



Asset Management and Vendors

SL1 version 12.3.0

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Chapter

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
What is an Asset?

Overview

An **asset** is a piece of equipment owned by an organization.

An asset record is a collection of information about that asset. In SL1, asset records are usually created for hardware devices, with some of the information populated automatically from collected data. Users can also manually enter information into an asset record.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ().
- To view a page containing all of the menu options, click the Advanced menu icon ().

This chapter covers the following topics:

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<i>How Does SL1 Create Asset Records?</i>	5

What Information is Contained in an Asset Record?

In SL1, asset records can contain information about:

- The name, make, model, and model number of a device.
- The serial number of a device.
- Function and status of a device.
- Networking information, like host ID, IP address, or DNS server for the device.
- Physical location of the device.
- Description of the network interface.
- Vendor information for the device, including PO or check number, warranty policy, and service policy.
- Hardware information like the amount of memory, CPU, and BIOS or EPROM version.
- Description of each hardware component (if applicable).
- Description of installed software (if applicable).

When possible, SL1 can automatically populate fields in each asset record. SL1 also allows users to create their own tabs and form fields in addition to the ones provided by default.

For more information, see [Asset Settings and Customization](#).

How Does SL1 Create Asset Records?

If you enable SL1 to automatically create asset records, SL1 will populate as many fields as possible automatically, using data retrieved during discovery and collection.

If you enable SL1 to automatically create asset records, you can specify which asset fields will be populated with data retrieved during discovery and during collections and which fields will be populated manually. To specify this behavior, go to the **Asset Automation** page (System > Settings > Assets).

NOTE: By default, SL1 does not automatically create asset records. To allow SL1 to automatically create asset records, you must enable the process **Enterprise Database: Asset Record Maintenance**. To do so, go to the **Process Manager** page (System > Settings > Admin Processes). Find the process **Enterprise Database: Asset Record Maintenance**. Follow the directions for editing a process and set **Operating State** to *Enabled*.

Chapter



2

Viewing Assets

Overview

You can view asset records from the **Asset Manager** page and also from the **Device Manager** page.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon (.
- To view a page containing all of the menu options, click the Advanced menu icon ().

This chapter covers the following topics:

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Viewing the List of Asset Records

You can view the list of all existing assets records in SL1 under the **Asset Manager** page, and then view the details of a specific asset record.

To view the **Asset Manager** page and filter the list of asset records:

1. Go to the **Asset Manager** page Registry > Assets > Asset Manager.
2. The **Asset Manager** page displays a list of all asset records you are allowed to view. The **Asset Manager** page displays the following for each asset record:
 - **Make / Model**. Manufacturer of the device. If possible, SL1 populates this field automatically. Model description of the device. SL1 populates this field automatically. The Model information is separated from the Make information in the SL1 database.
 - **Device-Link**. Name of the device in SL1. SL1 populates this field automatically.
 - **Organization**. The Organization to which the asset is assigned.
 - **Function**. Description of the asset's function. Although this value is customizable, usually contains values like "backup server", "web server", "file server".
 - **Status**. Describes the current service status of the asset. Although this value is customizable, usually contains values like "production", "backup", "development".
 - **Owner**. Describes the current owner or manager of the asset. Although this value is customizable, usually describes the group with responsibility for the asset, such as "customer", "partner", "self-owned".
 - **Location**. Describes the facility or data center where the asset resides. Although this value is customizable, usually describes physical location of the asset.
 - **Serial No.**. Serial number of the device.
 - **Asset Tag**. Asset tag of the device.
 - **ID**. Unique numeric identifier, automatically assigned to each asset-record by SL1.
 - **Edited By**. The user who created or last edited the asset record.
 - **Last Edited**. Date and time the asset record was created or last edited.

TIP: Clicking once on any of the column headings will sort the list by column heading in ascending order. Clicking on the same column heading a second time will sort the list in descending order.

Filtering the List of Asset Records

The **Asset Manager** page includes 12 filters. You can filter the list of assets by one or multiple of the parameters listed below. You can specify one or more parameter to filter the display of assets. Only assets that meet all the filter criteria will be displayed in the **Asset Manager** page.

You can filter by one or more of the following parameters. The list of assets is dynamically updated as you select each filter.

- For each filter except the **Last Edited** field, you must enter text to match against. SL1 will search for assets that match the text, including partial matches. Text matches are not case-sensitive. You can use the following special characters in each filter:
 - **,** Specifies an "or" operation. For example:


"dell, micro" would match all values that contain the string "dell" OR the string "micro".
 - **!** Specifies a "not" operation. For example:

"!dell" would match all values that do not contain the string "dell".
- **Make / Model** . You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching make or model.
- **Device-Link**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that are linked to a matching device.
- **Organization**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching organization.
- **Function**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching function.
- **Status**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching status.
- **Owner**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching owner.
- **Location**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching location.
- **Serial No.** You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching serial number.
- **Asset Tag**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching asset tag.
- **ID**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that have a matching asset ID.
- **Edited By**. You can enter text to match, including special characters, and the **Asset Manager** page will display only assets that were last edited by a matching user.
- **Last Edited**. Only those assets that match all the previously selected fields and were edited within the specified date range will be displayed. The choices are:
 - *All*. Display assets with all installed dates.
 - *Last Minute*. Display only assets that have been installed within the last minute.
 - *Last Hour*. Display only assets that have been edited within the last hour.

- *Last Day*. Display only assets that have been edited within the last day.
- *Last Week*. Display only assets that have been edited within the last week.
- *Last Month*. Display only assets that have been edited within the last month.
- *Last Year*. Display only assets that have been edited within the last year.

Viewing an Asset Record

On the **Asset Manager** page (Registry > Assets > Asset Manager), you can view details about a single asset. To view details about an asset record:

1. Find the asset for which you want to view an asset record.
2. Click its wrench icon ()
3. The **Asset Administration** panel appears, where you can click tabs and view details about an asset record.
4. The **Asset Administration** panel includes the following tabs and pages:
 - **Properties tab**. Displays the **Asset Properties** page. This page displays overview information about an asset, such as organization, make, model, identification numbers, administrators and technician, and location of the asset.
 - **Maintenance tab**. Displays the **Asset Maintenance & Service** page. This page displays business information about an asset, such as vendor and purchase date, cost, PO number, details on warranty policies and details on service policies.
 - **Configuration tab**. Displays the **Asset Configuration** page. This page displays technical information about the hardware configuration and system configuration of an asset, such as BIOS, operating system, host ID, host name, DNS name, and overview information about memory, CPU, and disks.
 - **Licenses tab**. Displays the **Asset Licenses** page. This page displays information for each discovered software product installed on the product.
 - **IP Networks tab**. Displays the **Asset IP Networks** page. This page displays technical information about each network interface on a device, such as interface name, speed, IP address, network mask, MAC address, associated blade/port, associated gateway, and associated name server.
 - **Components tab**. Displays the **Asset Components** page. Displays technical information about each hardware component associated with an asset, such as make, model, serial number, connection, and slot/bus.
 - **Notes tab**. Displays the **Asset Notes & Attachments** page. This page displays notes about the asset that were created with the **Notepad Editor** modal page. You can access the **Notepad Editor** modal page from the **[Action]** menu in any page in the Asset Administration panel. Each entry in the **Notepad Editor** page appears in the **Asset Notes & Attachments** page for the asset.

Viewing an Asset Record from the Device Manager Page

To view an asset record from the **Device Manager** page:

1. Go to the **Device Manager** page (Devices > Device Manager).
2. Find the device for which you want to view an asset record.
3. Click on the Asset icon (🔒)
4. The **Asset Properties** page appears.

NOTE: If the Asset (🔒) is grayed out, it means an asset record has not been created for the device. To create an asset record for a device, see the section on [Manually Creating an Asset Record](#).

Chapter



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Automatic Asset Management

Overview

SL1 can automatically create asset records and populate their fields. Users can also override this feature and prevent the system from automatically creating an asset record.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ()
- To view a page containing all of the menu options, click the Advanced menu icon ()

This chapter covers the following topics:

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How SL1 Automatically Creates Asset Records

If you enable SL1 to automatically create asset records, SL1 will populate as many fields as possible automatically, using data retrieved during discovery and collection. You can also manually enter values in one or more fields.

If you enable SL1 to automatically create asset records, SL1 will update create and update asset records at the interval specified in the **Frequency** field for the **Enterprise Database: Asset Record Maintenance** process. The default value is **60 minutes**.

If you enable SL1 to automatically create asset records, you can specify which asset fields will be populated with data retrieved during discovery and during collections and which fields will be populated manually. To specify this behavior, go to the **Asset Automation** page (System > Settings > Assets).

By default, SL1 does not automatically create asset records. To allow SL1 to automatically create asset records, you must enable the process **Enterprise Database: Asset Record Maintenance**. To do so:

1. Go to the **Process Manager** page (System > Settings > Admin Processes).
2. Find the process **Enterprise Database: Asset Record Maintenance**. Click its wrench icon (.
3. The **Process Editor** page is displayed. Select *Enabled* in the **Operating State** field.
4. Click the **[Save]** button.

Preventing SL1 from Automatically Creating Asset Records

If you enable the **Enterprise Database: Asset Record Maintenance** process, the following settings can prevent SL1 from automatically creating and updating asset records for specific devices:

- If you apply a device template during initial discovery or if you apply a device template to a device before the next instance of the **Enterprise Database: Asset Record Maintenance** process runs, the following settings in a device template can prevent SL1 from automatically creating an asset record:
 - **Disable Asset Update**. If selected, SL1 will not update the asset record associated with the device. If the device is a newly discovered device and SL1 has not yet run the process **Enterprise Database: Asset Record Maintenance**, SL1 will not automatically create an asset record for the device.
- The following settings in the **Device Properties** page can prevent SL1 from automatically creating an asset record:
 - **Disable Asset Update**. If selected, SL1 will not update the asset record associated with the device. If the device is a newly discovered device and SL1 has not yet run the process **Enterprise Database: Asset Record Maintenance**, SL1 will not automatically create an asset record for the device.

How SL1 Automatically Populates Fields in Asset Records

When an asset record is created (either manually through the **Device Manager** page, or automatically by the process **Enterprise Database: Asset Record Maintenance**) SL1 uses information collected during discovery, auto discovery, and collection to automatically populate fields.

SL1 uses data collected during initial discovery to automatically populate the following fields in the **Asset Properties** and **Asset Configuration** pages:

- **Properties | Organization**. The organization that the discovered device was aligned with.
- **Properties | Device-Link**. A link to a modeled device.
- **Properties | Make**. The "Device Class" field from the device class aligned during discovery.
- **Properties | Model**. The "Description" field from the device class aligned during discovery.
- **Configuration | Type**. The "Device Category" field from the device class aligned during discovery.

NOTE: SL1 can also populate the **Configuration | DNS Host Name** field automatically if you so choose. When it does so, it auto-populates with the device name unless you have the **DNS Hostnames** field set to *Use Full Domain Name (FQDN)* on the **Behavior Settings** page (System > Settings > Behavior), in which case it will use the FQDN.

To auto-populate the **DNS Host Name** field, you must first enable the **Auto Update** option for this field. To do so, go to the **Asset Automation** page (System > Settings > Assets), locate the **DNS Name** field and click its wrench icon, set the **Auto Update** field to Yes, and then click **[Save]**.

After an asset record has been created, SL1 can automatically populate fields in the asset records with values collected by configuration Dynamic Applications (For details on how to populate fields in asset records with values from configuration Dynamic Applications, see the following section.) The following fields in the Asset, Maintenance, Configuration, and Components page can be automatically populated with values collected by configuration Dynamic Applications:

- Properties | Make
- Properties | Model
- Properties | Serial
- Configuration | Operating System
- Configuration | Host ID /SID
- Configuration | Installed Memory
- Configuration | CPU Count
- Configuration | CPU Type/Make
- Configuration | BIOS/EPROM
- Component | Type
- Component | Make

- Component | Model
- Component | Serial
- Component | Slot
- Component | Notes
- Component | Connect
- Properties | Asset Tag
- Configuration | Disk Array Size
- Configuration | Disk Count
- Configuration | Disk Size
- Maintenance | Method
- Maintenance | Annual Rate
- Properties | RFID Number

Some asset fields can be updated either by data collected from a configuration Dynamic Application or by data collected by discovery. You can define how these asset fields will be populated in the **Asset Automation** page (System > Settings > Assets).

Generating Asset Records for Devices


After successfully discovering devices, you can automatically create asset records for one, multiple, or all discovered devices.

NOTE: These asset records will contain only the information that SL1 can collect from the device. You might later need to edit these asset records to include more detail.

To create asset records for devices from the **Device Manager** page:

1. Go to the **Device Manager** page (Devices > Classic Devices, or Registry > Devices > Device Manager in the classic SL1 user interface).
2. Select the checkbox for each device that you want to create an asset record for. To select all devices, select the large check icon in the upper right of the page.
3. In the **Select Action** menu, in the lower right of the page, select *CREATE Asset Record*.
4. Click the **[Go]** button. An asset record will be generated for each selected device.

NOTE: SL1 will automatically populate as many fields as possible for each device's asset record. However, depending on your business needs, you might need to manually add information to one or more of these asset records.

5. To check that SL1 generated the asset record, click the **[Reset]** button. The asset icon () should now be filled in red next to each selected device.

Automating the Population of Asset Records

There are three ways that SL1 gathers data about a device:

- **Discovery.** These sessions can be manually initiated from the **Discovery Control Panel** (System > Manage > Classic Discovery), scheduled to run automatically from the **Discovery Control Panel** (System > Manage > Classic Discovery), or manually initiated from the **Device Properties** page. This type of discovery session performs the initial discovery on a range of IP addresses and discovers the devices within that IP range. When run after initial discovery, this type of discovery will rediscover one or more devices but will preserve any existing data in SL1.
- **Auto Discovery.** This type of discovery is run automatically every night by SL1. This type of discovery session applies only to devices that have already been discovered by SL1. Each auto discovery session updates each device with any changed data.
- **Collection.** For each device, SL1 retrieves the data specified in each Dynamic Application aligned with the device. For each device, SL1 also retrieves data for each policy aligned with the device (for example, port availability or system processes), and internal collections (such as availability and interfaces monitoring).

By default, SL1 automatically creates an asset record for each device that does not already have an asset record. Automatic creation of asset records is performed every hour.

The following sections explain features that allow you to define how SL1 will populate asset records.


Linking Asset Fields to Collection Objects

When working with Dynamic Applications of type "configuration", you can link a retrieved data point from a Dynamic Application to a field in the asset record. For example, if the Dynamic Application retrieves the name and version of the operating system, you could define a link between the "operating system" collection object and the "operating system" field in each asset record.

For example, suppose you wanted to edit a Dynamic Application for Dell OpenManage. Suppose the Dynamic Application for Dell OpenManage included a collection object called "BIOS Version". Suppose you defined a link between the "BIOS Version" collection object and the "BIOS/EPROM" field in an asset record. SL1 will collect data from devices using the Dell OpenManage Dynamic Application. If we create an asset record for a device that uses Dell OpenManage, the "BIOS/EPROM" field will be populated automatically by SL1.

You can specify the link between the collection object and an asset record field when you create or edit a Dynamic Application.

To edit a Dynamic Application to include an asset link:

1. Navigate to the **Dynamic Applications Manager** page (System > Manage > Dynamic Applications).
2. Select a Configuration Dynamic Application. Click its wrench icon ()
3. Click the **[Collections]** tab to navigate to the **Dynamic Applications | Collections Objects** page.

4. The **Asset Link / Precedence** field displays two drop-down lists you can modify to specify the link between the collection object, asset report field, and priority values of the assets.
5. The first drop-down list specifies the link between the collection object and the asset report field. The choices are:
 - Make
 - Model
 - Serial Number
 - Operating System
 - Host ID/SID
 - OS System Name
 - CPU Count
 - CPU Type/Make
 - CPU Speed
 - Firmware/BIOS Name
 - Installed Memory
 - Asset Tag
 - Disk Array Size
 - Disk Count
 - Disk Size
 - Model Number
6. The second drop-down list specifies the priority value of the asset selected in the first drop-down. The choices are multiples of ten, ranging from 0 to 100. The default value is 50. Choosing a higher number will make the asset have a higher precedence. If you have more than one Dynamic Application updating the specified value, the asset field with the highest precedence that also contains valid data will display in the Asset Properties.
7. The **Form Link** link displays a drop-down list you can modify to populate a custom asset field. Select the name of a field in the second drop-down list. The choices are all fields included in the Application Form for "Embedded Asset Form Fields". To view or configure this form, go to System > Customize > Form Fields.
8. Click the **[Save]** button to save the link between the collection object and the asset record field. For devices that use this Dynamic Application, SL1 will now populate the specified asset record field with the value from the specified collection object.
9. Repeat these steps for each asset record field you want to populate with values from a collection object.

Preventing SL1 from Automatically Populating Fields in Asset Records

SL1 can automatically populate the fields in asset record every hour. However, SL1 can automatically populate these fields, only if:

- The **Enterprise Database: Asset Record Maintenance** process is enabled.
- The device aligned with an asset record does not include **Disable Asset Update** (defined in the **Device Properties** page).
- In the **Asset Automation** page (System > Settings > Assets), each field has been defined with **Auto Update** enabled.

Defining Default Behavior for Asset Records

On the **Asset Automation** page (System > Settings > Assets), you are allowed to define the default behavior for all asset records. You can define the default behavior for each standard field in the **Asset Properties** page. For each standard asset field, you can specify:

- **Field Name.** Name of the standard field. This field is populated automatically when you select a field from the register pane.
- **Data Source:** Defines how SL1 will populate an asset field and what type of data will be supplied in the field. For fields that can accept data from multiple sources, this field defines the precedence. For example, if a field can be populated with data from a Dynamic Application or with data from discovery, you can specify that you want SL1 to try and populate the field with data from discovery first, and if that isn't available, to use data from a Dynamic Application. Choices are:
 - *Update Disabled.* Don't define an automation policy for this field. This field must be populated manually after the asset record is created.
 - *Dynamic App.* Use data collected from a linked Dynamic Application to populate the field.
 - *Internal.* Use the value collected from auto discovery to populate this field.
 - *Dynamic App -> Internal.* Use the value from a Dynamic Application to populate the field. If it is not available, use the value supplied by auto discovery to populate this field.
 - *Internal -> Dynamic App.* Use the value collected during auto discovery to populate the field. If no value is retrieved during auto discovery, use the value from a Dynamic Application.

NOTE: Some fields can be set only to a Data Source of "internal." Some asset fields can be set only to a Data Source of "Dynamic App." Some asset fields can be set only to a Data Source of "Update Disabled," and some asset fields can be set to use multiple data sources.

- **Alert on Change.** Specifies whether or not SL1 should generate an event each time the value of the field changes in any asset record.
- **Auto Update.** Specifies whether the field's value is updated during nightly auto discovery. If this field is set to *No*, two behaviors will occur:
 - For devices for which there is not yet an asset record, during nightly auto discovery, SL1 will not automatically populate this field.
 - For devices for which there is already an asset record, during nightly auto discovery, SL1 will not automatically update this field.

- **Dynamic Apps.** Specifies how many data sources are linked to the asset field.

Chapter



4

Manual Asset Management

Overview

This chapter describes how to manually create and edit asset records in the SL1 system.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon (.
- To view a page containing all of the menu options, click the Advanced menu icon ().

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Manually Creating and Editing an Asset Record


Rather than clicking the asset icon () for a specific device, you can manually create an asset record. This is helpful when you want to:

- Create an asset record for an asset that is not a device.
- Create an asset record for an asset that is not discovered in the SL1 system.

To manually create an asset record:

1. Go to the **Asset Manager** page (Registry > Assets > Asset Manager).
2. In the **Asset Manager** page, click the **[Create]** button.
3. The **Asset Properties** page appears.
4. Supply values in one or more of the following fields:

Critical Information Pane

- **Organization**. Organization to which the asset is aligned. SL1 populates this field automatically. Clicking on the organization icon () leads to the **Organization Summary** page, where you can view information about the organization aligned with the asset.
- **Device-Link**. Name of the linked device in SL1. When manually creating an asset record, the only option is "none."
- **Make**. Manufacturer of the asset. Select from the options in the drop-down list.
- **Model**. Model description of the device. The description can be entered manually as any combination of alphanumeric characters, up to 64 characters in length.

Identification Pane

- **Serial**. Serial number of the asset. Can be entered manually as any combination of alphanumeric characters, up to 64 characters in length.
- **Asset tag**. Asset tag of the asset. Can be entered manually as any combination of alphanumeric characters, up to 64 characters in length.
- **RFID Number**. Radio frequency identification number. Can be entered manually as any combination of alphanumeric characters, up to 64 characters in length.

Administration Pane

- **Management Type**. Owner of the asset. Possible choices are:
 - Customer
 - Internal Group

- Lease
- Organization
- Other
- Partner
- Provider
- Self Owned

- **Administrator.** Administrator for the asset. If applicable, select a user from the drop-down list.
- **Technician.** Technician for the asset. If applicable, select a user from the drop-down list.

Physical Location Pane

- **Facility.** Business-specific location. The selections in the list can be customized by an Administrator.
- **Floor/Level.** The floor in the building where the asset is located.
- **Room Number.** The room in the building where the asset is located.

Cabinet Pane

- **Zone.** Zone where the asset is located.
- **Rack/Cabinet.** Rack or cabinet where the asset is located.
- **Shelf/U.** Shelf or unit where the asset is located.

Punch-Down Pane

- **Wall Plate.** Location of the cabling for the asset.
- **Closet Panel.** Location of the cabling for the asset.
- **Punch Block.** Location of the cabling for the asset.

Vital Asset Information Pane


In the **Vital Asset Information** pane, you can enter additional descriptive text to include with the asset record. You can format the text and include links and images in this field.

5. Click the **[Save]** button to save the new asset record.
6. After you click the **[Save]** button, the additional tabs in the **Asset Administration** page appear. In these tabs, you can define additional parameters for the asset record.

Editing an Existing Asset Record

From the **Asset Manager** page, you can edit an existing asset record. This is helpful when you want to add details (in addition to the information that SL1 automatically supplies) to an asset record.

To edit an existing asset record:

1. Go to the **Asset Manager** page (Registry > Assets > Asset Manager).
2. In the **Asset Manager** page, find the asset record you want to edit. Click its wrench icon ()
3. The **Asset Properties** page appears.
4. You can edit one or more of the values in the **Asset Properties** page, or click another tab and edit one or more values in another page in the Asset Administration panel. For more information on the tabs in the **Asset Administration** panel, see [Viewing Assets](#).

The following section will provide more detail about the individual fields in each field tab, excluding the **[Properties]** tab. For more information on the **[Properties]** tab, see [Manually Creating and Editing an Asset Record](#).

Asset Maintenance & Service

The **Asset Maintenance & Service** page displays business information about an asset. SL1 automatically populates as many fields in this page as possible. During nightly dynamic discovery, if SL1 discovers changes to a device, SL1 can automatically update any effected values in the device's asset record.

NOTE: See [Automatic Asset Management](#) to learn how SL1 can automatically update a device's asset record.

NOTE: This guide describes the default values for each drop-down field. You can customize the values in some of these fields on the **Select Objects** (System > Customize > Selected Objects) page.

While in the **Asset Maintenance & Service** page, if you see a plus sign (+) next to a field, you can add an additional entry to the drop-down list. This entry will then be available as a choice for all subsequent users.

The **Asset Maintenance & Service** page includes the fields below. SL1 will automatically populate as many fields as possible. You can supply a value in one or more fields, depending upon your business needs.

Purchase Information

- **Vendor.** Organization that sold the asset. You can select from the drop-down list of all vendors defined in the **Vendor Manager** page (Registry > Accounts > Vendors). For more information on vendors, see [Vendors](#).
- **Purchase Date.** Date the asset was purchased. Select month, date, and year from the drop-down lists.

Expense

- **Purchase Cost.** Cost of the asset. Can be any combination of alphanumeric characters, up to 12 characters in length.
- **Purchase Order.** Purchase order used to purchase the asset. Can be any combination of alphanumeric characters, up to 16 characters in length.
- **Check No.** Check number used to purchase the asset. Can be any combination of alphanumeric characters, up to 16 characters in length.

Depreciation

- **Method.** Method used to calculate depreciation. Select a value from the drop-down list.
- **Annual Rate.** Rate at which the asset depreciates. Select a value from the drop-down list.

Warranty Information

- **Vendor.** Organization that provides the warranty. You can select from the drop-down list of all vendors defined in the **Vendor Manager** page (Registry > Accounts > Vendors). For more information on vendors, see [Vendors](#) .
- **Policy No.** Warranty number. Can be any combination of alphanumeric characters, up to 32 characters in length.
- **Policy Description.** Description of what is covered under the warranty and any caveats. Can be any combination of alphanumeric characters, up to 68 characters in length.

Policy Dates

- **Policy Active.** Date the warranty went into effect. Select month, date, and year from the drop-down lists.
- **Policy Expiration.** Date the warranty expires. Select the month, date, and year from the drop-down lists.

Expense

- **Policy Cost.** Cost of warranty, in dollars and cents.
- **Purchase Order.** Purchase order used to purchase the warranty. Can be any combination of alphanumeric characters, up to 16 characters in length.
- **Check No.** Check number used to purchase the warranty. Can be any combination of alphanumeric characters, up to 16 characters in length.

Service Policy

- **Vendor.** Organization that provides the services policy. You can select from the drop-down list of all vendors defined in the **Vendor Manager** page (Registry > Accounts > Vendors). For more information on vendors, see [Vendors](#) .
- **Policy No.** Service policy number. Can be any combination of alphanumeric characters, up to 32 characters in length.
- **Policy Description.** Description of what is covered under the service policy and any caveats. Can be any combination of alphanumeric characters, up to 68 characters in length.

Policy Dates

- **Policy Active.** Date the service policy went into effect. Select month, date, and year from the drop-down lists.
- **Policy Expiration.** Date the service policy expires. Select month, date, and year from the drop-down lists.

Expense

- **Policy Cost.** Cost of service policy, in dollars and cents.
- **Purchase Order.** Purchase order used to purchase the service policy. Can be any combination of alphanumeric characters, up to 16 characters in length.
- **Check No.** Check number used to purchase the service policy. Can be any combination of alphanumeric characters, up to 16 characters in length.

Vital Service Information

In the **Vital Service Information** pane you can enter additional descriptive text to include with the warranty and service information for the asset record.

Asset Configuration

The **Asset Configuration** page displays technical information about the hardware configuration and system configuration of an asset. SL1 automatically populates as many fields in this page as possible. During nightly dynamic discovery, if SL1 discovers changes to an entity, SL1 can automatically update any changed values in the entity's asset record. If you want to override this behavior, the **Device Properties** page includes a setting that prevents SL1 from automatically updating a device's asset record.

NOTE: See [Automatic Asset Management](#) to read how to prevent SL1 from automatically updating a device's asset record.

NOTE: This guide describes the default values for each drop-down field. You can customize the values in some of these fields on the **Select Objects** page (System > Customize > Selected Objects) page.

While in the **Asset Configuration** page, if you see a plus sign (+) next to a field, you can add an additional entry to the drop-down list. This entry will then be available as a choice for all subsequent users.

The **Asset Configuration** page includes the following fields. SL1 will automatically populate as many fields as possible. You can supply values in one or more fields, depending on your business needs.

Classification

- **Type.** Device Category. SL1 populates this field automatically.
- **Function.** Description of the device's function. If possible, SL1 populates this field automatically.
- **Service Status.** Current use of the device. Possible choices are:
 - None
 - Backup
 - Development
 - Internal
 - Production

Operating Environment

- **BIOS/EPROM.** The name and version number of the BIOS or EPROM (whichever is applicable). Can be any combination of alphanumeric characters, up to 64 characters in length.
- **Operating System.** Operating system running on the asset. Select an entry from the drop-down list. If possible, SL1 populates this field automatically.
- **Host ID/SID.** An identifier for the asset, unique to the device's network. This ID defines networking and access permissions for the asset. Can be any combination of alphanumeric characters, up to 64 characters in length.

System Naming

- **OS System Name.** Operating system defined for the device. Can be any combination of alphanumeric characters, up to 64 characters in length. If possible, SL1 populates this field automatically.
- **DNS Host Name.** Name of the asset, as defined in the DNS system for the asset's network. Can be any combination of alphanumeric characters, up to 64 characters in length.

NOTE: SL1 can populate the **DNS Host Name** field automatically if you so choose. When it does so, it auto-populates with the device name unless you have the **DNS Hostnames** field set to *Use Full Domain Name (FQDN)* on the **Behavior Settings** page (System > Settings > Behavior), in which case it will use the FQDN.

To auto-populate the **DNS Host Name** field, you must first enable the **Auto Update** option for this field. To do so, go to the **Asset Automation** page (System > Settings > Assets), locate the **DNS Name** field and click its wrench icon, set the **Auto Update** field to Yes, and then click **[Save]**.

- **DNS Domain Name.** Domain in which the asset is a member, as defined in the DNS system for the device's network. Can be any combination of alphanumeric characters, up to 64 characters in length.

Hardware Profile

- **Installed Memory.** Amount of memory installed on the asset. If possible, SL1 populates this field automatically.
- **CPU Count.** Number of CPUs installed on the asset. Can be any combination of alphanumeric characters, up to three characters in length. If possible, SL1 populates this field automatically.
- **CPU Type/Make.** Manufacturer of CPUs. Can be any combination of alphanumeric characters, up to 32 characters in length. If possible, SL1 populates this field automatically.
- **Disk Array Size.** Size of the disk array, if applicable. Can be any combination of alphanumeric characters, up to 64 characters in length.
- **Disk Count.** Number of hard drive disks, if applicable. Can be any combination of alphanumeric characters, up to three characters in length.
- **Disk Size.** Combined size of hard drive disks, if applicable. Can be any combination of alphanumeric characters, up to 64 characters in length.

Asset Licenses

The **Asset Licenses** page displays license information for each installed software product on an asset. SL1 gathers and populates some of the fields automatically, if possible. During nightly dynamic discovery, if SL1 discovers changes to a device, SL1 can automatically updated any effected values in the device's asset record. If you want to override this behavior, the **Device Properties** page includes a setting that prevents SL1 from automatically updating a device's asset record.

NOTE: See [Automatic Asset Management](#) to read how to prevent SL1 from automatically updating a device's asset record.

In this page you can create new records or edit existing records. You can enter values in all the fields or in only those fields that are required for your business practices.

NOTE: This section describes the default values for each drop-down field. You can customize the values in some of these fields on the **Select Objects Editor** page (System > Customize > Selected Objects).

The following fields are included in the **Asset Licenses** page:

- **Software Title / Product.** Name of the software product. You can select from the drop-down list. The list contains all software installed on the asset and a list of common software products.
- **Version.** Version number of the software. Can be any combination of alphanumeric characters, up to 16 characters in length.
- **Serial.** Serial number of the software. Can be any combination of alphanumeric characters, up to 64 characters in length.
- **Software Key.** License number or license key for the software. Can be any combination of alphanumeric characters, up to 64 characters in length.
- **Vendor.** Organization that sold the software. You can select from the drop-down list of all vendors defined in the **Vendor Manager** page (Registry > Accounts > Vendors).
- **Memo.** Any additional notes about the software. Can be any combination of alphanumeric characters, up to 128 characters in length.

Asset IP Networks

The **Asset IP Networks** page displays technical information about each network interface on a device. SL1 automatically populates as many fields in this page as possible. During nightly dynamic discovery, if SL1 discovers changes to a device, SL1 can automatically update any changed values in the device's asset record. If you want to override this behavior, the **Device Properties** page includes a setting that prevents SL1 from automatically updating a device's asset record.

NOTE: See the section on [Automatic Asset Management](#) to read how to prevent SL1 from automatically updating a device's asset record.

In this page, you can create new records or edit existing records. You can enter values in all fields or in only those fields that are required for your business processes.

NOTE: This section describes the default values for each drop-down field. You can customize the values in some of these fields on the **Select Objects Editor** page (System > Customize > Selected Objects).

The following fields are in the **Asset IP Networks** page:

- **Identification.** Description of the network interface, as defined by the device's operating system (if applicable). Select an entry from the drop-down list. If possible, SL1 populates this field automatically.
- **Speed.** Speed and description of the interface (full duplex or half duplex and the number of megabits per second that can pass through an interface). Select an entry from the drop-down list. If possible, SL1 populates this field automatically.
- **IP Address.** IP address associated with the network interface. Can be any combination of alphanumeric characters, up to 15 characters in length. If possible, SL1 populates this field automatically.
- **Network Mask.** Subnet mask address for the network interface, if applicable. Can be any combination of alphanumeric characters, up to 15 characters in length.
- **MAC Address.** Short for Media Access Control Address. A unique number that identifies network hardware. MAC Addresses are defined by the hardware manufacturer. Can be any combination of alphanumeric characters, up to 18 characters in length. If possible, SL1 populates this field automatically.
- **Blade/Port.** The server blade or switch blade and port of the network interface, if applicable. Can be any combination of alphanumeric characters, up to 15 characters in length.
- **Gateway Address.** IP of the gateway used by the network interface, if applicable. Can be any combination of alphanumeric characters, up to 15 characters in length.
- **Name Server Address.** IP address of the primary Domain Name server for the network interface. Can be any combination of alphanumeric characters, up to 15 characters in length.
- **Linked Device.** Device to which the interface is linked—for example, a switch, router, or firewall. Select an entry from the drop-down list.

Asset Components

The **Asset Components** page displays technical information about each hardware component associated with an asset. SL1 automatically populates as many fields in this page as possible. During nightly dynamic discovery, if SL1 discovers changes to a device, SL1 can automatically update any changed values in the device's asset record. If you want to override this behavior, the **Device Properties** page includes a setting that prevents SL1 from automatically updating a device's asset record.

NOTE: See the section on [Automatic Asset Management](#) to read how to prevent SL1 from automatically updating a device's asset record.

In this page you can create new records or edit existing records. You can enter values in all fields or in only those fields that are required for your business practices.

NOTE: This section describes the default values for each drop-down field. You can customize the values in some of these fields on the **Select Objects Editor** page (System > Customize > Selected Objects).




The following fields are in the **Asset Components** page:

- **Make.** Manufacturer of the sub-component. Select an entry to the drop-down list. If possible, SL1 populates this field automatically.
- **Model.** Description of the sub-component. Can be any combination of alphanumeric characters, up to 40 characters in length. If possible, SL1 populates this field automatically.
- **Serial.** Serial number of the sub-component. Can be any combination up alphanumeric characters, up to 32 characters in length. If possible, SL1 populates this field automatically.
- **Type.** Generic description of the hardware sub-component. Select an entry from the drop-down list. If possible, SL1 populates this field automatically.
- **Connect.** The method by which the sub-component communicates with the device. Select an entry from the drop-down list.
- **Slot/Bus.** The slot or bus where the sub-component resides. Can be any combination of alphanumeric characters, up to 16 characters in length. If possible, SL1 populates this field automatically.
- **Memo.** Additional notes about the sub-component. Can be any combination of alphanumeric characters, up to 32 characters in length. If possible, SL1 adds information retrieved from the device and any agents or Dynamic Applications running on the device.

Asset Notes and Attachments

The **Asset Notes & Attachments** page displays notes about the asset that has been created with the **Notepad Editor** modal page. You can access the **Notepad Editor** modal page from the **[Actions]** menu in any page in the **Asset Administration** panel. Each note created in the **Notepad Editor** page appears in the **Asset Notes & Attachments** page for the asset.

You can perform the following on each note entry:

- **To view a note's attachment,** click the paperclip icon (.
- **To edit the content of a note,** click the wrench icon (). The **Notepad Editor** modal page is displayed. You can update the note; format the text; insert content from a saved template; and add an attachment, image, or video to the note. Click the **[Save]** button to save your changes.
- **To delete a note,** click the bomb icon (.

The Actions Menu

Each separate tab in the **Asset Administration** panel includes the **[Actions]** menu. This menu allows users to perform many asset-related tasks directly from the current page. The **[Actions]** menu looks like a button and is located in the upper right of the page.

The entries in the **[Actions]** menu are described below:

- **My Bookmarks.** Displays the **Administer Bookmarks** modal page, where you can access pre-defined bookmarks or save a new bookmark.
- **Custom Navigation.** Leads to the **Custom Navigation** modal page, where you can define a custom navigation tab for the **Asset Administration** panel for the current asset. The **[Custom]** tab will contain a link to an outside URL.
- **Create a Ticket.** Leads to the **Ticket Editor** page, where you can define a new ticket about the asset. To learn more about creating a ticket, see [Asset Reports and Tickets](#).
- **Notepad Editor.** Leads to the **Notepad Editor** modal page, where you can enter a note to include with the asset record. The note will appear in the **Asset Notes & Attachments** page for the asset.
- **Product Catalog.** Leads to the **Product Catalog** modal page, where you can associate a product SKU with the asset record or disassociate the asset record from a product SKU.
- **Report Creator.** Leads to the **Report Creator** modal page, where you can define an asset report, including the information to include in the report and the format in which to generate the report.
- **Rediscover.** Queues the device associated with the asset for rediscovery. Any fields that are linked to dynamic discovery through the **Asset Automation** page will be updated.

Editing Multiple Asset Records

The **Asset Manager** page contains a drop-down field in the lower right called **Select Action**. This field allows users to apply an action to multiple asset records at once.

You can make changes to multiple asset records simultaneously; however, you can perform these "bulk edits" only for the following actions and fields:

- Change the value in the **Asset Properties/Organization** field.
- Change the value in the **Asset Properties/Make** field.
- Change the value in the **Asset Properties/Management Type** field.
- Change the value in the **Asset Properties/Facility/Data Center** field.
- Change the value in the **Asset Configuration/Function** field.
- Change the value in the **Asset Configuration/Service Status** field.

NOTE: See the section on [Automatic Asset Management](#) to read how to prevent SL1 from automatically updating a device's asset record.

To apply an action to multiple asset records:

1. In the **Asset Manager** page, select the checkbox for each asset record you want to apply the action to. To select all of the checkboxes for all asset records, select the red check mark (☑) at the top of the page.
2. In the **Select Action** drop-down list, select one of the following actions:

- *DELETE Selected Assets*. Deletes selected asset records.
- *CLEAR Device Link*. Removes the association between the asset record and the linked device.
- *Set Function*. Changes the value in the **Asset Configuration/Function** field of the asset record. The list of choices includes all of the entries for that field. System administrators can go to the **Select Objects Editor** page to customize the entries that appear in this list.
- *Set Owner*. Changes the value in the **Asset Properties/Management Type** field of the asset record. The list of choices includes all of the entries for that field. System administrators can go to the **Select Objects Editor** page to customize the entries that appear in this list.
- *Set Status*. Changes the value in the **Asset Configuration/Service Status** field of the asset record. The list of choices includes all of the entries for that field. System administrators can go to the **Select Objects Editor** page to customize the entries that appear in this list.
- *Set Make*. Changes the value in the **Asset Properties/Make** field of the asset record. The list of choices includes all of the entries for that field. SL1 system administrators can go to the **Select Objects Editor** page to customize the entries that appear in this list.
- *Set Location*. Changes the value in the **Asset Properties/Facility** field of the asset record. The list of choices includes all the entries for that field. System administrators can go to the **Select Objects Editor** page to customize the entries that appear in this list.
- *Move To Organization*. Changes the value in the **Asset Properties/Organization** field of the asset record. The asset record(s) will be associated with the selected organization.

Chapter



5

Vendors

Overview

A vendor is a business that sells a product or service. SL1 provides a list of vendor records to help manage and consolidate your list of vendors and maintain contact information for each vendor. You can view, manage, and create new vendors, generate a report for a single vendor, or generate a report for multiple or all vendors, among other features.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ().
- To view a page containing all of the menu options, click the Advanced menu icon ().

This chapter covers the following topics:

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<i>Relationships Between Asset Records and Vendor Records</i>	38

Viewing and Searching the List of Vendor Records

You can select from the drop-down list of all vendors defined in the **Vendor Manager** page (Registry > Accounts > Vendors). The **Vendor Manager** page displays information on each vendor and allows you to search for vendors, among other options. To view a list of vendors:

1. Go to the **Vendor Manager** page (Registry > Accounts > Vendors).
2. The **Vendor Manager** page displays the following information about each vendor:
 - **Vendor Name**. Name of the vendor.
 - **ID**. Unique numeric ID, assigned to each vendor by SL1.
 - **City**. City in which the vendor resides.
 - **State**. State in which the vendor resides.
 - **Phone**. Vendor's main phone number.
 - **Email**. Email address for the vendor.
 - **Assets**. Specifies the number of asset records associated with the vendor. Clicking the asset icon (🔍) icon in this column leads to the **Vendor Assets** page, where you can view a list of asset records associated with the vendor.
 - **User Edit**. The user who created or last edited the vendor record.
 - **Date Edit**. Date and time the vendor record was created or last edited.

Filtering the List of Vendors

The **Vendor Manager** page includes nine filters, in the top row in the list of vendors. You can specify one or more parameters to filter the display of vendor accounts. Only vendor accounts that meet all the filter criteria will be displayed in the **Vendor Manager** page.

You can filter by one or more of the following parameters. The list of vendor accounts is dynamically updated as you select each filter.

- For each filter except **Date Edit**, you must enter text to match against. SL1 will search for vendor accounts that match the text, including partial matches. Text matches are not case-sensitive. You can use the following special characters in each filter:
 - , (comma). Specifies an "or" operation. For example:
"dell, micro" would match all values that contain the string "dell" OR the string "micro".
 - & (ampersand). Specifies an "and" operation. For example:
"dell & micro" would match all values that contain the string "dell" AND the string "micro".

◦ **!** (exclamation mark). Specifies a "not" operation. For example:

"!dell" would match all values that do not contain the string "dell".


- **Vendor Name.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching name.
- **ID.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching ID.
- **City.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that are located in a matching city.
- **State.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that are located in a matching state.
- **Phone.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching phone number.
- **Email.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching email address.
- **Asset.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching number of associated asset records.
- **User Edit.** You can enter text to match, including special characters (comma, ampersand, and exclamation mark), and the **Vendor Manager** page will display only vendor accounts that have a matching "edited by" value.
- **Date Edit.** You can select from a list of time periods. The **Vendor Manager** page will display only vendor accounts that have been created or edited within that time period.

Creating a Vendor Record

You can create a new vendor record from the **Vendor Manager** page. To create a new vendor record:


1. Go to the **Vendor Manager** page (Registry > Accounts > Vendors).
2. In the **Vendor Manager** page, click the **[Create]** button in the top right of the page.
3. The **Create New Vendor** modal page appears. To define a new vendor record, supply values in the following fields:
 - **Vendor Name.** Name of the Vendor. Can be any combination of characters up to 64 characters in length.

TIP: Click the Google icon () next to the **Vendor Name** field to search for information about the vendor.

- **Street Address.** Street address of the vendor. Can be up to five lines, with up to 60 characters per line.
 - **City.** City where the vendor is located. Can be up to 64 characters in length.
 - **State.** State where the vendor is located. Select from the drop-down list.
 - **Postal Code.** Zip code of the vendor. Can be up to 15 characters in length.
 - **Country.** Country where the vendor is located. Select from the drop-down list.
 - **Phone.** Business phone number for the vendor. Can be up to 36 characters in length.
 - **Fax Machine.** Fax number for the vendor. Can be up to 36 characters in length.
 - **Toll Free Number.** Toll-free phone number for the vendor. Can be up to 36 characters in length.
 - **Email Address.** Vendor's main Email address. Can be up to 64 characters in length.
 - **Contact First Name.** First name of vendor contact. Can be up to 128 characters in length.
 - **Contact Last Name.** Last name of vendor contact. Can be up to 64 characters in length.
 - **Title.** Contact's title. Can be up to 64 characters in length.
 - **Department.** Contact's department. Can be up to 64 characters in length.
 - **Customer ID.** Customer ID associated with the vendor. Can be up to 24 characters in length.
 - **Service ID.** Service ID associated with the vendor. Can be up to 64 characters in length.
 - **Memo.** Users can add notes and memos about the vendor in this area.
 - **Vendor URL.** Users can add up to three URLs associated with the vendor. Users can then click the globe () icon to execute the URL after the vendor record has been saved. URL must include "http://" (without the quotation marks).
4. To save the vendor record, click the **[Save]** button. To discard all changes and reset all fields to their previous values, click the **[Refresh]** button.

Editing a Vendor Record

You can edit existing vendor records from the **Vendor Manager** page. To edit an existing vendor record:

1. Go to the **Vendor Manager** page (Registry > Accounts > Vendors).
2. Find the vendor record you want to edit. Click its wrench icon ()
3. The **Vendor Profile** page appears, with the same fields as described in [Creating a Vendor Record](#). You can edit the values in one or more fields.

4. Click the **[Save]** button to save your changes. Clicking the **[Refresh]** button will discard your changes and reset all fields with their previous content.

Deleting a Vendor Record

You can delete one or more vendor records from the **Vendor Manager** page. To delete one or more vendor records:

1. Go to the **Vendor Manager** page (Registry > Accounts > Vendors).
2. Find the vendor(s) you want to delete. Select their checkbox to the right of the page .
3. For each vendor record you want to delete, select its checkbox.
4. In the **Select Action** drop-down field (in the lower right), choose *DELETE*.
5. Click the **[Go]** button.
6. The selected vendor record(s) will be deleted from SL1.

Generating a Report for a Single Vendor


From the **Vendor Manager** page, you can generate an HTML report for a single vendor. The report displays all the information from the **Vendor Profile** page and the **Vendor Assets** page.

Vendor Profile	
Vendor Name	Dell Sales
Address	
City	Round Rock
State	Texas
Country	United States
Postal Code	
Phone	877-671-3355 x3678
Fax	
Toll Free	
Email	jonn_higgins@dell.com
Contact Name	
Title	
Department	
Service ID	
Customer ID	5

Miscellaneous	
Vendor URL	
Vendor URL	
Vendor URL	
Memo	

To generate a report for a single vendor:

1. Navigate to the **Vendor Manager** page (Registry > Accounts > Vendors).
>

- In the **Vendor Manager** page, find the vendor for which you want to generate a report. Click its printer icon (). An HTML report appears, populated with data from the selected vendor.
- You can print the report or right-click to save the HTML page.

Generating a Report for Multiple Vendors

From the **Vendor Manager** page, you can generate an .XLSX report on all, multiple, or a single vendor in SL1. The report will contain information about all vendors in the **Vendor Manager** page.

EM7™ Vendor Report																				
Management Systems																				
April 17, 2015, 3:46 am																				
Report Data																				
Vendor ID	Vendor Name	Address	City	State / Province	Postal Code	Country	Last Name	First Name	Email	Phone	Fax	Title	Department	Service ID	Customer ID	Toll-Free	Assets	Domains	Edit User	Edit Date
24	Active IT Services	123 Main St	Anchorage	AK	99501	US	—	—	support@activeit.com	800-555-1212	—	—	—	1007448	123456789	800-555-1212	0	0	patel	
17	ACS Environmental Svcs	200 Seaside Ave	Pacific	CA	94444	US	Guster	Tony	assistance@acsenvironmental.com	855-467-8982	—	—	—	—	76439	76439	—	0	0	patel
12	Brocade	100 Ridger Way San Jose CA 95134 Tel: 408-335-3009 Fax: 408-335-8101	San Jose	CA	95134	US	Evetry	WIB	info-vty@brocade.com	408-333-8000	—	Account Manager	Sales	ET438	4402	800-792-8061	0	0		
4	CDW Sales	300 N. Milwaukee Ave. Vernon Hills, IL 60061	Vernon Hills	IL	60061	US	Hortis	Alagna	amortis@cdw.com	800.886.4239	—	Account Executive	Sales	41987-EX	41987	800.383.4239	1	0		
3	Claro	—	San Jose	CA	—	US	Alonso	Eric	eric@claro.com	800-553-2447	—	Account Manager	Sales	SL4208	679248	800-553-2447	0	0		
2	Dell Basic Support	—	Round Rock	TX	—	US	Walt	—	support@dell.com	800-503-4237	—	—	—	—	—	—	0	0		
1	Dell ProSupport (APAC)	Dell Australia Pty Limited Building 3, 14 Aquatic Drive Frenchs Forest NSW 1505, 2008	Frenchs Forest	NSW	2086	AU	Hibbard	Alice	1800-812-393	—	—	Technical Account Mgr	LE - APAC	789801	1092-812-393	—	0	0		
11	Dell ProSupport (EMEA)	Dell House The Boulevard Can Road Bracknell Berkshire RG12 1LP	—	—	—	GB	Deane	Alison	alison_deane@dell.com	2844-444-4999	—	Technical Account Mgr	LE - EMEA	—	—	2844-444-4999	0	0		
1	Dell ProSupport (US)	—	Round Rock	TX	—	US	—	—	—	866-616-3115	—	—	—	—	—	—	0	0		
5	Dell Sales	—	Round Rock	TX	—	US	Higgins	John	john_higgins@dell.com	(877) 671-3355 x3878	—	—	—	—	—	(877) 671-3355	0	0		
10	Facilities Svcs (Austin)	—	Austin	TX	78723	US	Morgana	Adam	adam@facilities.com	512-276-2991	—	—	—	—	—	—	0	0		
12	Facilities Svcs (Beijing)	—	Beijing	—	—	CN	Chen	Edward	edwardchen@facilities.com	861026116152026	—	—	—	—	—	—	0	0		
10	Facilities Svcs (DR Meeting Partner)	—	Albuquerque	NM	87101	US	Egerton	Clair	clair@facilities.com	505-322-6789	—	—	—	—	—	800-222-7844	0	0		
8	Facilities Svcs (HQ)	—	Falls Church	VA	22046	US	Bilars	Janet	janet@facilities.com	703-526-2472	—	Property Manager	—	—	—	800-327-9999	0	0		
14	Facilities Svcs (London)	—	London	—	—	GB	Norman	Clare	clarenorman@facilities.com	414-442-7420-4000	—	—	—	—	—	—	0	0		
9	Facilities Svcs (NYC)	—	New York	NY	10007	US	Rogers	Jay	assistance@facilities.com	212-306-3800	—	—	—	—	—	—	0	0	spinnaker	
23	Herwell Packard	—	—	—	—	US	Jones	Swain	support@hpc.com	—	—	Account Manager	Sales	SL2812	679248	877-963-7400	3	0		
20	IBM	1 New Orchard Rd	Armonk	NY	10801	US	—	—	www.ibm.com	814-486-2000	—	—	—	—	—	800-752-8872	0	0	spinnaker	
10	Juniper	1194 North Mathilda Avenue	Sunnyvale	CA	94089-1209	US	Simpson	Alex	alex@juniper.com	408-745-2000	—	—	—	—	—	800-596-4737	0	0		
22	Microsoft, Inc.	One Microsoft Way 100th Ave. NE, Suite 1400	Bellevue	WA	98004	US	—	—	support@microsoft.com	—	—	—	—	—	—	4803-4567-5684447	0	0	spinnaker	
21	NetApp Support/Edge Standard	495 East Java Dr	Sunnyvale	CA	94089	US	—	—	support@netapp.com	877-263-8277	—	—	—	—	—	800-443-4537	0	0	spinnaker	
19	Oracle Support	500 Oracle Parkway	Redwood Shores	CA	94065	US	Dee	John	john.dee@oracle.com	965-899-8890	—	—	—	—	—	867684321	123456789	800-688-8921	0	0
6	Scansage Support	10700 Partridge Blvd, Suite 200	Reston	VA	20191	US	—	—	support@scansage.com	703-504-1010	—	—	—	—	—	871-338-8000	—	0	0	

To generate a report on all or multiple vendors in SL1:

- Navigate to the **Vendor Manager** page (Registry > Accounts > Vendors).
- In the **Vendor Manager** page, click the **[Report]** button.


NOTE: If you want to include only certain vendors in the report, use the search fields at the top of each column. You can then click the **[Report]** button, and only the vendors displayed in the **Vendor Manager** page will appear in the report.

- After clicking the **[Report]** option, specify whether you want to save the report to your local computer or open the report immediately. The report will contain all the information displayed in the **Vendor Manager** page.

Creating a Ticket for a Vendor Record

You can create a ticket about a vendor record from the **Vendor Manager** page. A ticket is a request for work, and allows you to monitor required work tasks associated with your network.

To create a ticket for a vendor report:


- Navigate to the **Vendor Manager** page (Registry > Accounts > Vendors).
- Find the vendor record for which you want to create a ticket. Click its life ring icon () to the right of the page.

3. In the **Ticket Editor** page, supply a value in each field.
4. Click the **[Save]** button to save the ticket. To read more about creating tickets, see the *Ticketing* manual.

Relationships Between Asset Records and Vendor Records




An asset is a piece of equipment owned by an organization. An asset record is a collection of information about that asset. SL1 allows you to associate asset records with a specific vendor. You can view associated asset records from the **Vendor Manager** page and the **Vendor Assets** page.

To associate an asset record with a specific vendor:

1. Navigate to the **Asset Manager** page (Registry > Assets > Asset Manager).
2. In the **Asset Manager** page, find the asset record you want to associate with a specific vendor. Click its wrench icon () .
3. The **Asset Properties** page appears. Click the **Maintenance** tab. The **Asset Maintenance & Service** page appears.
4. In the **Asset Maintenance & Service** page, in the *Vendor* field, select from the list of all vendor records to associate with the asset.
5. Click the **[Save]** button to save the changes to the asset record.

The asset record now appears in the **Vendor Manager** page. From the **Vendor Manager** page you can also access the **Vendor Assets** page, which displays information about each asset associated with the vendor.

To view the **Vendor Assets** page:

1. Navigate to the **Vendor Manager** page (Registry > Accounts > Vendors).
2. In the **Vendor Manager** page, an asset icon () will appear for each vendor record that is associated with an asset record. Click the asset icon to view a list of assets associated with a vendor record.
3. The **Vendor Assets** page appears, and displays the following information:
 - **Asset Make**. Manufacturer of the device. If possible, SL1 populates this field automatically.
 - **Asset Model**. Model description of the device. If possible, SL1 populates this field automatically.
 - **Device-Link**. Name of the device in SL1. SL1 populates this field automatically. Clicking on the device icon () leads to the **Device Properties** page. Clicking on the bar-graph icon () leads to the **Device Summary** page.
 - **Organization**. The organization to which the asset is assigned.
 - **AID**. Asset ID. A unique, numeric identifier, assigned to the asset record by SL1.
 - **Function**. Description of the asset's function. If possible, SL1 populates this field automatically.
 - **Serial No**. Serial number of the asset.
 - **Asset No**. Asset tag of the asset.

Chapter

6



Asset Reports and Tickets

Overview

SL1 allows you to generate two types of reports for asset records:

- A **report of all asset records** that you can view in the **Asset Manager** page.
- A **report for a single asset record**.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ().
- To view a page containing all of the menu options, click the Advanced menu icon ().

This chapter covers the following topics:

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Creating a Report for a Single Asset Record	42
Creating a Ticket About an Asset Record	43

Creating a Graphical Overview for Asset Records

You can generate a graphical overview for asset records in the **Asset Dashboard** page. You can view reports on assets grouped by manufacturer, function, or location. The **Asset Dashboard** page is located at Reports > Leaderboards > Assets.

Selecting an Asset Report to View

In the **Asset Dashboard** page, you can view two different graphs and also define the start date for each graph. To select a graph to view and define its start date:

1. Go to the **Asset Dashboard** page (Reports > Leaderboards > Assets).
2. In the **Asset Dashboard** page, select one of the following options from the **Select Graph** drop-down list in the upper right of the page:
 - **by manufacturer**. Displays the Managed Assets by Manufacturer report, where the assets are grouped by manufacturer. For each asset, the manufacturer is retrieved from the *Make* field in the **Asset Properties** page.
 - **by location**. Displays the Managed Assets by Location report, where the assets are grouped by Facility/Data Center. For each asset, the location is retrieved from the *Facility/Data Center* field in the **Asset Properties** page.

Managed Assets by Manufacturer

This graph displays distribution of assets by manufacturer. For each asset, the manufacturer is retrieved from the *Make* field in the **Asset Properties** page.

- The y-axis displays the number of assets.
- The x-axis displays the manufacturer.
- Mousing over a point on the graph displays the number of assets for that manufacturer.

Managed Assets by Location

The pie graph displays the distribution of assets by location. For each asset, the location is retrieved from the *Facility/Data Center* field in the **Asset Properties** page.

- Each slice has a unique color and represents a specific location.
- Each slice is labeled with its percentage of total devices at all locations.
- The legend to the left maps the slice color to location and lists the number of assets at each location.

Creating a Report for All Asset Records

From the **Asset Manager** page you can generate a single report that contains information about multiple or all asset records. The **Asset Manager** page is located at Registry > Assets > Asset Manager.

Asset List Report		Device	Make	Model	Hostname	Configuration
3	System	Azure Device[3]	Microsoft	Azure Services		Azure Device
5	System	Integration Service Docs[5]	ScienceLogic	Integration Service		Integration Service Docs
1	System	em7ao[1]	ScienceLogic, Inc.	EM7 All-In-One		em7ao
2	System	em7ao[2]	ScienceLogic, Inc.	EM7 All-In-One		em7ao
4	System	ServiceNow Instance 1[4]	ServiceNow	Instance		ServiceNow Instance 1

To generate a report on multiple or all asset records:

1. Navigate to the **Asset Manager** page (Registry > Assets > Asset Manager) .
2. To include only certain assets in the report, use the "search as you type" fields at the top of each column. You can filter the list by one or more column headings.
3. Click the **[Report]** button The **Export current view as a report** modal page appears.
4. Select the format in which SL1 will generate the report. Your choices are:
 - Adobe Acrobat document (.pdf)
 - Web page (.html)
 - Excel spreadsheet (.xlsx)
 - OpenDocument Spreadsheet (.ods)
 - Comma-separated values (.csv)
5. Click **[Generate]**. The report will contain all the information displayed in the **Asset Report** page. You can view the report now or save it for later viewing.

The report displays the following information from each asset record:

- Organization
- Device
- IP Address
- MAC Address
- Make
- Model
- Serial
- Asset Tag
- Type
- Function
- Asset Owner
- Service Status
- Host ID / SID
- Operating System
- OS System Name

- DNS Hostname
- DNS Domain Name
- Installed Memory
- CPU Count
- CPU Type / Make
- BIOS / EPROM
- Disk Array Size
- Disk Count
- Disk Size

Creating a Report for a Single Asset Record

You can view a customizable report for a single asset record. You can specify the asset record to create the report about, the information to include in the report, and the format of the generated report.

Asset Profile Information	
Organization	System
Device-Link	7609S-NPE3.cisco.com
Make	Cisco Systems
Model	
Serial Number	12233344
Asset Tag	--
Asset Record ID	1

Asset Classification	
Type	
Function	new
Service Status	


Physical Location	
Facility	West USA Data Center
Floor/Room No.	--
Zone/Rack/Shelf	--
Plate/Panel/Patch	--

Point-Of-Contact	
Owner Type	
Administrator	--
Technician	--

Configuration Profile	
Host ID / SID	--
Operating System	--
OS System Name	--
Host Name	--
Domain Name	--


Hardware Profile	
Installed Memory	--
CPU Count	--

To generate a report for a single asset record:

1. Navigate to the **Asset Manager** page (Registry > Assets > Asset Manager).
2. In the **Asset Manager** page, find the asset record for which you want to generate a report. Click its printer icon (). The **Report Creator** modal page appears.
3. Select from the following list of formats in which the report can be generated:
 - Create Report as HTML Document
 - Create Report as PDF Document
 - Create Report as MS Word Document
 - Create Report as MS Excel Document
 - CSV - Comma Separated Values
4. Select one of the following to specify the information to include in the report:
 - **Full Report**. Displays all the information from all of the pages in the asset record.
 - **Partial**. Displays all of the information in the **Asset Properties** page and some information from the **Asset Maintenance & Service** page and the **Asset Configuration** page.
 - **Minimal**. Displays a subset of information from the **Asset Properties** page.
 - **Notes**. Displays only the notes from the **Asset Notes & Attachments** page.
 - **Hardware**. Displays all of the information from the **Asset Components** page and some information from the **Asset Configuration** page.
 - **Network**. Displays all of the information from the **Asset IP Networks** page and some information from the **Asset Configuration** page.
 - **Support**. Displays all of the information in the **Asset Properties** page and some information from the **Asset Maintenance & Service** page.
 - **Software**. Displays all of the information from the **Asset Licenses** page and displays minimal information from the **Asset Properties** page.
 - **Legacy**. Displays a legacy asset report.
5. When you select the information to include in the report, SL1 will generate the report. You can immediately view the report or save it to a file for later viewing.


Creating a Ticket About an Asset Record

A **ticket** is a request for work. This request can be in response to a problem that needs to be fixed, for routine maintenance, or for any type of work required by your enterprise.

Tickets can be created manually or from events. Users can create a ticket from any place in SL1 where they can click the ticket icon, which comes in the form of a life ring (.

Creating a New Ticket

To create a ticket for an asset record:



1. Navigate to the **Asset Manager** page (Registry > Assets > Asset Manager).
2. In the **Asset Manager** page, select the asset for which you want to create a ticket.
3. Click the life ring icon ().
4. The **Ticket Editor** page appears. In the **Ticket Editor** page, some of the fields will be automatically populated with information about the asset. You can create a new ticket from this page.
5. Click the **[Save]** button to save the new ticket.

Asset Settings and Customization

Overview

This section describes the device-level and global settings that affect assets. It also describes how to customize fields and drop-down lists in asset records.

Use the following menu options to navigate the SL1 user interface:

- To view a pop-out list of menu options, click the menu icon ().
- To view a page containing all of the menu options, click the Advanced menu icon ().

This chapter covers the following topics:

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<i>Global Settings That Affect Asset Records</i>	46
<i>Customizing Select Objects</i>	47
<i>Customizing Form Fields</i>	48

Device Settings That Affect Asset Records


The **[Settings]** tab of the **Device Investigator** and the **Device Properties** page both include a field, **Disable Asset Update**, which allows you to disable the creation of or automatic updates to asset records for a specific device.

For the selected device, this checkbox overrides any settings defined in the **Asset Automation** page (System > Settings > Assets).

To edit the **Disable Asset Update** field from the **Device Investigator**:

1. Go to the **Devices** page.
2. Locate the device you want to update this setting for and click its **Device Name** hyperlink. The **Device Investigator** for that device appears.
3. Click the **[Settings]** tab.
4. Click **[Edit]**.
5. Do one of the following in the **Disable Asset Update** field:
 - Select the checkbox if you do not want SL1 to create or update asset records for that device.
 - Clear the checkbox if you want SL1 to create or automatically update the asset record associated with the device with any new information during hourly asset automation.
6. Click **[Save]**.

To edit the **Disable Asset Update** field from the **Device Manager** page:

1. Go to the **Device Manager** page (Devices > Classic Devices, or Registry > Devices > Device Manager in the classic SL1 user interface).
2. Locate the device you want to update this setting for and click its wrench icon (). The **Device Properties** page for that device appears.
3. In the Preferences section, do one of the following in the **Disable Asset Update** field:
 - Select the checkbox if you do not want SL1 to create or update asset records for that device.
 - Clear the checkbox if you want SL1 to create or automatically update the asset record associated with the device with any new information during hourly asset automation.

Global Settings That Affect Asset Records

In addition to the [default asset record behavior settings](#) that you can set on the **Asset Automation** page, the **Behavior Settings** page includes two fields that affect assets across your SL1 system.

To update these fields from the **Behavior Settings** page:

1. Go to the **Behavior Settings** page (System > Settings > Behavior).
2. Update one or more of the following fields:

- **Enable Unique Asset Tag to Organization Constraint.** Select this option if you want to prevent an asset from being moved to another organization if the new organization is already aligned to an asset with the same asset tag. Do not select this option if you want to allow assets with the same asset tags in the same organization. This field is selected by default.
- **Asset Warranty Expiry.** Select the amount of time that should pass before SL1 generates an event to notify you that an asset's warranty is about to expire. The choices range from 1 day to 9 months.

Customizing Select Objects

SL1 allows you to customize the options, called select objects, that appear in the drop-down lists associated with assets. The following steps describe how to customize select objects.

1. Navigate to the **Select Objects Editor** page (System > Customize > Selected Objects).
2. In the upper right of the page, the **Filter** drop-down displays a list of entries that can be customized, separated by project area (such as "Assets"). Each entry in the drop-down list specifies the tab on which the drop-down list appears (such as "Properties"), and the name of the drop-down list (such as "Facility").
3. The default asset drop-down lists you can customize are:
 - **Components tab**
 - Connect
 - Type
 - **Configuration tab**
 - Asset Owner
 - Function
 - Installed Memory (Mb.)
 - Operating System
 - Service Status
 - **Licenses tab**
 - Product
 - **Networks tab**
 - Identification
 - Speed
 - **Properties tab**

- Facility
 - Make
 - Rack
 - Shelf
 - Zone
 - Asset Owner
4. To add a Select Object to a specific drop-down, select the field name for which you want to add an object. The **Select Objects Editor** is populated with the Select Objects already defined for the drop-down list.
 5. In the top pane, supply a **Definition / Value** for the desired Select Object and click **[Save]**.
 6. To delete a Select Object from the **Select Objects Editor**, click its bomb icon (💣).

NOTE: Asset Records can also be affected by a Device Template. With a Device Template, you can configure a device for nightly auto update, and can disable asset updates.

Customizing Form Fields



In addition to the default set of asset forms, you can add additional custom forms that will appear for all asset records. Custom forms are either embedded (appear in one of the default tabs) or tabbed (appear in a new, user-defined tab). You can define only one embedded asset form, which appears under the **[Configuration]** tab. You can add as many tabbed forms as you need.

As the embedded form has already been created in the **[Configuration]** tab, the user can begin editing it with additional form fields that are not already included in the **[Configuration]** tab.

To add a tabbed form:

1. Navigate to the **Application Forms** page (System > Customize > Form Fields).
2. Click the **[Create]** button. Enter values in the following fields:
 - **GUI Type.** Select *Tabbed*.
 - **Form Type.** Select *Asset*.
 - **Description.** Enter a description for the tabbed form.
3. Click the **[Create]** button.
4. The user now has two forms they can edit: The default embedded form, or the newly created tabbed form. Many of the same form fields are available in both options, although some are only available in the newly created tab.
5. Click the wrench icon (🔧). The **Editing Form** page appears.
6. The **Editing Form** page allows you to specify the layout and form fields that will appear on the custom form. The **[Add Layout]** buttons allow you to add container elements that can be used to arrange the layout of the form fields.

7. The **Add Forms** form fields and buttons allow you to add form fields to the custom forms. The options are:

- **Form Name/Description**. The name and description of the new form.
- **Tab Label**. The name of the tab that will hold the new form.
- **VarChar32**. A label that allows you to enter a string up to 32 alphanumeric characters in length.
- **VarChar48**. A label that allows you to enter a string up to 48 alphanumeric characters in length.
- **VarChar64**. A label that allows you to enter a string up to 64 alphanumeric characters in length.
- **Float**. Allows you to enter a floating-point number.
- **Drop-Down**. Allows you to add a drop-down box. An optional SQL query performed on SL1's database can be added to populate the drop-down list.
- **Checkbox**. Allows you to create a checkbox to toggle queries on or off. This option is only available in tabbed forms.
- **Textbox**. Creates a blank text box that allows you to create notes. This option is only available in the tabbed form.
- **Rich Text Area**. Creates a blank text box that allows you to format the text in the text box. This option is only available in the tabbed form.
- **Large RText Area**. Creates a large blank text box that allows you to create notes. This option is only available in the tabbed form.
- **Password**. Allows you to create a password.
- **Multiple**. Allows you to create a multiple select list.
- **Phone Number**. Allows you to enter a phone number.
- **Email Address**. Allows you to enter an Email address
- **Web Address**. Allows you to enter a Web Address.
- **Date**. Allows you to enter a date.
- **Date & Time**. Allows you to enter a date and time.
- The Drag and Drop icon () allows you to rearrange the order of form elements and nest form fields inside container elements. To delete a form or container element, click its bomb icon ()

8. You can further edit a form or container element using the following buttons:

- Clicking the **[Preview]** button opens a new window showing what the new form will look like.
- To clear the form fields you have created and start over, click the **[Reset]** button.
- To create and/or edit a guide for the new form, click the **[Edit Guide]** button.
- The **[Detach]** button clears any entries you have made and opens an empty **Editing Form** page.
- To save the new form, click the **[Save]** button.

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