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Introduction

Asset Management

ManageEngine AssetExplorer is a comprehensive Asset Management Software that helps to manage all your IT and Non-IT assets. AssetExplorer offers a single view to track and manage all your assets. With AssetExplorer, you can track and manage ownership of

- IT & Non-IT Assets
- Software Asset Management
- Purchase Orders
- Contracts

IT & Non-IT Asset Management

AssetExplorer helps you to manage,

- IT assets such as, workstations, switches, routers, printers, and access points
- Non-IT assets such as basic fixtures, furniture, chairs, tables, projectors, and desk phones
- Asset Components such as keyboards, software, software licenses and even your printer inks.

Software Asset Management

Software License Management

AssetExplorer helps you to manage software licenses installed across the enterprise. You can consolidate and manage all your software licenses from a single screen. AssetExplorer will scan and automatically pickup license keys for Microsoft Windows and Microsoft Word. You can key-in all the licenses purchased earlier and track future purchase of software licenses through the Purchase module.

Software Metering

AssetExplorer helps you to track the usability of the installed software across organization. It gives the count of rarely used, frequently used and occasionally used software.

Software Compliance

AssetExplorer tracks purchased versus installed licenses helping you to ensure software license compliance. The scheduled scan alerts you when an unauthorized software installation is detected, ensuring software compliance on an on-going basis.

Purchase Orders

AssetExplorer offers a complete Purchasing system that helps you manage Pos with approvals. Detailed reports based on Pos such as Pos by required date help you plan your asset rollout in advance.

Contracts

AssetExplorer helps you effectively manage contracts with different vendors. It keeps a check on the expiry date and alerts for renewal. Detailed reports based on contracts such as contracts by maximum spend and contracts by vendors helps you negotiate and make informed decisions.

- [Setting Up AssetExplorer](#)
 - [Configuring AssetExplorer](#)
 - [Scanning IT Assets](#)
 - [Assets](#)
 - [Software Asset Management](#)
 - [Software Licenses](#)
 - [Groups](#)
 - [Purchases](#)
 - [Contracts](#)
 - [Reports](#)
-


Getting started

To get started with understanding of AssetExplorer user interface explains all the options available in the AssetExplorer.

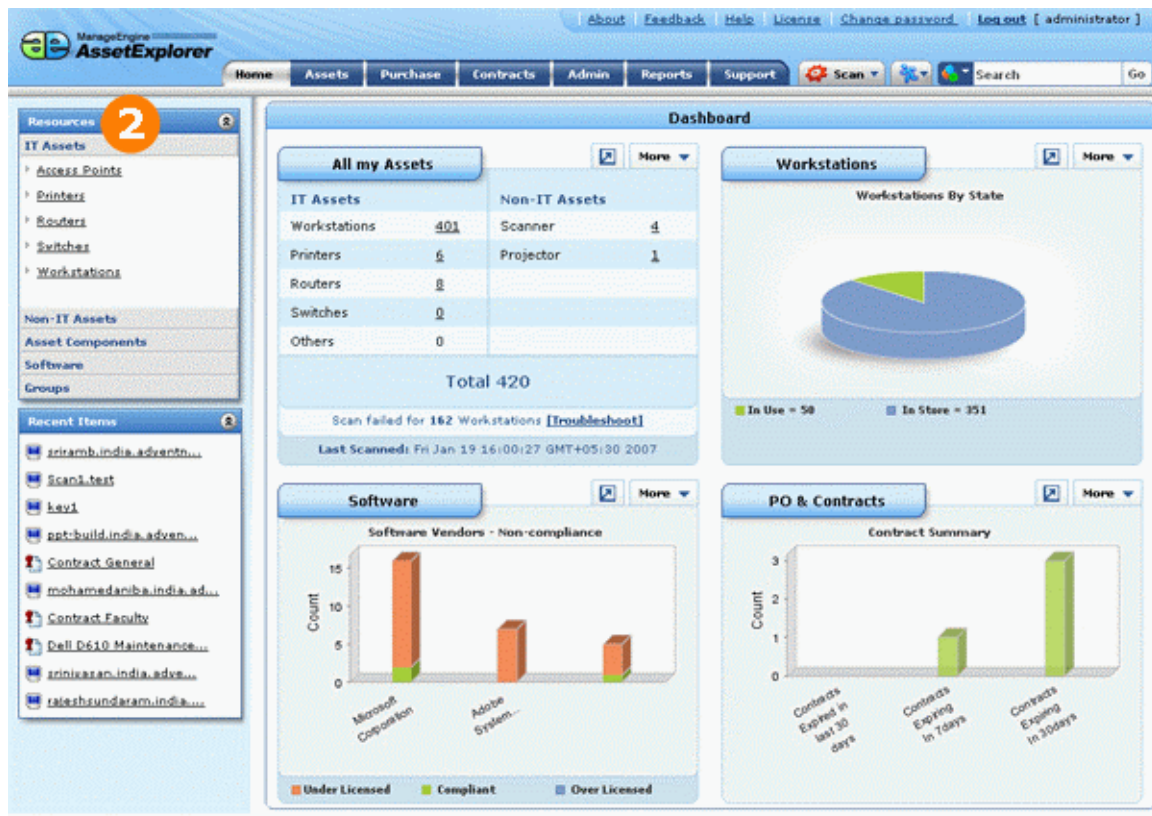
Home Page

Scanning of Assets



- After the installation of ManageEngine AssetExplorer the network is scanned for assets available across organization.
- To navigate through the modules of the AssetExplorer click on the tabs menu.
- The other options available in the tabs menu is quick access  to create new workstation, assets, groups etc.

List of all Assets across organization



All my Assets

- On scanning all the IT & Non-IT assets in the organization are listed below in **All my Assets**.
- This displays each product type count across organization (Workstation, scanner etc.).



- Click **More** link and select the options to view the graph of resources by site or region or state or asset summary.
- This also displays number of failed workstations on scanning at the bottom of the section. Click the **Troubleshoot** link for troubleshooting tips.

Workstations

- On scanning, **Workstations** shows the graph of Workstations by os, domain, manufacturer, processor type, department, site, region, state etc.
- Click the **More** link and select the option to view the graph.



Software

- On scanning Software shows the graph of Software by category, software licensing status, software license compliance, software vendors volume etc.
- Click **More** link at the right side of the section and select the options to view the graph.



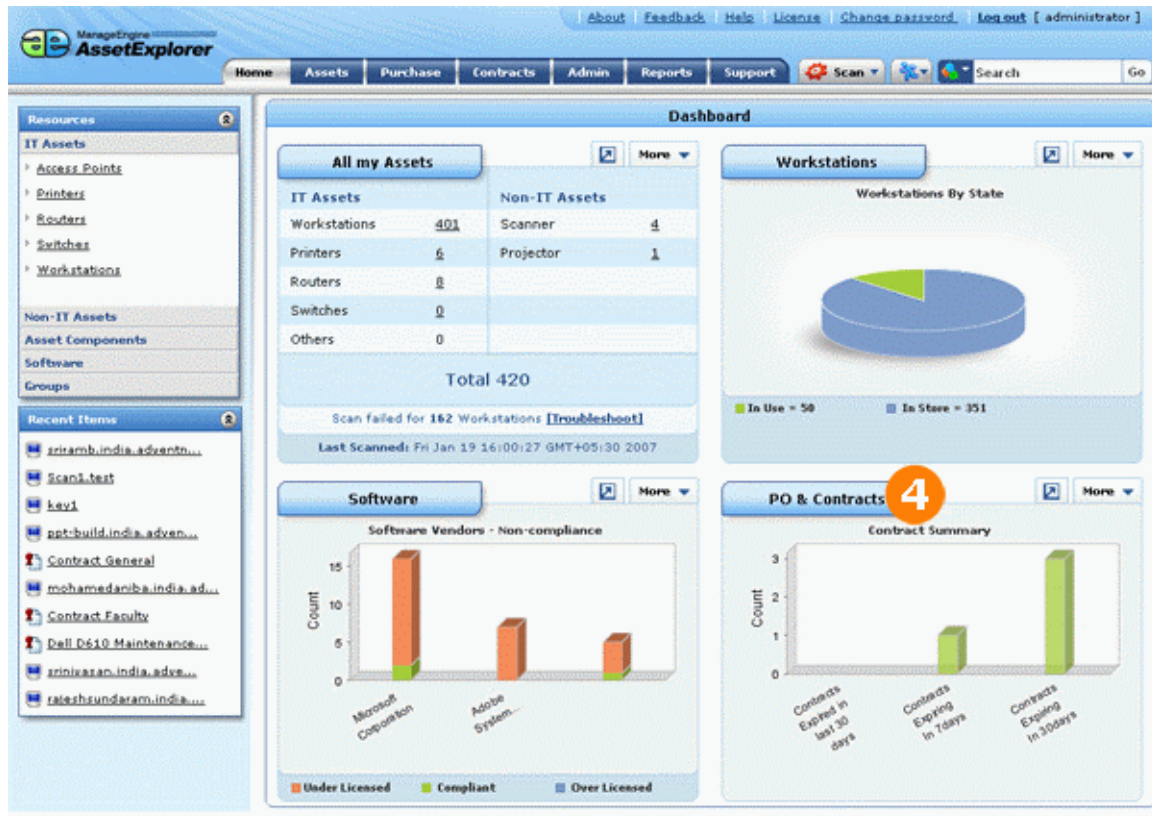
Resources



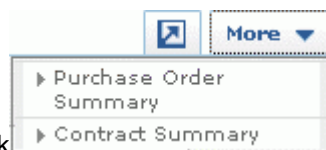
- Resources pane lists IT, Non-IT, Asset Components, Software & Groups.
- On clicking the resources, (IT Assets etc) the list of default assets will be listed. Click on the assets link to create a new asset.

- Under **Groups** you can create a group based on asset properties.
- All recently added assets will be listed under **Recent Items**.

Purchase & Contracts



- On scanning, PO & Contracts shows the graph of contract summary and purchase order summary.



- Click **More** link and select the option to view the graph.
- Contracts summary shows the graph for contracts expiring in next 7days, 30 days, also contracts expired in last 30 days.
- Purchase Order summary shows the graph for purchase due today, next 7 days & next 30 days.

System Requirements

Hardware

CPU	Pentium III 800 MHz or above
RAM	512 MB or above
Disk Space	200 MB
Display	High Color

Operating System

- Windows 2000 + SP4
- Windows 2000 / 2003 Server
- Windows XP Professional
- Red Hat Linux 7.2 and above
- Debian Linux 3.0

Installing AssetExplorer

- [In Windows](#)
- [In Linux](#)

In Windows

Follow the steps given below to install and set up the ManageEngine AssetExplorer.

1. Download the **AdventNet_ManageEngine_AssetExplorer.exe** file.
2. Click the .exe file to start the installation. The AssetExplorer installation wizard appears. Follow the instructions given in the wizard to successfully set up AssetExplorer.
3. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the AssetExplorer application. Free Edition never expires but is restricted to a single technician login and 25 nodes (workstation) discovery. The Trial Edition is valid only for 30 days and provides two technician login. There are no other restrictions.
4. The next step is choosing the installation directory. By default, the application is installed in *C:\AdventNet\ME\AssetExplorer* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.

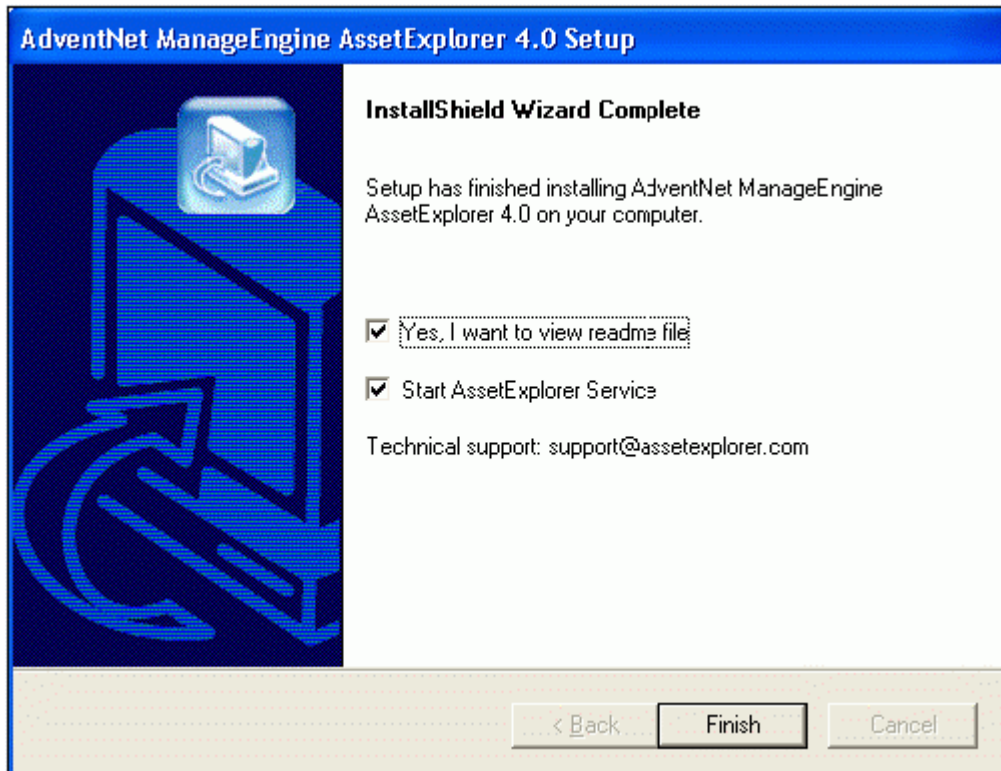


Note: The installation directory or its parent directories must not have any space character in its name.

5. From the file chooser window, choose the directory of your choice and click **Next**.
6. Provide a name that needs to appear in the Programs folder. By default, it is **ManageEngine AssetExplorer**.
7. Click **Next**.
8. Enter the port number that has to be used to run the web server. The default port number provided is **8080**. If you already have any application running in that port, then enter the number of the port that is free and can be used by the web server to run the AssetExplorer application server and click **Next**.
9. The **Registration for Technical Support** form is displayed. This is an optional form and this enables you to register for technical assistance. By registering, it helps the technical support team to be better informed about your organization and its specific needs and hence provide a more focused support. Enter the details such as **Name**, contact **E-mail ID**, **Phone Number** (helps in making calls for immediate support), **Company Name**, and **Country**.
10. Click **Next**.
11. The details that you have provided till now will be displayed as below for your confirmation:
Installation Directory : C:\AdventNet\ME\AssetExplorer
Folder Name : ManageEngine AssetExplorer
WebServer Port : 8080

If the displayed information is correct, then click the **Next** button, or else click the **Back** button and make the necessary changes and proceed with the installation.

12. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.



13. When you choose to start the AssetExplorer Service, the AssetExplorer Server is started automatically and the client window opens. If you do not wish to view the readme file or start AssetExplorer as a windows service, de-select the options provided.
14. Click **Finish** to complete the installation.

Following the instruction as suggested above, the **ManageEngine AssetExplorer** program group is created in the **Start** menu. Also, the AssetExplorer server will be started and the client window opens with the login page. Enter the user name and password to log in to the application.


To manually start the AssetExplorer application

1. Click **Start -> Programs -> ManageEngine AssetExplorer -> AssetExplorer Server** to start the web server. This takes approximately 2 minutes in a Windows XP, 512 MB RAM, and 1.0 GHZ processor. Generally, the server is started and the web client is also launched in the default browser.
2. If the web client is not launched automatically, then click **Start -> Programs -> ManageEngine AssetExplorer -> AssetExplorer Web Client** to start the web client. The application opens the login page in your default web browser.
3. Enter your **user name** "administrator" and **password** "administrator" to log in to AssetExplorer. As soon as you log in the **configuration wizard** home page is displayed. Follow the instructions provided in the wizard and click the **Next** button.

To configure your application settings, refer to the [Configurations](#) section.

To shut down the AssetExplorer application

1. Click **Start -> Programs -> ManageEngine AssetExplorer -> Shutdown AssetExplorer**. A confirmation message is displayed.
2. Click **OK** to proceed with the shut down.

Alternatively, you can also right-click on the system tray icon  and choose **Shut down Server**. A confirmation message is displayed; click OK to shut down AssetExplorer.

To reinitialize the server

1. Go to <AssetExploreer>\bin directory.
2. Execute **reinitializeDB.bat** to reinitialize the server. **Please note that all the data in the server will be lost when you reinitialize.**

In Linux

Follow the steps given below to install and setup the ManageEngine AssetExplorer application:

1. Download the **AdventNet_ManageEngine_AssetExplorer.bin** file.
2. Execute the .bin as given below, at your command prompt:

```
./AdventNet_ManageEngine_AssetExplorer.bin
```



Note: You need to have execute permissions for executing the .bin type files.

The following screen of the installation wizard is opened and the you will be guided through the installation process.

3. Click **Next** and follow the steps given in the installation wizard.
4. The second screen displays the License Agreement. You need to accept the license agreement to proceed with the installation. So select the radio button accepting the license agreement and click **Next**.
5. On accepting the license agreement, the installation wizard provides you with an option to choose between Trial Edition and Free Edition of the AssetExplorer application. Free Edition never expires but is restricted to only 25 nodes (workstation) discovery. The Trial Edition is valid only for 30 days and provides only 25 nodes discovery. Choose the appropriate edition for your need and click **Next**.
6. The next step is choosing the installation directory. By default, the application is installed in *home/<user>/AdventNet/ME/AssetExplorer* directory. If you want to change the installation directory, then, click the **Browse** button beside the directory path.
7. From the file chooser window, choose the directory of your choice and click **Next**.
8. Enter the port number that has to be used to run the web server. The default port number provided is **8080**. If you already have any application running in that port, then enter the number of the port that is free and can be used by the web server to run the AssetExplorer application server and click **Next**.



Note: If you wish to provide a port number lesser than 1024 as the web server port, then you need to be the super-user of the system to successfully install and run AssetExplorer application.

9. The **Registration for Technical Support** form is displayed. This is an optional form and this enables you to register for technical assistance. By registering, it helps the technical support team to be better informed about your organization and its specific needs and hence provide a more focused support. Enter the details such as **Name**, contact **E-mail ID**, **Phone Number** (helps in making calls for immediate support), **Company Name**, and **Country**.
10. Click **Next**.
11. The details that you have provided till now will be displayed as below for your confirmation:

Details of Installation

Installation Directory: *home/<user>/AdventNet/ME/*

Product Size : 34 MB.

If the displayed information is correct, then click the **Next** button, or else click the **Back** button and make the necessary changes and proceed with the installation.

12. After you confirm the above details, the application is installed. On successful installation, the following screen is displayed.

If you do not wish to view the Readme file, de-select the check box.

13. Click **Finish** to complete the installation.

To manually start the AssetExplorer application

1. Go to the <AssetExplorer>/bin directory and execute the run.sh file as given below:

```
$ sh run.sh
```

2. To start the web client, open a web browser and type the following in the address field:

```
http://localhost:8080
```

Here, you need to replace the localhost with the corresponding server name where the AssetExplorer web server is running and the port number 8080 should be replaced with the actual port where the server is running. The application opens the login page in your default web browser.

3. Enter your **user name** "administrator" and **password** "administrator" to log in to AssetExplorer. As soon as you login the **configuration wizard** home page is displayed. Follow the instructions provided in the wizard and click the **Next** button.

To configure your application settings, refer to the [Configurations](#) section.

To shutdown the AssetExplorer application, execute **shutdown.sh** file from the **bin** directory as below:

```
sh shutdown.sh -S
```

To reinitialize the server

1. Go to <AssetExplorer>/bin directory.
2. Execute **reinitializeDB.sh** to reinitialize the server. **Please note that all the data in the server will be lost when you reinitialize.**

Uninstalling AssetExplorer

- In Windows
 - In Linux
-

In Windows

To uninstall AssetExplorer from Windows

1. Click Start -> Programs -> ManageEngine AssetExplorer -> Uninstall AssetExplorer.

In Linux

To Uninstall AssetExplorer from Linux

1. Go to `<AssetExplorer>/_uninst` directory.
2. Execute `uninstaller.bin` as below:

```
$ ./uninstaller.bin
```

Registering AssetExplorer

Once our trial evaluation period is over, you need to register the AssetExplorer application. To purchase the application, please contact sales@adventnet.com. They will send you the registered license file. Using this license file, you can register the AssetExplorer application.

To register AssetExplorer

1. Log in to the AssetExplorer application using the user name and password of an admin user.
2. Click the **License** link available at the right top of the application. The **License** window is opened.
3. Click the **Browse** button to locate the license file sent to you when you purchased the application.
4. From the file chooser window, select the license file and click **Open**.
5. Click **Upgrade**.

The registration of AssetExplorer application is complete. You can continue using the application.

Contacting AdventNet

- AdventNet Headquarters
- Sales
- Technical Support

AdventNet Headquarters

Web Site	www.adventnet.com
AdventNet Headquarters	AdventNet, Inc. 5645 Gibraltar Drive Pleasanton, CA 94588 USA Phone: +1-925-924-9500 Fax : +1-925-924-9600 E-mail: info@adventnet.com
AdventNet Development Center	AdventNet Development Centre (I) Private Limited 11 Sarathy Nagar, Vijayanagar, Velachery, Chennai 600 042 INDIA Phone: +91-44-22431115 (10 lines) Fax: +91-44-22435327 E-mail: info@adventnet.com

Sales

For purchasing ManageEngine AssetExplorer from any part of the world, fill out the [Sales Request Form](#). A sales person will contact you shortly. You can also send us e-mail at sales@adventnet.com.

You can also call the AdventNet headquarters at the following numbers:

Phone: +1-925-924-9500

Fax: +1-925-924-9600 and request for Sales

Technical Support






One of the value propositions of AdventNet to its customers is excellent support. During the evaluation phase, the support program is extended to users free of charge.

For support, please mail to support@assetexplorer.com.

Alternatively, you can submit your feedback from the AssetExplorer product by clicking the **Feedback** link at the top right corner just above the header tabs after logging in to the application. Your feedback will be sent to the AssetExplorer Support Team and they will get in touch with you. Do not forget to provide your e-mail ID or your contact information for the team to get in touch with you.

Setting Up ManageEngine AssetExplorer


Setting Up ManageEngine AssetExplorer helps the user to add the company details, region & sites of your organization. Also your organization's departments its users & technicians can also be added here. The entire organization details can be specified using this module.

-
- [Company Details](#) 
 - [Regions](#) 
 - [Sites](#) 
 - [Departments](#) 
 - [Users](#) 
 - [Technicians](#) 
-

Adding Company details

To provide complete information about your organization, add your company details in the ManageEngine AssetExplorer.

Adding Company Details

1. Click on Admin tab -> Click Company Details icon  in the Configuration Wizard page. This opens the Organization Details page.
2. Specify the full name of the organization in the given **Name** field. This will be used as a header while generating purchase orders
3. Provide relevant information about the organization in the **Description** field.
4. Specify the **Address, City, Postal Code, State** and **Country** of the organization.
5. Specify the general contact **E-mail ID** of the organization.
6. Specify the **Phone No, Fax No,** and **Web URL** of the organization.
7. You can also import the Company Logo(s) and use any one of them wherever necessary.


Importing Image

- Click Import Image button beside the Company Logo field.
 - Click the Browse button and choose the image file from the file chooser window and click Open.
 - Click Import.
8. Save the settings.

Adding Regions


You can add the list of places where you have set up branches of your organization in ManageEngine AssetExplorer.

Add Region


1. Click on Admin tab -> Click Regions icon  in the Configuration Wizard page. This opens Region View list page.
2. To add new region of the organization, click on **Add New Region** link on the right side corner of the page.
3. Specify the **Region Name** where you have your branch operations set up. This is a mandatory field.
4. Specify relevant information about the operations in the above-mentioned region in the **Description** field.
5. Click the **Save** button to save the details. You can see the newly added region getting listed in the Region View list page.
6. Click **Save and add new** button to save the region and add another region.

Editing & Deleting Regions

Edit Region

1. From the Region view list page, click on the Edit icon  or click on the Region name to edit the Region details. This brings up the Edit Region page.
2. Edit the details and save the changes.


Delete Region

1. From the Region view list page, click on Delete icon  to delete the region name from the list.
2. A pop up window pops up to get your confirmation on the delete operation. Click **yes** to proceed. You can see the region name deleted from the list.

Adding Sites


You can add list of all sites (building or complex) of your organization in the ManageEngine AssetExplorer.

Add New Site


1. Click on the Admin tab -> Click Sites icon  in the Configuration Wizard page. This opens Sites View list page.
2. To add the new site of your organization, click on **Add New Site** link on the right side corner of the page.
3. Specify the **Site Name** where you have your organization operations set up. This is a mandatory field.
4. Specify relevant information about the operations in the above-mentioned site in the **Description** field.
5. Select the **Region of the site** from the combo box.
6. Click the **Save** button to save the details. You can see the newly added site getting listed in the Site View list page.
7. Click **Save and add new** button to save the Site and add another Site.

Editing & Deleting Sites

Edit Site

1. From the Site view list page, click on Edit icon  or click on the Site name to edit the site details. This brings up the Edit Site page.
2. Edit the details and save the changes.


Delete Site

1. From the Site view list page, click on Delete icon  to delete the Site name from the list.
2. A pop up window pops up to get your confirmation on the delete operation. Click **yes** to proceed. You can see the Site name deleted from the list.

Adding Departments


You can add various departments available in your organization (even across branches) in the ManageEngine AssetExplorer.

Add New Department


1. Click on Admin tab -> Click on the Departments icon  in the Configuration Wizard page. This opens Departments view list page.
2. To add a new department, click on **Add New Department** link on the right side corner of the page.
3. Specify the new **Department Name** in the given field. e.g. Engineering. This is a mandatory field.
4. Specify any relevant information about the department operations in the **Description** field.
5. Select the **Site** of the department from the combo box.
6. Click Save button to save the details. You can see the newly added department name getting listed in the department View list page.
7. Click **Save and add new** button to save the Department and add another department.

Editing & Deleting Departments

Edit Department

1. From the Department view list page, click on Edit icon  or click on the Department name to edit the department details. This brings up the Edit Department page.
2. Edit the details and save the changes.


Delete Department

1. From the Department view list page, click on Delete icon  to delete the Department name from the list.
2. A pop up window pops up to get your confirmation on the delete operation. Click **yes** to proceed. You can see the department name deleted from the list.

Users


Users are the employees of the organization who uses the assets assigned to them. Users and their details can be added manually, or from Active Directory, or from a CSV file.

To Add list of Users from Active Directory

1. Click on Admin tab -> Click Users icon  in the Configuration Wizard page. This opens Users list view page.
2. Click **Import from Active Directory** link in the User list page. This opens Import Requesters from Active Directory page.
3. Select the **Domain Name** from the combo box, if other details such as Domain Controller Name, Login Name & Password is already specified in the Domain Scan page then the details get populated automatically. Else specify the **Domain Controller Name** in the given field.
4. Specify the **Login Name and Password** in the given field.
5. Click **Import Now!** button. The import wizard displays various **Organizational Units (OUs)** available in that domain. Choose the specific OU by enabling the check box from which you want to import the users.
6. Click **Start Importing** button. Once the importing is complete you can get the complete reports on number of records added, overwritten and failed to import.
7. Click Close Window.

To add a list of users from .CSV file, click Import from CSV link at the top of the User List view. The Import Wizard opens in a pop-up window. Follow the instructions of the wizard to import the user details from the CSV file.

Adding New User

1. Click on Admin tab -> Click Users icon  in the Configuration Wizard page. This opens Users list view page.
2. From the user view list page, click **Add New User** link on the right side corner of the Users view list page.
3. Specify the **User Name** in the given field. ex. John. This is a mandatory field.
4. Specify the **Employee ID** and specify any relevant information about the user in the **Description** field.
5. Specify the **E-mail, Phone, Mobile** details of the user to notify users in case of any changes.
6. Select the **Department Name** from the combo box.
7. Specify the **Job title** of the user.
8. Click **Save** to save the settings.
9. Click **Save and add new** button to save the user and add another requester.

Editing & Deleting User

Edit User


1. From the user view list page, click on the user Name to bring up the Edit User page.
2. Edit the details of the user and save the changes.

Delete User


1. From the user view list page, select the users to be deleted by enabling the check box.
2. Click **Delete** button to delete the users. You can see the users deleted from the User view list.

Adding Technicians

To add technicians to the AssetExplorer,





1. Click on Admin tab -> Click Technicians icon  in the Configuration Wizard page. This opens Technicians list view page.
2. Click **Add New Technician** link on the right side corner of the Technicians view list page.
3. Specify the **Technician Name** in the given field. ex. Administrator. This is a mandatory field.
4. Specify the **Employee ID** in the given field .
5. Specify the **E-mail address, Phone, Mobile and SMS Mail ID** Ex. 1234567890@mobile.att.net.
6. Select the **Department Name** from the combo box. The department to be selected should be the .
7. Specify the technician **Job Title**.
8. To enable login permissions for the technicians select **Enable Login for this Technician** check box.
9. Specify a unique **Login Name** and **Password** for a technician. Specify the password again in the Re- Type Password for confirmation.
10. Save the changes. You can see the technician listed in the list view.
11. Click **Save and add new** button to save the technician details and add another technician.

Editing Technician

1. From the Technician view list page, click Edit icon  or click on the technician name. This brings up the Edit Technician.
2. Edit the technician details and save the changes.

Configuring Asset Explorer


Using Configuring AssetExplorer module the user can configure outgoing mail server settings, notification rules, customizing message templates, adding product types & products.

-
- [Configuring Mail server settings](#) 
 - [Configuration Notifications Rules](#) 
 - [Product Types](#) 
 - [Products](#) 
-

Mail Server Settings

You need to set the mail server settings in the ManageEngine AssetExplorer to send notification mails to users and technicians. To configure outgoing mail server settings,

Outgoing Mail Server Settings

1. Click on Admin tab -> click Mail Server Settings icon  in the Configuration Wizard page. This opens General mail Server settings page.
2. Specify the **Server Name** or **IP Address** for the outgoing mail server. Ex. SMTP.
3. If you have a back up server specify the Server Name or IP Address in the Alternate Server Name or IP Address field.
4. Specify the **Sender's Name** in the given field, which will be displayed along with the email ID.
5. Specify the email address to which the replies need to be sent in the **Reply-to-Address**.
6. Specify the type of the email dispatching Ex. SMTP or POP etc. in the **Email Type** field.
7. Specify the **Port** where the mails need to be sent.

Of the above fields, Server Name / IP Address, Reply-to Address, and Port are mandatory fields and hence cannot take null values.


If your outgoing mail server needs authentication, then select the check box **Requires Authentication**. And enter the **User Name** and **Password** for authenticating the outgoing mails.

Click **Save** to save the settings.

Notification Rules

Notification Rules are helpful when an event has to be notified to the technicians. For ex. When Purchase order is overdue or Audit changes during discovery or Software under Compliance during discovery or when prohibited software is identified during discovery. When the above-mentioned situations are managed suitably, it not only helps technicians in efficient management of the assets but also bring in cost savings to the organization.

Enabling Notification Rules

1. Click on Admin tab -> Click Notification Rules icon  in the Configuration Wizard page. This opens Notification Rules page.
2. To set the notification rules select the relevant notification rules by enabling the check box. These notification rules are self-explanatory.
3. Except for Purchase order Overdue, You can assign technicians to notify of the fault for all the other notification rules.
 1. To assign technician select **Choose** button, this brings up the Choose Technician Name page.
 2. Select as many as technicians from the list using ctrl or shift keys.
 3. Click **OK** button to save. You can see the selected technicians displayed in the choose technicians grayed out field.
4. Click **Save** button to save the set notification rules. The notification to the administrator or to the technicians will be generally sent through email.

Customize Message Template

You have default message template for Purchase Order and Contracts. To customize email templates as per your requirement,

1. In the Notification Rules page -> under **Customize Message Template**, there are two message templates available one for **Purchase Order & other for Contracts**.
2. Click **Email Template link** beside the corresponding module. This opens **Message Template** page. In the Message Template edit form; the **Notification Type** is a non-editable mandatory field.
3. You can change the **Subject** provided for the notification type.
4. In the Message block, to add content variables that need to be a part of the notification, select the fields from the Database fields list and click **>>** button to move the database fields list to the Notification fields list. If you want to remove the fields from the Notification Fields list, then select the same and click **<<** button.
5. To order Notification Fields you can select Forward arrow or backward arrow button.
6. On completing the modifications, click **Save** button to save the settings.

Product Types

Each product can be categorized into a specific Product Type, Type & Category. This is a high level categorization of the assets in an organization. e.g., Adobe Photoshop licenses or Macromedia Flash licenses.

Product Type : Product Type refers to a product typecast. The assets are grouped according to their Product Types. For e.g. all the Printers in the organization will be grouped under the product type printers.


Type : Type is a subdivision of product types. They are classified in to Asset and Asset Components for e.g. a Workstation is an Asset, Keyboard is an Asset Component.

Category : Category is a common attribute of Product Types and Types. They are classified into IT and Non-IT. For e.g. Workstation is an IT asset & Projector & Scanners are Non - IT assets.

Example : Adobe Photoshop & HP Inkjet Printer can be categorized as,


Assets	Product Type	Type	Category
Adobe Photoshop/Macromedia Licenses	Software Licenses	Components	IT
HP Inkjet Printer	Printer	Asset	IT

Add New Product Type


1. Click on Admin Tab -> Click Product Type icon  in the configuration Wizard. This brings up the Product Type view list.
2. Click Add New Product Type link on the right side corner of the page.
3. Specify the **Product Type Name** in the given text field. ex. Printer. This is a mandatory field, which will uniquely identify the individual product types.
4. Select the **Type** from the combo box. This is a mandatory field.
5. Select the **Category** from the combo box. e.g. IT or Non-IT. This is a mandatory field.
6. Specify any relevant information about the product type in the **Description** field.
7. Click **Save** button to save the changes. Click **Save and add new** button to save the Product Type and add another Product type. You can see the Product Type listed in the view list.

Editing & Deleting Product Types

Edit Product Type

1. From the Product Type view list page, click Edit icon  to edit the product type details. This brings up the Edit Product Type page.
2. Edit the details and save the changes.


Delete Product Type

1. From the Product Type view list page, click Delete icon  to delete the selected Product Type from the list.
2. A pop up message pops up to get your confirmation on the delete operation. Click **Yes** to proceed. You can see the network deleted from the list.

Products




Specific asset types are termed as products. For example, Dell Latitude D600 is a product representing Dell Laptops. To add a product,

Add New Product

1. Click on Admin tab -> Click Product icon  in the Configuration Wizard page. This brings up the Product view list page.
2. Click **Add New Product** link on the right side corner of the page. This brings up the Add Product view list page.
3. Specify the **Product Name** in the given text field. ex. Dell Latitude D600. This is a mandatory field. Which will uniquely identify the individual products.
4. Specify the **Manufacturer name** in the given field. For ex. Dell.
5. Select the relevant Product Type from the combo box under which the product can be classified. If the selected Product Type is a Workstation, then you need to select either of the two options **Desktop or Laptops** by enabling the radio button.
6. Specify the **Part No** in the given field.
7. Specify any relevant comments regarding the product in the **Comments** field.
8. Click **Save** button to save the Product and continue with the vendor association. You can associate any number of vendors to the product.


Scanning IT Assets

Scanning IT assets module helps you to scan all windows domain, networks, other Linux machines & IP based IT assets. Also helps in setting up audits for scheduling periodic scanning and regular cleanup.


-
- [Windows Domain Scan](#) 
 - [Network Scan](#) 
 - [Audit Settings](#) 
-

Editing & Deleting Domains

Edit Domains

1. From the Domains list view page, click Edit icon  to edit the domain details. This opens Edit Domain page.
2. Edit the domain details and save the changes. You can see the edited domain getting listed in the view list page.


Delete Domains

1. From the Domains list view page, click Delete icon  to delete the selected domain from the list.
2. A pop up box pops up to get your confirmation on the delete operation. Click yes to proceed. You can see the domain deleted from the list.


Network Scan

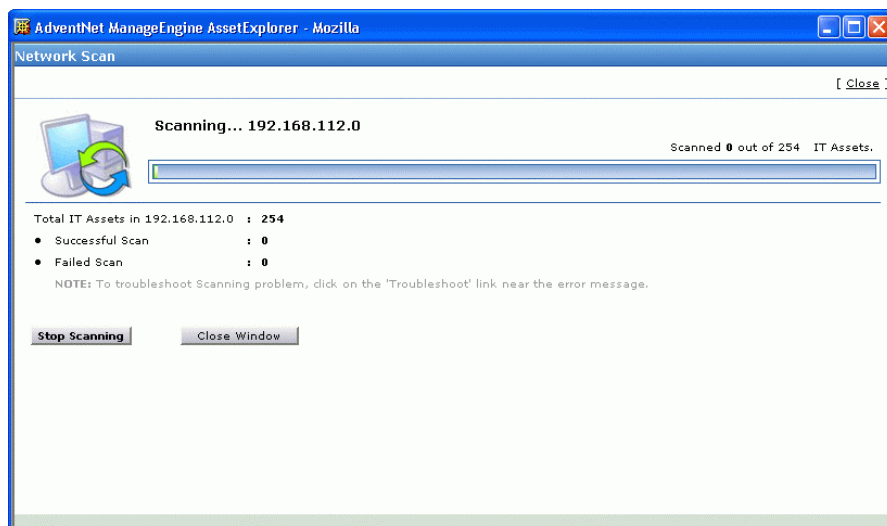
Network scan allows you to discover networks that are part of your enterprise. These networks are scanned for Linux machines and other IP based IT assets ex: printers, routers, switches etc and they are grouped under this network.

Add New Network

1. Click on **Admin tab** -> Network Scan icon  in the Configuration Wizard page. This opens the Network view list page.
2. Click on **Add New Network** link on the right side corner of the Network view list page. This opens Add Network page.
3. Specify the Network Address in the given field. For ex. 192.168.27.0, this is a mandatory field, which uniquely identifies the network address.
4. Specify the **Login Name** in the given text field. This login name should have telnet access across all machines in the organization. For ex. Administrator.
5. Specify the **Password** for the user.
6. Specify the **Community String** for the network address, ex: public or private
7. Provide any relevant information pertaining to the network details in the **Description** field.
8. Click **Save** button to save the details. Click **Save and Add New** button to save the network and add another network. You can see the network address getting listed in the network view list.
9. Click **Cancel** to cancel the details.


Scan Domains

1. Click on Scan menu on the right side of the page -> Click Network Scan sub menu to go to the network view list page. (Or) Select Admin tab -> Click Network Scan to go the view list page.
2. Click Scan Network icon  of the particular network to discover all network in the organization. You can get the complete reports of the scan, with successful and failed workstations.




Editing & Deleting Networks

Edit Networks

1. From the Network view list page, click Edit icon  to edit the network details. This brings up the Edit Network page.
2. Edit the network details and save the changes. You can see the edited network getting listed in the view list page.


Delete Networks

1. From the Network view list page, click Delete icon  to delete the selected network from the list.
2. A pop up window pops up to get your confirmation on the delete operation. Click **Yes** to proceed you can see the network deleted from the list.

Audit Settings

Audit settings help you to schedule [periodic scanning](#) of your network and enable [regular cleanup](#) of scanned information and set re-scanning interval for scanning workstation.

Enable Scheduled Scan

1. Click on Admin Tab -> Click Audit Settings icon  in the configuration wizard page. This opens Audit Settings form.
2. Select **Enable Scheduled Scan** check box to configure regular scanning of the workstations.
3. Set the **Date and Time** (hours & minutes) for scanning of workstations.

Select any of the 5 radio buttons below the Enable Scheduled Scan sub-heading explained below:

Scan Once

Select the date on which you want to scan your network using the calendar icon. And set the time to scan on the chosen date.

Daily Scan

Select the time (hours and minutes) from the combo box to scan workstations on a daily basis. Then select the date from the calendar button to schedule scans.

Weekly Scan

In the weekly scan option, you can also choose to schedule a daily scan. Select **Everyday** checkbox to enable scan on all the days of the week. Or select the check box beside a particular day of the week. Then set the time (hours and minutes) of the scan to start the scanning process on the selected day of the week.

Monthly Scan

In the monthly scan option select the check box **Every Month** to scan every month throughout the year. Or you can also choose the months you want to scan by selecting the check box beside the name of the months.

In the monthly scan option you can also choose to schedule a weekly scan by selecting the radio button Day, and specifying the scanning day of the week from the combo box. Or select the Date radio button and specify the date from the combo box.

Finally select the time (hours and minutes) of the scan.

Periodic Scan

You can enter a random period of time to repeat the scan. Enter the number in the field provided. The scan will be performed on every specified nth day. Where n is the number you enter in the field. The default value is 7th day.

History Clean up

You can enable regular cleanup of scanned information, by selecting the Enable Scan History Clean up check box and enter the number of days in the field provided for deleting the scanned information.

Newly Added workstations

You can also check for newly added workstations by performing a re-scan of your network. For this you need to select **Check for newly added workstations** check box and enter the number of days when the periodic re-scanning of your network will be performed. Once the details are specified save the changes. Click Reset button to reorganize the settings.

Discovery - Audit Settings

Enable Scheduled Scan

Scan Once

Daily Scan

Weekly Scan

Monthly Scan

Periodic Scan

Daily Scan for workstations :

Daily At

Time : Hour : Minutes

From :

Enable Scan History Clean up

Clean up Scan History older than days

Check for newly added workstations

Every days

Assets

Assets can be categorized as IT, Non IT Assets & Asset Components in an organization. This includes Workstations, Printers, Routers, Software Licenses, Scanners, Projectors and even your air conditioning systems. These assets require substantial investment and proper maintenance to cut down the unnecessary cost incurred by unmanaged assets.

AssetExplorer helps you to track & manage your assets efficiently. It tracks all your newly added assets, and have a record of all the assets in the organization.

-
- [IT Assets](#)
 - [IT Components](#)
 - [Non -IT Assets](#)
-

IT Assets

All IP based assets are discovered under IT assets. The list of possible IT assets are given below,

- Workstations
- Laptops
- Printers
- Switches
- Servers
- Routers
- Access Points

-
- [Adding IT Asset](#)
 - [Adding Assets to Group](#)
 - [Assigning Assets to Department](#)
 - [Associating Vendor to the Product](#)
 - [Deleting Assets](#)
 - [Asset Additional Fields](#)
 - [Importing Asset details from CSV](#)
 - [Scanning New Workstation](#)
 - [Adding New Workstation](#)
 - [Viewing Workstation Details](#)
 - [Adding Workstation to Group](#)
 - [Adding Workstation to Department](#)
 - [Deleting Workstations](#)
 - [Importing Workstation Details from CSV](#)
-

Adding IT Asset

IT Assets other than workstations are configured under IT Assets. To add a new asset,

1. Click Create New tab -> Click Asset option from the drop down menu. This opens Add Asset page.
2. OR click **IT Assets** under Resources on the left side of the page -> Select any one of the listed IT assets link. e.g. Access points, printers etc. This opens the particular IT asset page.
3. Click New button. This opens Add Asset page.
4. Specify the **Product Name** in the given text field. This is a mandatory field.
5. Specify the **Asset Name** in the given text field. This is a mandatory field.
6. Specify the **Asset Tag, Asset Serial No, Bar Code, Vendor Name, Asset Cost** in \$ in the corresponding text fields.
7. Specify the **Acquisition Date & Expiry Date** from the calendar button.
8. Select the **Region, Site** from the combo box.
9. Specify the **Location** in the given text field.
10. Specify the **Asset State** by selecting the current status of the asset from the combo box. If the asset is in **Use** state you need to associate or assign asset to department or user or asset.
11. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.
12. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.
13. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.
14. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

Adding Assets to Group

1. From the Asset view list page, select assets to be added to the group by enabling the check box. This opens Add Resource(s) to page.
2. Select the **Existing Group** or the **New Group** from the page.
3. Click **Save** button to save the changes.

Assigning Assets to Department

1. From the Assets view list page, select assets to be assigned to the department by enabling the check box.
2. Click **Assign to Department** button. This opens Assign resource(s) to Department page.
3. Select the Existing Department from the combo box. Or Select the New Department by enabling the radio button. Specify the **New Department Name** and **Description** in the given text field. Department Name is a mandatory field.
4. Click Save button to save the changes.

Associating Vendor to the product

1. Click on the Vendors tab -> Click Associate Vendor button to associate vendor with the product. This opens the Associate Vendor page.
2. Select the **Vendor Name** from the combo box. This is a mandatory field.
3. Specify the cost in the **Price** field. Both are mandatory fields.
4. Select the **Warranty Period** from the combo box.
5. Select the **Maintenance Vendor** from the combo box if available.
6. Specify relevant information about the product and the vendor in the **Comments** field.
7. Click **Save** to save the details. You can see the vendor details listed in the Vendors view list.
8. Click the **Save and add new** button to save the Product and add another Product. In this Case, you need to associate the vendor by going to the specific product in the list view and then clicking the vendor tab and then clicking Associate Vendor button.

Deleting Assets

1. From the assets view list page, select assets to be deleted by enabling the check box.
2. Click **Delete** button to delete the selected assets. You can see the selected assets deleted from the list.

Asset Additional Fields

You can define your own organization specific fields that need to appear in the new asset form apart from the default fields. You can add text fields, numeric fields, and date/time type fields in the form.

Adding Asset Additional Fields

Configuring Additional Text fields

1. Click on Admin tab -> Click Assets Additional Fields icon in the Configuration Wizard page. This opens Assets – Additional Fields page. You can configure 12 additional text fields for an asset.
2. By default the list of all additional text fields are displayed. Specify the **Label** for the asset additional fields.
3. Specify any relevant information about the additional fields in the **Description** field.
4. Specify the **Type** of the text field by enabling the radio button. It can be either **Single- Line, Multi – Line or drop down** menu list.
5. Specify the **Default Values** in the given text field.
6. Click **Save** to save the settings.

Configuring Additional Numeric fields

1. Click on the Numeric tab. You can configure 4 additional numeric fields for an asset.
2. Specify the **Label** for the additional field. This is a mandatory field.
3. Specify any relevant information for the additional fields in the **Description** field.
4. Click **Save** to save the settings.

Configuring Additional Date/Time fields.

1. Click on Date/Time tab. You can configure 4 additional fields for an asset.
2. Specify the **Label** for the additional field. This is mandatory field.
3. Specify any relevant information for the additional fields in the **Description** field.
4. Click **Save** to save the settings.

Importing Asset details From CSV

AssetExplorer helps you to import your asset details saved in CSV (Comma Separated values) format. If you have asset details in .XLS files, open it with Microsoft Excel and save it as .CSV files and then import it.

1. Click on Admin tab -> Click Import From CSV icon in the Configuration Wizard page. This opens Import Wizard page.
2. Select the Resource Category such as NON-IT from the combo box. This is a mandatory field.
3. Select the Resource Type such as Components or Assets from the combo box. This is a mandatory field.
4. Locate the .CSV file using the Browse button.
5. Click on Step2 button to go to the next page. Click Previous button if you need to go the previous page.
6. Specify the asset Details. The columns in .CSV file are populated in the select boxes beside each field label. Advent Net Manage Engine Asset Explorer asset field's needs mapping with the field names from the .CSV file.
7. Map the Product Type, Product Name, Asset Name from the combo box. All the three are mandatory fields.
8. Map the Asset Tag, Asset Serial No, Bar Code, Vendor Name, Asset Cost, Warranty Expiry Date, Expiry Date, Location, Assigned to User, Assigned to Department from the combo box.
9. Map the Acquisition Date field with the relevant field in the .CSV file. Also map the order of the acquisition date i.e. date/month/year available in the .CSV file.
10. Click Step3 to go the next page. Click Previous button if you need to go the previous page.
11. Click Import Now button to import the existing data from the .CSV file. Once the data is imported, you can see the Import Wizard page with result break-up.

Scanning New Workstation

1. Click on the Assets tab -> click on workstations link. This opens Workstations list view page.
2. Click on the workstation name to be scanned. This opens workstations details page.
3. Click **Scan Now** tab to scan the selected workstation. Based on the success or failure of the scan, corresponding message is displayed at the top of the page.

Adding New Workstation

1. Click on Create New tab -> click **Workstation** option.
2. Specify the **Name** of the computer in the name text field. This is a mandatory field.
3. Specify the **Model, Service Tag, and Manufacturer** of the workstation.
4. Specify the **Processor Count, Processor Info, Clock Speed, and Manufacturer** of the processor in the given text fields.
5. Specify the **RAM and Virtual Memory** in (MB) in the given text fields.
6. Specify the **Name and Service Pack** of the operating systems.
7. Specify the **Resource Tag, Resource Serial No, Bar Code, Acquisition Date and Expiry Date** in the given text fields.
8. Choose the **Vendor Name, Region and Site** from the combo box.
9. Select the current **Asset state** from the combo box.
10. Select the **Network IP Address, MAC Address, NIC, Network, Domain, DNS Server name & Default Gateway**
11. Select **DHCP** enabled.
12. Specify the **Monitor, Keyboard, Mouse Type and Manufacturer** in the given text field. You can see the asset getting listed.

Adding Workstation to a Group

1. From the Workstations view list page, select workstations to be added to the group by enabling the check box. This opens Add Resource(s) to page.
2. Select the Existing Group or the New Group from the page.
3. Click **Save** button to save the changes.

Adding Workstation to Department

1. From the Workstations view list page, select workstations to be assigned to the department by enabling the check box.
2. Click **Assign to Department** button. This opens Assign resource(s) to Department page.
3. Select the **Existing Department** from the combo box. OR select the **New Department** radio button.
4. Click **Save** button to save the changes.

Deleting Workstations

1. From the Workstations view list page, select workstations to be deleted by enabling the check box.
2. Click **Delete** button to delete the selected workstations. You can see the selected workstation deleted from the list.

Workstation Additional Fields

You can define your own organization specific fields that need to appear in the new workstation form apart from the default fields. You can add text fields, numeric fields, and date/time type fields in the form.

Adding Workstation Additional Fields

Configuring Additional Text fields

1. Click on Admin tab -> Click Workstation Additional Fields icon in the Configuration Wizard page. This opens Workstation – Additional Fields page. You can configure 12 additional text fields for a workstation.
2. By default the list of all additional text fields are displayed. Specify the **Label** for the Workstation Additional Fields.
3. Specify any relevant information about the additional fields in the **Description** text field.
4. Specify the **Type** of the text field by enabling the radio button. It can be either **Single- Line, Multi – Line or drop down menu list**.
5. Specify the **Default Values** in the given text field.
6. Click **Save** to save the settings.

Configuring Additional Numeric fields

1. Click on the Numeric tab. You can configure 4 additional numeric fields for a workstation.
2. Specify the **Label** for the additional field. This is a mandatory field.
3. Specify any relevant information about the additional fields in the **Description** text field.
4. Click **Save** to save the settings.

Configuring Additional Date/Time fields.

1. Click on the Date/Time tab. You can configure 4 additional fields for a workstation.
2. Specify the **Label** for the additional field. This is a mandatory field.
3. Specify any relevant information about the additional fields in the **Description** text fields.
4. Click **Save** to save the settings.

Importing Workstation Details from CSV

AssetExplorer helps you to import your workstation details saved in CSV (Comma Separated values) format. If you have asset details in .XLS files, open it with Microsoft Excel and save it as .CSV files and then import it.

1. Click on Admin tab -> Click Import From CSV icon in the Configuration Wizard page. This opens Import Wizard page.
2. Select the Resource Category such as IT from the combo box. This is a mandatory field.
3. Select the Resource Type such as Components or IT- Assets (Workstation & Other IT Assets) from the combo box. This is a mandatory field.
4. Locate the .CSV file using the Browse button.
5. Click on Step2 button to go to the next page. Click Previous button if you need to go the previous page.
6. Specify the workstation Details. The columns in .CSV file are populated in the select boxes beside each field label. Advent Net Manage Engine Asset Explorer asset field's needs mapping with the field names from the .CSV file.
7. Select the Workstation Name from the combo box. This is a mandatory field.
8. Note: Use FQD Names (Fully Qualified Domain Name) for workstations. While scanning Asset Explorer can identify only the FDQ Names else the existing workstation will be added as a new workstation (duplicate copy).
9. Workstation Name will be the identifier for workstations. i.e. no two workstation can have the same name if so it will be replaced by the new name.
10. Select the Service Tag, Model, Manufacturer, Operating System, Location, and Assigned to User and Assigned to Department from the combo box.
11. Click Step3 to go the next page. Click Previous button if you need to go the previous page.
12. Click Import Now button to import the existing data from the .CSV file. Once the data is imported, you can see the Import Wizard page with result break-up.

Components

A part of the asset (ie. associated with the asset) which does not stand alone are grouped under components. The list of all possible components are given below,

- Keyboards
- Mouse
- Software's
- Software Licenses
- Printer ink

-
- [Adding Components](#)
 - [Adding Components to Group](#)
 - [Adding Components to Department](#)
 - [Deleting Components](#)
-

Adding Components

1. Click Create New tab -> Click Asset option from the drop down menu. This opens Add Asset page.
2. OR click **Asset Components** under Resources on the left side of the page -> Select any one of the listed IT assets components link. e.g. Keyboards etc. This opens the particular Asset Component page.
3. Click New button. This opens Add Asset page.
4. Specify the **Product Name** in the given text field. This is a mandatory field.
5. Specify the **Asset Name** in the given text field. This is a mandatory field.
6. Specify the **Asset Tag, Asset Serial No, Bar Code, Vendor Name, Asset Cost** in \$ in the corresponding text fields.
7. Specify the **Acquisition Date & Expiry Date** from the calendar button.
8. Select the **Region, Site** from the combo box.
9. Specify the **Location** in the given text field.
10. Specify the **Asset State** by selecting the current status of the asset from the combo box. If the asset is in **Use** state you need to associate or assign asset to department or user or asset.
11. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.
12. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.
13. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.
14. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

Adding Components to Group

1. From the Asset view list page, select assets to be added to the group by enabling the check box. This opens Add Resource(s) to page.
2. Select the **Existing Group** or the **New Group** from the page.
3. Click **Save** button to save the changes.

Adding Components to Department

1. From the Assets view list page, select assets to be assigned to the department by enabling the check box.
2. Click **Assign to Department** button. This opens Assign resource(s) to Department page.
3. Select the Existing Department from the combo box. Or Select the New Department by enabling the radio button. Specify the **New Department Name** and **Description** in the given text field. Department Name is a mandatory field.
4. Click Save button to save the changes.

Deleting Components

1. From the assets view list page, select assets to be deleted by enabling the check box.
2. Click **Delete** button to delete the selected assets. You can see the selected assets deleted from the list.

Non IT Assets

All non IP based assets are grouped under Non - IT assets. The list of all possible non-it assets are given below,

- Projectors
- Scanners
- Tables
- Chairs
- Telephones

-
- [Adding Non - IT Asset](#)
 - [Adding Non - IT Asset to Group](#)
 - [Adding Non - IT Asset to Department](#)
 - [Deleting Non- IT Asset](#)
-

Adding Non-IT Asset

1. Click Create New tab -> Click Asset option from the drop down menu. This opens Add Asset page.
2. OR click **Non - IT Assets** under Resources on the left side of the page -> Select any one of the listed Non - IT assets link. e.g. Projectors & Scanners etc. This opens the particular Non - IT asset page.
3. Click **New** button. This opens Add Asset page.
4. Specify the **Product Name** in the given text field. This is a mandatory field.
5. Specify the **Asset Name** in the given text field. This is a mandatory field.
6. Specify the **Asset Tag, Asset Serial No, Bar Code, Vendor Name, Asset Cost** in \$ in the corresponding text fields.
7. Specify the **Acquisition Date & Expiry Date** from the calendar button.
8. Select the **Region, Site** from the combo box.
9. Specify the **Location** in the given text field.
10. Specify the **Asset State** by selecting the current status of the asset from the combo box. If the asset is in **Use** state you need to associate or assign asset to department or user or asset.
11. Allocate the asset to an **Asset** or to an **User** or to the **Department** by selecting any of the two radio button. Say Associate to Asset or Assign User/ or Department.
12. If you choose to associate asset to an asset then select the asset name from the **Choose Asset** combo box. Or if you have chosen to assign to user or the department then select User or Department from the combo box.
13. If the asset is leased select the check box Asset is **Leased**. If the asset is leased then specify the **From** and **To** date from the calendar button.
14. Click **Save** button to save the changes. To save and add another asset click **Save and add new button**.

Adding Non-IT Asset to Group

1. From the Asset view list page, select assets to be added to the group by enabling the check box. This opens Add Resource(s) to page.
2. Select the **Existing Group** or the **New Group** from the page.
3. Click **Save** button to save the changes.

Adding Non-IT Asset to Department

1. From the Assets view list page, select assets to be assigned to the department by enabling the check box.
2. Click **Assign to Department** button. This opens Assign resource(s) to Department page.
3. Select the Existing Department from the combo box. Or Select the New Department by enabling the radio button. Specify the **New Department Name** and **Description** in the given text field. Department Name is a mandatory field.
4. Click Save button to save the changes.

Deleting Non-IT Asset

1. From the assets view list page, select assets to be deleted by enabling the check box.
2. Click **Delete** button to delete the selected assets. You can see the selected assets deleted from the list.

Software Asset Management

ManageEngine AssetExplorer discovers all installed software in the network. Asset managers have tough time managing personal, official and recreational software that is common in the workplace.

- 1) AssetExplorer groups scanned software based on Managed, Open Source types etc.
- 2) Help in license management
- 2) Help in Group based on application
- 3) Software metering- which tracks the usage of the software in each workstation.

-
- [About Software](#)
 - [Adding New Software](#)
 - [Deleting Software](#)
 - [Changing Software Category](#)
 - [Moving Software](#)
 - [Viewing Software Details](#)
 - [Changing Software Type](#)
 - [Adding Software License](#)
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About Software

1. Click on Assets Tab. This brings up the Software view list page. By default, the list of **All Software** will be displayed.
2. Select the corresponding filter option from the **Viewing** combo box. You can view the softwares with different status levels using filters. They are,
 - Excluded
 - Freeware
 - Managed
 - Prohibited
 - Shareware
 - Unidentified

Adding New Software

1. Click on the Assets tab-> click **Software** link. (Or)
2. Click **Software** link under Resources on the left hand side of the page. This opens softwares view list page. By default the list of **All softwares** will be listed.
3. Click **New** button to add new software. This opens Add Software page.
4. Specify the **Software Name** in the given text field. e.g. Adobe Photoshop. This is a mandatory field.
5. Specify the **Version** of the software. Say 7.1,7.2 etc.
6. Select the **Software Type** from the combo box. Say Managed.
7. Select the **Software Category** from the combo box. Say Others.
8. Specify relevant information about software in the **Description** field.
9. Click **Add** button to add the software. You can see the newly added software getting listed in software view list page.

Deleting Software

1. From the Software view list page, select the corresponding filter option from the **Viewing** combo box. By default the list of All Softwares will be displayed.
2. Select the softwares to be deleted by enabling the check box.
3. Click **Delete** button to delete the selected softwares. A pop up window pops up to get your confirmation on the delete operation. Click **yes** to proceed. You can see the selected softwares getting deleted from the list.

Changing Software Category

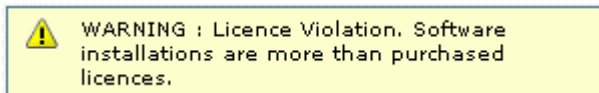
1. From the Softwares view list page. Select the corresponding filter option from the **Filter Viewing** combo box. By default the list of **All Softwares** will be listed.
2. Select the software from the list to change the category. Click **Change Category** button. This opens **Change Software Category to** page.
3. Select the Software Category from the list say Accounting, Development etc.
4. Click Save button to save the changes.

Moving Software

1. From the Software View list page. Select the corresponding filter option from the From the **Filter Viewing** combo box. By default the list of All Softwares will be listed.
2. Select the corresponding filter option from the **Move To** combo box. Select the software to be moved by enabling the check box.
3. Click **Move** button to move the selected software to the specified category.

Viewing Software Details

1. From the Software view list page, select **Managed** software type from the **Filter Viewing** combo box, to view the license details of the software. All the licensed software comes under Managed software type.
2. Click on the software name to view the software details.
3. In the software details page, You have the Product Name, Version, Manufacturer and Category. You can also change the category by clicking **change** link adjacent to the category.
4. You can also view the purchased licenses details, Licensed users, Available Licenses and Unlicensed Installations. On having unlicensed installations you get a warning message for license violation as shown below,



Licensed Installations

Under Licensed Installations, you can view the workstation details, user details, software usage details, number of licensed installations and allocated licenses details .

Un Licensed Installations

Under Unlicensed installations, you can view the list of unlicensed installations , users using the unlicensed software, usage of the software say frequently or occasionally etc can be viewed.

Allocate Licenses to single machines

To allocate licenses to the single machines,

1. Click on the Select software license icon -> Select software license page opens.
2. Select the license name by enabling the radio button.
3. Click Save button to save the changes. You can see the unlicensed installations changing to licensed installations and listed under the Licensed Installations column.

Allocate Licenses to multiple machines

To allocate licenses to multiple machines,

1. Select the workstations to allocate licenses by enabling the check box.
2. Click **Allocate License** button to allocate licenses to bulk of workstations. It takes all un allocated licenses and assign it to the workstations automatically.

Purchased Licenses

Under Purchased licenses, you can view the number of purchased licenses, license type, Installation details, license key details etc.

To delete the purchased licenses,

1. Select the purchased licenses from the list by enabling the check box.
2. Click **Delete** button to delete the selected licenses. A pop window pops up to get your confirmation on the delete operation click Yes to proceed. You can see the softwares licenses getting deleted from the list.

Changing Software Type

1. From the Software view list page, click the software name. This opens the software details page.
2. Click Actions link on the right hand upper corner of the page. Select **change software type** option. This opens change software type page.
3. Select any one of the listed software type. Say Excluded.
4. Click **change** button to change the software type. You can see the software type changing to excluded in the software details page.

Adding Software License

1. From the software view list page, click on the software name to open asset details page.
2. Click Actions tab on the right side upper corner of the software details page.
3. Click Add Software License option. This opens Add Software License page.
4. Specify the **Number of licenses** in the given text field. This is a mandatory field.
5. Specify the License Type from the combo box. Say for the Enterprise or for the individual.
Enterprise: Is for the entire organization (license for unlimited users), **Individual:** Is for each individual.(license for limited users). This is a mandatory field.
6. Specify the **License Keys** in the given text field. Say
XBVJD,YCCYR,7DF28,JH2PX,MYT7M.



Note: The license keys values should be in comma separated values format.

7. Select the **Vendor Name** from the combo box. If the specified vendor is not available in the list click **Add New** link and specify the vendor details and save the changes.
8. Specify the **Purchase Date** from the calendar button.
9. Click **Save** button to save the changes. You can see the license getting listed in the software license view list page.

Associating Software Minor Versions

ManageEngine AssetExplorer allows you to group minor versions of the software under major version.

For e.g. A company buys AdobePhotoshop 7.0 with 4 licenses. The license is applicable for both 7.1 and 7.2 versions and vice versa. In this case 7.0 is the major version and 7.1 and 7.2 are the minor versions. The licenses purchased are the same for all the three versions.

If Adobephotoshop 7.0 is installed in two different machines and 7.1 & 7.2 is installed in other two different machines. On scanning for Adobe Photoshop software before grouping, the AssetExplorer shows the list as different single entries. The purchased licenses for the software would be as ' 4 ' for the version 7.0 and ' 0 ' purchases for other versions (7.1 & 7.2) .

Using associate minor versions option you can group 7.1 & 7.2 minor versions under 7.0 major version. This shows the software list to be a single entry with the number of purchased licenses and installations. Thus helps you in avoiding individual entry for each version of the software. And also helps in easier management of the installed software for the assetmanager.

1. From the software view list page. Click on the software name. This opens the software details page.
2. Click on the Actions tab on the right hand side upper corner of the page. Click **Associate Minor Versions** option. This opens Associate minor versions page.
3. Select the minor versions of the selected software from the list to group under the Major version.
4. Click >>button to move the selected **minor version software** to the **Selected** software list.
5. Click **Save** button. You can see the minor versions getting listed in the software details page as **Software - All Versions**.

Emailing Users

ManageEngine AssetExplorer has email options for the technicians to communicate to the users. Say, technicians communicate to the users for any event occurred or to get any information from users.

1. From the users view list page, click on the software name to open the users details page.
2. Click on the **Actions** tab on the right side upper corner of the page-> click **Email users** option. This opens Email Users page.
3. Specify the **To** email address in the given field.
4. The **Subject** field will be in non-editable format.
5. Specify the message about the mail in the **Description** field.
6. Click **Send E-mail** option to send the email to the user.

Software Licenses

AssetExplorer helps you to manage software licenses installed across the enterprise. You can consolidate and manage all your software licenses from a single screen. AssetExplorer will scan and automatically pickup license keys for Microsoft Windows and Microsoft Word. You can key-in all the licenses purchased earlier and track future purchase of software licenses through the Purchase module.

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- [Adding New Software Licenses](#)
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 - [Associating Software Licenses to Asset](#)
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Adding Software Licenses

To add software licenses for the existing software,

1. From the software view list page -> Click **Create New** link -> select **Software License** option. This opens Add Software License page.
2. Select the **Product Name** from the combo box. If the product name is not available in the list select **Add New** link to add the product. specify the Product Name in the given field. This is a mandatory field. Choose the Managed software from the list and click >> button to move the selected software to the selected software list. This is also a mandatory field. Click Save to save the details.
3. Specify the **Number of licenses** in the given text field. This is a mandatory field.
4. Specify the **License Type** from the combo box. say for the Enterprise or for the individual. **Enterprise:** is for the entire organization (license for unlimited users) **Individual:** Is for the each individual.(license for limited users). This is a mandatory field.
5. Specify the **Vendor Name** from the combo box. If the specified vendor is not available in the list click **Add New** link and specify the vendor details and save the changes.
6. Specify the **Purchase Date** from the calendar button.
7. Select the **Unlicensed Installations** and move to the **Selected Workstations** list using >> forward button. Click << button to remove the selected workstations.
8. Click **Save** button to save the changes. You can see the license getting listed in the software license view list page.

Copying Software Licenses

1. From the software licenses view list page. Click the software license name. This opens the software license details page.
2. Click on the Actions link -> Click Copy Resource option. This opens Copy Resource page.
3. Specify the Number of Copies to be copied in the given text field.
4. Click Copy button.

Editing Software Licenses

1. From the Software license view list page, click the software license name. This opens the software details page.
2. Click on the Actions tab -> Click Edit Resource option. This opens the Edit Resource page.
3. Do the required changes and click the Update button to update the changes.
4. Click **Copy** button to Copy the edited software license.
5. To **Reset** the changes click Reset button.

Associating Software License to Asset

1. From the software view list page, click the Software license name. This opens the Software license details page.
2. Click on the Actions tab -> Click Associate option to associate the software license to the asset. This opens the Associate page.
3. Select the asset from the combo box and save the changes. You can see the software licenses associated with the selected asset.

Group

Manage Groups

ManageEngine AssetExplorer helps you to group assets based on asset properties. You can group assets of users belonging to the same team and location. Organizing assets based on groups gives you more fine-grained control and helps you manage assets efficiently. E.g. you can group assets based on OS, Service packs, Memory size and so on. When you are getting ready for migration you will be able to pinpoint assets with 256 MB RAM that need upgrade before rolling out Windows Vista.

-
- [Creating New Group](#)
 - [Removing Assets from the Group](#)
 - [Editing & Deleting Groups](#)
-

Creating New Group

For easier channelization, users can be categorized under Static and Dynamic groups.

Under **Static group** you define the group by listing its members.

Under **Dynamic group** resources are grouped automatically based on certain criteria set by the administrator.

1. Click on Assets Tab -> Click Groups under Resources pane on the left hand side of the page.
2. Click **Add New Group** link on the right hand side corner of the Manage Groups page. This opens Create Group page, it has three fields namely Group Name, Description & Group Type.
3. Specify the **Group Name** in the given text field. This is a mandatory field.
4. Specify relevant information about the newly created group in the **Description** field. Say the group name is Test DL600 you can specify Test DL600 stands for Dell Lateral 600.
5. Specify any of the **Group Type** by enabling the radio button. Say Static or Dynamic group.
Static Group: You define the group by listing its members.
Dynamic Group: Resources are grouped automatically based on certain criteria.
6. Click **save** button to save the group. You can see the newly created group getting listed in the Create Group page.
7. Once the group is created you have to add resources to the group.

To add resources to the Static group,

1. Select the filter criteria from the Showing combo box. Say for ex. You can select All Assets in Use.
2. Specify the **Search** criteria in the given text field.
3. Click **Go** button to list all resources based on the filter criteria. You can see the list of all filtered resources.
4. Select the resources to be added to the group by enabling the check box.
5. Then click **Add** button to add resources to the group. You can see the selected resource added to the group, shown under Resources In group column.

To add resources to the Dynamic Group,

1. You define the filter criteria by selecting the **Criteria** and **Conditions** from the combo box.
2. Select the **Criteria** from the combo box say for e.g. Resource Criteria or Workstation Criteria.
3. Select **Conditions** from the combo box, which will be listed based on the selected criteria.
4. Select any one of the **Match Criteria** by selecting either of the radio buttons. Say (And) or (OR) criteria.
5. Click **Choose** button to choose the resource or workstation criteria listed based on the criteria you have selected. **For example:** If you have selected resource criteria as **Product Type** and conditions as **is** then on clicking choose button you will get the list of all product types say scanners, keyboard, printers etc.
6. Select any of the listed Product Type and click **Ok** buttons to add to the group. You can see the group criteria getting listed.
7. Click **Save and View group** button to view the list of all resources based on the filter criteria.

Removing Assets from Group

To remove the existing resources from the group,

1. From the Create Group page, select the resource name from the list by enabling the check box under the Resources in-group column.
2. Click **Remove** button to remove the resources. You can see the selected resource deleted from the list.

Editing & Deleting Groups

Edit Groups

1. From the Manage Groups view list page, click Edit link of the group to be edited. This opens Create group page with the Group details.
2. Click **Edit** button on the left hand side corner of the group details column. This opens Group details form with the Group details namely, **Group Name, Description and Group Type**.
3. Do the required changes and click **Edit** button to edit and save the changes.

Delete Groups

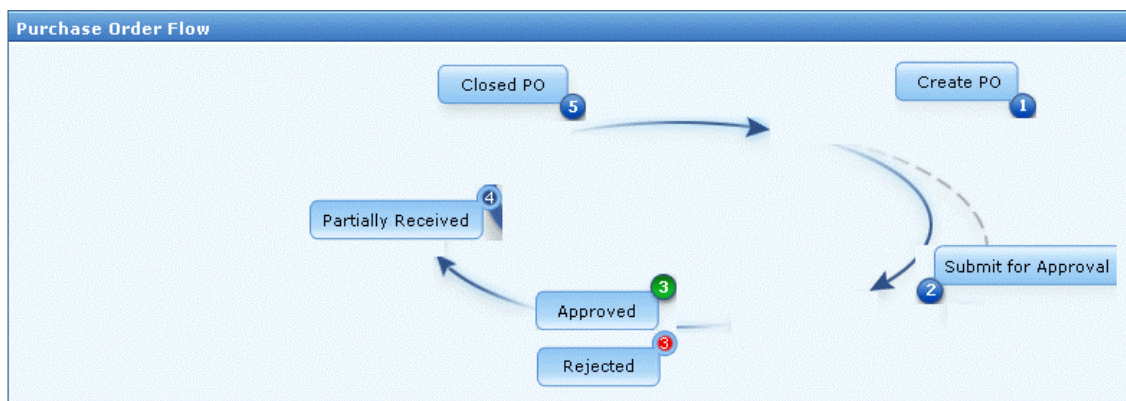
1. From the Manage Groups view list page. Click **Delete** link on the left hand side of the page.
2. A pop up window pops up to get your confirmation on the delete operation. Click **OK** to proceed. You can see the group deleted from the list.

Purchase Order

ManageEngine AssetExplorer has a complete purchase system which helps to,

- Create purchase order by the purchase officer
- Submit purchase order for approval to the manager.
- Approve/reject purchase order by the authority.
- Approved purchase orders sent to the vendor.
- Vendor ships the items to the organization.
- Items are received from the vendor.
- Assets are assigned to the owner in the organization.

Purchase Order Cycle



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- [Adding Purchase Default Values](#)
- [Creating New Purchase Order](#)
- [Editing Purchase Order](#)
- [Deleting Purchase Order](#)
- [Approve Purchase Order](#)
- [Reject Purchase Order](#)
- [Receiving Purchase order Items](#)
- [Purchase Order Print Preview](#)
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About Purchase Orders


To view a purchase order,

1. Click on Purchase Tab. This brings up the Purchase Orders view list page. By default the status of the Purchase Order will be pending Approval.
2. Select the corresponding filter option from the **Filter Showing** combo box. You can view purchase orders with different status levels using filters. They are,
 - **Pos Pending Approval**
Purchase Orders which are pending and waiting for approval from the higher authority comes under this category.
 - **Approved POs**
All the agreed Purchase Orders will be listed under this category.
 - **Rejected POs**
All the unaccepted purchase orders will be listed under this category.
 - **Partially Received POs**
Purchase Orders, which are partly received from the vendor, will be listed under this category.
 - **Closed POs**
Purchase Orders, which are already purchased from the vendors, will be listed under this category.
 - **Overdue Pos**
Purchase orders not delivered and have exceeded the delivery date will be listed under this category.
 - **Pos due in next 7 days**
Outstanding Purchase Orders, expiring in next 7 days will be listed under this category.
 - **Pos due in next 30 days**
Outstanding Purchase Orders, expiring in next 30 days will be listed under this category.

Purchase Default Values

You can set the Purchase Default Values such as the default currency, tax rate, billing & shipping address, and terms & conditions of the purchase. To add purchase default values,

Adding Purchase Default Values

1. Click on Admin tab -> Click Purchase Default Values icon  on the Configuration Wizard page. This opens Purchase Default Values page.
2. Specify the **Default Currency** (For example, USD or \$). This will be displayed in all the purchase orders (PO) generated and in any place where money is being used.
3. Specify the **Default Tax Rate** (%) in the given text field. This will be the tax rate, used for calculating the sales tax in all the POs generated. If you wish to have a different tax rate for any specific PO, then enter the new rate while creating that particular PO.
4. If you wish to have tax shipping as default value, then select the check box beside Tax Shipping field.
5. Enter the **Shipping Address** to which the PO items will be shipped and the **Billing Address** to which the invoice and bill needs to be sent.
6. Enter the **PO** terms in the Terms text box.
7. Click **Save** to save the settings.

Creating New Purchase Order

1. Click on **Purchase** tab in the header pane. This brings up the **Purchase Orders** view list page.
2. Click **New Purchase Order** button. By default the status of the Purchase Order will be the **POs pending Approval**.
3. Specify the **PO#** number. E.g. P.O #2268. This is a mandatory field.
4. Specify the **PO name** say Dell Lateral 600 and **Required by date** from the calendar button.
5. Select the **Vendor Name** from the combo box. This is a mandatory field. If the specified vendor name is not available in the list, click **Add New link** adjacent to the Vendor field and specify the vendor details like Name, Description and Contact Person of the vendor. And click Save button to save the details.
6. Specify the **Contact Address, Phone number** and **Signing Authority** of the company.
7. Specify any related comment regarding the purchase order in the **Remarks** field. Ex: if the PO# name is PO L 600-500 then in this case you can explain about the L 600 in the PO# name. Where L600 stands for lateral 600.
8. Specify the terms and conditions of the purchase in the **Terms** field.
9. Once these details are specified click **Save and Proceed to add items**.

This opens Add Items page. Select the Items from the combo box. If the required item is not available in the list, click Add Items link next to the Items field. Specify the **Product Name & Product Type** of the item, which are mandatory fields. Then specify the **Price** of the items in \$. Click Save to save the details. Specify the Item **Cost in \$** and Required Quantity of the items. All the three are mandatory fields. Click Add Item you can see the added items listed below showing the total cost of the purchase in \$.

10. Click **Save and Proceed to Shipping Details** button to proceed to the shipping details.
11. Specify the **Shipping Address & Billing Address**. If the billing address is same as shipping address Select **Same as Shipping Address** option by enabling the check box, both are mandatory fields.
12. Click **Save and Proceed to preview button**. You can see the Purchase order preview.
13. Click **Save Purchase Order** button to save the purchase order. You can see the purchase order getting listed in Purchase Orders page.

Editing Purchase Orders

1. From the Purchase Order view list page select the corresponding filter option from the **Filter Showing** combo box. By default, the list of all Pos Pending Approval will be displayed.
2. Click the **PO # Name**. This brings up the View Purchase Order page.
3. Click **Edit Purchase Order** tab. This opens **Edit Purchase Order** page. Edit the purchase order details and save the changes.

Deleting Purchase Orders

1. From the Purchase Orders view list page, select the **Purchase Order** to be deleted by enabling the check box.
2. Click **Delete** button.
3. A pop up window pops up to get your confirmation on the delete operation. Click **Yes** to proceed. You can see the purchase order deleted from the list.

Submit for approval

By default, all purchase orders are grouped under POs Pending Approval. The PO has to be approved by the concerned person initially and then sent to the vendor to receive the items. The PO approval process is initiated with a request for approval and sent to the concerned authority and depending on the decision taken by the personnel to approve or reject the PO.

Approve Purchase Order

To submit PO for approval,

1. Click Purchases tab in the header pane this opens Purchase Orders view list page with the list of Pos pending approval by default.
2. Click the PO# of the PO from the list to submit the purchase order for approval.
3. Click **Actions** tab -> Click **Submit for Approval** option. This opens Submit for Approval page.
4. Select **Send mail notification** check box. **And To, Cc** and **Subject fields** drops down.
5. Enter the **To Email ID**. The Cc field displays the Email ID of the logged in user. If needed you can modify the subject content manually, else you can change the same from the Notification Rules email template.
6. Type in the message text for mail notification in the **Description** field.
7. Click **Save**.

The mail notification is sent to the person who was addressed in the **To** field of the notification. The mail contains the link to the specific PO, which needs approval. On clicking the link, it leads you to the login screen, where on providing the proper credentials, the PO awaiting approval opens.

Rejecting Purchase Orders

Once a PO is submitted for approval, a mail notification is sent to the concerned authority requesting the approval for the PO along with the link to the PO.

1. Click Purchases tab in the header pane -> This opens the Purchase Orders view list page. This displays the lists of Pos pending approval by default.
2. Click the **PO#** of the **PO** from the list to Reject for approval.
3. Click **Actions** tab and click **Reject this PO option**. Reject this PO page pops up PO# name displayed.
4. Select **Send mail notification** check box. And **To, Cc** and **Subject field's** drops down.
5. Enter the **To Email ID**. The **Cc** field displays the Email ID of the logged in user. If needed you can modify the subject content manually, else you can change the same from the Notification Rules email template.
6. Type in the message text for mail notification in the **Description** field.
7. Click **Save**.

The POs that have been approved will be grouped under the Approved POs state and the POs that have been rejected will be moved under Rejected POs status. From the Rejected POs state, you can either delete the PO or once again reopen the Po for approval. You can also edit the POs that are in the rejected status.

Receiving Purchase Order Items

Once the PO is approved, it is sent to the vendor to receive the ordered items. The ordered items can be received either partially or completely from the vendor. In both the cases you can have the receipt of the received items. On receiving the partial items from the vendor the purchase order can be marked as **Partially Received** and moved under **Partially Received Pos**. And on receiving the complete items from the vendor, the purchase order can be moved under **Closed Pos**.

To mark partially or completely receive items,

1. From the Purchase Order view list page select the corresponding filter option from the Filter Showing combo box. By default, the list of all Pos Pending Approval will be displayed.
2. Select **Approved Pos** from the **Filter Showing** combo box. Click the **PO # Name** for the received items. This opens View Purchase Order page.
3. Click on the **Actions** tab and click **Receive Items**. The Receive Items dialog pops up.
4. Enable the check box beside each of the received items. If only a part of the ordered items are delivered, then click the edit icon to edit the value against each of the received items and enter the quantities that have been received.
5. Click **Receive Items** button. This updates the PO with the Received Quantity value and moves the PO under Partially Received POs.

In the Receive Items dialog pop-up window, the quantity of items displayed will be the difference between the actual quantity ordered and the already received quantity. Once all the items have been received, the PO moves to the closed status.

All the received items from the PO will be added as assets automatically. And the assets that are created from a particular PO will be associated to that particular PO.

To associate assets,

1. Click on Actions tab -> click Associated Assets link option. This will display all the assets that were created from the PO.
2. Associate the assets to the group or to the department.

Purchase Order Print Preview

1. From the Purchase Order view list page select the corresponding filter option from the Filter Showing combo box. By default, the list of all Pos Pending Approval will be displayed.
2. Click the **PO # Name**. This opens View Purchase Order page.
3. Click **Print Preview** option under the **Actions** tab. The Purchase Order details are displayed in a printable format in a pop-up window.
4. Click the **Print** option to print the contract details.
5. Set the required options and click **OK**.

E-mailing the Owner

By default, the owner of the contract is the person who enters the contract details into the application.


To send an e-mail to the owner,

1. From the Purchase Order view list page select the corresponding filter option from the Filter Showing combo box. By default, the list of all Pos Pending Approval will be displayed.
2. Click the **PO # Name**. This opens the View Purchase Order page.
3. Click on the **Actions** tab on the right side corner of the page. Click **E-mail the Owner** option. A Send Notification window opens with the owner's **e-mail ID** in the **To** field. The subject reads as Notification for **Purchase Order ID** and the notification number. Ex. Notification for Purchase Order ID 1.
4. To notify the contents of the e-mail to any other person other than the owner, specify the **E-mail ID** in the **Cc** field.
5. To attach any file to the mail, select **Attach a file** link adjacent to Attachments.
 1. Click **Browse** button to choose a file.
 2. Select the file and click **Attach** button to attach the files. You can see the file attached with the file size.
 3. Click **Done** button to close the page. Once the document is attached you can see the attached file name getting displayed in the **Newly Attached files** field.
Note: Files up to the file size of 3 MB can be attached.
6. Enter the e-mail content in the **Description** area.
7. Specify the mail format by enabling any one of the radio buttons. Say HTML or Plain Text.
8. Click **Send** button to send the mail. This displays a message showing that the Notification has been sent successfully.
9. Click Close.

Adding New Vendor

An organization can have business contacts with more than one vendor. Hence, it is very essential to maintain the records about each vendor and the list of products that are supplied by the particular vendor. To add new vendor,

Add New Vendor

1. Click on Admin tab -> Click Vendor icon  in the Configuration Wizard page. This brings up the Vendor view list page.
2. Click **Add New Vendor** link on the right side corner of the page.
3. Specify the **Name** of the vendor in the given field. e.g. Dell. This is a mandatory field.
4. Enter a brief profile about the vendor in the **Description** field.
5. Specify relevant information for **Address, City, Postal Code, State** and **Country** of the Vendor.
6. Enter the **E-mail ID, Phone** and **Fax** of the person who is the point of contact at the vendor location in the Contact Info field.
7. Specify the **Web URL** of the company.
8. Click the **Save** button to save the vendor information. Once the vendor details are saved you can see the product tab gets created, now continue with the Product association.
9. Click **Save and add new** button to save and add new vendor. Then continue with the product association.

Associate Product

1. Click Products Tab -> click **Associate Product** button.
2. In the associate product form Vendor Name is non editable.
3. Select the **Product Name** from the combo box. This is a mandatory field.
4. Specify the **Price** of the product. This is a mandatory field.
5. Specify the **Warranty Period** from the combo box.
6. Specify the **Maintenance Vendor** if necessary.
7. Enter any relevant comments about the product and vendor.
8. Click **Save** to save the settings.

Emailing the Vendor

1. From the Purchase Order view list page select the corresponding filter option from the Filter Showing combo box. By default, the list of all Pos Pending Approval will be displayed.
2. Click the **PO # Name**. This brings up the View Purchase Order page.
3. Click on the **Actions** tab on the right side corner of the page. Click **Email the Vendor** option. A Send Notification window opens with the vendor's e-mail ID in the **To** field. The subject reads as Notification for Purchase Order ID and the notification number. Ex. Notification for Purchase Order ID 1.
4. To notify the contents of the e-mail to any another person then enter their e-mail ID in the **CC** field.
5. To attach any attachment to the mail select **Attach a file** link to attach the document. This opens Add/Remove attachment page.
 1. Click **Browse** button to choose a file.
 2. Select the file and click **Attach** button to attach the files. You can see the file attached with the file size.
 3. Click **Done** button to close the page.
Note: Files up to the file size of 3 MB can be attached.
6. Enter the e-mail content in the **Description** area.
7. Specify the mail format by enabling any one of the radio buttons. Say HTML or Plain Text.
8. Click **Send** button to send the mail. This displays a message showing that the Notification has been sent successfully.
9. Click Close.

Contracts

Organizations have multiple contracts with different times for renewal. All asset purchases have more than one contract. If the contracts are not renewed on time, enterprise end up paying huge penalties

ManageEngine AssetExplorer helps you to manage multiple contracts associated with your assets such as printers, scanners, workstations, routers, and even your air conditioning systems. It not only helps you track contract renewal time but also helps you to avoid penalties by notifying the asset manager before hand. AssetExplorer can create and track different types of contracts such as Annual maintenance, warranties, Support contracts and licenses. It also allows you to attach relevant terms and agreement related to a contract for future reference.

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About Contracts

1. Click on Contracts Tab. This brings up the Contracts view list page. By default, the list of all Active contracts will be displayed.
2. Select the corresponding filter option from the Filter Showing combo box. You can view the contracts with different status levels using filters. They are,
 - **Open Contracts**
Contracts which are active and yet to get expired comes under this category.
 - **All Expired Contracts**
All the expired contracts will be listed under this category.
 - **Contracts expired in last 30 days**
Contracts which expired in the last 30 days gets listed under this category
 - **Contracts expiring in next 7 days**
Contracts, which will be expiring in next 7 days, will b listed under this category.
 - **Contracts expiring in next 30 days**
Contracts, which will be expiring in next 30 days, will be listed under this category.

Creating New Contracts

1. Click On the Contracts tab in the header pane. This brings up the Contracts view list page. By default, the list of all Active contracts will be displayed.
2. Click **New Contract** button. This opens New Contracts page.
3. Specify the **Contract Name** in the given field. This is a mandatory field.
4. Specify any relevant information about the contract in the **Description** field.
5. Select the **Maintenance Vendor** from the combo box. If the maintenance vendor is not available in the list, click Add New link next to the Maintenance Vendor field. This opens vendor details page.
6. Specify the **Name, Description & Contact Person** of the vendor. Save the changes.
7. Specify the support details of the contract in the **Support** field.
8. To attach any file to the contract,
 1. Click **Attach a File** button to attach files. This opens Add/Remove attachment page.
 2. Click **Browse** button to choose a file.
 3. Select the file and click **Attach** button to attach the files. You can see the file attached with the file size.
9. Click **Done** button to close the page.



Note: Files up to the file size of 3 MB can be attached.

10. Select the **Assets** that are covered under the contracts from the **Maintained Assets** list.
11. To add more resources to the list, click **Select Resources** link. This opens Select Resources page.
12. Specify the **Resource Name** or **Product Type** or **Product** in the search field.
13. Click **Search** button to get the result. Select the required resources by enabling the check box.
14. Click **Add Items** button to add the selected items.
15. Click **View Resources>>** button to view the selected resources.
16. Click **Add Resources** to Contract button to add resources to the Maintained Assets list.
17. Click **Remove Selected Resources** icon to remove selected resources from the list.
18. Specify the Active Period of the contract. Specify the **From & To** date of the contract from the calendar button. This is a mandatory field. Specify the Maintenance Cost in \$.
19. Select **Enable Notification** option by enabling the check box. On enabling you get the User list & Notified User list.
20. To notify users regarding contract expiry select the user from the User list and click **forward >>** button to move the user to the Notified User List. Specify the days before which the information has to be notified in the Notified before field. And save the details.

Editing & Deleting Contracts

Editing Contracts

1. From the Contracts view list page. Select the corresponding filter option from the Filter Showing combo box. By default, the list of all Active contracts will be displayed.
2. Click on the **Contract Name** to be edited. This opens View Contract page.
3. Click on the **Edit** button. This opens Edit Contract page.
4. Edit the contract details and save the changes.

Deleting Contracts

1. From the Contracts view list page, select the corresponding filter option from the Filter Showing combo box. By default, the list of all Active contracts will be displayed. .
2. Select the Contracts name to be deleted by enabling the check box.
3. Click **Delete** button.
4. A pop up window pops up to get your confirmation on the delete operation. Click **Yes** to proceed. You can see the Contracts deleted from the list.

Viewing Owner Details

By default, owner of the contract is the person who enters the contract details in the application.

1. From the contracts view list page, select the corresponding filter option from the Filter Showing combo box. By default, the list of all Active contracts will be displayed.
2. Click on the **Contract Name** to view the owner details. This opens View Contract page.
3. Click on **Actions** tab on the right hand side of the view contract page then click **View Owner Details** option. This brings up the User Details page with complete user details.
4. Click Close to close the pop-up page.

To Renew a Contract

1. Open the Contracts view list page. By default, the list of all Active contracts will be displayed.
2. To renew the expired contracts or a contract about to expire, select the corresponding filter option from the **Filter Showing** combo box. Ex. All Expired Contracts or Contracts Expiring in next 7 days.
3. Click the **Contract Name** you wish to renew. This opens View Contract page.
4. Click **Actions** tab and click **Renew Contract** option. This opens Renew Contract form with the Original contract rules. The contract name is appended with the word renewed. You can edit the name but ensure that the contract name is unique and does not have the old name.
5. Enter the description of the contract in the **Description** field.
6. Choose the maintenance vendor from the combo box. If the vendor is not listed, then click **Add new link** beside the combo box. The Vendor Details page pops up. Specify the name of the vendor, description, and the contact person name in the pop-up window. Save the changes.
7. If you have any information on the type of support, enter the same in the **Support** text area.
8. To attach any document to the contract, click **Attach a file** link. This opens Add/Remove attachment page. Click **Browse** button to choose a file. Select the file to be attached and click **Attach** button. The selected file is added and is displayed with the file size in the same window just below the file selection field. If you wish to add more than one file then repeat step 2 and 3 till you add all the files.



Note: The total size of the attachments should not exceed 3 MB.

9. Select the Assets that are covered under the contracts from the Maintained Assets list. To add more resources to the list,
 1. Click **Select Resources** link. This opens Select Resources page.
 2. Specify the **Resource Name or Product Type or Product** in the Search field.
 3. Click **Search** button to get the result.
 4. Select the required resources by enabling the check box.
 5. Click **Add Items** button to add the selected items.
 6. Click **View Resources>>** button to view the selected resources.
 7. Click **Add Resources to Contract** button to add resources to the Maintained Assets list.
10. Specify the **Active Period** of the contract. Specify the **From & To** date of the contract from the calendar button. This is a mandatory field.
11. Specify the **Maintenance Cost in \$**.
12. Select **Enable Notification** option by enabling the check box. On enabling you get the User list & Notified User list. To notify users regarding contract expiry select the user from the User list and click forward >> button to move the user to the Notified User List. Specify the days before which the information has to be notified in the Notify before field. And save the details.
13. To notify others about the renewal, select the check box, Notify others about this contract renewal.
14. Select the check box, to disable notifications of the old contract.
15. Click **Save**.

Print Preview of Contract

1. Open the Contracts view list page. By default, the list of all **Active contracts** will be displayed.
2. Select the corresponding filter option from the **Filter Showing** combo box.
3. Click the **Contract Name** you wish to print. This opens view Contract page.
4. Click **Print Preview** option under the **Actions** tab. The contract details are displayed in a printable format in a pop-up window.
5. Click the **Print** option to print the contract details.
6. Set the required options and click **OK**.

E-mailing the owner

By default, the owner of a contract is the person who enters the contract details in the application.

1. From the contracts view list page, select the corresponding filter option from the **Filter Showing** combo box. By default, the list of all Active contracts will be displayed.
2. Click on the **Contract Name**. This opens the View Contract page.
3. Click on the **Actions** tab on the right side corner of the page. Click E-mail the Owner option. A Send Notification window opens with the owner's e-mail ID in the **To** field. The subject reads as Notification for Contract ID and the notification number. Ex. Notification for Contract ID 1.
4. To notify the contents of the e-mail to any another person then enter their e-mail ID in the CC field.
5. To attach any attachment to the mail select **Attach a file link** to attach the document.
6. Enter the e-mail content in the **Description** area.
7. Specify the mail format by enabling any one of the radio buttons. Say HTML or Plain Text.
8. Click **Send** button to send the mail. This displays a message showing that the Notification has been sent successfully.
9. Click Close.

Notifying the Vendor

1. From the contracts view list page, select the corresponding filter option from the **Filter Showing** combo box. By default, the list of all Active contracts will be displayed.
2. Click on the **Contract Name**. This brings up the View Contract page.
3. Click on the **Actions** tab on the right side corner of the page. Click Notify the Vendor option. A Send Notification window opens with the vendor's e-mail ID in the To field. The subject reads as Notification for Contract ID and the notification number. Ex. Notification for Contract ID 1.
4. To notify the contents of the e-mail to any another person then enter their e-mail ID in the CC field.
5. To attach any attachment to the mail select **Attach a file** link to attach the document.
6. Enter the e-mail content in the **Description** area.
7. Specify the mail format by enabling any one of the radio buttons. Say HTML or Plain Text.
8. Click **Send** button to send the mail. This displays a message showing that the Notification has been sent successfully.
9. Click Close.

Reports

Reports are the account of all the assets details in printable format. ManageEngine AssetExplorer has default reports which are commonly used on daily basis. The default reports are, summary reports, reports on contracts, purchases, resources & on workstations. Using default reports users can retrieve all key details about the assets.

You also have an option to create reports on your own. Other options available are,

- Customized reports: In customized report user should specify specific criteria to get the required information.
- Query report: In query report user should type the query to ping the database to get required information.
- Scheduled report: In scheduled report the user can schedule to generate reports on a daily or weekly or on a monthly basis.

The reports generated can be of three types such as, tabular report, matrix report & summary report.

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Creating New Reports

1. Click Reports tab -> Click Create New Report. This opens Custom Reports page.
2. From the Reports form specify the **Report Title** in the given text field. This is a mandatory field.
3. Select the **Report Type** by selecting any of the three radio buttons. Say Tabular, Matrix or Summary report type. This is a mandatory field.
Tabular Reports, allow you to list your data based on certain criteria. You can select the columns to view and group the output data.
Matrix Reports provide the data in a grid manner (m x n format). It allows you to study different scenarios based on the chosen criteria.
Summary Reports, Tabular reports are simple reports that allow you to list your data based on certain criteria. You can select the columns to view and group the output data.
4. Select a module from any of the radio buttons. This is a mandatory field.
5. Click **Proceed to Report Wizard>>** button on the right hand side corner of the page. This opens Select Columns to display page.
6. Select the **Available Columns** from the list using ctrl keys and use **forward button >>** to move the selected columns to the Columns to Display list. To reorder the columns listed use the arrows buttons given on the right hand side of the list.
7. Click Next button to go the **Next>>** page.
8. Specify the **Date Filter** say **Acquisition Date** or the **Expiry Date** and also the **From and To** date.
9. Specify the **Advance** filtering by selecting the **Column Name** and the **Criteria** (is, is not etc) from the combo box. For **Column Name** other than **Expiry Date** and **Acquisition Date** you have to click **Choose** button to select or specify the column name. In the **Select Column Data** page specify or select the corresponding name and click **OK** button to save the details. For Ex. If you choose the column name to be Vendor Name and the criteria to be is click choose button select the vendor name from the list in the Column Data page.
10. Click **Add to Filter** button to add the specified filter to the Filter set.
11. Specify the match criteria say **Match ALL** of the following or **Match ANY** of the following i.e. AND, OR by enabling either of the two radio buttons.
12. Click **Next>>** button to go to the next page. This opens select column to group page. Select the Group by combo box to group the data by column. For ex. Grouping workstation by OS name.
13. Click **Next>>** button to go the next page. This opens Select Summary type page for the reports, which requires sum or average or count or Max & Min values for the columns displayed in the column summary. For ex. Total Cost, Memory Count, and Processor Count etc. otherwise it displays the chart based on the grouping.
14. If you specify the **Chart Type**, **Specify the Group by**, **Stack On** and **Chart Orientation** fields. Group by is a mandatory field.
15. Click **Run Report** button to go to the next page. This opens the Refine Search page.
16. Click **Graph View** link to view the report in graphical format.
17. To view the print preview of the report click **Print Preview** link.
18. To export as **PDF file**, **XLS file** or **CSV file** click the link given in the page.
19. Click **Show Query** button to view the query executed for the report.
20. Click **Save Report** button to save the report. This opens the Save Report button.
21. Specify the **Report Name** in the given text field. Select the Viewed by radio button by enabling the check box. Say by Every One or Just me.

22. Specify the **Save In folder** to save the report. To save a new folder click **Add New Folder** link adjacent to the Save-in Folder combo box. Specify the new **Folder Name** and click **Add button** to add the new folder to the list.
23. Specify the description about the report in the **Description** field.
24. Click **Save** button to save the details. You can see the report getting listed under the selected folder.

Creating New Query Reports

1. Click on **Reports** tab -> click **New Query Report**. This opens the Query Editor page.
2. Specify the query to be executed for getting reports in the **Query** field.
3. Specify the title of the report in the **Report Title** field.
4. The logs will display all error messages on providing any wrong query.
5. Click **Run Report** to run query report.

Tips

1. Date Formulae: DATE_FORMAT (FROM_UNIXTIME (COLUMN_NAME/1000),'%d-%m-%Y %k: %i') 'Column Alias'.
2. Minutes Formulae: ROUND (((COLUMN_NAME/1000)/60)) % 60 'Minutes'.
3. Hours Formulae: ROUND (((COLUMN_NAME/1000)/3600)) 'Hours'.
4. Compare Date: COLUMN_NAME >= (UNIX_TIMESTAMP (DATE ('2006-07-24 00:00:00')) * 1000).
5. Convert Memory in GB: (((MEMORY_COLUMN)/1024)/1024)/1024
6. Default Value For Null Data: COALESCE (COLUMN_NAME, 'Unassigned')
7. Group by: Query statement will be ends with order by <column_index>

Additional Field tables

1. Request Additional Fields - WorkOrder_Fields
2. Requester Additional Fields - Requester_Fields
3. Technician Additional Fields - Technician_Fields
4. Asset Additional Fields - Asset_Fields
5. Workstation Additional Fields - Workstation_Fi

Scheduling Report Settings

1. Click Reports tab -> Click New Scheduled Report button. This opens Schedule Report Settings page.
2. To generate report once click **Generate Once** radio button. Specify the date using the calendar button and Time from the combo box on which the report has to be generated.
3. Select the report to schedule from the combo box. This is a mandatory field.
4. Specify the **E-mail ID** of the person to whom the generated report has to be sent.
5. To generate reports on a daily basis click **Daily Report** radio button and specify the **From Date, Time, report to be scheduled** and the **e-mail address** of the person to whom the report has to be sent.
6. To generate weekly report click **Weekly Report** radio button. Specify the days of the week on which you want to generate reports by selecting the check box. Or select **Everyday** check box to generate reports on daily basis. Also specify the time, report to schedule, and E-mail ID of the person to whom the generated report has to be sent.
7. To generate reports on a monthly basis click **Monthly Report** radio button. Specify the month on which the report has to be generated by enabling the check box. Or select **Every Month** check box to generate reports on monthly basis. Also specify the time, report to schedule, and E-mail ID of the person to whom the generated report has to be sent. You can see the scheduled report getting listed on the Scheduled Reports page.