Symantec Endpoint Management
Technical Workshop 2017

Introduction to Asset Management Suite

Description:	Asset Management Suite maximizes existing IT investments by actively eliminating unnecessary costs, managing contracts, aligning service resources with ITIL standards, and accurately measuring asset total cost of ownership (TCO). The suite provides the accountability for tracking assets from procurement to disposal to deliver the best value. Asset Management Suite is an important part of the Symantec Endpoint Management story by playing an important role in endpoint management. Knowing who has been assigned assets as well as if that asset is in compliance from a software perspective is a vital part of a solid Security Strategy. AMS can leverage other solutions such as Inventory and Software Management to extend its capabilities
At the end of this lab, you should be able to:	• Demonstrate the concepts behind Configuration Item Management • Demonstrate Resource Creation and Resource Association • Demonstrate Contract Management functions • Demonstrate Procurement functions
Notes:	• Feel free to follow the lab using the instructions on the following pages. • Be sure to ask your instructor any questions you may have. • Thank you for coming to our lab session.

Contents

Configuration Item Management

This exercise will help you to better understand how to manage configuration Items within Asset Management Suite. Some of the key points to remember during the exercise are:

- **Tracks and manages** the physical, contractual and financial data associated with the IT assets in your environment throughout their lifecycle—from receiving through disposal.
- **Empowers you** with a firm understanding of how your IT assets are being used at every point of their lifecycle to help you identify possible cost savings, fulfill compliance initiatives, and justify your business decisions.
- **Centralizes** the management of resources (Configuration Items) with such associations as Location, Owner, Department, etc.

It is very easy to manage Configuration Items with Asset Management Suite (AMS). AMS allows assets and resources to be associated with other configuration items such as users, location, department, etc. AMS also can leverage other solutions through the Symantec Management Platform to extend resource information

Scenario

This exercise will walk through the Manage Configuration Items portal as well as the creation of a resource and the association of other CIs with it. If your customer is not familiar with ITIL, then you may need to explain the term Configuration item (CI).

Lab Exercise 1: Configuration Item Management

Reviewing the CI Management Portal

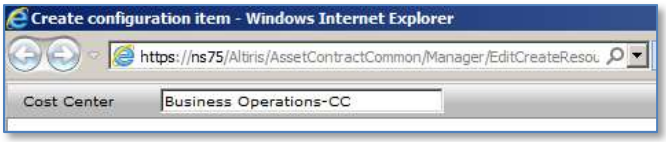
1. Switch to the **SMP** Virtual Machine
2. Open the **Symantec Management Console** by double clicking on the icon placed on the Desktop
3. Navigate to **Home | Service and Asset Management | Manage Configuration Items**. The Configuration Item Console view appears on the Left and the Portal page appears on the right.
4. In the left pane, expand all of the folders to better understand their purpose and notice the following:
    a. The **Communication Equipment** folder contains telecommunications items like phones
    b. The **Computers and Peripherals** folder contains items that may be used with a computer
    c. The **Datacenter Types** folder contains items that may be used or categorized in a Datacenter
    d. The **Financial Types** folder contains items that may be used in financial calculations or categorizations
    e. The **Generic Asset Types** folder contains parent Asset Resources
    f. The **Organizational Types** folder contain organizational items that can be associated to assets
    g. The **Other Assets** folder contains items that don't fit the categorization of the above folders
    h. The **Service and Asset Management Reports** folder contains respective reports on asset management
5. In left pane, select the **CI Management** folder.

6. On the right pane, notice the **Asset Search** web part.
7. Select the link next to **Location**
8. Select **Lindon** on the list, then press **OK.**
9. Press **Search**. You will see a list of all Assets at the Lindon location. This report has many parameters to pinpoint exactly what you are looking for.
10. Close the report when you finish reviewing the data

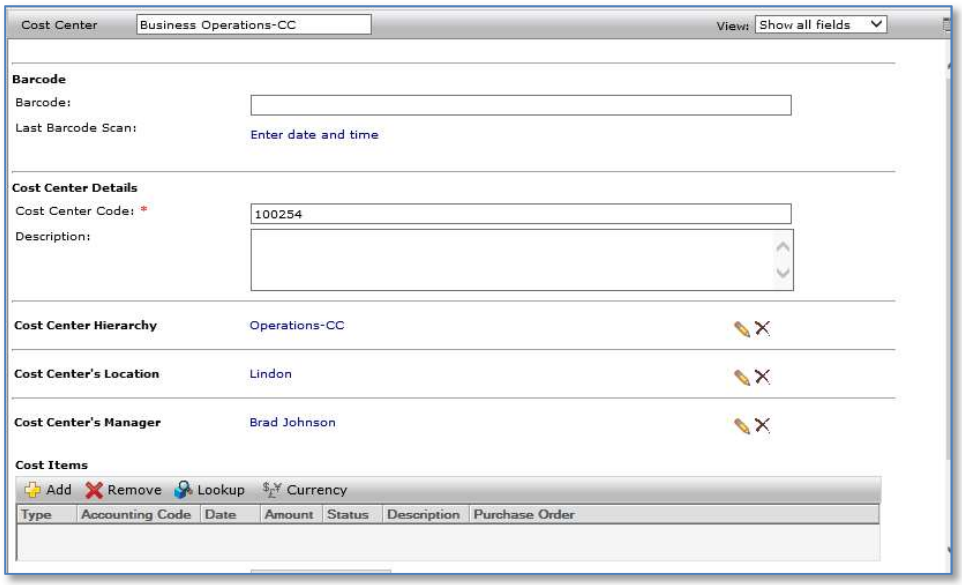
Reviewing Organizational Items

Location, Cost Center, and Department are CIs that get associated with most assets and they should be created before working with other asset types.

1. In the left pane, expand **CI Management > Organizational Types** select the **Company** resource
2. Sort the results by clicking the City column then Double click on any **Company** name with information in the record and review the fields that can be edited.
3. Press **Cancel** when you have finished reviewing the data.
4. In the left pane, select the **Location** resource type
5. Double click on any **Location** name and review the fields that can be edited, press **cancel** to close it.
6. In the left pane, select the **Cost Center** resource type
7. Right click on the **Cost Center** resource type and select **Create Cost Center**
8. At the top left of the window, type **Business Operations-CC** into the Cost Center field



9. Under Cost Center Code, type **100254**
10. Select the link next to **Cost Center's Hierarchy**
11. Expand the **All Cost Centers** folder
12. Select **Operations-CC**
13. Press **OK**
14. Select the link next to **Cost Center's Location**
15. Expand the **All Locations** folder, Select **Lindon,** then Press **OK**
16. Select the link next to **Cost Center's Manager**
17. Select **Brad Johnson,** then Press **OK**
18. Press **OK** on the edit window of **Business Operations-CC** to close it



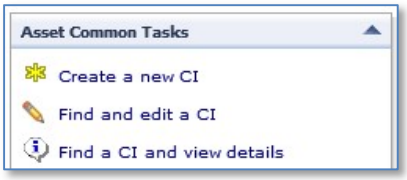
19. In the left pane, select the **Department** resource type
20. In the right pane, double click on the **Operations-D** name and review the fields that can be edited
21. Select the link next to **Department's Cost Center**
22. Select **All Cost Centers ➔ Operations-CC ➔ Business Operations-CC**
23. Press OK
24. Select the link next to **Department's Location**
25. Expand the **All Locations** folder, Select **Lindon,** then Press **OK**
26. Select the link next to **Department's Manager**
27. Select **Brad Johnson,** then Press **OK**
28. Press **OK** on the edit window of **Operations-D** to close it

You have now created a new cost center and resource associations to Location and Manager, and have edited the association of the Operations-D department to the Business Operations-CC Cost Center. There are many associations that can be made to organizational types. Editing organizational resource types are similar for Department, Location and Company.

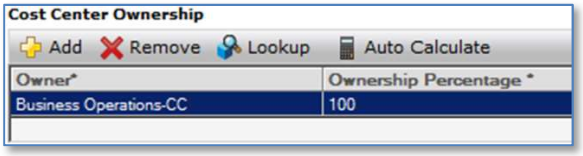
Creating a New CI

Any resource can be created by selecting the appropriate resource type in this portal. You can also create custom resource types as needed. In the following exercise, you will create a "Computer" resource and review each parameter to show how it relates to the resource and its function.

1. Return to the CI Management portal by selecting the **CI Management** folder at the top of the left pane
2. Click **Create a new CI** in the **Asset Common Tasks** web part on the right pane. A select resource window will appear.



3. Select **Computer** in the **Select Resource Type** dialogue box, then press **OK**
4. Enter **SYMC22222** in the **Computer** Field at the top left of the window
5. Select **Active** in the **Asset's Status** Field. Notice the other asset status choices
6. Select **Purchase** in the Purchase or Lease field.
7. Enter **36** in Warranty Period field
8. Enter **Available for Use** date as today's date (Press the green check mark first)
9. Enter **Planned Disposal Date** of **January 1, 2019** (Press the green check mark first)
10. Select **Expense** in Expense Type field
11. Click the **Edit** (pencil) Icon next to the **Associated Assets** field
12. Enter **Mon17** in the **search** field
13. Select **Mon17** from the list and press the right arrow **(>)** to add it to **Selected Items**
14. Enter **LaserJet** in the **search** field
15. Select **KOLOB-HP Color LaserJet 4600** from the list and press the right arrow **(>)** to add it to the **Selected items** list
16. Click **OK.** You have now associated the computer to a Monitor and Printer asset
17. Enter **BC0000123** in the Barcode field
18. Click the ***Click to Select*** *link* next to Computer **Type**
19. Select **Workstation** and click **OK**
20. Scroll down and click **+Add** in the **Cost Center Ownership** field
21. Select **Business Operations-CC** and click **OK**
22. Click the **Auto Calculate** button. This shows that the asset is owned 100% by Business Operations. An asset can also be shared between multiple cost centers and can have different ownership percentages if needed.



23. Under the Identity section, verify that **System Number** field has data. This field automatically generates an item number based on the resource type and a number.
24. Click the ***Click to Select...*** in the **Location** field
25. Select **All Locations** ➔ **Lindon** as the location and click **OK**
26. Type ***Dell*** in the Manufacturer field
27. Type ***OptiPlex GX270*** in the **Model** field

28. Click the ***Click to Select...*** in the **Asset Owners** field
29. Select **Brad Johnson** as the owner, and click **OK**
30. Enter ***GG67YY*** in the **Serial Number** field.

    NOTE: Depending on customer needs and input, many customers use the serial number and the system number as the same field.

31. Click **OK** to save the newly created computer asset

    The method used to create a Computer resource is critical in entering and tracking information on computer devices that may not be able to host the Symantec Management Agent, but still need to be accounted for. This method can also be used to add any type of non-discoverable asset like desk phones, furniture and fixtures and peripherals.

Viewing a Configuration Item

1. On the left pane, expand the **Computers and Peripherals** folder
2. Select the **Computer** resource type
3. On the right pane at the top right side, enter **SYMC** in the Search field. You should see SYMC22222 appear
4. Right Click on the **SYMC22222** asset, and review the various actions that can be performed on this asset
5. Right Click on **SYMC22222** and select **CMDB Functions ➔ Resource Association Diagram**.
6. You will now notice a very complex diagram appear that shows all of the associations with SYMC22222 as the main Asset in the view.
7. Change the **Levels:** field to 1, then press the **Refresh** button. *If a black screen appears, click on it to show the diagram.*
8. Notice that the diagram shows all of the associations for the Monitor, Printer, Location, Cost Center, Etc., that is associated to SYMC22222. Any asset in the Symantec CMDB can show these relationships by simply Right Clicking on them and selecting CMDB Functions > Resource Association Diagram
9. Right Click on the SYMC22222 computer and notice that you can manage this asset with all of the right click options that were made available to you in the Report within the console
10. Feel free to change the options and views to explore the possibilities of this view.
11. Close the Resource Association Diagram window.

CI Asset Reports

1. Switch to the **SMP** Virtual Machine
2. Open the Symantec Management Console and navigate to **Home | Service and Asset Management | Manage Configuration Items.**
3. Expand the **Service and Asset Management Reports ➔Assets ➔Count of Assets**
4. Select **Active** in the **Asset Status** drop down.
5. Select **Computer** in the **Asset Type** drop down
6. Press the **RUN** button on the top menu of the report. This report provides you with a report that allows you to quickly find assets in your environment.
7. Review some of the asset reports in this folder.

Lab Exercise 2: Customizing Resource Types

The purpose of this exercise is to provide a walkthrough of creating and populating new Asset Types and Data Classes in AMS that can be used to track and report on non-discoverable asset types that are not included in AMS.

Out of the box, Asset Management Suite has a wide variety of asset types set up and ready to use, but on occasion, you may want to track and report on a non-discoverable asset type that does not currently exist. This exercise will cover how to create a custom data class and how to tie it to a custom asset type.

The first step is to decide what information you want to store about your asset. If the type of information you want to track is already contained in an existing data class, you should use the one that already exists, but for our example, we are going to create a new data class that will hold data not contained in any of the available data classes.

Creating a new data class will create a new table in your Symantec CMDB with the columns and data types that you provide.

Scenario

The administrator has been asked to add a new non-discoverable Asset type for **Authentication Tokens** that needs to be tracked in the environment. The company needs to track the ***Token ID Number***, ***Expiry Date***, and ***User*** for each token. This exercise will walk you through the creation of a custom resource and the custom data classes associated with it.

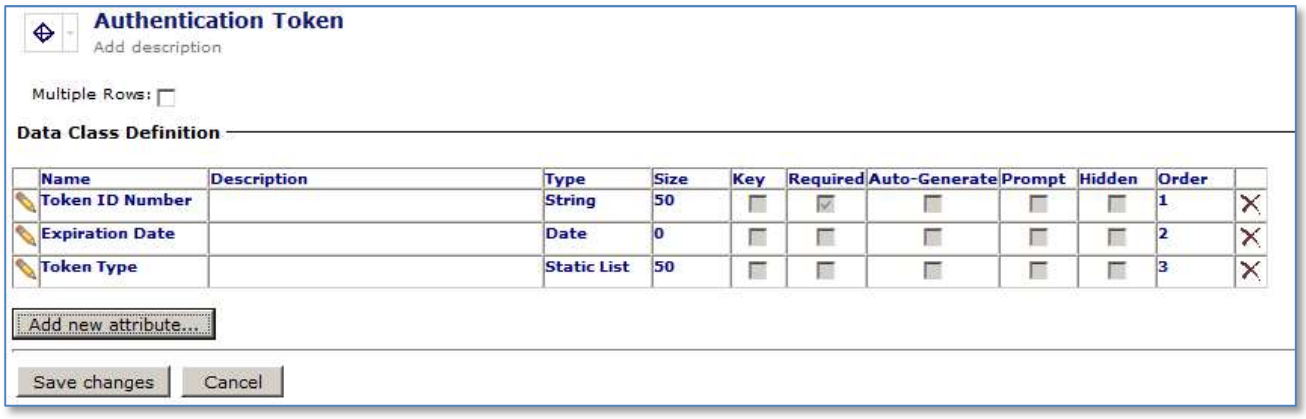
Data Class Creation

1. In the Console, Navigate to **Settings | All Settings**
2. Expand the **Settings** ➔ **Notification Server** ➔ **Resource and Data Class Settings** folders
3. Right click on the **Data Classes** folder and select to **New** ➔ **Folder**
4. Type in the name ***Custom Data Classes*** and select **OK**.
5. Right click on the **Custom Data Classes** folder and select **New** ➔ **Editable Data Class**
6. Replace the "New Editable Data Class" Name with ***Authentication Token***
7. **IMPORTANT!** Uncheck the **Multiple Rows** box
8. Click the **Add new attribute** button.
    a. Name: **Token ID Number**
    b. Check the **Required** box
    c. Display Order: **1**
    d. Click **OK**
9. Click the **Add new attribute** button.
    a. Name: **Expiration Date**
    b. Type: **Date**
    c. Display Order: **2**
    d. Click **OK**
10. Click the **Add new attribute** button.
    a. Name: **Token Type**
    b. Type: **Static List**
    c. Click **Edit** button next to **Static List**

i. Enter ***Hard Token*** and click **Add**
ii. Enter ***Soft Token*** and click **Add**
iii. Click **OK**

d. Display Order: **3**
e. Click **OK**

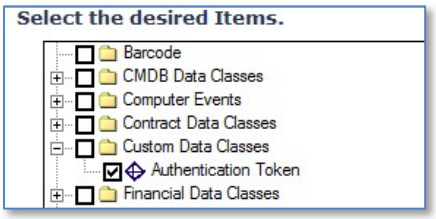
11. Data Class should look like this:



12. Click **Save Changes**

Creating a New Resource Type

1. Return to the **Settings ➔ Notification Server ➔ Resource and Data Class Settings folder**
2. Collapse the **Data Classes** folder
3. Right click on the **Resource Types** folder and select to **New ➔ Folder**
4. Type in the name ***Custom Resources*** and select **OK**.
5. Right click on the **Custom Resources** folder and select **New ➔ Resource Type**
6. Click on the "New Resource Type" text on the right pane to ***Authentication Token***
7. The Base Resource Type will dictate the default data classes. For example, *Resource* will have no assigned data classes and the *Asset* resource type will have several inherited data classes such as Serial Number and Manufacturer
8. Click the **Add Data Classes** button
9. Expand the Custom Data Classes folder and select the **Authentication Token** data class

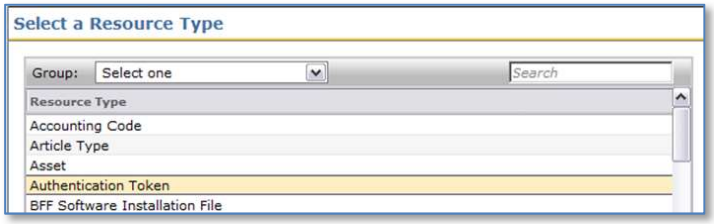


10. Click **OK**
11. Click **Save Changes** on the resource type window

Creating a Resource Association

Associations can be inherited based on the original resource type chosen when creating the resource type. In our case, we used resource which has no default associations. If you choose Asset as the base type, then your new resource type will have all the associations that assets have.

1. On the left pane, expand the **Resource Associations** Folder
2. Right click on the **CMDB Association Types** folder and select **New ➔ Editable Association Type**
3. Change the **Name** to ***Token Owner***
4. Enter ***Owner's Token*** in the Reverse Display Name
5. Click Select a **Resource Type** in the **From Type** field
6. Select ***Authentication Token*** and click **OK**



7. Click Select a **Resource Type** in the **To Type** field
8. Select ***User*** and click **OK**
9. Enter ***0*** in **Minimum Cardinality** field

   Cardinality allows for a Many to One relationship. If Minimum Cardinality is set to 0, then the association is optional, and if there is only a one to one relationship then Maximum Cardinality would be set to 1.

10. Select the ***Authentication Token*** and ***User*** check boxes in the **Enable Editing From** section, and set them to **Generic Picker** in the dropdown lists.

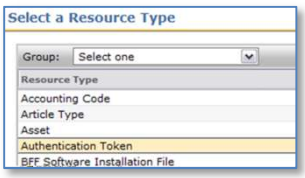
11. Click **Save Changes**

Creating a Resource View Link

A view needs to be created so that the new **Resource Type** will show up in the console.

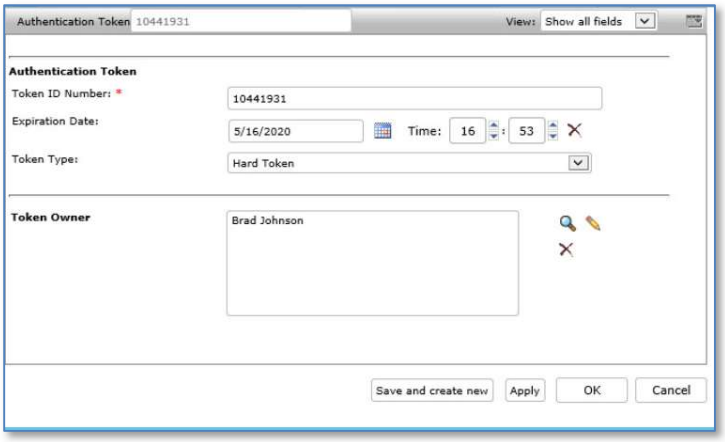
1. On the left pane, expand **Settings ➔ Notification Server ➔Console Settings➔Views ➔ Asset Management Views➔ Assets ➔ Manage Configuration items**

2. Right Click on **Computers and Peripherals** and select **New ➔ Resource Type Link**
3. Highlight **Authentication Token** and click **OK**

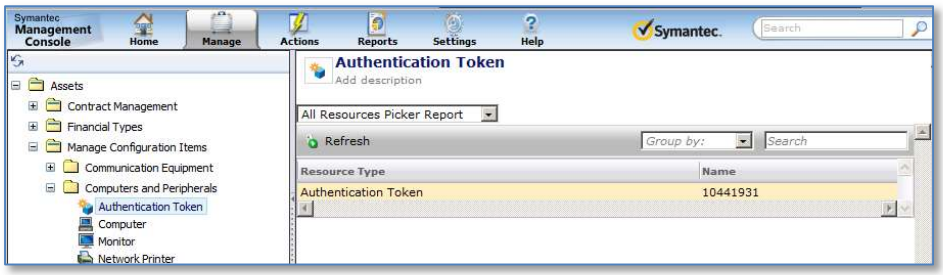


Creating a Resource

4. In the console main menu, navigate to **Manage | Assets**
5. Expand **Manage Configuration Items ➔ Computers and Peripherals**
6. Right click on **Authentication Token** and select **Create Authentication Token**
7. Enter a ***10441931*** in the Authentication Token field (Top Left in grey area)
8. Enter ***10441931*** *in the* Token ID Number field
9. Enter **May 16, 2020** in the Expiration Date field
10. Select **Hard Token** in the **Token Type** field
11. Click **Edit** (Pencil Icon) next to the **Token Owner** field
12. Select **Brad Johnson**
13. Press **OK**



14. Click **OK** to save the resource
15. Press the **Refresh** button on the Authentication Token asset view and you should be able to see your newly created asset.



Contract Management

Lab Exercise 3: Contract Management

Asset Management Suite lets you proactively track vendor contracts, including software licenses as well as lease, enterprise, and underpinning service agreements. You can also track warranties and entitlements. A contract is a resource type that lets you manage agreements made with third-party vendors and customers. As with Asset resource types, you can choose to create custom types or modify existing resource type templates in the database.

Comprehensive reports provide in-depth details about the objects under contract by correlating contract data with actual system inventory stored within the CMDB, which presents reallocation and retirement opportunities. If a contractual agreement has a deadline or expiration date, you can also configure notification policies to alert you in advance.

With proper planning of your asset management strategy, you will develop effective vendor negotiation strategies, consolidate contracts, and eliminate unnecessary maintenance costs associated with underutilized assets and configuration items.

Reviewing the Contracts Portal

1. Switch to the **SMP** Virtual Machine
2. Open the Altiris Console and navigate to **Home | Service and Asset Management | Contracts**. The Contracts Console view appears on the Left and the Portal page appears on the right.
3. In the left pane, expand all of the folders to better understand their contents. Notice the following:
    a. The **Contract Types** folder contains the various contract types available. Contract is the parent contract type that contains all others, and the other types show the specific contract types.
    b. The **Financial Types** folder contains items that may be used in financial calculations or categorizations
    c. The **Organizational Types** folder contain organizational items that can be associated to assets
    d. The **Service and Asset Management Reports** folder contains respective reports on contract management

Editing Contract Types

1. In the left pane, expand the **Contract Types** folder and select **Lease Schedule**
2. Review any one of the lease schedules by double clicking on one of them
3. Review the available fields in the contract and note that it allows for the entry of:
    a. Associated files or documents about this contract
    b. Contract Details
    c. Assigned User & Location
    d. Covered Hardware that can be associated with the contract
    e. Cost Items

f. Internal References

g. Contract information like Description, Start/End Dates, Status and approvals

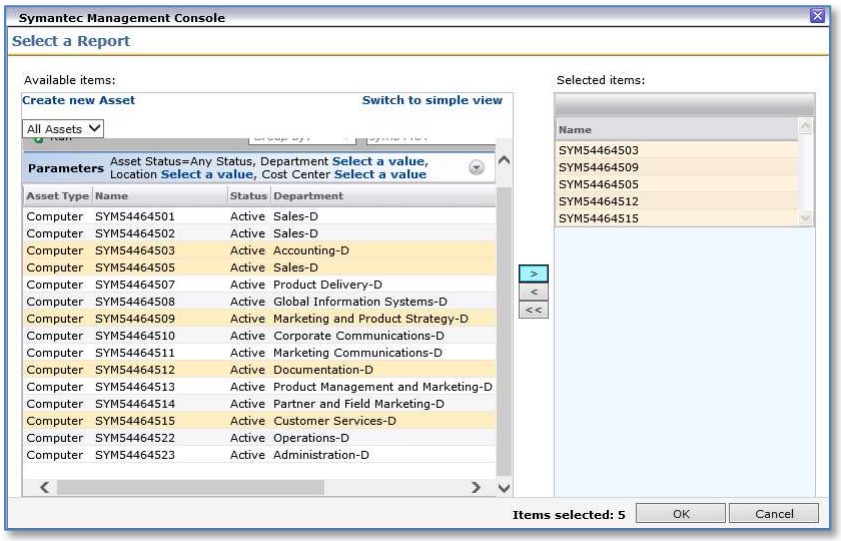
4. Press **Cancel** to close the contract

Creating a New Lease Schedule

In this scenario, the administrator has been asked to create a new Dell Lease Schedule for the following data that was discovered using a report:

Manufacturer	Model	Name	Serial Number
Dell Inc.	Precision M6400	SYM54464503	5JN28J1
Dell Inc.	Precision M6400	SYM54464505	99VZTL1
Dell Inc.	Precision M6400	SYM54464509	9JN28J1
Dell Inc.	Precision M6400	SYM54464512	9NR46L1
Dell Inc.	Precision M6400	SYM54464515	53741L1
Dell Inc.	Precision M6400	SYM54464531	BHXF94J

1. In the left pane, expand the **Contract Types** folder and select **Lease Schedule**
2. Right Click on **Lease Schedule** and select **Create Lease Schedule**
3. Type **Dell Precision M6400 Lease 2017** in the **Lease Schedule** Name field at the top left of the window
4. Enter the following details into the contract:
    a. Under **Contract Details**, Select the link beside **Applies to:**
    b. Select **Dell Computers** from the list then press **OK**
    c. Select the Pencil icon beside **Contract's Assigned User**, select **Brad Johnson**, then press **OK**
    d. Select the link beside **Contract's Location**, select **All Locations** ➔ **Lindon**, then press **OK**
    e. Under **Covered Hardware**, Press the **ADD List** button
    f. Type **SYM54464** in the **Search** field and select **SYM54464503, 505, 509, 512, and 515** (using Ctrl + Left Click)
    g. Press the Right Arrow **(>)** to show them in the Selected items on the right side



h. Press **OK** to close the window

i. You will now notice that the serial numbers have been associated to the Lease Schedule

j. Under Standard Contract information section, enter the following:

   i. Description: **Dell M6400 Lease Schedule - 2017**

   ii. Start Date: **Today's Date**

   iii. End Date: **01/10/2020**

   iv. Under Status: type Active

   v. Approved: **Yes**

k. Press **OK** to close and save the **Dell Precision M6400 Lease 2017** contract

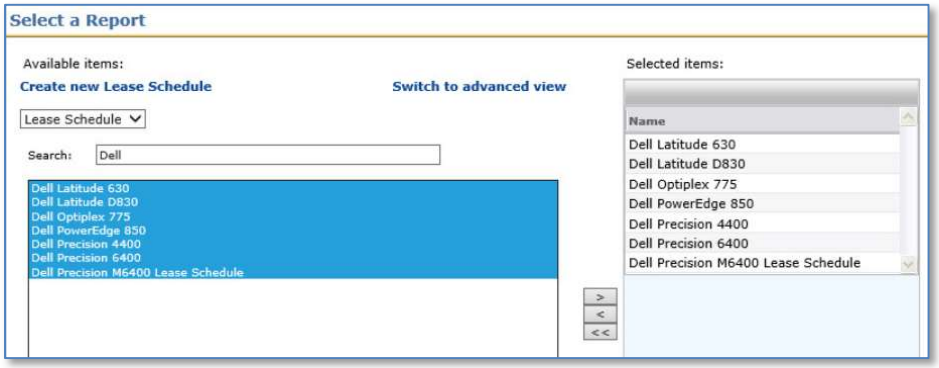
5. In the left pane, expand the **Contract Types** folder and select **Lease Schedule**
6. On the right pane, type **2017** in the search field on the top right side
7. Review the results and notice that the new lease schedule has all of the information in this view

Creating a Master Lease Schedule

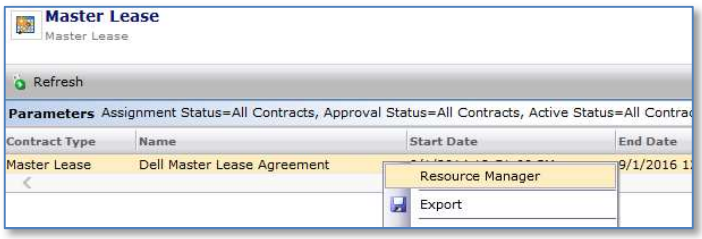
In this scenario, an administrator has been asked to create a new Master Lease Schedule for all of the Dell Equipment that is under lease:

1. In the left pane, expand the **Contract Types** folder and select Lease Schedule
2. Right Click on **Master Lease** and select **Create Master Lease**
3. Change the View to Contracts (Global) in the drop-down list on the top right side of the page

4. Type **Dell Master Lease Agreement** in the **Lease Schedule** Name field at the top left of the window
5. Enter the following details into the contract:
    a. Under **Contract Details**, Select the link beside **Applies to:**
    b. Select **Dell Computers** from the list then press **OK**
    c. Select the Pencil icon beside **Contract's Assigned User**, select **Brad Johnson**, then press **OK**
    d. Select the link beside **Contract's Location**, select **All Locations** ➔ **Lindon**, then press **OK**
    e. Under **Master Lease's Lease Schedules**, Press the Pencil (Edit) Icon
    f. Type **Dell** in the **Search** field and select **All** of the Dell items (Using Ctrl)

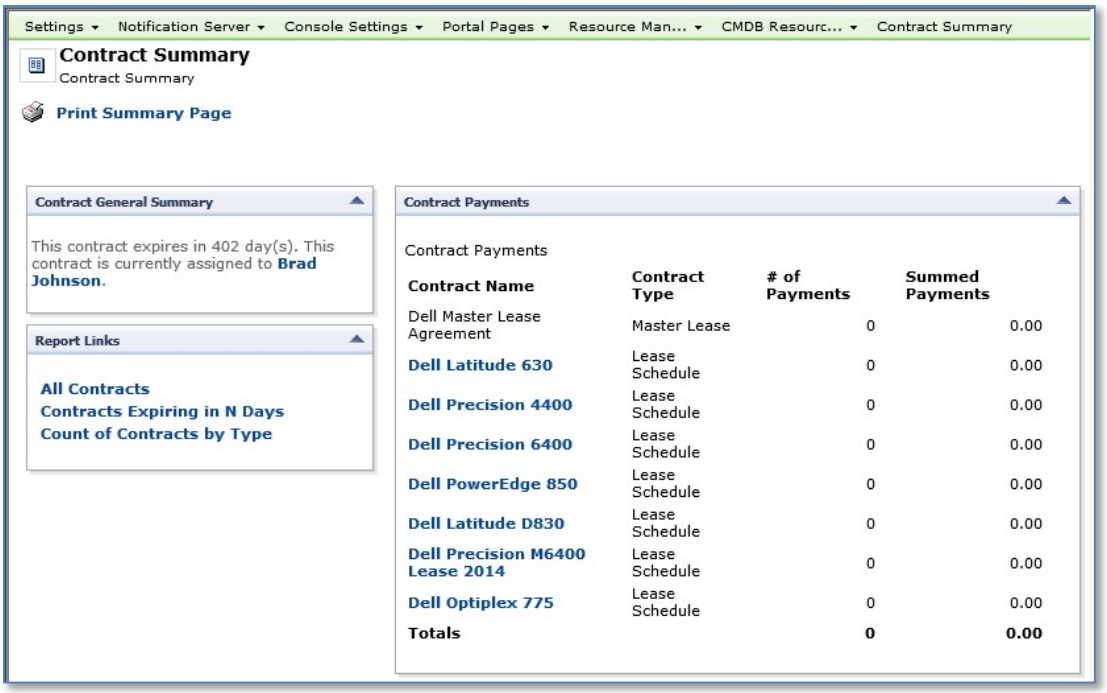


    g. Press the Right Arrow **(>)** to show them in the Selected items on the right side
    h. Press **OK** to close the window
    i. Under **Standard Contract information**, enter:
        i. Description: **Dell Master Lease Agreement**
        ii. Start Date: **Sept 1, 2013**
        iii. End Date: **Sept 1, 2016**
        iv. Status: **Active**
        v. Approved: **Yes**
6. Press **OK** to close and save the **Dell Master Lease Agreement** contract
7. In the left pane, expand the **Contract Types** folder and select **Master Lease Schedule**
8. On the right pane, Press the **Run** button
9. Review the results and notice that the new master lease schedule has much of the information in this view
10. Right Click on the **Dell Master Lease Agreement** in the right pane and select **Resource Manager**. The resource manager window opens.



11. Select **Summaries ➔ Contract Summary** from the resource manager main menu

12. Notice that it is assigned to Brad Johnson and all of the lease schedules have been combined in this report



Procurement

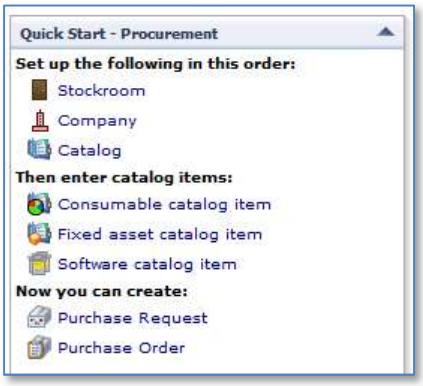
Lab Exercise 4: Procurement Process

The AMS Procurement Portal can track Purchase Requests along with any associated Purchase Orders and Invoices as well as the receiving of purchased objects. It also has the ability to create custom catalogs with the customers preferred vendors, standardized equipment, and software for purchase. There is also a built-in request system for automated purchase requests process, including built approval processes.

This exercise will provide you with pre-populated procurement data so that you can run through the entire procurement process.

Reviewing the Components of the Procurement Portal

1. Switch to the **SMP** Virtual Machine
2. Open the Console and navigate to **Home | Service and Asset Management | Procurement**. The Configuration Item Console view appears on the Left and the Portal page appears on the right.
3. Review the content of the **Quick Start – Procurement** web part on the right side. It clearly shows what needs to be implemented before the procurement process can begin.



Note: This Lab environment has been pre-populated with Company, Stockroom, Catalogs, and Catalog items so that the procurement process can be better demonstrated.

4. Select the **Stockroom** item in the left pane.
5. Notice on the right pane, that both of the Stockrooms have no inventory at this time.
6. Expand the **Catalogs** folder and select **Consumable Catalog Item**. Review the contents to understand the types of items that are placed here. Notice that they are categorized by Catalog name (Dell, CDW…)
7. Select **Fixed Asset Catalog Item**. Review the contents to understand the types of items that are placed here. Notice that they are categorized by Catalog name (Dell, CDW…)
8. Select **Software Catalog Item**. Review the contents to understand the types of items that are placed here. Notice that they are categorized by Catalog name (Dell, CDW…)
9. Select **Catalog**, and notice that it shows a list of Vendors and the total items for each. A catalog contains Consumable, Fixed Asset and Software items that are associated to their respective Vendors.
10. Double Click on the **CDW** Catalog on the right pane

11. Notice the **Associated Catalog Entries** field and how it is populated with a mix of the catalog items available from this vendor.
12. Press **Cancel** to close the CDW Catalog
13. On the left pane, Select **Bundle**, and notice that it shows a list of Catalog Items that have been combined to create a bundled package of items. A Bundle contains Consumable, Fixed Asset and Software items that are combined to create an easier way of procuring multiple items.
14. Double Click on the **Developer Bundle** on the right pane
15. Notice the **Item Quantity** field and how it is populated with a mix of the catalog items.
16. In this scenario, the administrator has been asked to add Microsoft Office 2007 Professional – Full to the bundle.
    a. Press the **Add** button on the **Item Quantity** field to add an item to this bundle.
    b. Type **Office** in the Search field
    c. Select **Microsoft Office 2007 Professional – Full** from the list
    d. Press **OK**
17. Scroll down the List of items and under the **Quantity** field for **Microsoft Office** enter a Quantity of **1**
18. Press **OK** to save and close the Developer Bundle

Procurement Process Example

The Administrator has a request for a new employee starting in the next few days and needs to order some remaining items that they didn't receive with the original bundle to accommodate this user. This exercise will walk you through the procurement process from the initial request to receiving the items.

Creating the Purchase Request

1. Open the Console and navigate to **Home | Service and Asset Management | Procurement**. The Configuration Item Console view appears on the Left and the Portal page appears on the right.
2. Select the **Purchase Request** item on the left pane
3. Right click on **Purchase Request** and select **Create Purchase Request**
4. Enter the following details into the Purchase Request
    a. **Requestor:** Select the **Click to select** link and choose **Brad Johnson**
    b. **Check Stockroom:** Select the **Click to select** link and choose **Lindon Stockroom.** This can be set to check a stockroom first before ordering from a vendor.
    c. Line Items:
        i. Press **+Add**
        ii. Select the **Catalog Item** button
        iii. Type **2007** in the Search field
        iv. Select **Microsoft Office 2007 Professional – Full** in the list
        v. Press **OK**
    d. Line Items:
        i. Press **+Add**
        ii. Select the **Catalog Item** button

iii. Type **5610** in the Search field

iv. Select **Mink – Black Ink Cartridge for 5610** in the list

v. Press **OK**

e. Line Items:

i. Press **+Add**

ii. Select the **Catalog Item** button

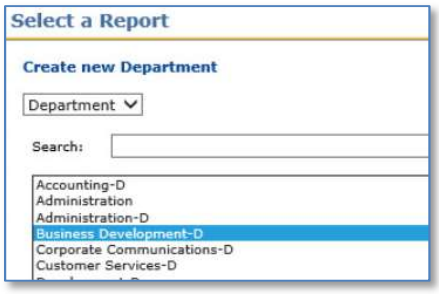
iii. Type **GX620** in the Search field

iv. Select **Dell OptiPlex GX620 Desktop, Basic** in the list

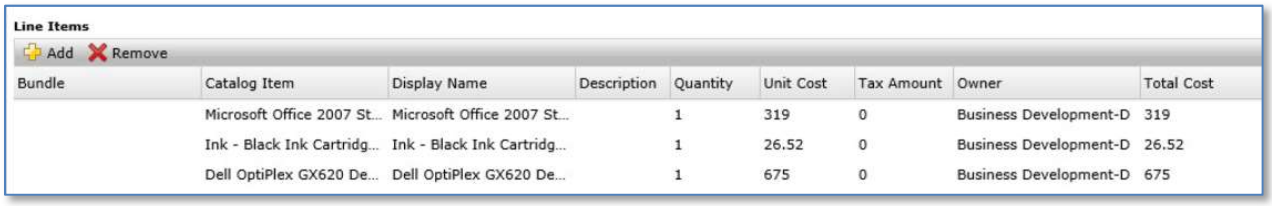
v. Press **OK**

f. For **each** of the items in the **Line Items** list, go to the **Owner** column and select the ellipsis button (…)

g. Change the drop down to **Department** in the **Select a** Report page and Select **Business Development-D**



h. The Line items should look like this:



i. Set Approval Status to **Approved**

j. Press **OK** to submit the purchase request

5. Return to the Purchase Request resource type and Press the **Run** Button on the right pane. You should see your Purchase request appear in the report.

Creating the Purchase Order

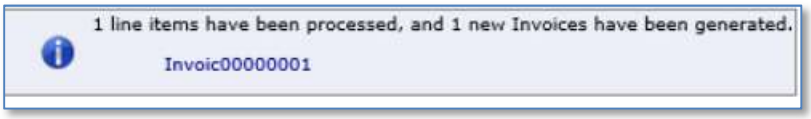
1. Right click on your **Purchase Order** in the list, and select **Generate Purchase Order**
2. You should see the following results:

3. Close the Generate Purchase Order window
4. Two new purchase orders were created, due to multiple vendors providing the items.
5. Select the **Purchase Order** item on the left pane
6. Notice that there are 2 Purchase orders created for Dell and CDW

Order Number	Supplier	Number of Items	Number of Received Items	Total Cost	Requestor
POrder00000002	Dell Inc.	1	0	675	Brad Johnson
POrder00000001	CDW	2	0	345.52	Brad Johnson

Creating the Invoices

1. You will now need to generate invoices in order to receive the items when they come in. To do this, follow these instructions:
    a. Open the **Dell Inc.** Purchase Order
    b. Under **Generate Invoice**, select **on all rows** and press the **Generate** button
    c. You should see a notice on the bottom of the window



    d. Press **OK** to close the **Purchase Order** window
    e. Right Click on the **CDW** Purchase order and select **Generate Invoice.** This is just another way to do this action.
    f. You will notice that 2 line items have been processed and 1 invoice was generated.
    a. Close the **Generate Invoices** window that appears.
2. Now that you have Invoices created, you are able to receive items

Receiving the Items into the CMDB

1. On the left pane, select the **Invoice** icon. You should see a list of 2 new invoices (CDW and Dell)
2. Double click on the **CDW** Invoice and review the data in the fields, then press **Cancel** to close the window
3. Right click on the **CDW** Invoice and select **Receive Items from Invoice.** The Receive Items window appears. Notice that the window shows the invoice number, what stockroom to receive it into, and the received line items
4. Press the **Receive** button
5. You notice that 1/2 items were received, and one of them was not. The Microsoft Software was received in this case, because we asked the process toc create a resource. One cannot be created for a consumable item (Ink Cartridge)

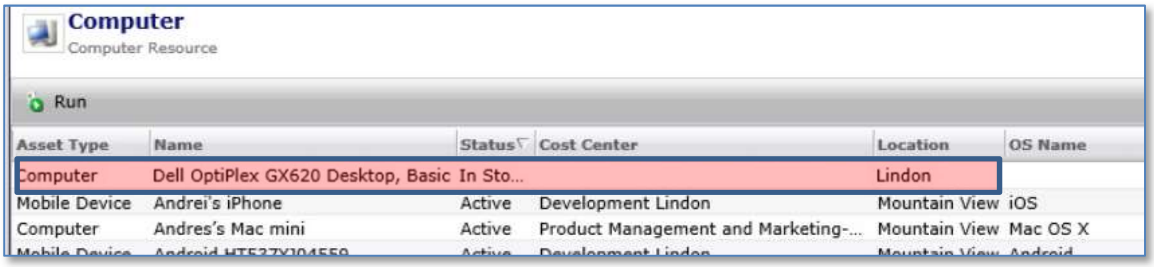
6. Press the button next to **Update and existing resource/Add the consumable to a Stockroom**
7. Press the **Receive** button. You will notice that it now completes the receiving process for the last item

Once you have implemented a stockroom and have received many of the catalog items, this process will not be necessary, and you may choose "**Update and existing resource/Add the consumable to a Stockroom"** as your default option for receiving items.

8. Close the **CDW Receive Items** window
9. Right click on the **Dell Inc. Invoice** and select **Receive Items from Invoice.** The Receive Items window appears
10. Choose the button next to "**Create a New Resource"**
11. Press the **Receive** button
12. Close the **Dell Inc.** Receive Items window
13. On the left pane, select the **Receiving Slip** icon. You should see a 3 receiving slips.
14. Double click on any of the Receiving Slips and review the data in the fields.
15. Press the **Cancel** button on the Receiving Slip to close the window

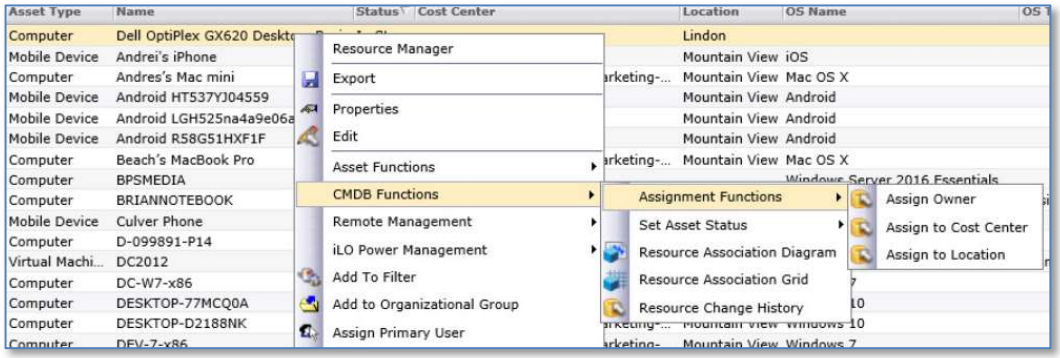
Viewing Received Items

1. On the left pane, select the **Stockroom** icon. You should see a list of 2 stockrooms. Notice how the Lindon Stockroom has 2 items in stock.
2. In the main menu and navigate to **Home | Service and Asset Management | Manage Configuration Items**
3. Expand the **CI Management ➔ Computers and Peripherals** folder
4. Select the **Computer** item in the left pane, and sort the list on the right pane by Name.
5. Notice that there is an entry for "**Dell OptiPlex GX620…"** Computers in the list and that it shows an Asset Status of **"In Stock"**



This shows that the 1 Dell computer that has been received and is awaiting deployment/delivery to the new hire.

6. From this view, we can right click on the Dell GX620 and complete many Asset assignment options like assigning it to an Owner, Cost Center and Location if we wish.



You are now able to allocate these assets to the new user and complete asset operations on them like assigning them to location, cost center, department, and the asset status.