Getronics

ValueWeb User's Guide

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ValueWeb User's Guide

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1.   **Purpose:** The purpose of this document is to provide a guide for Asset Managers to utilize the ValueWeb CMDB for Asset Management tasks.

2.   **Scope:** This guide covers asset management concepts, best practices and how to use ValueWeb with those processes.

3.   **Referenced Documents:** GetReports

4.   **Definitions: See glossary in Appendix C.**

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1 Introduction and Benefits of Asset Management

Information Technology Asset Management (ITAM) enables an enterprise to respond more quickly to competitive pressures, manage rapid technological development, control costs, and facilitate change. More than an inventory to count PCs, IT Asset Management is the integration of asset tracking data, demographic and contract management information. The management of asset information includes attributes such as make, model, serial number, type/speed, size of RAM, size of hard drive, etc. Managing demographic information includes cost information, user information, business unit information, budget code, ownership or lease information, etc. The management of contract information may include aspects such as break/fix maintenance, help desk support, leasing and software contract data, etc.

While asset management tools alone do not constitute an asset management program, they facilitate an enterprise's ability to automate the implementation of asset management programs while providing valuable decision support data.

The following is an outline of two categories of asset management tools that Getronics utilizes. They are part of the MRO/MCEmpower asset management software solution:

- **IT Asset Management Repository and Web Tools (ValueWeb, ValueWise and Enterprise Explorer):** An asset management repository that contains information on the physical, financial and contractual information associated with an enterprise's software and hardware IT assets across multiple platforms, including network assets. The data is maintained in a set of tables called ValueWise (VW) and the web interface for the ValueWise database is called ValueWeb.
- **Auto-discovery Tools (i.collect):** An auto-discovery tool collects point-in-time physical data on an enterprise's networked IT assets (i.e., memory, processor, and software version). The process of maintaining an accurate inventory must, at some point, include a physical inventory of all network and non-network assets (i.e., locally attached peripherals, assets in storage closets, etc.). The data is maintained in a set of tables called Enterprise Explorer (EE).

Another important toolset in maintaining the integrity of the asset repository is a set of processes that are adhered to by everyone involved with the asset management implementation. Getronics has developed a standard set of Asset Management processes that involve all tasks relating to the asset management implementation. These processes can be found in Appendix C.

There are many benefits for an organization to have Asset Management services. Knowing what is in the IT environment enables an enterprise to manage its IT resources more effectively, make sound decisions on PC migration planning, software license purchase decisions, PC upgrade planning, and overall contract management.

The key components of Asset Management include the following:

1. The capture of hardware and software configurations, location, and financial data from PCs and peripherals through the following stages of their lifecycle:

   - Planning
   - Acquisition and Configuration

- Inventory
- Deployment
- Maintenance
- Disposal

2. Maintenance and Updating of Data through:

- Periodic automated inventories
- Real-time entry of maintenance and support data
- Generation of customer reports

3. Utilization of captured data as the basis for developing management practices including:

- Support corporate strategic planning
- Reduce acquisition costs
- Reduce deployment costs

Together, these asset management activities capture information about day-to-day operations that effect future purchasing decisions.

What are the benefits of Asset Management? Through effective Asset Management organizations can:

- Reduce software purchase costs through volume-leveraged purchases. Software licenses can be recouped for reutilization during disposal.
- Reduce end user support costs; helpdesk personnel will have up-to-date PC configuration data available.
- Software copyright violations can be reduced by periodic analysis of software licensing on PCs. This can identify any unauthorized titles.
- The implementation of ongoing asset tracking will deter theft by closely tracking assets.
- Efficiently plan technology refreshes of equipment and component installations, since units can be verified before updated or replacing equipment.

Maintaining accurate data will support strategic business planning by providing an accurate basis for understanding the costs of migrating to new hardware and software platforms.

The next section of this manual describes all of the tools associated with Getronics' asset management service offering in further detail.

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2   Getronics Asset Management Tools

Getronics Asset Management Service offering includes a suite of tools that enables you to perform asset management to the highest level. The tools allow you to view, manipulate, collect and report on various data within the asset repository.

2.1   *ValueWeb*

ValueWeb is the web-based interface to the ValueWise asset repository. ValueWeb is used to access and perform Asset Management tasks via the Internet, using a web interface. For those of you who currently utilize the ValueWise interface to the asset repository, the ValueWeb interface will replace the ValueWise GUI.

2.2   *ValueWise*

ValueWise is the asset repository in the Getronics suite of asset management tools. ValueWise is used to manage asset data for the entire life cycle of all types of assets, including furniture, office equipment, manufacturing equipment, telephone systems, computers and peripherals, software, and internal hardware data.

2.3   *Enterprise Explorer*

Enterprise Explorer is the software and internal hardware data repository. Enterprise Explorer is also used to capture and import i.collect scan data into the QA tables which then go into the ValueWise asset repository. Enterprise Explorer uses a web interface to view and query internal hardware and software data and configure the i.collect data collection tool.

2.4   *i.collect*

i.collect is the data collection tool used with the Getronics suite of asset management tools. i.collect is used to collect demographic, asset, and internal hardware and software data for import and tracking in the ValueWise asset repository. i.collect can be configured with customer-specific data to ensure an accurate and thorough asset database.

2.5   *GetReports*

GetReports is a Microsoft Access database application that provides predefined asset management reports. The user also has the ability to define and save additional reports. Reports include:
- Summary and detailed reports, as well as drill-down capability to view further information of various data attributes.
- Various quality assurance (QA) reports to ensure the "health" of the database. Analyzing these QA reports periodically will help to eliminate any problems with the data.
- A custom reporting feature (Build-A-Report) which enables tailoring of fields and filters for custom reports.

2.6   GetMaintain

GetMaintain is part of the GetReports program that provides enhanced functionality to manage data via automated processes which include:

- Altering an Asset ID
- Bulk Asset Disposal
- Bulk Data Collector
- Bulk Moves/Changes
- Modification of Asset Class
- Modification of Asset Make/Model

2.7   AssetViewer

AssetViewer is an add-on to the Getronics Help Desk system that allows the help desk analyst to view asset data, including demographic, software and internal hardware data. There is also a stand-alone version and a web version of the AssetViewer for use by the Asset Manager.

2.8   Auto Push Tool

Getronics employs a back-end automatic push tool to push data from the database to the desktop. When database changes take place, data generated by the i.collect scan tool at the desktop is updated. This keeps the desktop and asset repository data in sync. This tool is used by Getronics Engineers and will not be used by the Asset Manager.

3 Asset Management Concepts

Asset Managers must thoroughly understand certain asset management concepts in order to effectively use the Asset Management tools covered in this Guide. The concepts covered in this section are generally necessary for use with ValueWise, ValueWeb, GetReports, and GetMaintain, but encompass the Getronics Asset Management model.

Appendix C contains a glossary of terms for asset management tools and concepts used in this Guide.

3.1 Systems

The definition of a **System** is a group or arrangement of items that relate to or interact with each other to form a whole. In IT Asset Management, the group or arrangement of assets that interact with each other to form a whole is a System. A system can have one or more assets in it. There is no set number of assets in a system, however, there are differences in the types of assets in different systems.

Workstation Systems

Let's take three assets (CPU, monitor, and local printer) and put them together on a desk. These assets collectively form a **Workstation System**. In many IT environments, this is referred to as a seat. The Workstation System has the same ID as the asset ID of the core asset (desktop, laptop or server) within it. A Workstation System **must** have a core asset and can only have **one** core asset. The Workstation System has a user, which is the user of the assets within the Workstation System. The Workstation system has a location, which is the location where the assets in the Workstation system reside. The workstation system has a status which tells us if the system is Active, Pending or Disposed.

Printer Systems

Printer Systems must contain one <u>network</u> printer. The Printer System has the same ID as the Network Printer. Printer systems usually do not have children (except in the case of a piece of furniture such as a printer cabinet). A Printer System **must** have one, and only one, network printer in it. Printer Systems share the same user and location concepts of Workstation Systems. The printer system has a status which tells us if the system is Active, Pending or Disposed.

Stock Systems

In a large IT environment, we track many assets that do not neatly fall under the Workstation and Printer system types. For instance, we could have many CPU assets that are not yet grouped with monitors and software to form a whole Workstation System. These assets may be on shelves or in warehouses waiting to be deployed, but if you think of these assets in terms of "a logical group of related assets" then you have just defined a **Stock System,** which is made up of all the stock assets that are located in that room. There would be one Stock System for each stock location that is managed. There can be an infinite number of assets in a stock system. The user associated with the Stock Room System is usually the person designated "in charge" of that room.

Equipment Room Systems

Equipment Room Systems can be wiring closets with racks, bridges, routers, etc., labs with several assets that are continuously being reconfigured and moved from one grouping to another, or server rooms with large amounts of shared equipment not necessarily associated with only one server. These are examples of assets that do not easily classify as workstations, nor are they stock assets. There would be one Equipment Room System for each equipment room location that is managed. There can be an infinite number of assets in an Equipment Room System. The user associated with the Equipment Room System is usually the person designated "in charge" of that room.

Disposed Systems

Disposed assets are put into their own system called "**Disposed.**" There is only one Disposed system in ValueWeb. All assets placed into the Disposed System must have a status of "Disposed." Disposed Systems have a user and location of N/A.

Key Attributes of Systems:	
• Systems have types	WORKSTATION, PRINTER, STOCK, EQUIP_ROOM, DISPOSED
• Systems have IDs	For Workstation Systems and Printer Systems, the System ID is the same as the Asset ID of the core asset. Stock, Equipment Room systems have an ID that corresponds to their location. The Disposed System has an ID of Disposed.
• Systems have statuses	Active, Disposed, Pending
• Systems have locations	A location is associated with a system **not** an asset.
• Systems have Users	A user is associated with a system, **not** an asset.

Table 1. Key Attributes of Systems

Let's explain the lifecycle of an asset in terms of its system. An asset starts in a stock room (location and user are defined by the location and user of the stock room where it is located). When the asset is taken from the stock shelf and grouped with other assets at the time of deployment, it is linked to a System with an appropriate location and user. As the system moves from location to location over its life cycle, the assets within the system are moved from location to location. If the system is surplused and returned to the stock room, each asset is moved out of the system into the Stock Room System. When the asset is ready to be disposed it is moved into the Disposed system. It is not necessary for all assets in a Workstation type system to be surplused or disposed of at

the same time. In some cases a monitor in a workstation system may be returned to stock and the CPU disposed. Table 2 illustrates the asset lifecycle in terms of systems.

Action	Assets are received and moved into a stockroom.	CPU, monitor and printer deployed to a cubicle.	Employee leaves: CPU, monitor, and printer go back to stockroom.	CPU has reached the end of its useful life. CPU is given a status of disposed.
System Type	**Stock System**	**Workstation System**	**Stock System**	**Disposed System**
User and Location	**User and Location of Stockroom**	**User and Location of Workstation**	**User and Location of Stockroom**	**N/A and N/A**

Table 2. Asset Lifecycle in Terms of System

One rule to remember regarding Equipment Room Systems and Stock Systems: The operational workstations and servers that are located in those rooms should be classified as individual Workstation Systems and not part of the Equipment Room or Stock System. For example, if you have a working desktop and monitor setup in an Equipment Room, it is considered a Workstation System, NOT part of the Equipment Room system.

3.2   Assets

An asset is defined as an item of property regarded as useful or valuable to have. In the IT Asset Management environment, examples of assets are desktops, laptops, printers, licensed software, external hard drives, etc.

Key Attributes of Assets:	
• Assets have IDs	This is the bar code number on the asset tag.
• Assets have classes	CPU, Printer, Handheld, Software, etc.
• Assets have statuses	Active, Disposed, New, On-Loan, On-Repair, Surplus.
• Assets have cost centers	The cost center is associated with the asset, not the system.

Table 3. Key Attributes of Assets

Core assets

Certain types of assets have been designated as **core** asset types. For standard IT-type installations, these include Desktop, Laptop, Server, and Network Printer. These core asset types are the only asset types that can have children assets linked to them. The first three can appear in Workstation systems where the System ID is the same as the asset ID. Similarly, Network Printers appear in Printer Systems where the System ID is also the same as the asset ID and they can appear in Stock Systems. All other asset types (i.e., monitors, scanners, CDROMS, etc.) must either be children of a core asset type, or be in Equipment Room systems (training rooms, server rooms, telephony cabinets, etc.) or be in Stockroom systems. Desktops, laptops and servers can have monitors and local printers directly linked to them. Furniture is really the only child asset that can be linked to a network printer. A core asset cannot be a parent of, or be a child of another core asset.

3.3   *Sites and Locations*

Sites

A **site** is a geographical facility with a **physical address** (i.e., 1234 Main Street) where IT assets reside. A site may be a corporate campus with multiple buildings, a military base, or a single building.

All sites must be created in the **ESC Help Desk System** (if used by the contract) or manually updated from customer provided data (if not used by the contract). Additionally, since sites are managed from the help desk system, any addition, update, or deletion must come from there.

Locations

Within a site, there are many locations that pinpoint exactly where a system can be found. Locations indicate the building, floor, room, desk level, or a combination of these. For locations, only **building** is mandatory and "N/A" is acceptable, and it is not necessary to track down to the desk level unless required by the customer. So, while a **site** will tell me that I am at the corporate headquarters of XYZ Corporation on Waterford Street in Capital City, USA, the **location** will tell me that I am on the twelfth floor of Tower B in room 1204. The location is linked to the site in ValueWise.

The location is referenced by a unique location code. Care needs to be taken to make this location code meaningful, yet not unruly. For example, if you create a location you could easily wind up with very long Location codes where the site, building, floor, and room are all put into one field. Try to avoid this situation if at all possible.

SITE   LOCATION

3.4   Cost Centers and Departments

Cost Centers

The **Cost Center** table is used to store accounting codes/names of an organization or functional area of a company. A cost center is assigned to each asset for cost tracking purposes. The Cost Center table includes a unique code and description.

Departments

In order to accommodate numerous requests to have a roll-up for cost centers into "super cost centers," the **Department** table has been created. A Cost Center will belong to a Department (an "N/A" entry is available if your contract does not use department data). Therefore, a **Department** is made up of one or more **Cost Centers.**

Only Assets have cost centers. A cost center must belong to one department.

Reporting summaries can be provided by Cost Center and Department. This means an additional level of discovery during implementation is needed to see where this rollup linkage is needed. Whoever does this part of the discovery needs to focus on this aspect and develop a "cross reference" of what Cost Centers make up each Department.

A department and cost center can have the same name and you can have just one cost center in a department, but **a cost center must belong to a department**.

If it can be determined that there is no use now or in the future for this kind of linkage, then it is not mandatory. Just use the "N/A" entry.

Cost Center-Departments can be created in the ValueWise GUI.

3.5   Asset Classes and Asset Types

All assets have a class and a type. Simply put, asset types are a further refinement of asset classes. For the most part, asset class and type are one and the same. A hub has an asset class of "HUB" and an asset type of "HUB." A modem has an asset class of "MODEM" and an asset type of "MODEM." But any device that is "intelligent" such as a desktop or laptop has a class of "CPU." In this case, the asset type breaks down the specific type of CPU. Thus a desktop has class of "CPU" and asset type of "DESKTOP." A server has class of "CPU" and asset type of "SERVER." Printers are also similarly broken out. All printers have a class of "PRINTER", but have an asset type depending on how they are employed - either "PTR-NW" or "PTR-LOCAL." Another example might be for assets which have a class of "AUDIO-VISUAL," but use the asset type to define whether they are: "PROJECTOR," "READER-BOARD," "TV," and "VHS PLAYER."

There are two reasons for this setup. A Dell Optiplex 12345 might be used as either a desktop or a server. Since a make and model must be tied to a unique term, we use CPU as the generic term and then use the asset type to properly define how the device is being used. The second use is as a roll-up for reporting purposes. Thus, there are report capabilities based on either asset class or asset type.

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4   ValueWeb

ValueWeb is the web interface to the ValueWise asset management database. ValueWise is an integrated software package designed to manage and control all asset information in your organization in a centralized database. As with similar software packages, ValueWise controls the entire life cycle of all types of assets, including furniture, office equipment, manufacturing equipment, telephone systems, computers and peripherals (including specific configuration information), copiers, fax machines, etc. ValueWeb allows you to access and update the ValueWise database from the Internet using a web interface.

This section covers the requirements you need for accessing the ValueWeb web interface, how to log into ValueWeb, and navigating through the ValueWeb GUI.

4.1   Getting Started

4.1.1   Requirements for Using ValueWeb

You will need a few things before you start using the ValueWeb interface. Below is some information you will need for connectivity to ValueWeb. You can get this information from your Network Administrator or your ITAM Project Manager.

- Web browser (Internet Explorer or Netscape Navigator)
- Address of the Web gui (http address)
- Login Credentials (user ID and password)
- The database name you are accessing
- Java 1.4.2_05 plugin

4.1.2   Accessing ValueWeb and Login

The first step is accessing the ValueWeb site. The site is located at: http://valueweb.us.getranet.com/valueweb/ValueWebJApplet.html. Copy and paste this link into your browser, or click on this link to go to the ValueWeb web site. Your web browser should display the screen illustrated in Figure 1.

Figure 1. ValueWeb Main Screen.

Once you've opened the main screen of ValueWeb a security screen will appear asking if you want to trust the signed applet distributed by MRO Software Inc. as illustrated in Figure 2. If you click "Yes," the screen will appear each time you access this site; if you click "Always," the screen will only appear the first time you access this site; and if you click "No," the login screen will not appear. Click "Yes" or "Always" to accept the security validation.
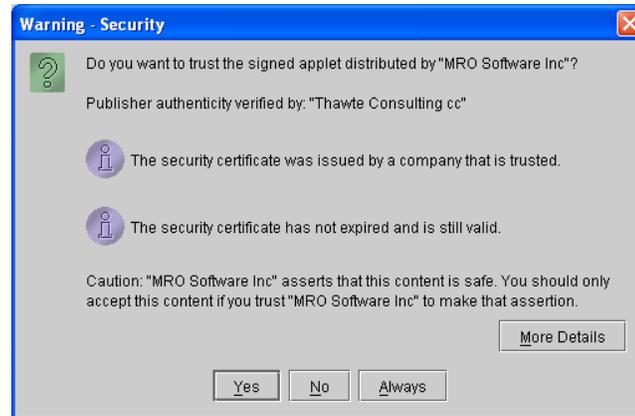
Figure 2. Security Authenticity Screen.

After you have accepted the Security validation, the login screen will appear as illustrated in Figure 3.

Figure 3. ValueWeb Login Screen.

There are three fields in the ValueWeb login screen. You need your ValueWeb login credentials to access the ValueWeb interface. If you do not have login information, contact your Getronics ITAM Team member.

Complete the login screen as follows:

- **Name:** Enter your user name
- **Password:** Enter your password
- **Account:** Enter your account name (usually a short acronym for your company name)

Once you complete the login screen, click **OK** and the ValueWeb interface will appear.

4.1.3   ValueWeb Interface

The ValueWeb Interface contains three sections as illustrated in Figure 4. All of the ValueWeb functionality is performed within this interface.

The most significant difference between the ValueWeb web interface and the ValueWise desktop gui is access to all of your functions will be performed through the treeview list on the left side of the screen instead of the main desktop area. When you click on a list to view in the left pane, it will appear in the main desktop area of the web interface.

Appendix A contains a detailed map of the default TreeView configuration with a description of the folders and lists in the Ongoing Asset Management group.

ValueWeb Toolbar
The ValueWeb toolbar displays shortcut icons to some of the most frequently used functions. To see a particular function, place your mouse pointer over the icon for a description of the shortcut.
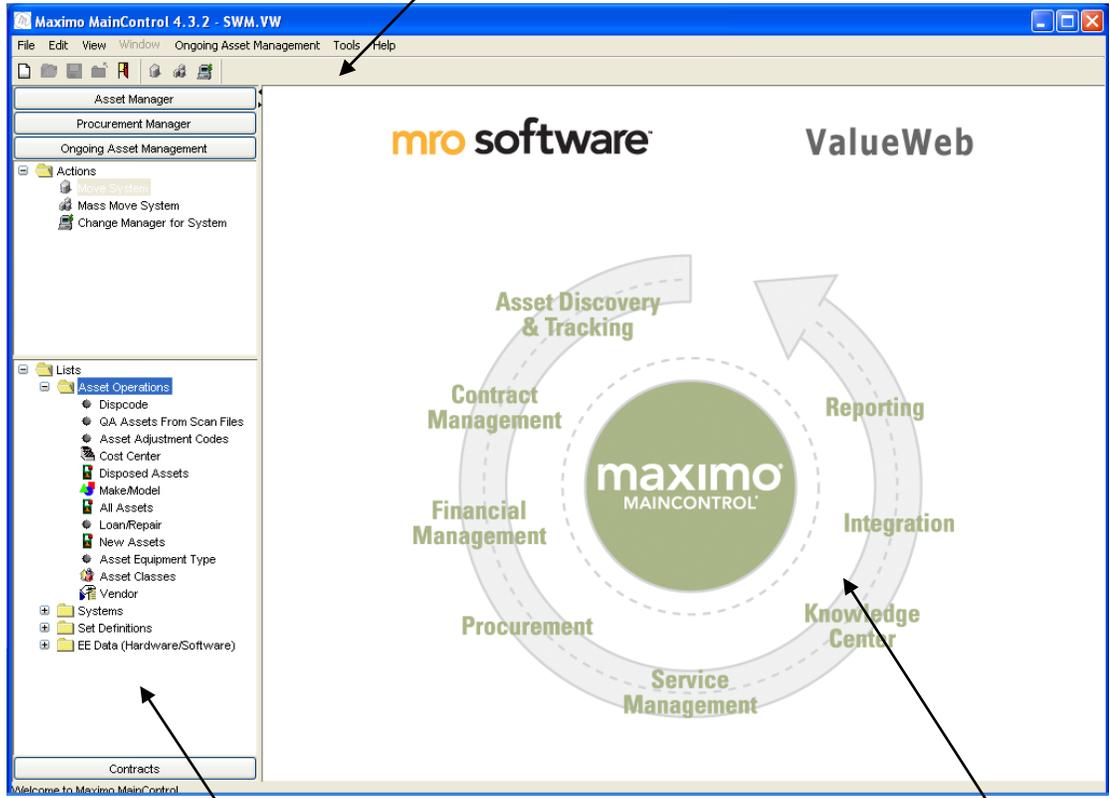
ValueWeb Treeview
This column of the ValueWeb interface is called the Treeview. This view enables you to view and create groups, folders, and lists for use with the web gui. The first level represents groups. The first folders represent the folder. Click on the plus (+) sign to the left of the folder to view their contents.

ValueWeb Desktop
The ValueWeb desktop is where lists, searches, and functions appear when you click on a function in the TreeView.

When a new screen appears, it will appear in this section of the ValueWeb interface.

Figure 4. ValueWise Web Interface

4.1.4   Toolbars and Menus

The dynamic toolbars and menus in ValueWeb display shortcuts to the most frequently used functions. Each screen has its own toolbar and file menu options. This manual cannot cover all of the toolbars and menus for each screen, but describes some of the toolbar icons and file menu options you will use frequently.

1. **Toolbar Shortcuts**

    The ValueWeb toolbar has several icons that represent shortcuts to frequently used features. Table 4 below illustrates some of the common icons you will see on the toolbar. You can also hover your mouse pointer over an icon on the toolbar to see a short description of the shortcut.

    Each of these icons enabled with the current active window. For example, if you have the asset list open, then the icons will apply to tasks relating to assets. If you have the system list open, the icons will apply to systems, and so on.

Toolbar Icon	Function
	Configure System
	Delete/Dispose
	Exit ValueWeb
	Export to Table
	History
	Move System
	New Record
	Open Selected Record
	Refresh
	Remove Selected Record from List

Table 4. Toolbar Icons

2. **File Menu Shortcuts**

    The File Menu is also dynamic. Each function has it's own shortcuts on the File Menu, which are similar to those on the toolbar. The icons you see in Table 4 above, are the same icons in each File Menu and represent the same functions as those on the toolbar.

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4.1.5   ValueWeb Screen Icons

ValueWeb has icons throughout the screens and lists to help you to access, create, and maintain data. Table 5 describes those icons that are common to most screens in ValueWeb.

Icons	Location	Purpose
🔍	This icon appears to the right of some of the fields within the ValueWeb screens.	Click this icon to bring up a search page for that particular field. You can import data from the search page into the current screen you are working with.
✏️	This icon appears to the right of some of the fields within the ValueWeb screens.	Click on this icon to clear data out of this field.
Save	This icon appears in the bottom right- hand corner of most of the ValueWeb create and properties screens.	Click on this to save a record. The screen stays open.
Close	This icon appears in the bottom right- hand corner of most of the ValueWeb screens.	Click on this icon to close the screen.
Save & Close	This icon appears in the bottom right- hand corner of most create and properties screens.	Click this icon to save and close a record.
New	This icon appears in the bottom right-hand corner of most of the lists.	Click this icon to create a new record.
Open	This icon appears in the bottom right-hand corner of the lists.	Click this icon to open a record.
Delete	This icon appears in the bottom right-hand corner of most of the lists.	Click this icon to delete a record. **Use caution as this deletes the record from the database.**
Remove	This icon appears in the bottom right-hand corner of the lists.	Click this icon to remove a record from a list.
◀	This icon appears in the bottom left-hand corner of the record screens.	Click this icon to go to the previous object/record.
▶	This icon appears in the bottom left-hand corner of the record screens.	Click this icon to go to the next object/record.
▶*	This icon appears in the bottom left-hand corner of the record screens.	Click this icon to open a new object/record screen.
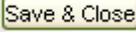
Table 5. ValueWise Screen Icons

4.2   Groups, Folders, Lists, and Actions

ValueWeb comes preconfigured with several actions, groups, lists and folders, depending on which set of permissions you have. Groups, folders, lists and actions are important in keeping your data organized for easy retrieval.

This section covers how to create, manage and delete groups, folders, lists and actions from the ValueWeb interface. Figure 4 illustrates Groups, Folders and Lists and Actions in the left pane in the ValueWeb interface. These items depicted in Figure 4 may differ slightly from your configuration.

Refer to Appendix A for a complete list of the Ongoing Asset Management Group folders and lists.

Actions:
The top pane of the list menu is for Action Lists and Folders. You can create lists of Actions in this pane.

Groups:
Groups are the highest level of organization in ValueWeb. There are several preconfigured Groups in ValueWeb.

Lists:
The Bottom pane of the list menu is for Data Lists and Folders. You can create and organize folders and data lists in this pane.
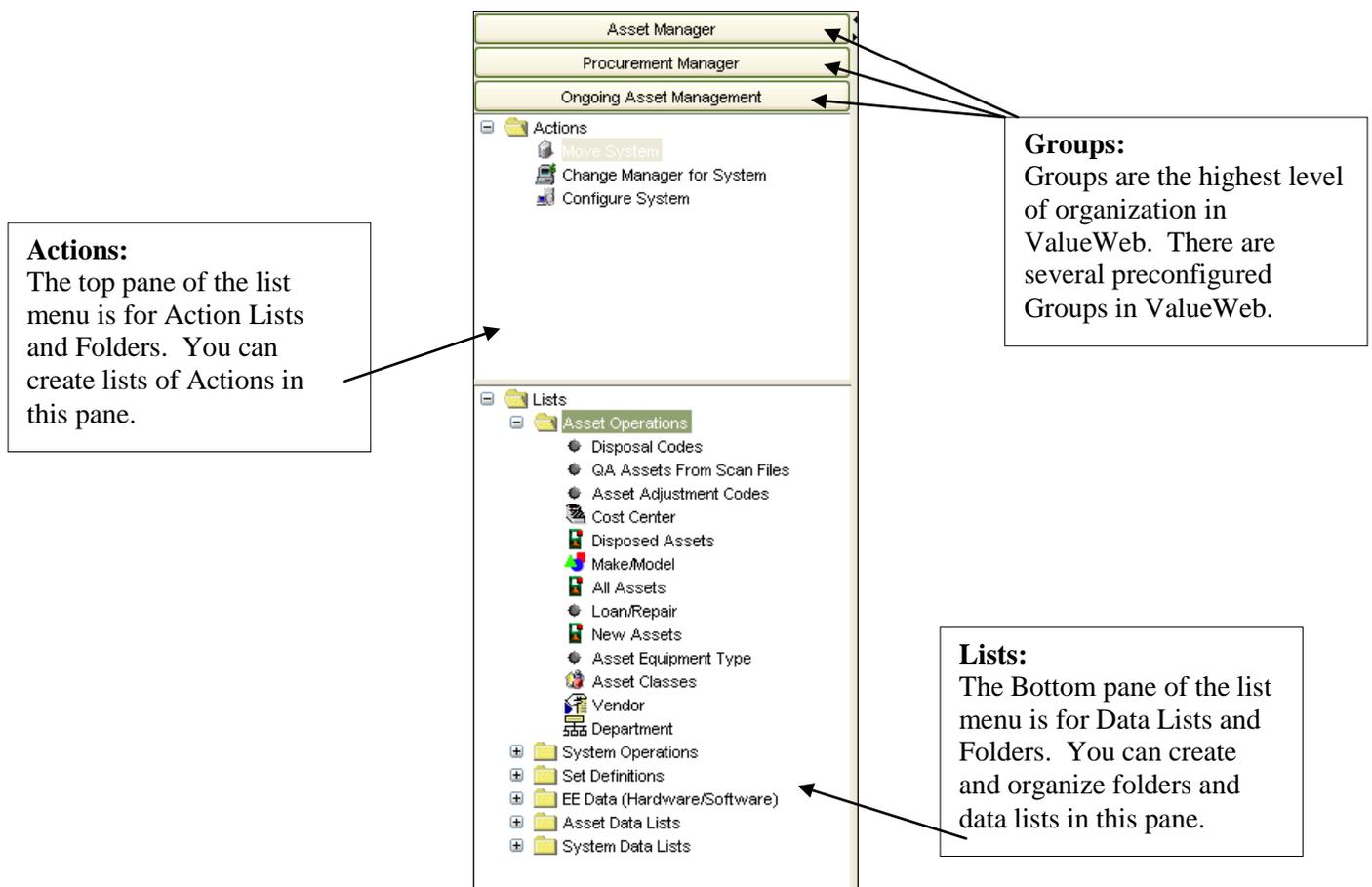
Figure 4. Left Pane or "Tree View" of ValueWeb Interface

1. **Groups**

   Groups are the highest level of organization in ValueWeb. Groups represent major functions such as Procurement, Asset Management, Contracts, etc. You should not delete any of the existing groups without first contacting the ITAM team. You can add groups according to your requirements.

   Viewing Groups

   To view a Group, click on the Group heading the lists and folders within that group will appear.

   Creating Groups

   To add a new Group right-click on one of the headings of an existing Group, then select New Group from the menu. You will see the words New Group highlighted at the bottom of the pane – **you must type in a name for your new group or it will not be created.** Your new group will appear at the bottom of the left pane.

   New groups automatically come configured with an Actions folder and a Lists folder.

   Renaming Groups

   You can rename any of the Groups in the right pane. Right-click on the heading of the Group and select Rename from the menu. Type in the new name of your group; the new name will appear at the heading of the Group list.

   Deleting Groups

   You can delete groups in ValueWeb, but **it is not recommended to delete any of the preconfigured Groups.** The Groups, Folders and Lists are organized to ensure proper categorization.

   You can delete any of the Groups configured for yourself.   To delete a group, right-click on the Group you wish to delete and select Delete from the menu. **Once you delete a group, you cannot get it back.**

   Reordering Groups

   Another customization tool in ValueWeb allows you to reorder Groups in a way that is most convenient for you. To reorder a group, right click on any of the Group names and select Reorder Groups. The Reorder Group screen will appear as illustrated in Figure 5.

Figure 5. Reorder Groups Screen.

Highlight the Group you want to move and use the directional arrows to the right of the window to move the Group up and down as needed. Click OK when you are finished.

2. Folders

Folders are the second level of organization in ValueWeb. Folders allow you to organize your Lists into Groups. You should not delete any of the existing folders without first contacting the ITAM team. You can add folders according to your requirements.

Viewing Folders

To view a Folder and the lists within it, double click on the folder itself or click the plus (+) sign to the left of the folder. The contents of the folder will appear.

Creating Folders

To add a new Folder right-click on one of the existing folders, then select New Folder from the menu. A splash screen will appear prompting you to name your new folder – name your folder and click OK. You can create folders within the Lists folders or any other folders. Your new folder will appear in the Group where you created it.

Renaming Folders

You can rename any of the folders in ValueWeb. Right-click on the folder you wish to rename and select Rename from the menu. A splash screen will appear prompting you for a new name. Type in a new name and click OK. The folder now displays the new name.

Deleting Folders

You can delete folders in ValueWeb, but **it is not recommended to delete any of the preconfigured Folders.** The Groups, Folders and Lists are organized to ensure proper categorization.

You can delete any of the Folders configured for yourself. To delete a folder, right-click on the Folder you wish to delete and select Delete from the menu. **Once you delete a folder, you cannot get it back.**

3. Lists and Actions

The left pane of the ValueWeb interface has several lists configured by data type. The pane is divided into two segments: Actions and Lists. Actions and Lists are the lowest level of organization and are the tools that enable you to view, manage, and search data. This Section covers steps to manage Lists, and the same steps apply for managing Actions.

Viewing Lists

To view the lists of Lists, double click on any of the folders within the groups, or click on the plus (+) sign to the left of the folder. The lists within the folder will appear.

To open a list, double click on the List. You can also right-click on a list and select Open List (or Open Action) from the menu.

Creating Lists

To add a new list right-click on one of the existing folders or lists, then select New List (or New Action) from the menu. You can only create Actions in the upper pane and Lists in the lower pane. A splash screen will appear prompting you to name your new list – name your list and click OK. Your new action will appear in the upper pane and your new list will appear in the lower pane.

Renaming Lists

You can rename any of the lists in ValueWeb. Right-click on the list you wish to rename and select Rename from the menu. A splash screen will appear prompting you for a new name. Type in a new name and click OK. The list now displays the new name.

Deleting Lists

You can delete lists in ValueWeb, but **it is not recommended to delete any of the preconfigured lists.** The Groups, Folders, Lists and Actions are organized to ensure proper categorization.

You can delete any of the Lists configured for yourself. To delete a list, right-click on the list you wish to delete and select Delete from the menu. **Once you delete an action or list, you cannot get it back.**

Moving Lists

Another customization tool in ValueWeb allows you to Move Lists between folders instead of having to recreate the list you want to move. To move a list, right click on the list you wish to move and select Move List from the menu. The Move List splash screen will appear as illustrated in Figure 6.
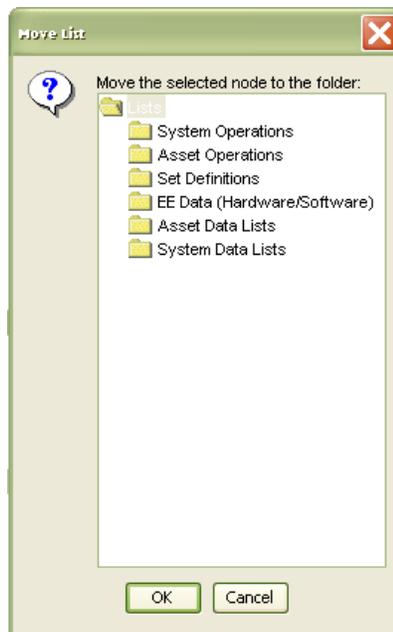
Figure 6. Move Lists Screen.

Highlight the folder where you want to move your list. Click OK when you are finished. You will see your list moved to a new folder.

Managing Groups, Folders, Lists and Actions is easy using ValueWeb. Be sure to organize your Groups, Folders and Lists so you can access your data quickly and efficiently.

4.3   Queries

Queries are the specific defined values used as a filtering tool to narrow a data record search to display only those records meeting defined search criteria.

Queries:

- Are used as filter criteria for precise data searching.
- Have many ways of searching: **%** - This is the wildcard character used for generic searching within ValueWeb and represents a character string of any length. For example 'A%' will select all items that begin with the letter 'A.'

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You can position the wildcard character at the beginning, middle, or end of a term to narrow your search.

- The only data records that will be displayed are those that match the values defined in the search arguments. Search arguments are automatically saved when a list is closed.

Each data attribute in ValueWeb has its own Edit Filter screen with searchable fields specific to that attribute. All data attributes also have an Advanced Filter screen that enables more customized queries. Depending on the last query you did (Basic or Advanced) will depend on what screen you see when you open the Edit Filter screen. The basic query dialogue box appears much like the record view. By selecting the criteria you wish to search by, the query is established.

The icons in all of the Edit Filter screens are consistent. Table 6 describes the functionality of these icons. All of these functions will be explained in detail within this section of the manual.

Icons	Purpose
Search	Once you've entered your search criteria, click this button to perform your search.
Cancel	Click this button to close/cancel out of the Edit Filter screen.
Clear	Click this button to clear all search criteria out of the fields of the Edit Filter screen.
Advanced Query	Click this button to go to the Advanced Query screen.
>>	Click this button to display the Database Sort Order screen.

Table 6. Edit Filter Screen Icons.

4.3.1   Basic Queries

You can query all of the lists in ValueWeb to return specific data. The following example shows you how to create a query. We will use the All Assets List and create a query to find only Laptop equipment as an example.

When you open the All Assets list you will see several different types of Assets as illustrated in Figure 7. If you are on a contract with thousands of assets and you only need to see a portion of those assets, going through all of the assets in the All Assets list can be cumbersome, so you will need to create a filter to display only the assets you want to see.

Figure 7. All Assets List

To open the Edit Filter screen right click on the list you want to query and select Edit Filter from the menu. The Edit Filter screen will appear. Figure 8 illustrates the Edit Filter screen for the All Assets list.

Figure 8. Edit Filter screen for All Assets.

The Edit Filter screen for All Assets has several searchable fields. Fields which have the magnifying glass icon to the right enable you to bring up a list of values for that particular field. Some fields have drop-down lists of values from which to select your search parameters. Type or select search criteria in any of the fields to build your search.

Once you've established your search parameters, you can also configure the sort order in which your data is displayed. Click the Database Sort Order Button (>>) in the lower right-hand corner of the Edit Filter Screen. The Database Sort Order screen will appear as illustrated in Figure 9.

Figure 9. Database Sort Order Screen

The Database Sort Order screen allows you to sort your search results down to four levels. Select your sort criteria from the drop-down menu, then select whether you want that field Ascending or Descending. Once you've established your sort order, click OK to go back to the Edit Filter screen.

Figure 10 displays the search results for Laptop assets from the All Assets List sorted by Asset ID, then Asset Description. Your results should look similar to the list illustrated in Figure 10.

Figure 10. Search Results.

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4.3.2   Advanced Queries

The Basic Query in ValueWeb works well for simple searches using existing fields and values. However, there will be times when you need to perform a more advanced query for more customized results.

NOTE: The Advanced Query functionality should only be used if you are familiar with database query concepts.

To open the Advanced Query screen, open the Edit Filter screen as described in Step 1. The Edit Filter screen has an icon at the bottom labeled "Advanced Query." Click on the Advanced Query button to open the Advanced Query screen. The Advanced Query screen is illustrated in Figure 11.
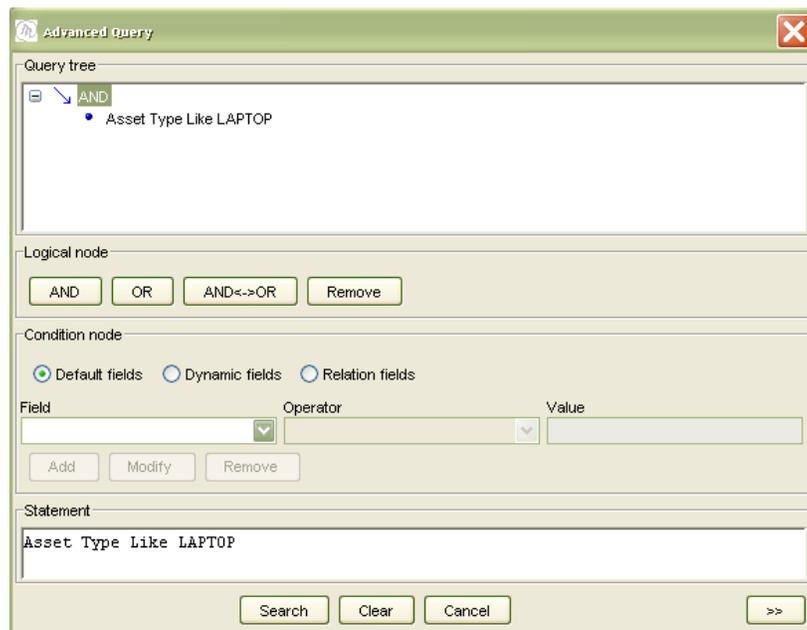
Figure 11. Advanced Query Screen.

The Query Tree box displays the current search criteria for the Basic Search in Step 1. Any search criteria added in this screen will be displayed in this window as well.

The Logical Node box displays the AND and OR operators. These are used in the Query Tree box. Definitions for these operators are below:

AND: The AND operator allows you to perform a search of all of the parameters for that operator. For example, if you search for an asset type of Laptop AND an asset make of Dell AND an asset model of Latitude 600, then your result will display only those assets which meet ALL of those parameters, so you will see only Laptops that are Dell Latitude 600s.

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OR: The OR operator allows you to perform a search of two attributes. For example, if you search for asset types of Laptop OR Desktop then your results will display both Laptops and Desktops.

You can also combine these operators for a highly customized search.

You can click on the AND button to add an AND operator, or click on the OR button to add the OR operator to the existing query in the Query Tree box. The AND<->OR button allows you to highlight an operator in the Query Tree box and change it from AND to OR or from OR to AND. The REMOVE button clears the highlighted operator and query in the Query Tree Box.

The Condition Node box allows you to select whether you are searching Default fields, Dynamic fields, or Relation fields. For most of the searches performed in ValueWeb, you will search Default fields (default). As you click the radio button next to each type of field, the Field drop-down menu will reflect only those fields that apply to the type of field selected.

The three drop-down menus in the Condition Node box determine Field, Operator and Value. The Field drop-down allows you to select a field to search; the Operator drop-down allows you to select an operator by which to search; and the Value field will display all of the available values from the Field value selected in the Field drop-down.

Once you have established your values and operator, click the ADD button to add your additional query condition to the Query Tree box. If you wish to modify your query condition, highlight the condition in the Query Tree box you wish to modify, select new values in the condition node box then click the MODIFY button. To remove a query condition, highlight the condition in the Query Tree box you wish to remove, then click the REMOVE button.

The Statement Box displays the SQL (Structured Query Language) statement. This is your query in English Language terms. This box cannot be edited.

Using the Advanced Query box we will customize our search from Step 1 further to illustrate how to use the Advanced Query functionality. We will search for all Laptops that have any Status except for Disposed.

When you configure your search conditions, the Query will appear as illustrated in Figure 12.
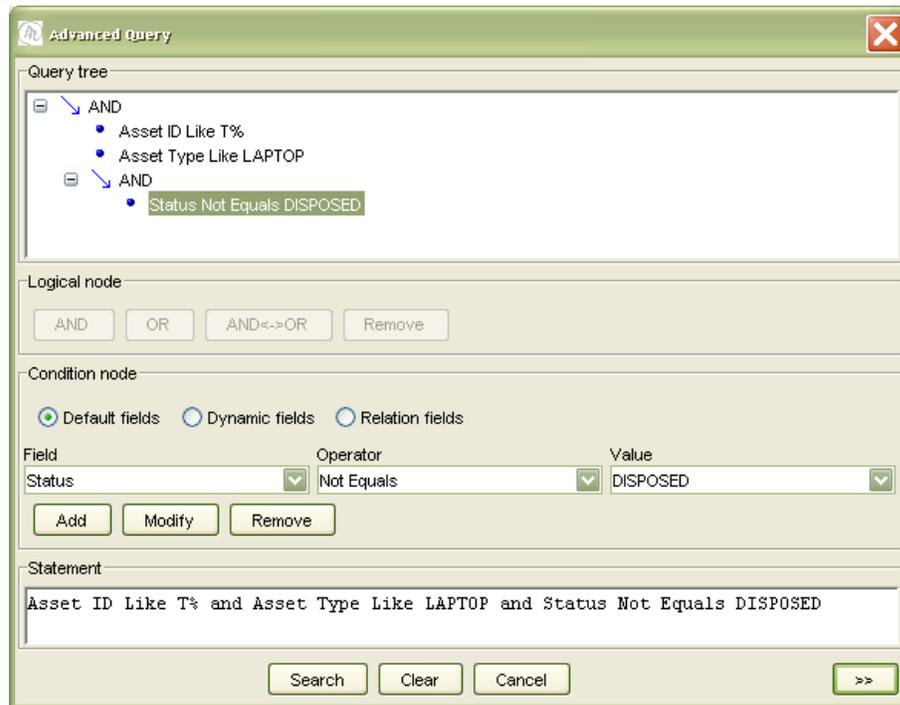
Figure 12. Advanced Query Search Conditions.

After you enter your search conditions, click the SEARCH button to initiate the search. You can use the >> button to display the Database Sort Order screen.

Be prudent when using any of the query tools included in ValueWeb. If you enter too many search parameters, you will get little or no data returned. If you enter too few, your search may be too broad. Be sure you know what you are looking for before building your query.

4.4   *Definition Data in ValueWeb*

Definition Data is lookup data within the ValueWise database that makes up an Asset record, System record, etc. Definition data includes source information such as cost centers, disposal codes, makes and models of assets, etc. The procedures in this Section will enable you to set up and maintain definition data for use within ValueWeb.

This section contains an overview of ValueWise standard definition data lists and what these data attributes represent. These lists should be used as a guide to creating and maintaining source data using the ValueWeb interface.

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4.4.1   Asset Definition Data

Asset definition data is exclusive to asset records. These definition data make up asset records in ValueWise/ValueWeb. Asset Definition Data can be customized to fit the specific needs of an organization.

1. **Asset Adjustment Codes:** Adjustment codes are of use in tracking different types of adjustments to a given asset. ValueWeb includes several preconfigured Asset Adjustment codes. This list is maintained by the Asset Manager.
2. **Asset Class**: Asset Classes are a high level of asset classification. Refer to Section 3.5, Asset Classes and Asset Types, for a complete description on Asset Classes. There are several Asset Classes preconfigured in ValueWeb. Asset Class data is maintained by the ITAM Team and is not maintained by the Asset Manager.
3. **Asset Equipment Type**: Asset Equipment Types are the intermediate level of asset classification. They describe the type (Laptop, Desktop, Monitor, etc.) given to describe an asset. There are several preconfigured Asset Equipment Types in ValueWeb. The Asset Equipment Type data is maintained by the Asset Manager with guidance from the ITAM Team.
4. **Cost Center:** Cost Centers should be obtained from the financial department. Note that Cost Centers are linked to a Department (use the N/A department entry if this is not required by the customer). Cost Center data is maintained by the Asset Manager.
5. **Department:** Many companies use Department information to track financial data. In ValueWeb, Departments are linked to Cost Centers. A department record in ValueWeb will always have one or more cost centers within it. The linkage between cost center and department is made in the cost center list and is a required field. Department data is either maintained by the help desk system and imported into ValueWeb or maintained by the Asset Manager.
6. **Disposal Code:** Disposal Codes are of use in tracking the reason an asset was disposed. When an asset is given a status of disposed, a disposal code is required. There are several preconfigured Disposal Codes in ValueWeb. Disposal Codes are maintained by the Asset Manager.
7. **Vendor**: Vendor data should be consistent with a specific customer's Purchasing Department data. Vendor data is used to track Vendor information and is needed for lease and repair actions within ValueWeb. Vendor data is maintained by the Asset Manager.

4.4.2   Systems Definition Data

System definition data is exclusive to system records. These definition data make up system records in ValueWise/ValueWeb. System Definition Data can be customized to fit the specific needs of an organization.

1. **Location:** Locations are obtained from the customer and are mandatory in System records. Each location record has a unique code and the location is made up of a combination of (some or all) site, building, floor,

room, and desk/cubicle. Each Location is linked to a Site which comes from the help desk system. For more information on Locations and Sites, refer to Section 3.3, Sites and Locations.

2. **Person:** Person Data is used to link a user to a group of assets in a system. Person data is maintained in the help desk system and cannot be altered in ValueWeb.

3. **Site:** A Site is a physical address where assets are located. The Site data is always linked to a Location. Site data is maintained in the help desk system and imported into ValueWise for use in ValueWeb. This data cannot be altered by the Asset Manager. For more information on Site data, refer to Section 3.3, Sites and Locations.

4. **System Type:** The System Type is a description of the type of assets in a system. System Types included in ValueWeb are: Disposed, Equip_Room, Printer, Workstation, and Stock. System Types are maintained by the ITAM Team.

4.4.3   Set Definition Data

Set Definition Data defines some of the drop-down menus in ValueWeb. This type of data is created through a Set Definition Data list instead of being created through a typical list. Set Definition Data can be customized to fit the specific needs of an organization.

1. **Asset Status:** This field is part of the Asset record. The Status of an asset classifies the current state of the asset. Asset Statuses include Active, New, Disposed, On Loan, On Repair, and Surplus.

2. **Location Type:** This field is part of the Location record. The Location Type is a description of the type of location where an asset resides. Location Types included in ValueWeb are: Conference Room, End User, Equip Room, Go To Station, Lab, Other, Server Room, Stock Room, and Training Room.

3. **Ownership:** This field is part of the Asset Record. The Ownership Code indicates the ownership status of an asset. Ownership Codes included in ValueWeb are: Leased, Off-Lease, Owned, Rented.

4. **Person Status:** This field is part of the Person record. The Person Status indicates the status of an employee's employment. Person Statuses included in ValueWeb are Active, Inactive, and Leave of Absence. The Person record is maintained in the help desk system and cannot be edited in ValueWeb.

5. **System Status:** This field is part of the System record. The Status of system classifies the current state of the system. System Statuses included in ValueWeb are Active, Disposed, and Pending.

6. **Usage:** This field is part of the Asset Record. Usage Codes describe the usage status of an asset. Usage Codes included in ValueWeb are: Disposed, In Use, and Not In Use. This list is maintained by the Asset Manager.

7. **Vendor Type:** This field is part of the Vendor Record and used in Contracts. The Vendor Type is a field in the Vendor records that indicates what type of services they provide, such as supplier, service provider, etc. Vendor Types are maintained by the Asset Manager.

4.5   Creating and Maintaining Definition Data

This section will show you the process of creating and maintaining some of the definition data described in the previous section using the ValueWeb interface. Some of the processes in this section may not apply to your contract; however, it is good to be familiar with the process of creating all types of Definition Data in the event you use it in the future.

The Definition Data processes in this section cover only the processes that need to be created and maintained by the Asset Manager. Definition Data for Asset Class, Asset Status, System Type, Site, and Person Lists are not covered in this section as they are created and maintained by the ITAM Team or the Help Desk system.

Before you proceed to Section 4.5.1, there are a few things you need to know entering and maintaining definition data:

- The fields in bold lettering indicate required entry. Data must be entered into these fields in order to save the record.
- All other fields are not required entry. If you aren't sure of what to enter in some of these fields, you can save the record and edit it in the future.
- Use the tab key to move from field to field.

4.5.1   Asset Adjustment Codes

Asset Adjustment Codes are used in tracking adjustments to a given asset. Some companies want to track the detail of any upgrades/changes to assets. This section covers how to create, view and maintain Asset Adjustment Code data.

1. View Asset Adjustment Code Records

To view the Asset Adjustment Codes double click on the Asset Adjustment Codes list or right-click on the Asset Adjustment Codes list and select Open List from the menu. The Asset Adjustment Codes list will appear as illustrated in Figure 13.

Figure 13. Asset Adjustment Codes List

The Asset Adjustment Codes list allows you to view Asset Adjustment Codes records in table format. From this list you can create, open, disable, and remove records. These functions are explained later in this section.

To view the properties of an individual Asset Adjustment Code, double click on an Asset Adjustment Code record and the properties will appear as illustrated in Figure 14.
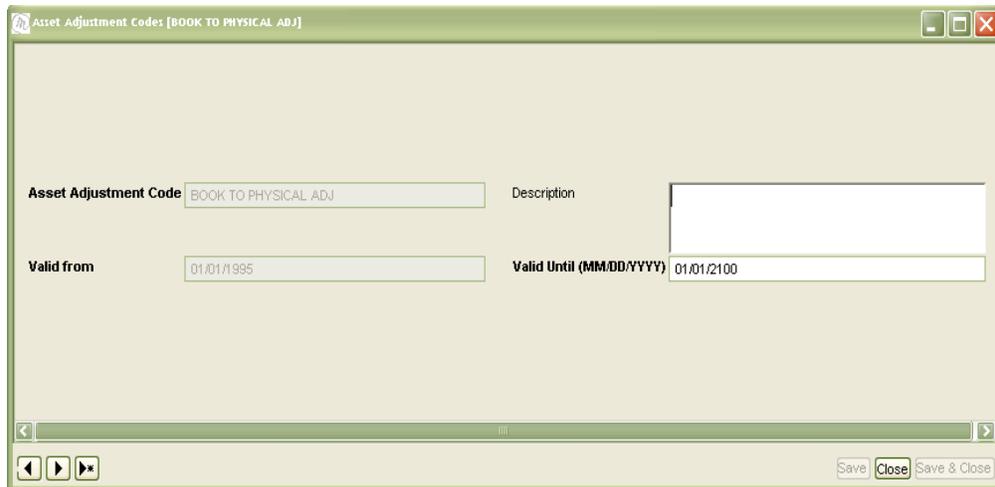
Figure 14. Individual Asset Adjustment Code Record.

2.   Creating Asset Adjustment Codes

There are two ways to access the New Asset Adjustment Codes screen:

- Right-click on the Asset Adjustment Codes list and select New Asset Adjustment Codes from the menu.
- Open the Asset Adjustment Codes list and click the New button in the bottom right-hand corner of the screen.

The New Asset Adjustment Codes screen will appear as illustrated in Figure 15.

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Figure 15. New Asset Adjustment Codes Screen.

To create a new Asset Adjustment Code, complete the fields as described below:

- **Asset Adjustment Code:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it. Enter a descriptive Asset Adjustment code in this field. Make sure the Code is named so you will be able to identify it for future use.
- Description: Enter a description for your Asset Adjustment code in this field.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.

Click the **Save** button to save the new Asset Adjustment Code. You can view the new Asset Adjustment Code in the Asset Adjustment Code List.

3. **Maintaining Asset Adjustment Code Data**

Along with creating Asset Adjustment Codes, you can edit and disable them as well. This section covers how to edit and disable asset adjustment codes in ValueWeb.

Editing an Asset Adjustment Code

To edit the properties of an Asset Adjustment Code, open the Adjustment Code record you want to edit. Only the Description and Valid Until fields can be edited. Click the **Save** or the **Save & Close** button to save your changes.

Disabling an Asset Adjustment Code

Warning: You should disable the Asset Adjustment Codes instead of deleting them to preserve the integrity of the asset database. By disabling a code, you can preserve the data in the records that are linked to that data.

To disable an existing Asset Adjustment Code open the record you wish to disable. Change the Valid Until date to the date the code will no longer be used. Click the **Save & Close** button to save your changes.

4.5.2   Asset Equipment Types

Asset Equipment Types are the intermediate level of asset classification. They describe the type (Laptop, Desktop, Monitor, etc.) given to describe an asset. Asset Equipment Types are linked to an Asset Class which is the top level of asset classification. ValueWeb comes preconfigured with several IT asset equipment types. Consult Getronics ITAM Team before editing, deleting or adding asset types. This section covers how to create, view and maintain Asset Equipment Type data.

1. **Viewing Asset Equipment Type Records**

    To view existing Asset Equipment Types double click on the Asset Equipment Types list or right-click on the Asset Equipment Types list and select Open List from the menu. The Asset Equipment Types list will appear as illustrated in Figure 16.

Figure 16. Asset Equipment Types List

The Asset Equipment Type list allows you to view Asset Equipment Type records in table format. From this list you can create, open, disable, and remove records. These functions are explained later in this section.

To view the properties of an individual Asset Equipment Type, double click on an Asset Equipment Type record and the properties will appear as illustrated in Figure 17.

Figure 17. Individual Asset Equipment Type Record

2. **Creating Asset Equipment Type Records**
    There are two ways to access the New Asset Equipment Type screen:

    • Right-click on the Asset Equipment Type list and select New Asset Equipment Type from the menu.
    • Open the Asset Equipment Type list and click the New button in the bottom right-hand corner of the screen.

    The New Asset Equipment Type screen will appear as illustrated in Figure 18.

Figure 18. New Asset Equipment Type Screen.

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To create a new Asset Equipment Type, complete the fields as described below:

- **Asset Equipment Type:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it. Enter an Asset Equipment Type in this field. The Asset Equipment Type should be descriptive of the equipment.
- **Asset Class:** Select an Asset Class to link to the Asset Equipment Type from the drop-down menu. If you need a new Asset Class created to link to the new Asset Equipment Type, contact the ITAM Team.
- **Description:** Enter a description of the new Asset Equipment Type.

Click the **Save** button to save the new Asset Equipment Type record. You can view the new Asset Equipment Type in the Asset Equipment Type List.

3. **Creating Asset Equipment Type Records**
    Along with creating Asset Equipment Types, you can edit and disable them as well. This section covers how to edit and disable Asset Equipment Type records in ValueWeb.

    Editing an Asset Equipment Type

    To edit the properties of an existing Asset Equipment Type, open the Asset Equipment Type record you want to edit. You can only edit the Description field. Click the **Save** or the **Save & Close** button to save your changes.

    Disabling an Asset Equipment Type

    NOTIFY THE GETRONICS ITAM TEAM BEFORE DISABLING AN ASSET EQUIPMENT TYPE!

    Warning: You should disable the Asset Equipment Codes instead of deleting them to preserve the integrity of the asset database. By disabling an equipment type, you can preserve the data in the records that are linked to that data.

    To disable an existing Asset Equipment Type open the record you wish to disable. Change the Valid Until date to the date the Asset Type will no longer be used. Click the **Save & Close** button to save your changes.

4.5.3   Cost Centers

Cost Centers are used by organizations to track financial data tied to IT assets. This section covers how to create, view and maintain Cost Center data.

1. Viewing Cost Center Records

To view existing Cost Center data double click on the Cost Centers list or right-click on the Cost Centers list and select Open List from the menu. The Cost Centers list will appear as illustrated in Figure 19.

Figure 19. Cost Center List

The Cost Centers list allows you to view Cost Centers records in table format. From this list you can create, open, disable, and remove records. These functions are explained later in this section.

The Systems, Persons, Departments, and Assets buttons in the lower-left hand corner of the Cost Centers screen allows you to view those records which are linked to the highlighted Cost Center.

To view the properties of an individual Cost Center, double click on a Cost Center record and the properties will appear as illustrated in Figure 20.

Figure 20. Individual Cost Center Record.

The Assigned Assets tab lists assets that are linked to this Cost Center. To view an individual Asset record, double click on the Asset record.

2.   Creating Cost Centers

There are two ways to access the New Cost Centers screen:

- Right-click on the Cost Centers list in the right pane and select New Cost Center ID from the menu.
- Open the Cost Centers list and click the New button in the bottom right-hand corner of the screen.

The New Cost Center screen will appear as illustrated in Figure 21.

Figure 21. New Cost Center Screen.

To create a new Cost Center, complete the fields as described below.

- **Cost Center ID:**   Delete the preconfigured data in this field. This value is automatically created and you do not need to use it. Cost Center IDs typically come from the Financial Department and should be considered when creating Cost Centers in ValueWeb.
- **Description:** Enter a description for your Cost Center ID in this field.
- **Department ID:** Select a valid Department ID from the drop-down list. The Department ID should be linked to the new cost center. If there is no department linked to this cost center, enter N/A.
- **Accounting:** This indicates whether or not this is an Accounting ID. Select Yes or No from the drop-down menu.
- **Cost Center Manager ID:** This ID is the person responsible for the Cost Center being created. If you know the ID you can type it in. You can search the person list by clicking the magnifying glass icon to the right of the field. If this data is not applicable, enter N/A.
- First Name: Enter the first name of the Cost Center manager.
- Last Name: Enter the last name of the Cost Center manager.
- Chargeback Cost Center: If the organization uses chargeback cost centers, enter it in this field. You can also search the chargeback cost center list by clicking the magnifying glass icon to the right of the field.
- Description (Chargeback): Enter a description of the Chargeback Cost Center in this field.

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- Parent Cost Center: Enter the Parent Cost Center in this field. You can also search the Parent Cost Center list by clicking the magnifying glass icon to the right of the field.
- Description (Parent): Enter a description of the Parent Cost Center in this field if applicable.
- **IT Cost Center:** If this is an IT Cost Center select Yes from the drop-down menu, otherwise, select No.
- Comments**:** Enter comments about the cost center in this field.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.

Click the **Save** button to save the new Cost Center. You can view the new cost center in the Cost Center List.

3.   Maintaining Cost Center Data

Along with creating Cost Center IDs, you can edit and disable them as well. This section covers how to edit and disable cost centers in ValueWeb.

Editing a Cost Center

To edit the properties of an existing Cost Center, open the Cost Center record you want to edit. All of the fields except the Cost Center ID field can be edited. Click the **Save** or the **Save & Close** button to save your changes.

Disabling a Cost Center

Warning: You should disable the Cost Centers instead of deleting them to preserve the integrity of the asset database. By disabling a cost center, you can preserve the data in the records that are linked to that data.

To disable an existing Cost Center open the record you wish to disable. Change the Valid Until date to the date the Cost Center will no longer be used. Click the **Save & Close** button to save your changes.

4.5.4   Departments

Many companies use Department information to track financial data. In ValueWeb, Departments are linked to Cost Centers. A Department record in ValueWeb will always have one or more cost centers linked to it. The linkage between cost center and department is made in the cost center list and is a required field. This Section covers how to create, view and maintain Department data.

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1. **Viewing Department Records**

To view existing Department data double click on the Department list or right-click on the Department list and select Open List from the menu. The Department list will appear as illustrated in Figure 22.

Figure 22. Department List

The Departments list allows you to view Department records in table format. From this list you can create, open, disable, and remove records. These functions are explained later in this section.

The Persons, Systems, and Assets buttons in the lower-left hand corner of the Departments screen allows you to view those records which are linked to this Department.

To view the properties of an individual Department, double click on a Department record and the properties will appear as illustrated in Figure 23.

The Cost Centers tab in the bottom portion of the Departments screen displays a list of the cost centers linked to the Department. You can double click on a Cost Center record to view the properties for that Cost Center.

Figure 23. Individual Department Record

2. Creating Departments

There are two ways to access the New Departments screen:

- Right-click on the Departments list in the right pane and select New Department from the menu.
- Open the Department list and click the New button in the bottom right-hand corner of the screen.

The New Department screen will appear as illustrated in Figure 24.

Figure 24. New Department Screen.

To create a new Department, complete the fields as described below.

- **Department ID:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it. Department IDs typically come from the Human Resources or HR Departments and should be considered when creating Departments in ValueWeb.
- **Description:** Enter a description for your Department in this field.
- Division: Enter a Division in this field if applicable.
- Department: Enter a secondary Department linked to the current Department if applicable.
- **Status:** Select a status from the drop-down menu. If you plan to use this Department ID immediately, select Active.
- Manager: Enter the name of the Department Manager if applicable.
- Email Addr: Enter the email address of the Department Manager if applicable.
- Company Code: Enter the Company Code linked to this department if applicable.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.
- Comments: Enter additional comments in this field if applicable.

Click the **Save** button to save the new Department. You can view the new Department in the Department List.

3. Maintaining Department Data

Along with creating Departments, you can edit and disable them as well. This section covers how to edit and disable Department records in ValueWeb.

Editing a Department

To edit the properties of an existing Department, open the Department record you want to edit. All of the fields except the Department ID field can be edited. Click the **Save** or the **Save & Close** button to save your changes.

Disabling a Department

Warning: You should disable the Departments instead of deleting them to preserve the integrity of the asset database. By disabling a

> **Department, you can preserve the data in the records that are
> linked to that data.**

To disable an existing Department open the record you wish to disable.
Change the Valid Until date to the date the Department will no longer
be used. Click the **Save & Close** button to save your changes.

4.5.5   Disposal Codes

Disposal Codes are used to describe the reason for disposal of an asset.
When an asset is disposed of in ValueWeb, a disposal code is required. This
section covers how to create, view and maintain Disposal Code data.

1.   Viewing Disposal Code Records

To view existing Disposal Codes double click on the Disposal Codes list
or right-click on the Disposal Codes list and select Open List from the
menu. The Disposal Codes list will appear as illustrated in Figure 25.

Figure 25. Disposal Codes List

The Disposal Codes list allows you to view Disposal Code records in
table format. From this list you can create, open, disable, and remove
records. These functions are explained later in this section.

To view the properties of an individual Disposal Code, double click on a
Disposal Code record and the properties will appear as illustrated in
Figure 26.

Figure 26. Individual Disposal Code Record

2. Creating Disposal Codes

There are two ways to access the New Disposal Codes screen:

- Right-click on the Disposal Codes list in the right pane and select New Dispcode from the menu.
- Open the Disposal Code list and click the New button in the bottom right-hand corner of the screen.

The New Disposal Code screen will appear as illustrated in Figure 27.

Figure 27. New Disposal Code Screen.

To create a new Disposal Code, complete the fields as described below.

- **Disposal Code:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it.

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The Disposal Code should describe the reason an asset is being disposed.

- Description: Enter a description for your Disposal Code in this field.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.

Click the **Save** button to save the new Disposal Code. You can view the new Disposal Code in the Disposal Code List.

3. Maintaining Disposal Code Data

Along with creating Disposal Codes, you can edit and disable them as well. This section covers how to edit and disable Disposal Code records in ValueWeb.

Editing a Disposal Code

To edit the properties of an existing Disposal Code, open the Disposal Code record you want to edit. Only the Description and Valid Until fields can be edited. Click the **Save** or the **Save & Close** button to save your changes.

Disabling a Disposal Code

Warning: You should disable the Disposal Codes instead of deleting them to preserve the integrity of the asset database. By disabling a code, you can preserve the data in the records that are linked to that data.

To disable an existing Disposal Code open the record you wish to disable. Change the Valid Until date to the date the code will no longer be used. Click the **Save & Close** button to save your changes.

4.5.6   Locations

Location data is obtained from the customer and is a required field in the System record. Each location record has a unique code which is made up of a combination of (some or all) site, building, floor, room, and desk/cubicle. Each Location is linked to a Site which comes from the help desk system. For more information on Locations and Sites, refer to Section 3.3, Sites and Locations. This section covers how to create, view and maintain Location data.

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1. Viewing Location Records

To view existing Location records double click on the Location list or right-click on the Location list and select Open List from the menu. The Location list will appear as illustrated in Figure 28.

Figure 28. Location List

The Locations list allows you to view Location records in table format. From this list you can create, open, disable, and remove records. These functions are explained later in this section.

The Systems and Facilities buttons in the lower-left hand corner of the Location screen allow you to view System and Site records linked to the highlighted Location record.

To view the properties of an individual Location, double click on a Location record and the properties will appear as illustrated in Figure 29.

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Figure 29. Individual Location Record

The Persons tab in the bottom portion of the Locations screen displays a list of the Person records linked to this Location. You can double click on a Person record to view the properties for that Person.

2. Creating Locations

There are two ways to access the New Location screen:

- Right-click on the Location list in the right pane and select New Location from the menu.
- Open the Location list and click the New button in the bottom right-hand corner of the screen.

The New Location screen will appear as illustrated in Figure 30.

Figure 30. New Location Screen.

To create a new Location, complete the fields as described below.

- **Location:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it. The Location code is made up of (one or all) of the following attributes: Site (facility), Building, Floor, Room, and Cubicle or Desk. Keep in mind you want to keep the Location codes manageable and may not want to use all of these attributes to make up your Location Code. This value must be unique.
- **Facility:** This field contains the Site. Select a Site from the drop-down menu.
- **Building:** Enter a building code in this field.
- Floor: Enter the floor number in this field, if applicable.
- Room: Enter the room number in this field, if applicable.
- Desk: Enter the desk/cubicle location in this field, if applicable.
- **Storage Location:** This field indicates whether or not this is a storage location (such as a stock room). From the drop-down menu select Yes if this is a storage location, otherwise select No.
- **Type:** Select a Location Type from the drop-down menu.
- Reference Location: Enter a reference location in this field, if applicable.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.

- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.

Click the **Save** button to save the new Location. You can view the new Location in the Locations List.

3. **Maintaining Location Data**

Along with creating Locations, you can edit and disable them as well. This section covers how to edit and disable Location records in ValueWeb.

Editing a Location

To edit the properties of an existing Location, open the Location record you want to edit. You can edit all fields except the Location Code. Click the **Save** or the **Save & Close** button to save your changes.

Disabling a Location

Warning: You should disable the Locations instead of deleting them to preserve the integrity of the asset database. By disabling a location, you can preserve the data in the records that are linked to that data.

To disable an existing Location open the record you wish to disable. Change the Valid Until date to the date the Location will no longer be used. Click the **Save & Close** button to save your changes.

4.5.7   **Location Type**

This field is part of the Location record. The Location Type is a description of the type of location where an asset resides. Location Types included in ValueWeb are: Conference Room, End User, Equip Room, Go To Station, Lab, Other, Server Room, Stock Room, and Training Room.

The values in the Location Type list are part of the Set Definitions list. There are several preconfigured Location Type values in ValueWeb, however, if you need to edit, delete, or add values to these lists, the procedure is a little different from a typical predefined list in ValueWeb. This section covers how to create, edit and delete data from the Set Definitions list.

1. **Viewing Location Values**

To view existing Location Type values double click on the Location Type list or right-click on the Location Type list and select Open List from the menu. The Location Type list will appear as illustrated in Figure 31.

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Figure 31. Location Type List

The Location Type list allows you to view Location Type values in table format. From this list you can create, open, delete, and remove values.

To view the properties of an individual Location Type, double click on a Location Type value and the properties will appear as illustrated in Figure 32.

Figure 32. Individual Location Type Value

2. Creating Location Types

There are three ways to access the New Set Definitions screen:

- Right-click on the Location Type list in the right pane and select New Set Definition from the menu.

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- Open the Location Type list and click the New button in the bottom right-hand corner of the screen.
- You can also use the above methods in the All Set Definitions list.

The New Set Definitions screen will appear as illustrated in Figure 33.

Figure 33. New Set Definition Screen.

To create a new Location Type, complete the fields as described below.

- **Set Name:** The set name value for this field is LOCATION TYPE.
- **Value:** Enter the new Location Type in this field. This value will appear in the drop-down menu.
- NLS Key: Leave this field blank.
- Translation: Enter a description in this field or leave it blank.

Click the **Save** button to save the new Location Type value. You can view the new Location Type in the Location Type or Set Definition Lists.

3. **Maintaining Location Type Data**

Along with creating Locations Types, you can edit and delete them as well. This section covers how to edit and delete Location Type values in ValueWeb.

Editing a Location Type

To edit the properties of an existing Location Type, open the Location Type value you want to edit. You can edit the NLS Key and Translation fields. Click the **Save** or the **Save & Close** button to save your changes.

<u>**Deleting an Location Type Value**</u>

Warning: Once you delete a Location Type value it is removed from the database permanently. If you only want to remove a record from the list, click the Remove button.

Before deleting a Location Type value, make sure all assets linked to it have been updated with a new Location Type value.

To delete an existing Location Type value highlight the Location Type you wish to delete and click the **Delete** button in the bottom right-hand corner of the screen. A splash screen will appear confirming the deletion of the Location Type value. Click **Yes** to delete, or **No** to cancel.

4.5.8   Ownership

This field is part of the Asset Record. Ownership indicates the ownership status of an asset. Ownership values included in ValueWeb are: Leased, Off-Lease, Owned, Rented.

The values in the Ownership list are part of the Set Definitions list. ValueWeb has the Set Definitions lists already configured for you, however, if you need to edit, delete, or add values to these lists, the procedure is a little different from a typical predefined list in ValueWeb. This section covers how to create, edit and delete values from the Set Definitions list.

1. **Viewing Ownership Values**

    To view existing Ownership values double click on the Ownership list or right-click on the Ownership list and select Open List from the menu. The Ownership list will appear as illustrated in Figure 34.
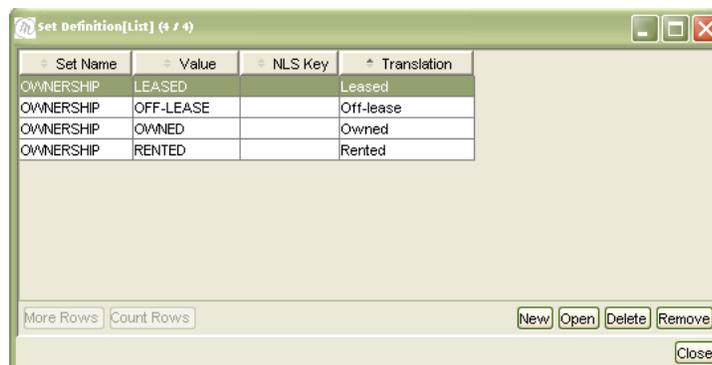
Figure 34. Ownership List

The Ownership list allows you to view Ownership values in table format. From this list you can create, open, delete, and remove values.

If there are more values than can be displayed on one screen, the **More Rows** button will allow you to display additional records. The **Count Rows** button counts the number of rows in this screen.

To view the properties of an individual Ownership value, double click on an Ownership value and the properties will appear as illustrated in Figure 35.

Figure 35. Individual Ownership Value

2.   Creating Ownership Values

There are three ways to access the New Set Definitions screen:

- Right-click on the Ownership list in the right pane and select New Set Definition from the menu.
- Open the Ownership list and click the New button in the bottom right-hand corner of the screen.
- You can also use the above methods in the All Set Definitions list.

The New Set Definitions screen will appear as illustrated in Figure 36.

Figure 36. New Set Definition Screen.

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To create a new Ownership value, complete the fields as described below.

- **Set Name:** The set name value for this field is OWNERSHIP.
- **Value:** Enter the new Ownership value in this field. This value will appear in the drop-down menu.
- NLS Key: Leave this field blank.
- Translation: Enter a description in this field or leave it blank.

Click the **Save** button to save the new Ownership value. You can view the new Ownership value in the Ownership or Set Definition Lists.

3. Maintaining Ownership Values

Along with creating Ownership values, you can edit and delete them as well. This section covers how to edit and delete Ownership values in ValueWeb.

Editing an Ownership Value

To edit the properties of an existing Ownership value, open the Ownership record you want to edit. You can edit the NLS Key and Translation fields. Click the **Save** or the **Save & Close** button to save your changes.

Deleting an Ownership Value

Warning: Once you delete an Ownership value it is removed from the database permanently. If you only want to remove a record from the list, click the Remove button.

Before deleting an Ownership value, make sure all assets linked to it have been updated with a new Ownership value.

To delete an existing Ownership value highlight the Ownership value you wish to delete and click the **Delete** button in the bottom right-hand corner of the screen. A splash screen will appear confirming the deletion of the Ownership value. Click **Yes** to delete, or **No** to cancel.

4.5.9   Usage

This field is part of the Asset Record. Usage describes the usage status of an asset. Usage values included in ValueWeb are: Disposed, In Use, and Not In Use.

The values in the Usage list are part of the Set Definitions list. There are several preconfigured Usage values in ValueWeb, however, if you need to edit, delete, or add values to these lists, the procedure is a little different

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from a typical predefined list in ValueWeb. This section covers how to create, edit and delete values from the Set Definitions list.

1. Viewing Usage Values

To view existing Usage values double click on the Usage list or right-click on the Usage list and select Open List from the menu. The Usage list will appear as illustrated in Figure 37.
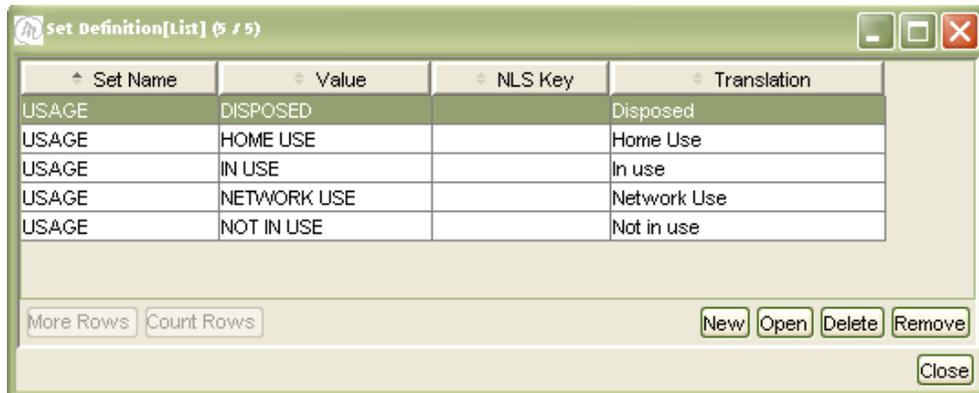
Figure 37. Usage List

The Usage list allows you to view Usage values in table format. From this list you can create, open, delete, and remove values.

To view the properties of an individual Usage value, double click on a Usage value and the properties will appear as illustrated in Figure 38.
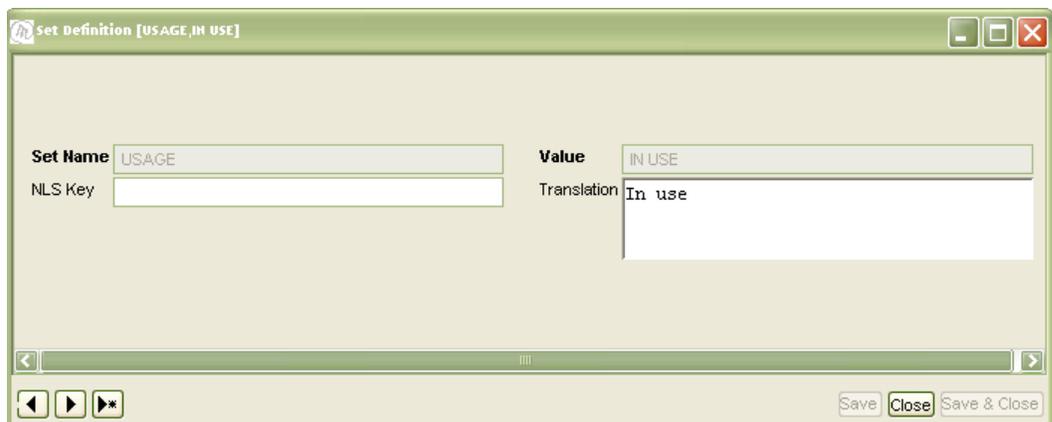
Figure 38. Individual Usage Value

2. Creating Usage Records

There are three ways to access the New Set Definitions screen:

- Right-click on the Usage list in the right pane and select New Set Definition from the menu.
- Open the Usage list and click the New button in the bottom right-hand corner of the screen.
- You can also use the above methods in the All Set Definitions list.

The New Set Definitions screen will appear as illustrated in Figure 39.

Figure 39. New Set Definition Screen.

To create a new Usage value, complete the fields as described below.

- **Set Name:** The set name value for this field is USAGE.
- **Value:** Enter the new Usage value in this field. This value will appear in the drop-down menu.
- NLS Key: Leave this field blank.
- Translation: Enter a description in this field or leave it blank.

Click the **Save** button to save the new Usage. You can view the new Usage value in the Usage or Set Definition Lists.

3. **Maintaining Usage Values**

Along with creating Usage values, you can edit and delete them as well. This section covers how to edit and delete Usage values in ValueWeb.

Editing a Usage Value

To edit the properties of an existing Usage value, open the Usage value you want to edit. You can edit the NLS Key and Translation fields. Click the **Save** or the **Save & Close** button to save your changes.

Deleting an Usage Value

Warning: Once you delete a Usage value it is removed from the database permanently. If you only want to remove a value from the list, click the Remove button.

Before deleting a Usage value, make sure all assets linked to it have been updated with a new Usage value.

To delete an existing Usage value highlight the Usage value you wish to delete and click the **Delete** button in the bottom right-hand corner of the screen. A splash screen will appear confirming the deletion of the Usage Value. Click **Yes** to delete, or **No** to cancel.

4.5.10   Vendors

Vendor data is used to track Vendor information and is needed for lease and repair actions within ValueWeb. Vendor data should be consistent with an organizations Purchasing Department data. This section covers how to create, view and maintain Vendor data.

1. Viewing Vendor Records

To view existing Vendors double click on the Vendors list or right-click on the Vendors list and select Open List from the menu. The Vendors list will appear as illustrated in Figure 40.

Figure 40. Vendor List

To view the properties of an individual Vendor, double click on a Vendor record and the properties will appear as illustrated in Figure 41.

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Figure 41. Individual Vendor Record

2.   Creating Vendor Records

There are two ways to access the New Vendor screen:

- Right-click on the Vendor list in the right pane and select New Vendor from the menu.
- Open the Vendor list and click the New button in the bottom right-hand corner of the screen. The New Vendor screen will appear as illustrated in Figure 42.

Figure 42. New Vendor Screen.

To create a new Vendor, complete the fields as described below.

- **Vendor:** Delete the preconfigured data in this field. This value is automatically generated and you do not need to use it. Enter a Vendor Code in this field. Your organization's Financial Department may have a list of preconfigured Vendor codes to use.
- **Name:** Enter a description for your Vendor in this field.
- Name II: Enter a secondary name for your Vendor in this field if applicable.
- Employee ID: Enter an employee ID for the Vendor in this field if applicable.
- Customer ID: Enter a customer ID for the Vendor in this field if applicable.
- **Vendor Type:** Select a Vendor Type from the drop-down list.
- Address 1: Enter the Address of the Vendor location in this field if applicable.
- Point of Contact Name: Enter the Point of Contact Name in this field if applicable.
- City: Enter the City in this field if applicable.
- Zip: Enter the zip code of the Vendor location in this field if applicable.
- State: Select a State from the drop-down menu if applicable.
- Phone: Enter the Vendor phone number if applicable.
- Fax: Enter the Vendor fax number if applicable.
- Contact Person: Enter the Vendor contact person if applicable.
- Bank Name, Bank Location, Bank Code, Account ID: These are all bank information fields. Enter data if applicable.
- Disc. Term 1 (days): Enter Vendor Discount Terms in this field if applicable. This information can be obtained from your Financial Department.
- Discount Rate 1: Enter Vendor Discount Rate in this field if applicable. This information can be obtained from your Financial Department.
- Disc. Term 2 (days): Enter additional discount terms in this field if applicable. This information can be obtained from your Financial Department.
- Discount Rate 2: Enter additional Discount Rate in this field if applicable. This information can be obtained from your Financial Department.
- Valid From: The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- Valid Until: The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.
- Comments: Enter any additional comments about the Vendor in this field.
- Contact Code: Enter the contact code for the Vendor in this field if applicable.
- County: Enter the county the Vendor is located in if applicable.

Click the **Save** button to save the new Vendor. You can view the new Vendor in the Vendor List.

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3. **Maintaining Vendor Data**

Along with creating Vendors, you can edit and disable them as well. This section covers how to edit and disable Vendor records in ValueWeb.

Editing a Vendor

To edit the properties of an existing Vendor, open the Vendor record you want to edit. You can edit all fields except for the Vendor ID. Click the **Save** or the **Save & Close** button to save your changes.

Disabling a Vendor

Warning: You should disable the Vendors instead of deleting them to preserve the integrity of the asset database. By disabling a Vendor, you can preserve the data in the records that are linked to that data.

To disable an existing Vendor open the record you wish to disable. Change the Valid Until date to the date the Vendor will no longer be used. Click the **Save & Close** button to save your changes.

4.5.11   Vendor Type

The Vendor Type is a field in the Vendor records that indicates what type of services they provide, such as supplier, service provider, etc.

The values in the Vendor Type list are part of the Set Definitions list. There are several preconfigured Usage values in ValueWeb, however, if you need to edit, delete, or add values to these lists, the procedure is a little different from a typical predefined list in ValueWeb. This section covers how to create, edit and delete values from the Set Definitions list.

1. **Viewing Vendor Type Values**

To view existing Vendor Types double click on the Vendor Type list or right-click on the Vendor Type list and select Open List from the menu. The Vendor Type list will appear as illustrated in Figure 43.
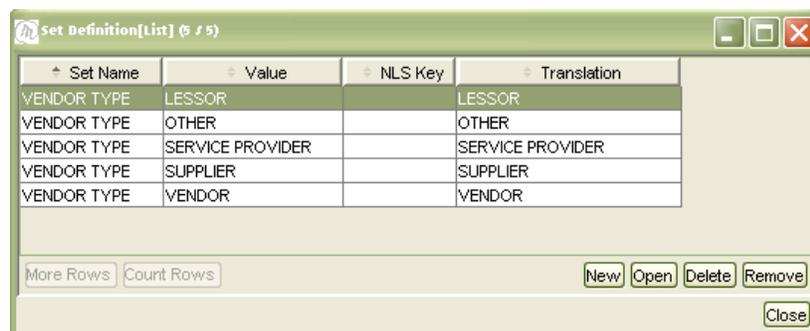
Figure 43. Vendor Type List

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The Vendor Type list allows you to view Vendor Type values in table format. From this list you can create, open, delete, and remove values.

To view the properties of an individual Vendor Type value, double click on an Vendor Type value and the properties will appear as illustrated in Figure 44.

Figure 44. Individual Vendor Type Value

2.   Creating Vendor Type Values

There are three ways to access the New Set Definitions screen:

- Right-click on the Vendor Type list in the right pane and select New Set Definition from the menu.
- Open the Vendor Type list and click the New button in the bottom right-hand corner of the screen.
- You can also use the above methods in the All Set Definitions list.

The New Set Definitions screen will appear as illustrated in Figure 45.

Figure 45. New Set Definition Screen.

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To create a new Vendor Type value, complete the fields as described below.

- **Set Name:** The set name value for this field is VENDOR TYPE.
- **Value:** Enter the new Vendor Type value in this field. This value will appear in the drop-down menu.
- NLS Key: Leave this field blank.
- Translation: Enter a description in this field or leave it blank.

Click the **Save** button to save the new Vendor Type. You can view the new Vendor Type value in the Vendor or Set Definition Lists.

3. Maintaining Vendor Types

Along with creating Vendor Types, you can edit and delete them as well. This section covers how to edit and delete Vendor Types in ValueWeb.

Editing a Vendor Type

To edit the properties of an existing Vendor Type, open the Vendor Type value you want to edit. You can edit the NLS Key and Translation fields. Click the **Save** or the **Save & Close** button to save your changes.

Deleting a Vendor Value

Warning: Once you delete a Vendor Type value it is removed from the database permanently. If you only want to remove a value from the list, click the Remove button.

Before deleting a Vendor Type value, make sure all vendors linked to it have been updated with a new Vendor Type.

To delete an existing Vendor Type highlight the Vendor Type value you wish to delete and click the **Delete** button in the bottom right-hand corner of the screen. A splash screen will appear confirming the deletion of the Vendor Type value. Click **Yes** to delete, or **No** to cancel.

4.6   *Systems Operations*

Before continuing on in this section, be sure you have read Section 3.1, Systems, in the Asset Management Concepts section and are familiar with Getronics asset management concepts before performing Systems Operations in ValueWeb.

As stated in Section 3.1, the definition of a system is a group or arrangement of items that relate to or interact with each other to form a whole. In IT Asset Management, the

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group or arrangement of assets that interact with each other to form a whole is a System. A system can have one or more assets in it. There is no set number of assets in a system.

There are five system types that Getronics uses for ITAM: Workstation, Printer, Stockroom, EQUIP_ROOM, and Disposed. Table 7 illustrates some of the basic rules for the five system types you will be using.

System Type	System ID	Assets	Location	User
Workstation	Same as ID of core asset in system	Workstation setup (desktop, monitor, etc.)	Location of asset and user	User Name
Printer	Network Printer ID	Network Printer	Location of Printer	Person responsible for printer or N/A
Stock	Location of Stockroom	Stockroom Assets	Location of Stockroom	Person responsible for stockroom or N/A
Equip_Room	Location of Equipment Room	Equipment Room Assets	Location of Equipment Room	Person responsible for equipment room or N/A
Disposed	DISPOSED	Disposed Assets	N/A	N/A

Table 7. System Type Rules.

This section covers how to create and maintain systems in ValueWeb including creating a system, changing a location, changing a user, viewing system history, and disposing of a system.

4.6.1   Creating a System

Systems are typically created automatically when scan data comes into the database, however, there will be times when you need to create assets and the systems they are linked to.

Receipt of a new asset: When a new core asset (desktop, laptop, server, or network printer) is received, you must first create a system entry for it, and then create the asset record and link the two. However, if the core asset is to be held in a storeroom or warehouse before installation, you should create the system record with a status of "Pending." Then create the asset record and link it to the desired stock system. When the time comes to deploy the asset to the proper system, set the system's status to Active. This is necessary since most likely you will be using the standard help desk system for this deployment and this action requires the system record to already exist in the database.

To access the New System screen, right-click on the Systems list and select New System from the menu. The New System screen will appear as illustrated in Figure 46.

Figure 46. New System Screen.

Once you are in the New System screen, there are few things you need to know:

- The fields in bold lettering indicate required entry. Data must be entered into these fields in order to save the record.
- All other fields are not required entry. If you aren't sure of what to enter in some of the fields, you can save the record and edit it in the future.
- Use the tab key to move from field to field.
- The tabs on the bottom portion of the screen contain required data to be linked to the new system record.

To create a new System, complete the fields as described below. The field names that are in **bold** correspond to the required fields in the New System screen.

- **System:** This is the ID for the system. Refer to Table 7 at the beginning of this section for rules for creating a System ID. Delete the predefined value in this field and enter the System ID.
- **Status:** Select a Status from the drop-down menu. The three statuses are as follows:
  - o **Active –** This is the status for a system that has assets currently being tracked.
  - o **Disposed –** This is the status for a system that is disposed. You should not use this status when creating a system.
  - o **Pending –** This is the status for a system that is awaiting assets to be assigned. Use this status if you are creating a system for later use.

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- **System Type:** Select a System Type from the drop-down menu. Refer to Table 7 at the beginning of this section to determine which system type is appropriate. Do not select Disposed as there is only one Disposed system for each contract and that system is already created.
- Comments**:** Enter any additional comments about the System in this field.
- **Valid From:** The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- **Valid Until:** The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.
- Cell Name: Skip this field.
- Node Name: Skip this field.
- **Chargeback Group:** You cannot enter data in this field. Skip this field.
- User Type: The User Type field has N/A by default. Keep the default value in this field.

The tabs as the bottom of the screen are the various data attributes linked to the System. The tabs are as follows: Asset, Location, Cost Centers, Person, Department, Usage Type, Contract Items, Reconciliation Differences, Hub Systems. Click each tab to see the data attributes linked to this system.

Assigning Assets to the System

Section 4.8.3, Moving Assets from One System to Another, covers creating assets and assigning them to a system record. We are only covering systems operations in this section.

Assigning a Location to the System

To assign a location to the system, click the Location tab and click the Assign button. The Location search box will appear as illustrated in Figure 47. Enter your location search criteria and click the **Find** button to display a list of locations matching your criteria as illustrated in Figure 47. For information on searching in ValueWeb, refer to Section 4.3.1, Basic Queries.

Figure 47. Location Search Box

Once you establish your search criteria and perform your search, the results will appear in the lower pane of the screen. To assign a location to the new system, double click on the appropriate location. You can also create a location from this screen. Click the **New** button to create a new location to link to this system. Once you link the location to the system, you will be returned to the Create System screen and your location will be displayed in the Location tab in the bottom pane.

Assigning a Cost Center to the System

Cost Centers are linked to assets, however, in ValueWeb, we need to link the cost center N/A to the system record. This is not the actual cost center of the asset. This is just to override the cost center field.

To assign the N/A Cost Center to the system, click the Cost Centers tab and click the Assign button. The Cost Center search box will appear. Enter N/A in the Cost Center ID field and click the **Find** button to display the N/A Cost Center. Double click on N/A in the bottom pane of the search screen to link the N/A cost center to the new system. You will be returned to the New System screen and N/A will be displayed in Cost Center tab in the bottom pane.

Assigning a Person to the System

To assign a person to the system, click the Person tab and click the Assign button. The Person search box will appear as illustrated in Figure 48. Enter your person search criteria and click the **Find** button to display a list of users matching your criteria as illustrated in Figure 48. For information on searching in ValueWeb, refer to Section 4.3.1, Basic Queries.

Figure 48. Person Search Box

Once you establish your search criteria and perform your search, the results
will appear in the lower pane of the screen. To assign a person to the new
system, double click on the appropriate person record. You cannot create a
new person record in this search box as the person records are created and
maintained in the help desk system and imported into the asset database.
You will be returned to the New System screen and your new person will be
displayed in the Person tab in the bottom pane.

Additional Data Attributes

You have now linked all of the required data attributes to the new system
record. The rest of the data attributes (tabs) are not required data so we will
not go into great detail on linking these attributes. If you do wish to link any
of these attributes to the system record, follow the steps for linking the
location, cost center, etc. The remaining data attributes are Department,
Usage Type, Contract Items, Reconciliation Differences, and Hub Systems.

To save the new system record, click the **Save & Close** button to save the
record and close the Create System screen.

To view the new System record, click on the Systems list.

4.6.2   Moves and Mass Moves of Locations and Users

Keeping data records up to date is important in keeping the integrity of the asset database. This section covers changing the location and/or user of a system, or several systems.

There will be times when assets move from one place to another or from one user to another and the asset database will need to be updated accordingly.

To move a system record to a new location or a new user, perform the following steps:

- Open the System list and highlight the system record you wish to move. If you are doing a mass move of several systems to the same location, you can highlight several systems at once to move to the same location.
- Click the Mass Move button at the bottom of the screen. The Mass move screen will appear as illustrated in Figure 49.

Figure 49. Mass Move Screen

- The selected system(s) will appear in the Available Systems box in the left pane of the Mass Move screen. In the Desired Assignment portion in the right pane of the screen there are options to move the system's location, cost center, user, department, and custodian. We will only be demonstrating the move feature for locations and users as the other data attributes are not linked to systems in our current model.

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Location Move

- To move a location, either enter a valid location in the Location field in the Desired Assignment section or click on the hourglass icon to bring up the Location search box.
- Enter your search criteria for the new location and click the **Find** button to display a list of current locations. If you need to create a new location to move the system to, click the **New** button to initiate the New Location screen. Once you have created or found your new location, double click on it to populate the Location field on the Mass Move screen.
- If you wish to change the move date to the date the move is to actually take place, click the **Effective Date** button and a calendar will appear. Select a new date and click **OK**.

You have now moved your system(s) to a new location. The link with the previous location will be disabled and the new location will be active. Click the X in the top right-hand corner of the screen to exit from Mass Move. To view the location change, double-click on the system(s) you changed and view the new location under the Location tab.

User Move

- To move a user, click on the hourglass icon to bring up the User search box.
- Enter your search criteria for the new user and click the **Find** button to display a list of current users. You will not be able to create a new user from this screen as user records come from the help desk system and are imported into the asset database. Once you have found your new user, double click on the user name to populate the User field in the Mass Move box.
- Click the **Replace User** box to disable the link between the system and the previous user.
- If you wish to change the move date to the date the move is to actually take place, click the **Effective Date** button and a calendar will appear. Select a new date and click **OK**.

You have now moved your system(s) to a new user. The link with the previous location will be broken and the new location will be active. Click the X in the top right-hand corner of the screen to exit from Mass Move. To view the user change, double-click on the system(s) you changed and view the new user under the Person tab.

4.6.3   System History

In order to keep the integrity of the asset database, many changes to the data will be made either via the collection agent, or in ValueWeb. However these changes are made, there are times when you may need to refer back to

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previous data. This section covers how to view the System History of various data attributes within the system record.

The system record allows you to view the history of changes made to each system record.

There are two different ways to view the history of various data attributes within the System record:

- Open the system list and highlight the system with the history you wish to view. Select System List from the File menu, then select History. Or, simply click the History button at the bottom of the System List screen.
- Open the system record to view its history. In the bottom pane, select any one of the data attributes linked to the System record, then click the History button in the lower left-hand corner of the screen.

Figure 50 displays a System History record. As you can see, you can view the history of several data attributes linked to the system record in this one screen. The bottom pane of the record contains tabs of the various data attributes with history records available.

Figure 50. System History Record

This history screen shows the Location history of this particular system record. The Location tab displays the previous location of this system. Every time you make a change to one of these data attributes, the previous data attributes will be listed in the history portion of the system record.

4.6.4   Disposal of Systems

When a system has reached the end of its useful life (or the assets within it) you will need to dispose of the system. When you dispose of a system in ValueWeb, you are not deleting the system. You can still view the disposed record in ValueWeb along with its history.

This section covers how to dispose of a system within ValueWeb.

When you dispose of a system, all of the assets within that system will be disposed as well. The Status of the system and the assets linked to it will be set to Disposed. Once you've disposed of a system, it is no longer searchable. The assets linked to the system will set the Status field to Disposed and will be linked to the Disposed System.

To dispose of a system, perform the following steps:

- Open the System list and highlight the system record you wish to dispose of.
- Click on the System[List] from the File menu and select Dispose. A splash screen will appear warning you that this process is not reversible as illustrated in Figure 51. Click **OK** if you wish to continue with the disposal or click **Cancel** if you wish to abort the process.
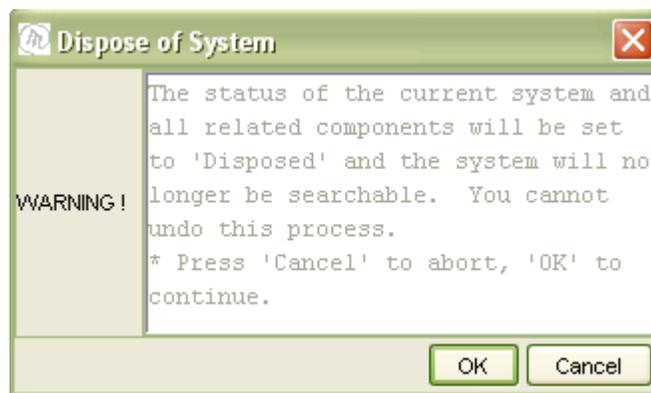
Figure 51. Dispose of System Warning.

- Once you click OK the Enter Disposal Code splash screen will appear as illustrated in Figure 52.
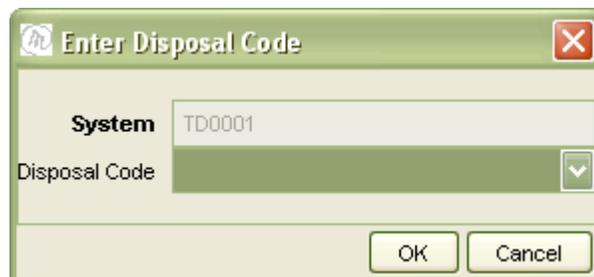
Figure 52. Enter Disposal Code screen.

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- Select a Disposal Code from the Drop down menu and click **OK**.

You have now disposed of a system in ValueWeb. You can still view the system record, but it will not be included with Active systems.

The asset(s) linked to this system are now linked to the Disposed System and can be viewed in the Disposed System's assets or in the Disposed Assets list. The assets of the Disposed System (or any system) can be viewed by opening that system and clicking on the Assets tab in the lower portion of the screen.

4.7   *Quality Assurance (QA) and Validation*

Quality Assurance, or QA, is a key factor in maintaining the integrity of any data repository. The QA process will take place when asset records imported into the Enterprise Explorer database have errors. These errors occur because the scan data (coming from the i.collect tool) does not match definition data in the ValueWise database. For example, if a technician entered Cost Center 1234 into the cost center field of the i.collect scan tool, and this particular cost center is not in the ValueWise database, an error will be generated and the Cost Center will be identified as incorrect. In order to correct this record, the Cost Center will need to be entered into the database or a correct cost center will need to be associated with the asset record.

Most errors occur in the cost center, user, location, and make and model fields.

This section covers how to identify and correct QA errors using ValueWeb.

4.7.1   **Identifying Errors in QA**

The first step in identifying errors in ValueWeb is to open the **QA Assets From Scan Files** list illustrated in Figure 53. This list is located in the Asset Operations folder. This list contains all new assets that have come into the ValueWeb database.

Figure 53. QA Assets From Scan Files List.

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This list displays new scan records that need to be validated and imported into the ValueWise database. Only records with no errors will be imported, the remaining records have errors that need to be corrected. The Comments field describes the error(s), if there are any, contained in the record.

The first task is to validate all records in QA. Follow the steps below to validate the records in QA Assets From Scan Files:

- Open QA Assets from Scan Files list.
- Click Asset Errors from the File menu.
- From the Asset Errors menu select **Validation Routine**. This will validate the assets in this table and import the error-free records into the database. If there are records remaining, they have errors and need to be corrected.

4.7.2   Correcting Records in QA

The records remaining after validation in the QA From Scan Files list need to be corrected. You can correct and add data in the record itself making QA tasks efficient and simple. The Comments field will tell you which data attribute is in error.

Open a record in the QA From Scan Files list. Figure 54 illustrates a record with errors.

Figure 54. Asset Record with Error in QA table.

As you can see, this record has several errors. The errors are as follows:

- Invalid Person: There is a problem with the data in the User ID, First Name, and/or Last Name fields.

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- Invalid Location: There is a problem with one or more of the location fields, including Site, Building, Floor, Room and Location Code.
- Invalid Make/Model: There is a problem with the Make and/or Model.

You can fix most of these errors within this record. The process for fixing data attribute in the asset record in QA are basically the same for all fields except for the site. The site cannot be corrected in the QA screen.

To fix any of these errors, either type in the correct data in the field (if you have it on hand) or click the hourglass icon next to the field to bring up the search box for that particular field. Any fields that are related (i.e., User ID, First Name, and Last Name) are corrected at the same time. All of the fields in the asset record that can be corrected contain a search feature which allows you to search for the correct data.

Once you have replaced incorrect data with correct data in the record, click the **Save & Close** button to save your changes.

Once you have corrected all of the records in QA, Validate the records again.

Open the New Assets list to view the new assets in ValueWeb.

4.8   Asset Operations

Before continuing on in this section, be sure you have read Section 3, Asset Management Concepts, and are familiar with Getronics Asset Management concepts before performing Asset Operations in ValueWeb.

Assets are IT equipment such as Desktops, Monitors and Software. Assets are grouped in Systems. All assets must be part of a system. Refer to Table 3 in Section 3.2, Assets, for key attributes of assets.

The section covers how to create and maintain asset records in ValueWeb, including creating an asset, new asset operations, moving an asset, on loan/on repair processes, asset history, and the disposal process.

Note: The term "Component" is used in place of "Asset" on several of the asset operations screens in ValueWeb. In this manual, we are using the term "Asset" in place of "Component."

4.8.1   Creating an Asset

Assets are typically created automatically when scan data comes into the database, however, there will be times when you need to create assets and the systems to which they are linked using ValueWeb.

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To access the New Asset screen, right-click on the Assets list and select New Component from the menu. The New Asset screen will appear as illustrated in Figure 55.

Figure 55. New Asset screen.

Once you are in the New Asset screen, there are few things you need to know:

- The fields in bold lettering indicate required entry. Data must be entered into these fields in order to save the record.
- All other fields are not required entry. If you aren't sure of what to enter in some of the fields, you can save the record and edit it in the future.
- Use the tab key to move from field to field.
- The tabs on the bottom portion of the screen have required fields in those screens.
- When you create an asset and link it to a STOCK type system, the Status will automatically be set to Surplus.

To create a new Asset, complete the fields as described below. The field names that are in **bold** correspond to the required fields in the New Asset screen.

- **Asset ID:** This is the ID for the asset which is typically found on the Asset Tag placed on the asset. Delete the predefined value in the field and enter the Asset ID.
- **Serial No.**: Enter the serial number of the asset in this field.
- **Asset Type:** This is the equipment type (laptop, desktop, etc.). Select an asset type from the drop-down menu.
- **Asset Class ID:** This is the class of the asset. This is the highest level of asset classification. For more information on Asset Classes, refer to Section 3.5, Asset Classes and Asset Types. Select an asset class from the drop-down menu. If you aren't sure what Asset Class to enter in this field, skip to the Make field and select the appropriate make for your asset, the Asset Class field will automatically populate.
- **Make:** This is the manufacturer and model of the asset. Click on the hourglass icon to bring up a list of asset makes. Select a make from the list of makes that appear. Once you select an asset make/model from this list, the Model field will automatically be populated.
- **Model:** See Make.
- Description: This field is automatically populated with the asset type. You cannot enter data in this field.
- Asset Description: This field allows you to enter further description for the asset.
- Model Number: Enter the model number of the asset in this field.
- **Ownership**: Select the ownership code from the drop-down menu. The default values are as follows (these values may vary for different contracts):
  - Leased: Equipment leased by the customer
  - Off-Lease: Off-Lease Equipment
  - Owned: Equipment owned by the customer
  - Rented: Equipment rented by the customer
- **Status**: This is the current status of the new asset. The default status is new and should not be changed as this value will change when the asset is accepted (you will learn about accepting assets later in this section).
- Usage Code: The usage code is a description of how this asset is used. Select the appropriate usage code from the drop-down menu. The default values are as follows (these values may vary for different contracts):
  - Disposed: Disposed Asset
  - Home Use: Asset is used at a home office
  - In Use: Asset is in use
  - Network Use: Asset is attached to the network
  - Not In Use: Asset is not in use (typically a stockroom asset)
- Purchase Price: Enter the purchase price of the new asset in this field.
- Purchase Order Number: Enter the purchase order number of the new asset in this field.
- Total Cost Adjustment: You cannot enter data in this field.

- Valid From: The default date in this field is today's date. You can change the date in this field. The format is MM/DD/YYYY.
- Valid Until: The default date in this field is 01/01/2100. You can change the date in this field. The format is MM/DD/YYYY.
- Warranty Start Date: Enter warranty information in this field if you are tracking warranty data. The format is MM/DD/YYYY.
- Warranty Until: Enter warranty information in this field if you are tracking warranty data. The format is MM/DD/YYYY.
- Extended Warranty Vendor Data (SKU): Enter warranty information in this field if you are tracking warranty data.
- End of Lease: Enter lease information in this field if you are tracking lease data. The format is MM/DD/YYYY.
- **System:** This field is where you link your new asset to a system. You can either type the system in this field or click on the hourglass button to display the System Search screen. From the system search screen you can search for a system, or create a new system for this asset. The remaining system fields are for display purposes only. You cannot enter or alter data in any of the system fields.
- Fixed Asset ID: Enter the fixed asset ID in this field, if applicable.
- Comments: This field is for further comments on the asset.
- Technical Status: You cannot enter data in this field.
- Inventory/i.collect Svcs Provider: If you have a third-party contract providing inventory services, enter the company name in this field. This field is typically reserved for i.collect scans.
- Tech Performing Scan: This field indicates the name of the technician performing the scan using i.collect. You can enter your own name in this field or leave blank. This field is typically reserved for i.collect scans.
- Inventory Date: This field is the date the asset is inventoried. This field is typically reserved for i.collect scans.
- Disposal Code: Do not enter data in this field. This field is used when the asset is disposed of.
- Super Asset: Do not enter data in this field. Getronics does not employ the use of Super Assets.
- Date Accepted: This is the date the asset goes through the acceptance process. You cannot enter data in this field.
- Priority: If your contract uses priority codes to identify assets, select a priority code from the drop-down menu.
- Date Disposed: Do not enter data in this field. This field is used when the asset is disposed of.
- Replaced On: This field is used for an asset's replacement date. Enter the format MM/DD/YYYY.
- Warranty Type: Enter warranty information in this field if you are tracking warranty data. The format is MM/DD/YYYY.
- Vendor: If you are tracking vendor data, select a vendor from the drop-down menu.

Once you have entered all applicable data to create your asset record, you need to link the asset to a cost center. Follow these steps to link the cost center:

- Click on the Cost Center tab in the bottom pane of the New Asset screen.
- Click the **Assign** button to bring up the Cost Center search screen.
- Enter a known cost center or enter your search criteria and click the **Find** button.
- Double click on the cost center in the bottom pane of the Cost Center search screen to link the cost center to your new asset.

The remaining tabs, SubAssets, System and Order Item will not be used in the asset creation process in ValueWeb at this time.

You are now finished creating a new asset record and linking it into a system. Click on the **Save & Close** button to save your new record.

You can now view your new asset in the New Assets list.

4.8.2 Accepting New Assets

Once you have created a new asset or a new asset has come in from a scan file and has been validated, you need to accept it into the database. At this point the asset still has a status of "New" and has not been accepted as part of the Active asset inventory. This section covers accepting a single new asset or all new assets using ValueWeb. You can only accept an asset that has the status of "New."

For assets that have come into the database via i.collect scan, refer to 4.7, QA and Validation, for steps to take for scanned assets prior to accepting them. To accept a new asset or all new assets, follow the steps below:

- Open the New Assets list and highlight your new assets(s) you wish to accept.
- To accept a single asset, select Component[List] from the File menu and select Accept Asset. The single highlighted asset will be accepted.
- To accept all new assets, select Component[List] from the File menu and select Accept All Assets. All assets will be accepted.

Once you close out of the New Assets list and open it back up, the assets will no longer appear in this list. To view the accepted assets, open the All Assets or Active Assets list. You will see the asset now has a status of "Active."

4.8.3 Moving Assets From One System to Another

There will be times when you have to move an asset from one system to another in ValueWeb. For example, if someone has a bad monitor and a

monitor has to be taken from a Stock system and moved into the Workstation system where the old monitor was, you will need to record the move in ValueWeb.

This section covers how to move single and multiple assets from one system to another. In the following example, we are going to move a monitor from a stock system into a workstation system.

To move asset (s) from one system to another, follow the steps below:

- Open the Active Assets list and highlight the asset(s) you wish to move. If you have more than one asset to move, hold down the CTRL key while highlighting the assets. In this case we are moving an asset from a stock system to a workstation system as illustrated in Figure 56.

Figure 56. Active Assets List.

- Click the **Configure** button at the bottom of the screen. The Configure Parameters screen will appear as illustrated in Figure 57.
- In the Target System field, either enter the System ID of the system you wish to move the asset(s) to or click the hourglass icon to bring up the System Search box. Once you find the target system, click on it and the Target System field will be automatically populated.
- The Effective Date field will automatically default to today. To change the date, click on the calendar icon to the right of the field to change the Effective Date.
- The Bundling Behavior field is used with Purchasing. You can skip this field.
- Click **OK** to move the asset(s) to its new system.
- You will receive a message saying the Components were successfully configured. Click **OK**.

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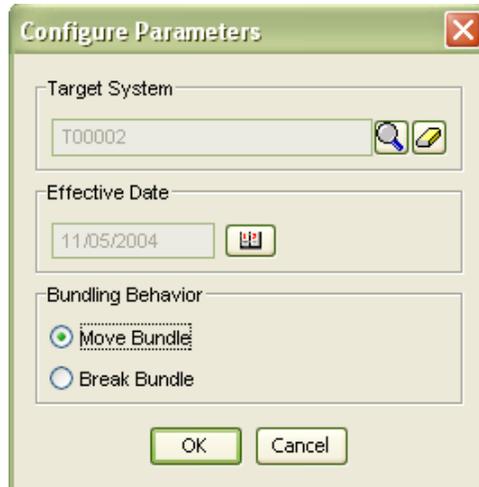
Figure 57. Configure Parameters Screen.

You have now moved an asset (or assets) from one system to another. To verify the asset(s) was moved to the appropriate system, open the system record you moved the asset(s) to and click the Assets tab in the bottom pane. You will see the asset(s) in its new system as illustrated in Figure 58.

Figure 58. Moved Asset

4.8.4   On Loan/On Repair

Many companies keep a loaner pool of assets to be loaned out when a user's asset is being repaired. For example, if a user's monitor is not working and is sent out for repair, the user is typically given a replacement monitor until the repaired monitors comes back. ValueWeb allows you to track assets that are on loan or on repair.

The section covers the On Loan and On Repair processes in ValueWeb. The processes are combined here as the steps are very similar.

To place an asset on loan or repair, follow the steps below:

- Open the Active Assets list and open the asset record to be put On Loan or On Repair.

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- Select On Loan or On Repair from the Status field drop-down menu.
- Click the **Save & Close** button.
- The next step is creating the Loan or Repair record. Open the Loan/Repair list and click the **New** button. The Loan/Repair screen will appear as illustrated in Figure 59.

Figure 59. Loan/Repair Entry Screen.

To create a new Loan/Repair record, complete the fields as described below.

- **Creation Date:** This is the date the record is created. The default is today's date.
- **Asset ID**: Enter the Asset ID of the asset going onto loan/repair.
- **Transaction Type:** Select On Loan or On Repair from the drop-down menu.
- **Transaction Date:** This is the date the loan/repair occurred.
- **Ticket No.:** If this loan/repair transaction is related to a help desk ticket, enter the ticket number here. If not, enter N/A.
- **Expected Return Date:** Enter the date the loaned/repaired machine is due for return.
- Actual Return Date: Enter the actual return date of the loaned/repaired asset.
- Comment: Enter comments about the loan/repair transaction here.
- Labor Costs: Enter labor costs here, if applicable.
- Parts Cost: Enter parts cost here, if applicable.
- Total Costs: Enter total cost of repair, if applicable.
- **Parts Under Warranty?** Select Yes or No from the drop down menu.
- **Labor Under Warranty?** Select Yes or No from the drop down menu.
- Vendor: Select a Vendor from the drop-down menu.
- Person ID: This field is for the person who is receiving the loaner asset. Click the hourglass icon to open the Person Search screen and select a person record.

- **Assigned To:** This field is for the technician who is assigned to repair the asset. Enter the tech name in this field.
- Click **Save & Close** to save the new loan/repair record**.**

You can view your Loan/Repair asset record in the Loan/Repair list.

To place an asset on loan or repair back to active, follow the steps below:

- Open the Assets on Loan or Assets on Repair list and open the loaned asset record.
- Select Active from the Status field drop-down menu.
- Click the **Configure** button to move the loaned asset back into the loaner pool system.
- Click the **Save & Close** button.

The loaned asset will no longer appear in the On Loan list. To view the asset, open the Active Assets list.

4.8.5   Asset History

In order to keep the integrity of the asset database, many changes to the data will be made either via the collection agent, or in ValueWeb. However these changes are made, there are times when you may need to refer back to previous data. This section covers how to view Asset History of various data attributes within the asset record.

The asset record allows you to view the history of changes made to each asset record.

To view the history of an asset, follow the steps below:

- Open the asset list and open the asset record whose history you wish to view.
- Click the **Component History** button at the bottom of the screen.

The Component History screen will appear as illustrated in Figure 60.
As you can see, you can view the history of systems and cost centers linked to the asset record in this screen. The bottom pane of the record contains tabs of the various data attributes with history records available.

Figure 60. Asset History Record

This history screen shows the System history of this particular asset record. The System tab displays the previous system of this asset. Every time you make a change to one of the data attributes in the asset record, the previous data attribute will be listed in the history portion of the system record.

4.8.6   Disposal of Assets

When an asset comes to the end of its useful life, it needs to be disposed. Most organizations have a process of disposing of assets physically; ValueWeb allows you to track the disposal of that asset. Why dispose of an asset instead of just deleting it? Disposing of an asset takes it out of the active asset stream and preserves the data of the asset in case you need to refer back to it. You would never delete a record in ValueWeb, you always dispose of it.

This section covers the process of disposing of an asset in ValueWeb.

To dispose of an asset in ValueWeb, follow the steps below:

- Open the Active Assets list and highlight the asset you wish to dispose of.
- Select Component[List] from the file menu, then select Dispose Asset. A splash screen will appear warning you that this process is not reversible as illustrated in Figure 61. Click **OK** if you wish to continue with the disposal or click **Cancel** if you wish to abort the process.
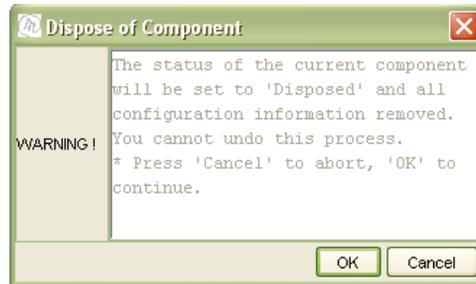
Figure 61. Disposal Warning.

- Once you click OK the Disposal Code splash screen will appear as illustrated in Figure 62
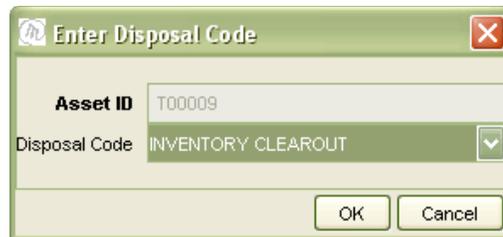
Figure 62. Asset Disposal Code Box.

- Select a Disposal Code from the Drop down menu and click **OK**.

You have now disposed of an asset in ValueWeb. You can view the asset record in the Disposed Assets list.

When the asset is disposed of, the asset's status is changed to Disposed and the asset is moved from its current system into the Disposed System.

4.9   *Exporting Data in ValueWeb*

ValueWeb allows you to export any of the list data to an Excel or web spreadsheet. This allows you to analyze and report on some of the data in ValueWeb.

This section covers how to export data to Excel or in a web format that displays a spreadsheet.

To export a list to an Excel spreadsheet or a web document, follow the steps below:

- Open the list you wish to export data from.
- Click the Excel icon on the toolbar.
- The **Save Export to File** box will appear. If you wish to export your data to an Excel spreadsheet, type in a name for your spreadsheet and add the **.xls** extension on the end.

- If you want to view the data as a table in a web document, do not add any extension. The file will automatically be saved as an html file.
- The file will appear on your desktop.

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APPENDIX A – Ongoing Asset Management Folders and Lists

The left portion of the ValueWeb desktop is a Tree View of all standard folders and lists used to maintain the Asset Management database. The Ongoing Asset Management Group is the group you will be using most often.

Asset Operations Folder

List	Function
QA Assets from Scan Files	QA scan files that come in from i.collect scans.
All Assets	View, create and maintain all assets.
Active Assets	View assets with status of active. Create and maintain assets.
New Assets	View assets with status of new. Create, maintain and accept assets.
Assets on Loan	View assets with status of On Loan. Create and maintain assets.
Assets on Repair	View assets with status of On Repair. Create and maintain assets.
Disposed Assets	View assets with status of Disposed. Create and maintain assets.
Make/Model	View, create and maintain asset makes/models.
Loan/Repair	View, create and maintain loan/repair records.
Asset Adjustment Codes	View, create and maintain asset adjustment codes.
Asset Classes	View, create and maintain asset classes.
Asset Equipment Types	View, create and maintain asset types.
Cost Centers	View, create and maintain cost centers.
Disposal Codes	View, create and maintain disposal codes.
Departments	View, create and maintain departments.
Vendors	View, create and maintain departments.

System Operations Folder

List	Function
ALL Systems	View, create and maintain systems.
WORKSTATION Systems	View Workstation systems. Create and maintain systems.
STOCK Systems	View Stock systems. Create and maintain systems.
PRINTER Systems	View Printer systems. Create and maintain systems.
EQUIPMENT ROOM Systems	View Equipment Room systems. Create and maintain systems.
DISPOSED System	View Disposed systems. Create and maintain assets.
Locations	View, create and maintain locations.
Person	View person records.
Sites	View site records.
System Type	View system types.

Asset Lists by Type Folder

List	Function
Laptops	View laptops. Create and maintain assets.
Desktops	View desktops. Create and maintain assets.
Monitors	View monitors. Create and maintain assets.
Network Printers	View network printers. Create and maintain assets.
Local Printers	View local printers. Create and maintain assets.

EE Data (Hardware/Software) Folder

List	Function
Adapters	View adapter data
Drives	View drive data
Nodes	View scanned assets
Nodes (Local)	View BIOS and Operating System data
Nodes (Software)	View assets and software data
Software	View software data

Set Definitions Folder

List	Function
Vendor Type	View, create and maintain Vendor Type values
Location Type	View, create and maintain Location Type values
Usage	View, create and maintain Usage values
Ownership	View, create and maintain Ownership values
Asset Status	View, create and maintain Asset Status values
All Set Definitions	View, create and maintain all Set Definition values

<u>APPENDIX B – Asset Management Processes</u>

This section contains Getronics' recommended Asset Management process to be used with ValueWeb. These processes may vary depending on the requirements of your contract.

Each process has one or more diagrams visually outlining each process.

These processes include:

- Receipt and Deployment Processes
- QA Process
- IMAC Process
- Perpetual Scan Process
- Disposal Process

Each written process is followed by a diagram illustrating that process.

Receipt and Deployment of New Assets

Every company at one time or another acquires new IT assets. These assets can be purchased in bulk or purchased individually. Having a good receiving process is an important first step in tracking the life of an asset.

Whenever an asset is purchased or otherwise acquired, it needs to be entered into the asset repository using ValueWeb or i.collect.

This document describes Getronics' recommendation for the process of receiving new assets. These processes may vary based on customer requirements.

The following acquisition processes will be covered:
- Overall process for receiving new assets
- Installing i.collect on new assets
- Deploying new assets

Receiving New Assets

When new assets are received into an organization there are various processes that take place. The procedures that follow assume the purchasing process has already been completed.

The steps for receiving new assets as suggested by Getronics are detailed below.

The overall process for receiving new assets:

1. The asset is received by the receiving technician at a central location.
2. The technician applies an asset tag to the asset.
3. If the asset is a desktop, laptop, or server, the company-standard image is loaded and the i.collect agent is installed and run and the data is sent to the asset repository.
4. If the asset is anything other than a desktop, laptop, or server and not associated with any one of these, a data collection form needs to be completed and the asset needs to be manually created using ValueWeb. Once the asset is created, it needs to be moved into a stockroom system until it is deployed to an end user.
5. If the asset is immediately deployed to an end user, and is a core asset, the i.Collect application is run. If the asset is not a core asset and is installed with an existing system, follow the corresponding IMAC process for adding new assets.
6. The asset repository is updated.

Installing i.collect on new assets:

Most organizations will install a customized image of company-standard software applications on new desktops, laptops, and servers. Getronics recommends including the i.collect agent on the image so that the agent can be installed when the image is loaded on the system.

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If the system will be placed in a stockroom instead of being deployed immediately, the company image should be installed on the system and a scan should be run on the new asset. If the asset is not connected to the network then the asset should be manually added to the asset repository using ValueWeb.

If the system will be setup immediately, the image is installed, along with the i.collect agent. i.collect runs when the system is set up at the end user location. The data is then sent to the asset repository.

If the i.collect agent is not included in the organization's image, then it will need to be installed separately. The asset information will need to be manually input into the asset repository until the system is deployed to an end user, then the repository will need to be updated with the new information, which will take place via i.collect scan.

Deploying New Assets:

Once new assets have been received, they are usually placed in a stockroom or "holding" area waiting to be deployed. Assets can also be deployed immediately upon arrival into an organization. In either case, the following process for deploying new assets should be adhered to.

1. The desk side technician receives an order to install a new asset for an end user.
2. The desk side technician obtains the equipment from one of two places:
   a. The asset is taken from the stockroom with the i.collect agent already installed on the system (if the asset is a core asset). The desk side technician installs the new asset at the end user location and runs Splash.exe to update the asset. Upon validation of the asset in ValueWeb, the database automatically moves the asset from the stock system into its own system (which is created automatically).
   b. The asset is received directly from the receiving technician and an image is immediately installed on the new equipment (if the asset is a core asset). When the image is installed the i.collect agent is also installed and the desktop technician then runs the i.collect agent and performs a scan. If the asset is a non-core asset, the asset is set up at the end user location and Splash.exe is run and the asset is added to the existing system.
3. If the asset is a peripheral asset not associated with a desktop setup, follow the IMAC process for adding a new asset.
4. The asset repository is updated.

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Process for Receipt of New Asset

Asset is received at a central location by receiving technician

Asset tag is placed on asset

Is new asset being deployed?

No → Is it a core asset?
— **Yes** → Technician images machine and installs i.collect → Asset record is auto entered into ValueWeb → Asset goes to stockroom
— **No** → Technician completes Asset Collector form → Asset record is manually entered into ValueWeb → Asset goes to stockroom

Yes → Is it a core asset?
— **No** → Asset is deployed to end user → i.collect scan is performed at desktop → Copy of ticket is sent to Asset Manager
— **Yes** → Technician images machine and installs i.collect → Asset is deployed to end user → Copy of ticket is sent to Asset Manager → Asset repository is Updated

Process for Deployment of New Asset

Technician receives an order to install a new asset for end user

Just rec'd or from stock?

Received → Technician installs asset → Core asset?
— **Yes** → Technician installs asset, and image; runs i.collect → Technician installs asset → Copy of ticket is sent to Asset Manager → Asset repository is updated
— **No** → Technician runs splash.exe and adds new asset → Copy of ticket is sent to Asset Manager → Asset repository is updated

Stockroom → Core asset?
— **No** → i.col Install
   — **No** → Technician installs asset → Technician installs and runs i.collect
   — **Yes** → Technician installs asset → Technician runs i.collect → Copy of ticket is sent to Asset Manager → Asset repository is updated
— **Yes** → Technician installs asset → Technician runs splash.exe and adds new asset

QA Process

The QA process is one of the most important aspects of maintaining the integrity of the asset repository. To ensure the integrity of the data in the database, a QA process must be in place.

ValueWeb has an automatic QA process that takes place when assets are imported into the database from the Cell Manager. The QA tables are a combination of tables in Enterprise Explorer and ValueWise that work together to form the QA table. When a record with invalid data (such as make, model, asset type, user, etc.) comes into the database from a scanned asset record, it is checked against existing data (also referred to as Definition Data) in the asset repository. If that data is not already in the database, the record will remain in the QA table until it is corrected.

Getronics recommends checking the QA tables using ValueWeb at least once per day.

The following process explains how QA should be performed on new assets coming in to the asset repository.

QA Process

1.   The Asset Manager checks the "QA Assets from Scan Files" list in ValueWeb. Any errors that have come in via i.collect scan can be found in this list.
2.   The Asset Manager validates the data in the QA table. The asset records that remain have errors.
3.   The Asset Manager opens each record and looks at the Comments section on Asset Attributes screen. The Comments field will tell you what problems are preventing the record from going into ValueWise. The problems that usually arise are invalid cost center, invalid person, invalid make and model, etc.
4.   The Asset Manager corrects the asset records.
5.   Once all records have been corrected, the Asset Manager runs the Validation Routine again and the records are then imported into ValueWise.
6.   The asset repository is updated.
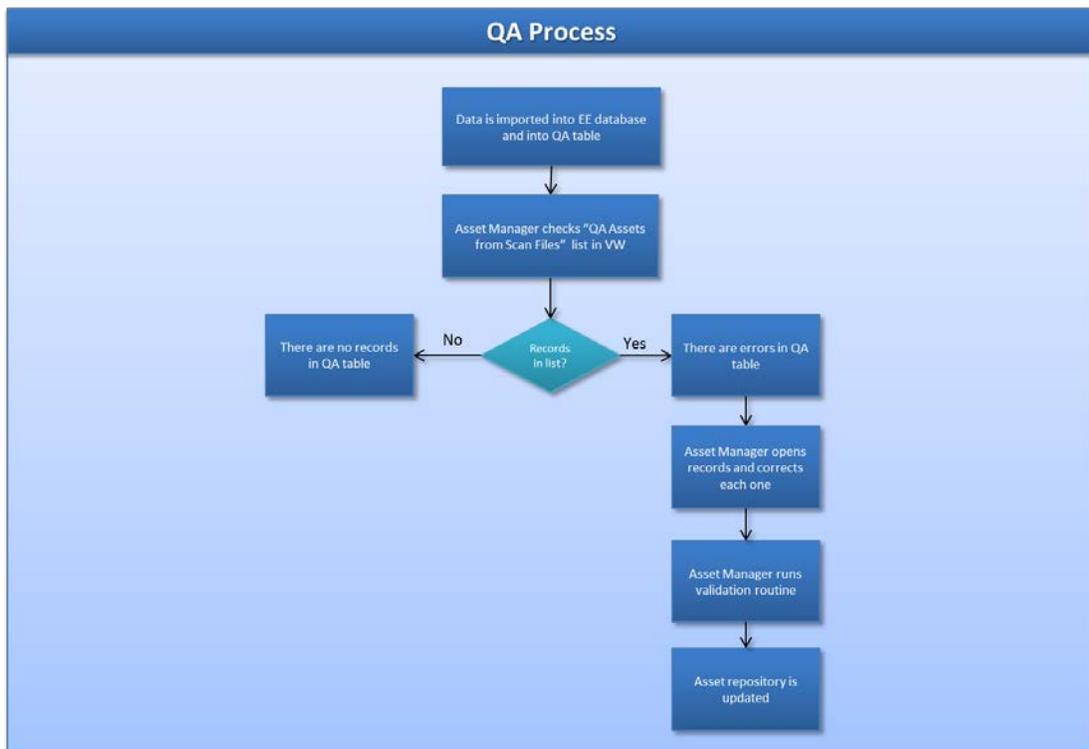
IMAC Process

The IMAC (inventory move, add, change) process is a very important aspect of maintaining data integrity within the asset management repository. An IMAC is defined as an inventory move, add, or change to an IT asset that is being tracked using the asset management system. Anytime an IMAC takes place, the asset repository must be updated to reflect any changes. The updates can take place at the desktop with i.collect or in ValueWeb.

We highly recommend the updates take place at the end user's desktop using the i.collect tool, however, in the event that this cannot be done (i.e., if the end user's desktop is not connected to the network) we have also included procedures for entering IMAC information directly into the asset repository using ValueWeb.

These processes assume the i.collect tool has been installed.

This document describes Getronics' recommendations for processes for asset management IMACs. These processes may vary based on customer requirements.

The following IMAC actions will be covered:
- Desk side visits, including replacement, addition or upgrade of an asset or system.
- Change of user
- Change of location and/or site

Desk Side Visits

A desk side visit takes place when a repair, replacement, upgrade, or addition of a system or peripherals is necessary.

Repair

When a technician makes a desk side visit to repair an asset, the Asset Manager needs to record the repair in the asset repository using ValueWeb, and if necessary, give the user loaner equipment until the asset is repaired. The following describes this process:

1. The technician makes a desk side visit and takes an asset to be repaired. The technician leaves a replacement asset until the original asset is fixed.
2. The technician gives a copy of the ticket to the Asset Manager.
3. The Asset Manager gives the asset on repair a status of On Repair and enters the appropriate information using ValueWeb.
4. The Asset Manager gives the loaner asset a status of On Loan and moves the asset (temporarily) from a Stock System to the end user's current system.
5. When the asset is repaired and returned, the help desk technician gives the Asset Manager a copy of the ticket and returns the loaner asset.
6. The Asset Manager gives the repaired asset a status of Active using ValueWeb.
7. The Asset Manager returns the loaner asset to the stockroom, gives it a status of Active and moves it back into the Stockroom System using ValueWeb.
8. The asset repository is updated.

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Repair/Loan Process

Technician makes deskside visit, takes asset to be repaired

Loaner asset issued?

No → Copy of ticket is sent to Asset Manager

Yes → Copy of ticket is sent to Asset Manager

Asset Manager updates asset status to "On Repair"

Asset Manager updates asset status to "On Repair"

Asset repository is updated

Asset is taken out of loaner pool and given status of "On Loan"
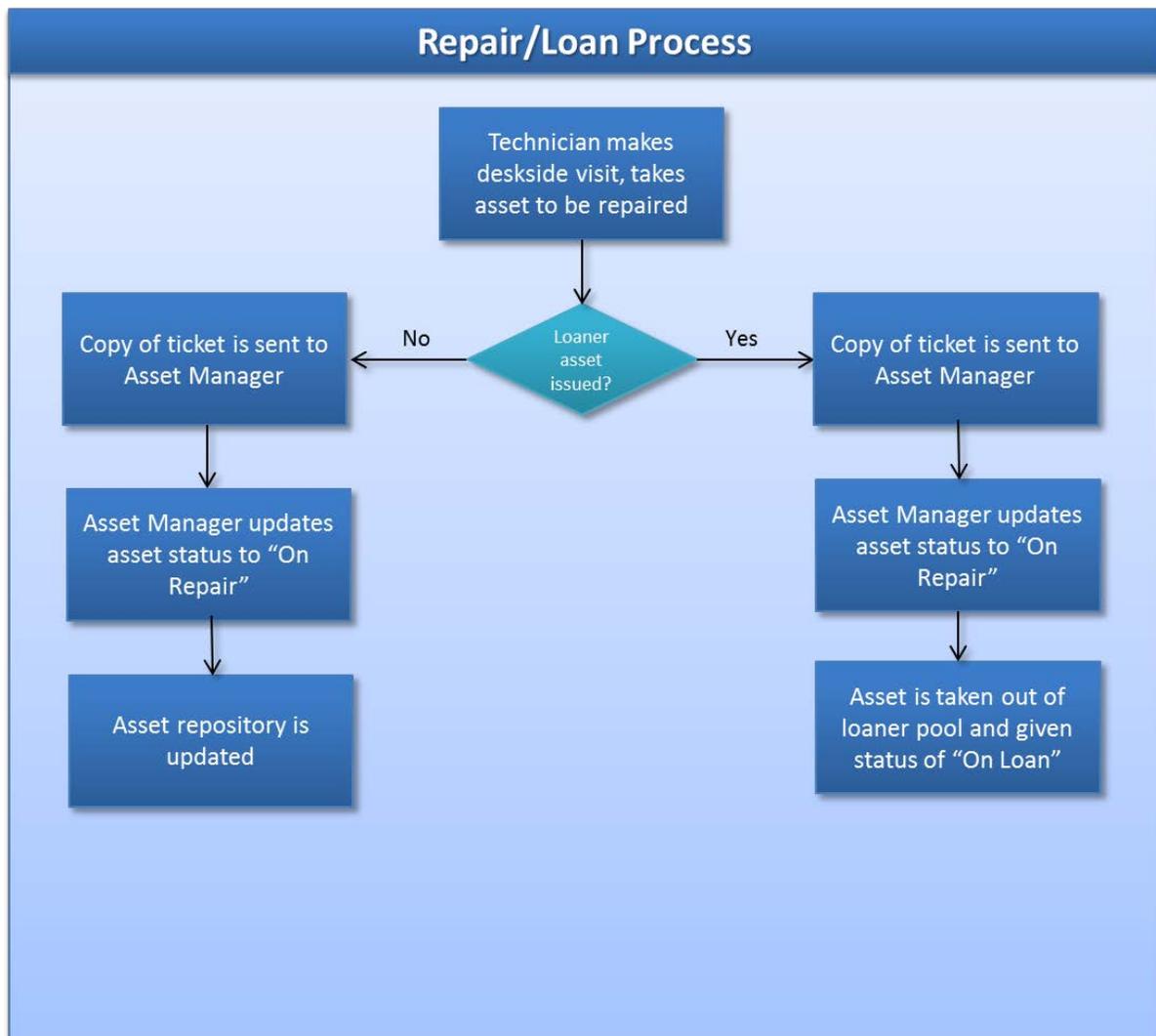
Replacement

When a technician makes a desk side visit to replace an asset in a system (i.e., monitor, local printer, etc.) an i.collect scan must be run at the end user's desktop to update the local information, which will in turn, update the asset repository.

Replacing a core asset:

1. The technician makes a desk side visit and replaces a core asset (desktop, laptop, system) of an end user's system.
2. After the asset is replaced and functional the technician installs i.collect (if not already installed) and completes the i.collect GUI with the proper information and runs a scan.
3. The technician disposes of the old core asset according to the Disposal Process.
4. The technician gives a copy of the ticket to the Asset Manager.
5. The Asset Manager disposes of the old asset using ValueWeb according to the Disposal Process.
6. The asset repository is updated.

Replacing a non-core asset:

1. The technician makes a desk side visit and replaces a non-core asset of an end user's system.
2. After the asset is replaced and functional the technician runs the Splash.exe program to initiate the i.Collect GUI.
3. The technician deletes the old asset and adds the new asset to i.Collect and runs a scan.
4. The technician disposes of the old asset according to the Disposal Process.
5. The technician gives a copy of the ticket to the Asset Manager.
6. The Asset Manager disposes of the old asset using ValueWeb according to the Disposal Process.
7. The asset repository is updated.

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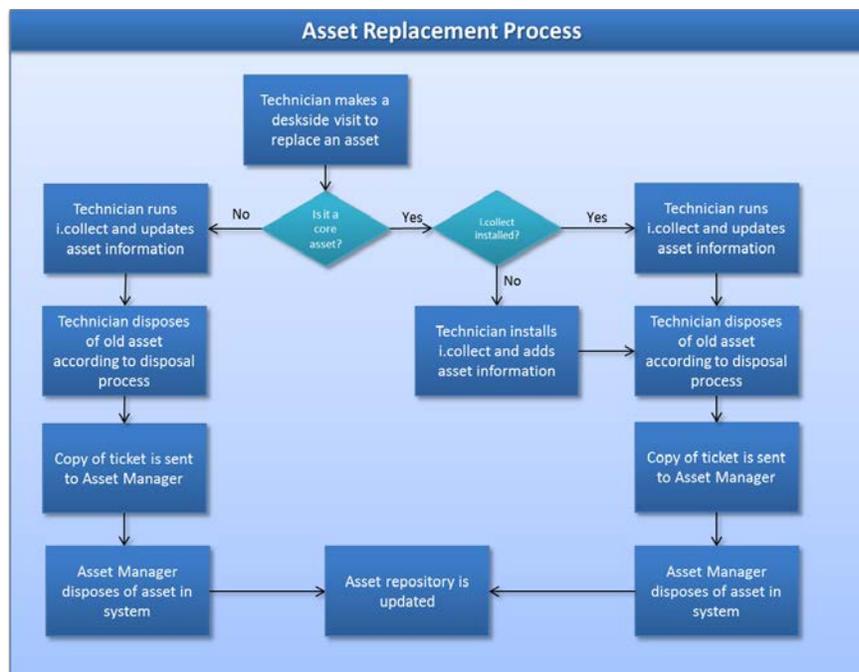
Upgrade

When a technician makes a desk side visit to upgrade internal hardware or software of a desktop or other peripheral (i.e, new hard drive, more memory, new operating system, etc.) an i.Collect scan must be run at the end user's desktop to update the local information, which will in turn, update the asset repository.   This can only be done using i.collect. There is no procedure for this process involving manually entering this hardware and software data into the asset repository using ValueWeb.

1. The technician makes a desk side visit and upgrades internal hardware or software of an end user's system.
2. After the hardware or software is replaced and functional the technician runs the Splash.exe program at the end user's desktop. No changes are made to the demographic and asset data in the i.collect GUI. The scan will detect the hardware/software changes during the scan.
3. Technician gives a copy of the ticket to the Asset Manager.
4. The scan takes place and the asset repository is updated.
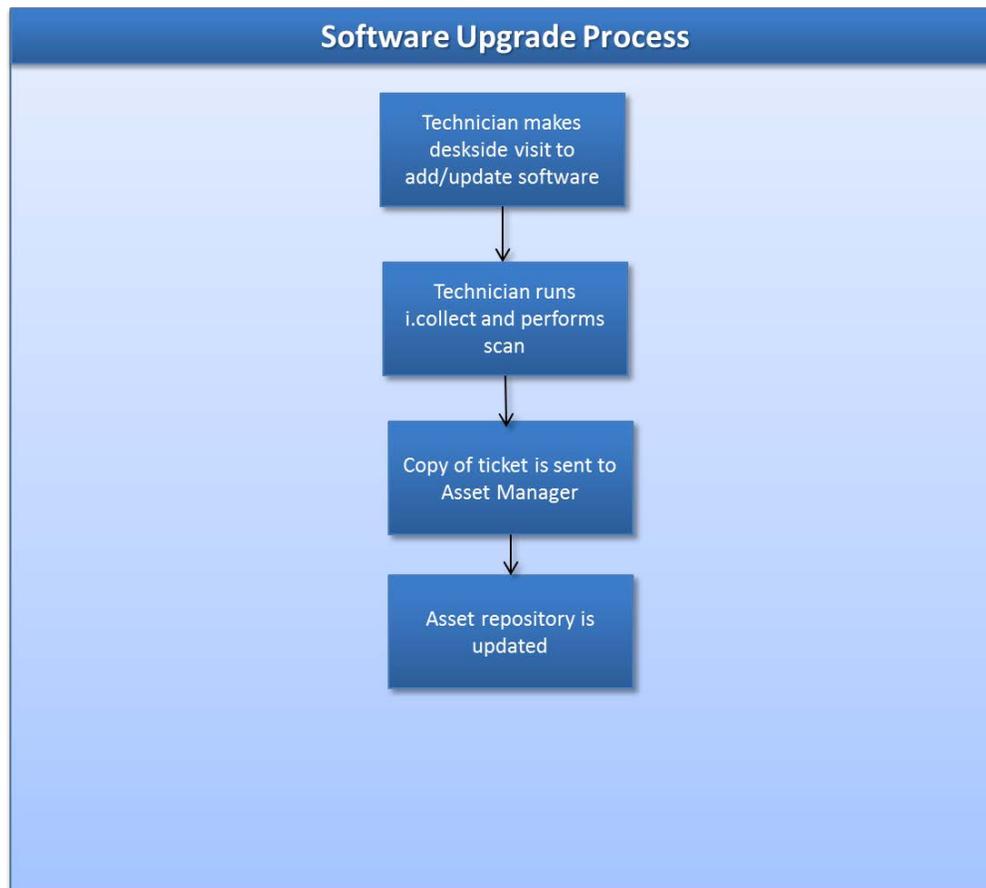
Addition

When a technician makes a desk side visit to add an asset to a system (i.e., new local printer or scanner) an i.collect scan must be run at the end user's desktop to update the local information, which will in turn, update the asset repository.

Addition of a core asset:
1. The technician makes a desk side visit and adds a core asset (desktop, laptop, system) for an end user.
2. After the asset is added and functional the technician installs i.collect (if not already installed) and completes the i.collect GUI with the proper information and runs a scan.
3. The technician gives a copy of the ticket to the Asset Manager.
4. The asset repository is updated.

Addition of a non-core asset:

1. The technician makes a desk side visit and adds a non-core asset to an end user's system
2. After the asset is added and functional the technician runs the Splash.exe program to initiate the i.collect GUI.
3. The non-core asset is added to the system via the i.collect GUI.
4. The technician gives a copy of the ticket to the Asset Manager.
5. The asset repository is updated.
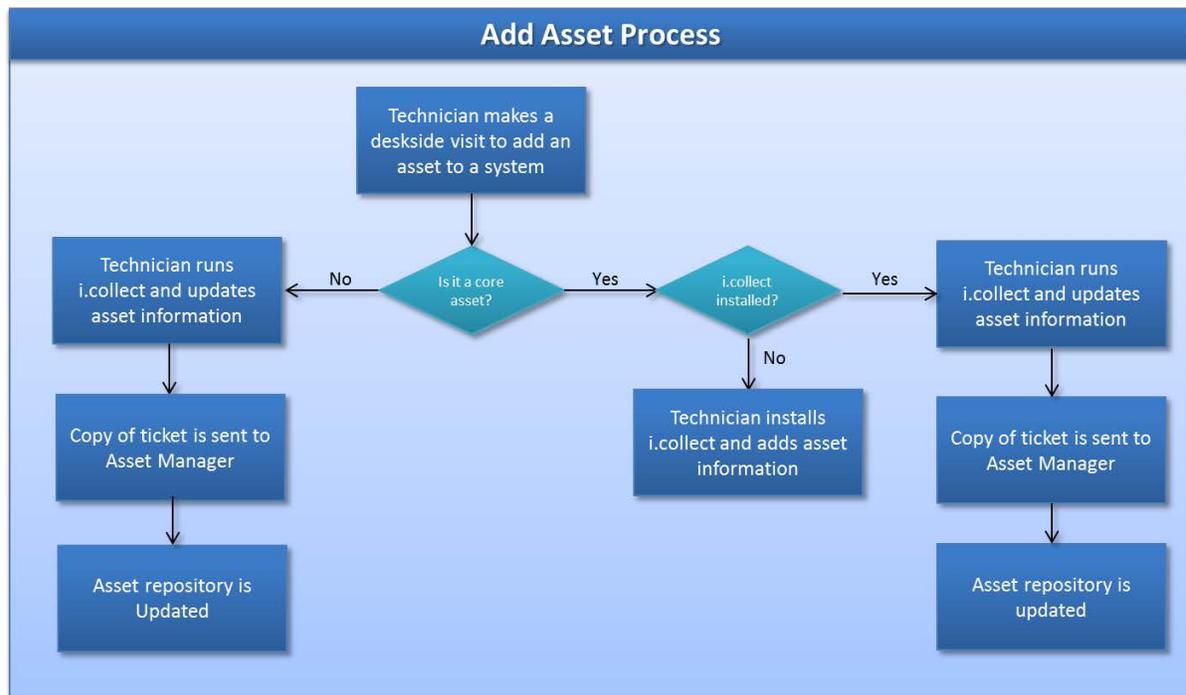
Change of User

This procedure describes the process of changing the user of a system. This process takes place when a system is moved from one user to another.

All user data in the ValueWise database comes from the help desk system. If the asset is being transferred to a new user, that user record must be created in the help desk system, then imported into the asset repository. Once the user record is the database, the change of user for the asset is ready to take place.

1.   The technician installs the system or asset for a different user than what is in the asset repository.
2.   After the system or asset is installed and functional the technician runs Splash.exe at the end user's desktop.
3.   The technician changes the information to reflect the new user.
4.   A scan is run and the asset repository is updated.
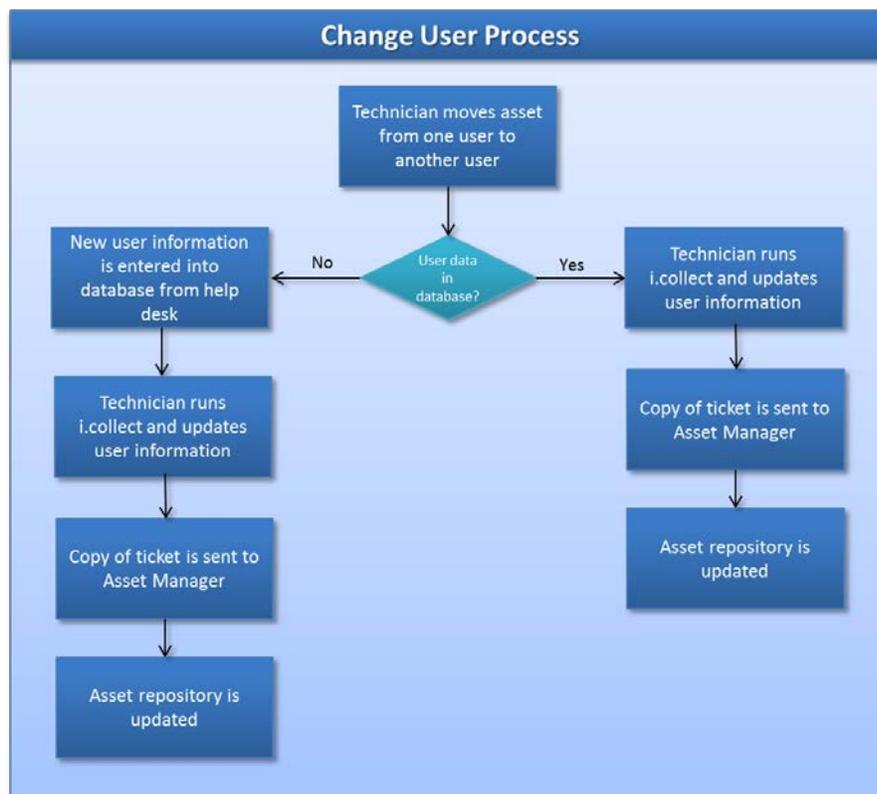
Change of Site and/or Location

This procedure describes the process of changing the site and/or location of a system. This process takes place when a system is moved from one site and/or location to another.

Site and location data are created separately in the asset repository, however, when you move a system from one location to another, the site information is linked to it.

Before moving a system from one site/location to another, be sure the data for the new site/location currently exists in asset repository. All site data comes from the help desk system and is transferred to the database.

1. The technician moves the system to a different site and/or location.
2. After the system is installed and functional the technician runs Splash.exe at the end user's desktop.
3. The technician changes the demographic information to reflect the new site/location.
4. A scan is run and the asset repository is updated.

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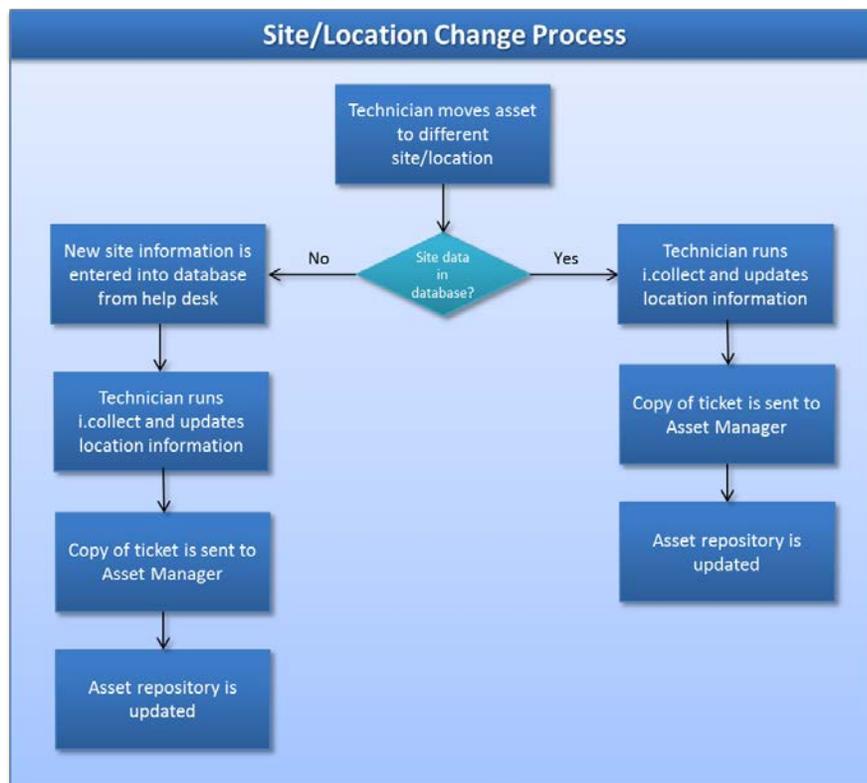
Perpetual Scan Process

The perpetual scanning process is implemented after the i.collect tool is installed on end user machines and the initial scan is run. After the initial scan has run, the i.collect will run again in the number of days set within the i.collect agent (usually 30 days). i.collect can be configured to run in the background with little or no impact on the end user's machine. When used in conjunction with the Automatic Data Push Tool, the i.collect perpetual scan process keeps the data in the asset repository current. The Automatic Data Push Tool functionality is also explained in these processes.

The frequency of perpetual scan is configured when the i.collect agent is created. Getronics recommends a perpetual scan take place every 30 to 60 days.

This document describes Getronics' recommendations for the perpetual scan process. These processes may vary based on customer requirements.

Desktop Data Push Tool

The Automatic Data Push Tool is an external tool (separate from the MRO suite of asset management products) that "pushes" data that was updated manually in the asset repository using ValueWeb down to end user desktops. This application creates files and holds them in a folder on the Cell Manager. Once the perpetual scan is run, i.Collect checks this folder for updates to existing data and uses the updated data during the scan. This process happens automatically every evening. This keeps both the asset repository and the data at the desktop in sync.

Perpetual Scan Using i.Collect

1. The i.Collect tool is installed on all end user desktops and configured to run a perpetual scan every XX number of days.
2. The perpetual scan runs and brings updated data into Enterprise Explorer, then into the QA tables.
3. The Asset Manager follows the QA process for checking and correcting the data in ValueWeb.
4. The Asset Manager uses GetReports to check for exceptions in the scanning process (i.e., machines that weren't scanned).
5. The Asset Manager corrects any exceptions.
6. The perpetual scanning process is complete and runs again in XX days.

Perpetual Scan Process
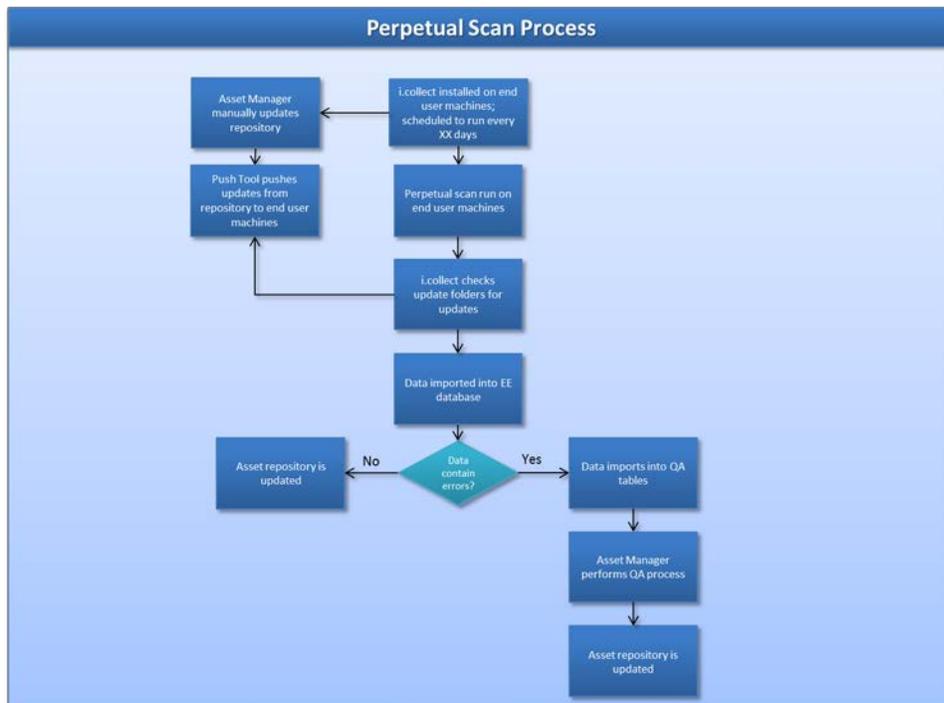
Disposal Process

The Disposal process takes place when an asset has reached the end of its useful life. Once an asset is destroyed, broken, obsolete, etc. the asset has to be disposed of. Whenever an asset is disposed of, ValueWeb is used to update the database and reflect this change.

This document describes Getronics' recommendations for IT asset disposal. These processes may vary based on customer requirements.

Asset Disposal

There a several different instances of asset disposal that can occur in an organization. We will cover the most common instances in the following procedures.

Physically Disposing of an Asset

Most organizations already have a process for disposing of IT assets. We recommend the following procedure, along with the procedures for updating the database using ValueWeb to ensure an efficient disposal process.

1. The desk side technician deems the equipment to be unusable. The equipment needs to be disposed of.
2. The desk side technician gives the old equipment to the Asset Manager who puts it in a stockroom where it a third-party vendor will come and remove the equipment once per month or as specified.
3. A form is completed with the asset information for input into the asset repository. The form is signed by an authorized manager for disposal. (See attached Asset Disposal Form).

Disposing of Assets in a Stockroom

This process follows the process of physically disposing of an asset. Documentation should be kept and copied for the Asset Manager to dispose of the assets in the asset repository using ValueWeb.

1. Assets are disposed of and corresponding documentation is given to the Asset Manager.

2. The Asset Manager goes into the Stockroom system in ValueWise where the disposed assets reside and gives the assets a status of "Disposed."

3. The Asset Manager then moves the disposed assets from the Stockroom system to the Disposed system using ValueWeb.

Equipment is Broken and Replaced

When equipment breaks down, a desk side technician is called to fix the equipment or it is deemed disposable. Once the asset or system is replaced, the old asset/system needs to be disposed of in using ValueWeb. There are different processes for disposing of assets and systems at the System level in ValueWeb. The first process is for disposing of a non-core individual asset (monitor, local printer, scanner, etc.). The second process is for disposing of a core asset (desktop, laptop, server,

network printer). The third process is for disposing of an entire system (i.e., desktop and monitor setup). These three processes are defined below.

Disposing of a non-core asset:

1.   The desk side technician replaces a broken asset with a new one. The old asset needs to be disposed of.
2.   The desk side technician gives the Asset Manager a copy of the help desk ticket.
3.   The Asset Manager physically disposes of the asset according to company guidelines.
4.   The Asset Manager searches for the asset in ValueWeb and gives it a status of "Disposed."
5.   The disposed asset is moved from its current system to the Disposed System.
6.   The asset repository is updated.

Disposing of a core asset:

1.   The desk side technician replaces a broken core asset with a new core asset. The old core asset needs to be disposed of.
2.   The desk side technician gives the Asset Manager a copy of the help desk ticket.
3.   The Asset Manager physically disposes of the asset according to company guidelines.
4.   Following the IMAC process of creating a new system and asset record for the new core asset, the existing assets in the old system (i.e., monitor, local printer, etc.) are moved to the new system.
5.   The Asset Manager gives the disposed core asset a status of "Disposed" and moves it to the Disposed System.
6.   The old system should now be empty and given a status of Disposed.
7.   The asset repository is updated.

Disposing of a system:

1.   The desk side technician replaces an obsolete desktop and monitor with a new desktop and monitor. The old system is deemed unusable and needs to be disposed of.
2.   The desk side technician gives the Asset Manager a copy of the help desk ticket.
3.   The Asset Manager physically disposes of the assets according to company guidelines.
4.   Following the IMAC process of creating a new system and asset records for the new workstation setup, the old assets and system needs to be disposed of.
5.   The Asset Manager gives the old assets a status of "Disposed" and moves them to the Disposed System.
6.   The Asset Manager gives the old system a status of Disposed.
7.   The asset repository is updated.

Disposal Process
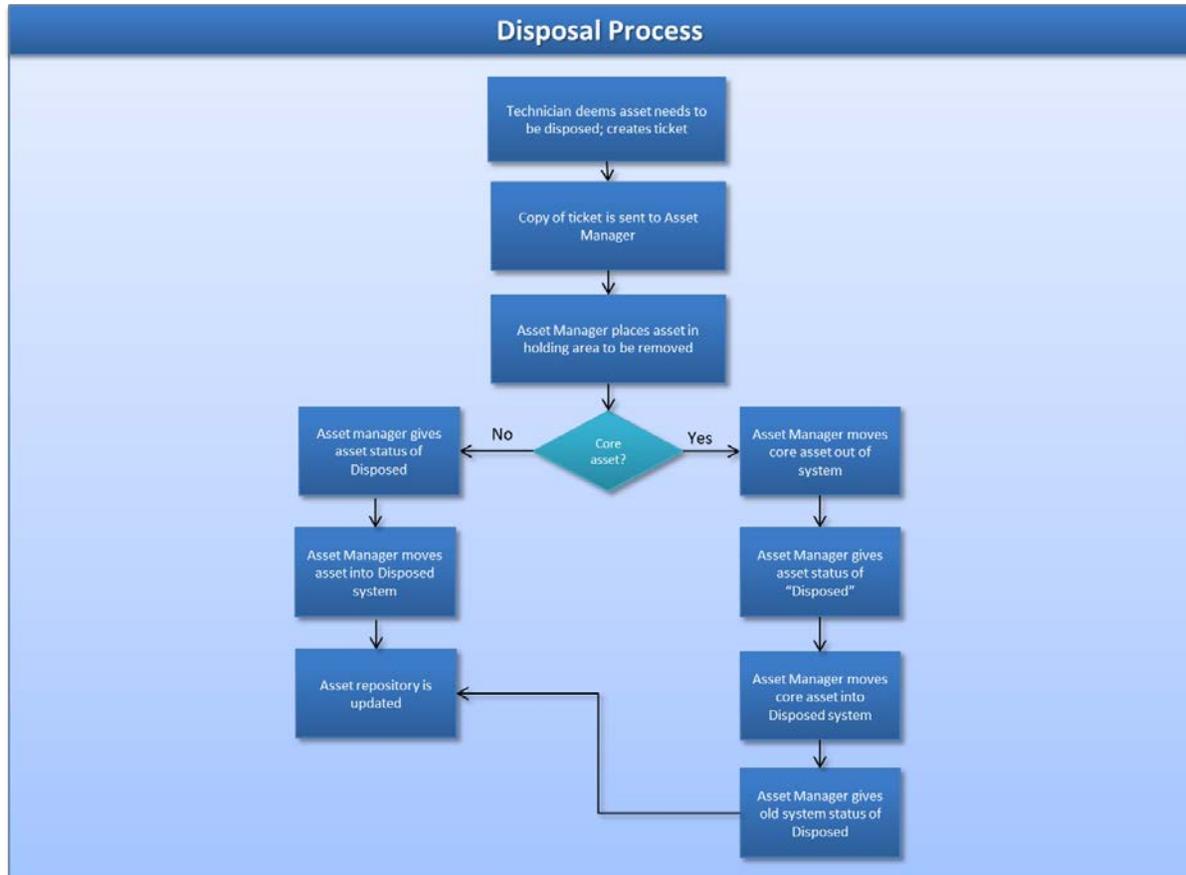
Asset Disposal Form

This form needs to be completed whenever an IT asset is ready to be disposed of. The Asset Manager should keep a copy of this form for their records.

Asset ID:	
Asset Type:	**Serial Number:**
Date of Disposal:	**Ticket Number:**
Reason for Disposal:	

_____   _____
Asset Manager's Signature   Date

_____   _____
Supervisor Signature   Date

APPENDIX C – Glossary of Terms

This section contains a glossary of terms used throughout this manual related to asset management processes and tools.

Glossary

Active: Active is a status used in the asset repository to describe an asset or system that is currently functional and being used.

Asset: An item of property regarded as useful or valuable to have. In the IT environment, examples of assets are desktops, laptops, printers, software, external hard drives, etc.

Asset Class: The highest level of classification of asset equipment. Asset Classes in ValueWeb include CPU, Monitor, Modem, etc.

Asset Type: A breakdown of the Asset Class classification of equipment. Asset Types in ValueWeb include Desktop, Laptop, Monitor, CD Rom, PTR-Local, etc.

Asset Management: The tracking and management of asset, demographic, and contract data. Asset tracking data includes make, model, class, type, CPU speed, etc. Demographic data includes cost center, user, location, etc. Contract data includes break/fix maintenance, help desk support, leasing, etc.

Core Asset: An "intelligent" asset. Core assets in ValueWeb include desktops, laptops, servers, and network printers.

Cost Center: Accounting codes/names of an organization related to the financial department.

Department: Groups in organizations that usually define function. In ValueWeb, Departments are made up of one or more Cost Centers.

Disposed: Disposed is a status used in the asset repository to describe an asset or system that is no longer on the physical premises and has been discarded.

Enterprise Explorer: Part of the MRO suite of asset management tools, Enterprise Explorer (also referred to as EE) is the software and internal hardware data repository. EE is also used to capture and import scan data into the QA tables.

Field: A field is a data attribute that makes up part of a record in a database. For example, a cost center is an attribute of an asset record.

i.collect: Data collection tool that resides on the desktop and sends asset and demographic data back to the ValueWise database.

Location: A location is where assets within a system physically reside. In ValueWeb, a location is determined by one or more factors: Site, Building, Floor, Room, Desk/Cubicle.

Pending: Pending is a status used in the asset repository to describe a system that is waiting to be Active.

Person: A person is a user in ValueWeb. A person record is linked to a System record.

Query: Specific defined values used as a filtering tool to narrow a search and display only that data meeting defined search criteria.

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Record: A group of related data attributes in a database. Tables in a database are made up of several records.

Search Argument: Criteria which defines a query.

Set Definition: A table which houses a configurable group of values that appears in drop-down menus.

Site: A geographical location with a physical address where assets reside. An example of a site could be a campus with multiple buildings, a military base, or a single building.

SQL: SQL is an acronym for Structured Query Language. SQL is programming language for a database used in queries.

Status: An attribute of an asset or a system that describes its current state.

System: A group or arrangement of items that relate to or interact with each other to form a whole. In IT asset management, the group or arrangement of assets that interact with each other to form a whole is a system. Types of Systems in ValueWeb include Workstation, Printer, Stock, Equipment Room, and Disposed.

Table: A group of related records in a database.

Usage: A data attribute used to describe how an asset or system is used in ValueWeb. Usage values can include In Use, Not In Use, Network Use, Home Use, etc.

Value: Data which is part of a group that makes up a data attribute.

ValueWeb: The web-based graphical interface for the ValueWise database.

ValueWise: Asset repository in which assets are tracked.

Vendor: A service or product provider of IT assets.