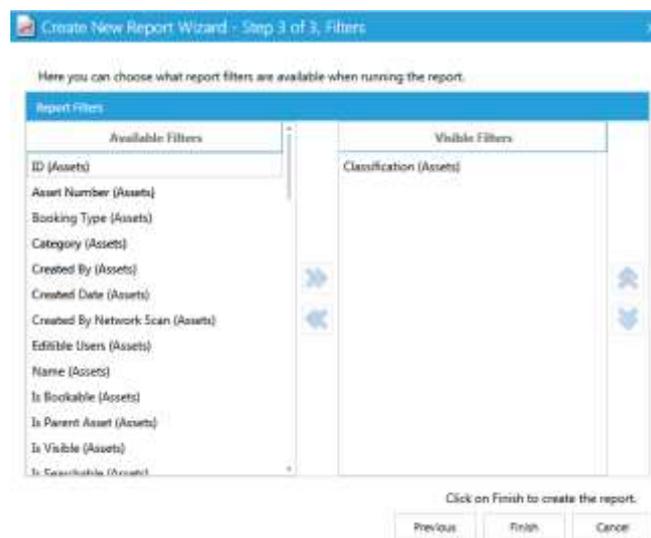
a mistake you can move the offending item back to the *Available Fields* table by highlighting the item and clicking on the *left facing arrow* icon.

In this example, select *ID (Assets)*, *Name (Assets)*, *Purchase Date (Asset)*, and *Purchase Price (Asset)*.



The *up and down arrows* allow you to select a field and move it up or down the list. This ultimately alters the field's column location when the report is generated.

The *Group By* options are in effect a control that allows you to sort the report based upon the selection. In this instance we will leave this blank. Click on the *Next* button
You can now specify any *Report Filters* that you might want. In this example we will choose to filter based upon the *Classification (Assets)* field. The Classification field is one of the system's inbuilt fields and it contains the device type (such as server, switch, or workstation).



You can of course select multiple filters, but we will leave that for you to explore in your own time. You can also use the control buttons at the bottom of the screen to move back and forth through the various steps. When you are happy with what you have selected, click the *Finish* button.

General Asset Report

Created By: sdadmin Created On: 09/09/2012 14:02

Last Updated By: Last Updated On:

Report Name: General Asset Report

Report Title: General Asset Report

Classification: Equals * Camera *

Owner: sdadmin

Save Changes Undo Changes View Report Share Report

The next step is to select the classification criteria for the report. We will select *Equals, Server* and then run the report.

Report Viewer

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General Asset Report

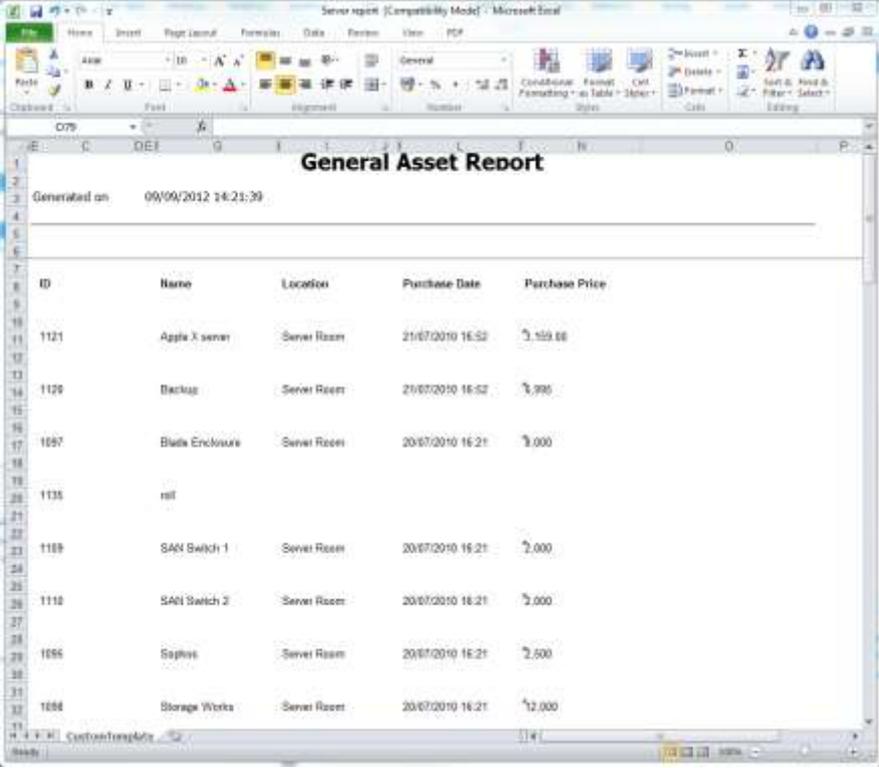
Generated on 09/09/2012 14:21:38

ID	Name	Location	Purchase Date	Purchase Price
1121	Apple X server	Server Room	21/07/2010 16:52	3,159.00
1120	Backup	Server Room	21/07/2010 16:52	6,995
1097	Blade Enclosure	Server Room	20/07/2010 16:21	8,000
1135	roll			
1109	SAN Switch 1	Server Room	20/07/2010 16:21	2,000
1110	SAN Switch 2	Server Room	20/07/2010 16:21	2,000
1095	Sophos	Server Room	20/07/2010 16:21	2,500
1098	Storage Works	Server Room	20/07/2010 16:21	12,000
1100	SVR-DC01	Server Room	20/07/2010 16:21	3,025
1101	SVR-DC02	Server Room	20/07/2010 16:21	3,025
1102	SVR-DC03	Server Room	20/07/2010 16:21	3,025
1119	SVR-TS01	Server Room	20/07/2010 16:21	3,025
1118	SVR-TS02	Server Room	20/07/2010 16:21	3,025
1096	Tape Library	Server Room	20/07/2010 16:21	4,600
1111	UPS Cab 1	Server Room	20/07/2010 16:21	1,250
1112	UPS Cab 2	Server Room	20/07/2010 16:21	1,250
1113	UPS Cab 3	Server Room	20/07/2010 16:21	1,250
1114	UPS Cab 4	Server Room	20/07/2010 16:21	1,250
1115	UPS Cab 5	Server Room	20/07/2010 16:21	1,250
1116	UPS Cab 6	Server Room	20/07/2010 16:21	1,250
1117	UPS Cab 7	Server Room	20/07/2010 16:21	1,250
1099	Video on Demand	Server Room	20/07/2010 16:21	3,500

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The rendered report will then appear. As with the template reports, we have access to various controls that allow us to navigate through the report's output. We can print it if we wish, or save it to file in one of a number of different formats. In this instance, save the file in CSV format and then open it within Excel.



The screenshot shows a Microsoft Excel spreadsheet titled "General Asset Report". The report is generated on 09/09/2012 at 14:21:39. It contains a table with the following data:

ID	Name	Location	Purchase Date	Purchase Price
1121	Apple X server	Server Room	21/07/2010 16:52	3,559.00
1120	Backup	Server Room	21/07/2010 16:52	3,990
1097	Blade Enclosure	Server Room	20/07/2010 16:21	3,000
1135	nil			
1109	SAH Switch 1	Server Room	20/07/2010 16:21	2,000
1110	SAH Switch 2	Server Room	20/07/2010 16:21	3,000
1095	Saphos	Server Room	20/07/2010 16:21	2,500
1088	Storage Works	Server Room	20/07/2010 16:21	12,000

Once imported into Excel, you can use spreadsheet functions to manipulate the data, and perhaps use it to calculate the total investment you have made in your server hardware.

Using Group by

As hinted on earlier, the *Group By* facility allows you refine your reports further.

As a simple exercise to demonstrate this, create a new bespoke report using the *Report Wizard*.

As before, select *Assets* as the report's focus. Again, select *ID (Assets)*, *Name (Assets)*, *Purchase Date (Asset)*, and *Purchase Price (Asset)*.

In *Group By 1* select *Category (Asset)*. Move to the next step and do not select a filter. **Finish** and then select *Classification: Equals; Computer* and run the report. This time you will notice that the report takes considerably longer to be rendered. This is because the report contains all the assets contained in the database. The system has to query a large amount of data, and that takes time.

Report Viewer

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Assets Grouped By Report

Generated on 05/09/2012 14:45:46

ID	Name	Purchase Price	Install Date
Category	Desktop		
1372	CL185w1	2,800	12/06/2004
92	CL185w1	2,800	12/06/2004
93	CL185w2	2,800	12/06/2004
94	CL185w3	2,800	12/06/2004
95	CL185w4	2,800	12/06/2004
96	CL185w5	2,800	12/06/2004
97	CL185w6	2,800	12/06/2004
98	CL185w7	2,800	12/06/2004
102	CM185w1	2,800	12/06/2004
143	CM185w2	2,800	12/06/2004
103	CM185w3	2,800	12/06/2004
144	CM185w4	2,800	12/06/2004
99	CL185w8	2,800	12/06/2004
100	CL185w9	2,800	12/06/2004
101	CL185w10	2,800	12/06/2004
80	CL185w11	2,800	12/06/2004
81	CL185w12	2,800	12/06/2004
82	CL185w13	2,800	12/06/2004
83	CL185w14	2,800	12/06/2004
84	CL185w15	2,800	12/06/2004
85	CL185w16	2,800	12/06/2004
86	CL185w17	2,800	12/06/2004
104	CL185w18	2,800	12/06/2004
105	CL185w19	2,800	12/06/2004
87	CL185w20	2,800	12/06/2004
106	CL185w21	2,800	12/06/2004
88	CL185w22	2,800	12/06/2004
107	CL185w23	2,800	12/06/2004
89	CL185w24	2,800	12/06/2004
108	CL185w25	2,800	12/06/2004
90	CL185w26	2,800	12/06/2004
109	CL185w27	2,800	12/06/2004
91	CL185w28	2,800	12/06/2004
110	CL185w29	2,800	12/06/2004
92	CL185w30	2,800	12/06/2004
111	CL185w31	2,800	12/06/2004
93	CL185w32	2,800	12/06/2004
112	CL185w33	2,800	12/06/2004
94	CL185w34	2,800	12/06/2004
113	CL185w35	2,800	12/06/2004
95	CL185w36	2,800	12/06/2004
114	CL185w37	2,800	12/06/2004
96	CL185w38	2,800	12/06/2004
115	CL185w39	2,800	12/06/2004
97	CL185w40	2,800	12/06/2004
116	CL185w41	2,800	12/06/2004
98	CL185w42	2,800	12/06/2004
117	CL185w43	2,800	12/06/2004
99	CL185w44	2,800	12/06/2004
118	CL185w45	2,800	12/06/2004
100	CL185w46	2,800	12/06/2004
119	CL185w47	2,800	12/06/2004
101	CL185w48	2,800	12/06/2004
120	CL185w49	2,800	12/06/2004
102	CL185w50	2,800	12/06/2004

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77 %

As you can see, this report is much larger: almost 50 pages.

The resulting report is grouped by the *Category* field. When you scan through this report, you will see that all assets belonging to a particular category are grouped together.

Shared Reports

Share Report

Here you can share this report with all other technicians and administrators or a specific person. In any instance when you share the report it will take a copy and use that as the shared report.

Report Name : Asset Disposal

Share Report With

Technicians and Administrators :- The report will appear under the Shared Reports Section. As the owner of the report only you will be able to delete it from this area, unless an Administrator takes ownership.

Specified Person :- The report will appear under the specified person MyReports Section. They will take ownership of this report copy and does not affect your copy.

Administrator

Share Report Folder

Copy the folder structure the report is in.

Select a folder structure that is available.

Create a new folder structure. Example :- Service Desk/Reports

Share Close

If you have created a report that you would like to share with your colleagues, you can do so by selecting the report and then clicking the **Share Report** button.

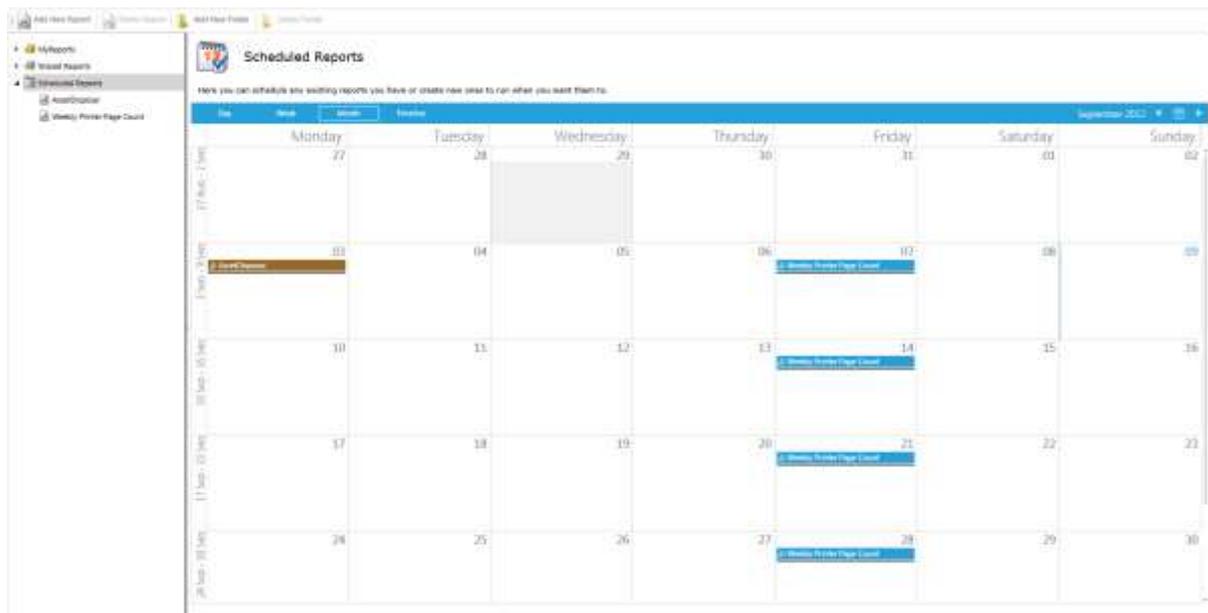
This opens up the *Shared Reports* manager, in which you can specify who you would like to share with, and whether the report should be placed in a specific folder.

Rather than going through the procedure step-by-step in this introduction, you can explore this feature in your own time if you wish to.

Scheduled Reports

Finally, let's look at scheduling a report. This very useful feature allows you to set up reports to run unattended and to a schedule. The results of each report are emailed automatically to recipients within a mailing list of your own creation.

When you click on [Scheduled Reports](#) a calendar appears. If any reports are scheduled to run, they will appear on this schedule.



Please note that email services are not enabled on the service demo system, so whilst you can schedule reports to run, the results cannot be emailed to you.

Highlight the [Scheduled Reports](#) header by clicking on it, and then click [Add New Reports](#). This starts the report selector, which you will have seen before. Select the report type and follow the wizard as normal.

When complete, the system will open up the [Appointment](#) screen.

Appointment - AssetLeaseMainWarranty

Edit Recurrence | Categorize

Subject: Warranties about to expire

Description: Weekly scheduled report sent to ICT managers to inform of impending warranty expiry

Email To: sdadmin@rockroll.local;bursar@rockroll.local
separate addresses with ;
[Edit Report Details](#)

Start time: 10/09/2012 09:00

OK Cancel

Here you can enter the *Subject* and *Description* of your report, and specify the mailing list that you want the report sent to using the *Email To* field. Note that multiple addresses are separated by semicolons.

You can then use the calendar control to select the *Start Time* (the date and time) that the report to be run.

If you want this report to be scheduled to run more than once, click the *Edit Recurrence* button.

Appointment - Warranties about to expire

Appointment time

Start: 09:00 | End: 09:00 | Duration: []

Recurrence pattern

Daily | Weekly | Monthly | Yearly

Recur every 1 week(s) on:

Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday

Range of recurrence

No end date | End after 10 occurrences | End by 19/09/2012

Start: 10/09/2012

OK Cancel

Here you can set up your schedule. In this example, the report will be run every Monday from this date onwards.