

ASSET VUE INVENTORY

USER GUIDE: VERSION 2.16.2



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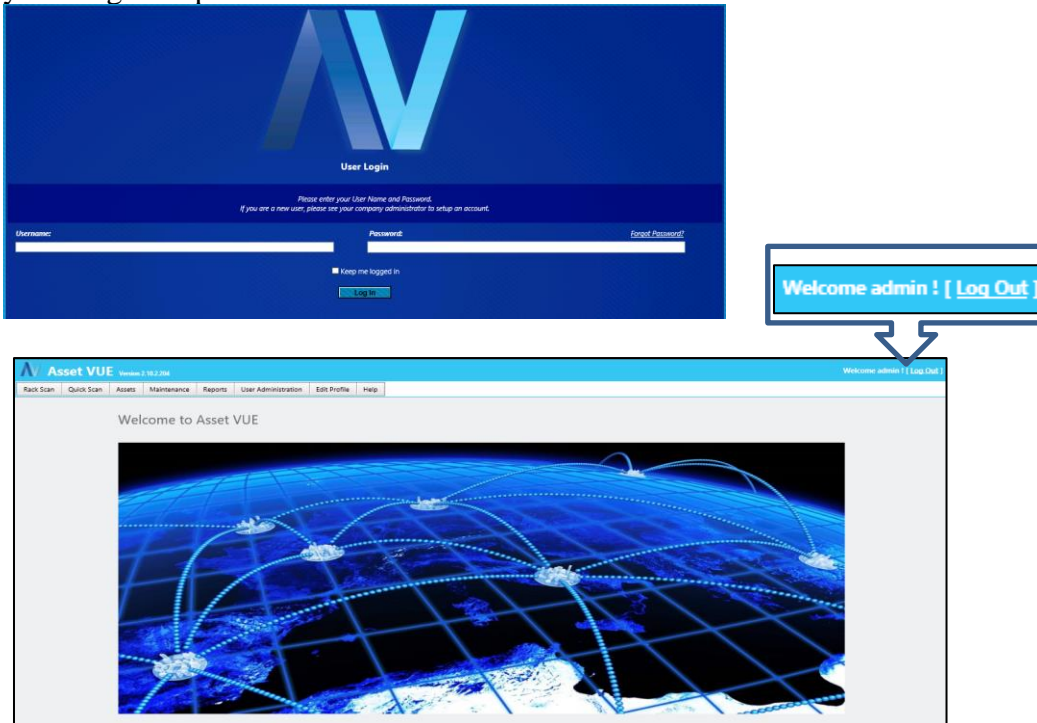
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Logging in and out of the Asset Vue Application

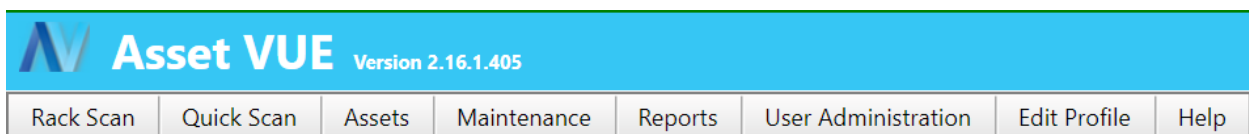
- Asset Vue Inventory is accessible via web browser or mobile app. Please see your administrator or contact support@assetvue.com for your connection information.
- Enter the Username and Password and click on the “Log In” button.
- The “Forgot Password” link (top right side of the password field) will email you to reset your forgotten password.



Click on the “Log Out” link in the upper right-hand of your web browser to sign out.

Menu Bar Options

List of the Menu Bar items, and their sub menu items:



Rack Scan

Initiates the “Scan” process. In this mode, the SCAN is activated

Quick Scan

Initiates a ‘spread sheet’ like display of assets actively being scanned

Assets

Asset Search
Add Asset

Initiates the “Asset Search” page.
Initiates the process to “Add an Asset”

Maintenance

Edit Rooms and Locations	Maintains the list of “ <i>Locations and Rooms</i> ”
Edit Asset Models	Maintains the list of “ <i>Models and Manufacturers</i> ”
Edit Scanners	Maintains the list of “ <i>Scanners</i> ”
Edit Asset Types	Maintains the list of “ <i>Asset Types</i> ”
Edit User Defined Attributes	Maintains the list of “ <i>User Defined Attributes</i> ”
Edit Recognized Tag Patterns	Maintains list of “ <i>Acceptable Tag Patterns</i> ”
Edit Customers	Maintains list of “ <i>Customers</i> ”
Data Export/Import	Accesses the ‘bulk’ <i>Export</i> and <i>Import</i> tools

Reports

Audit Reports	Available “ <i>Audit Reports</i> ” will drop down
Standard Reports	Available “ <i>Standard Reports</i> ” will drop down

User Administration

Create New User	Create new user(s) and Assign a Role(s)
Manage Users	Edit Users, Scanner, Role or Delete User

Edit Profile

Edit your user Profile options

Help

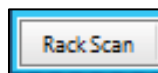
About Asset Vue	Link to the Asset Vue User Guide and Support Resources
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Application Shortcuts

Zoom In and Out	CTRL+ / - OR CTRL+ ‘mouse wheel’ will zoom in and out of the web page
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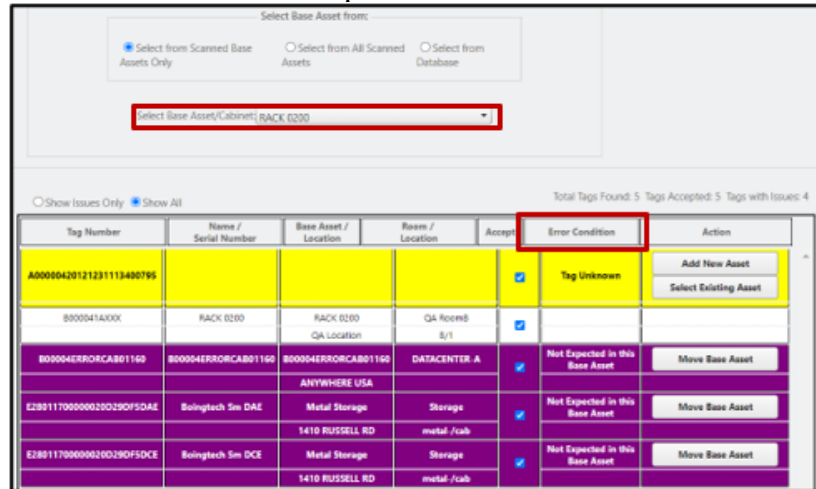
Rack Scan

1. Select **Rack Scan** from the menu



2. Scanning RFID graphic will activate
3. Pass the reader over all tags approximately 5 inches from tags
4. When finished, select “**Stop Scan**” button and produce either the ‘*Scan Preview*’ screen or the ‘*Rack Elevation*’ screen
 - a. The **Scan Preview** screen appears if more than the intended rack tags are detected in the scan process

- b. and bypassed to the ‘*Rack Elevation*’ if only the intended rack tags are detected in the scan process



Select Base Asset from:

Select from Scanned Base Assets Only Select from All Scanned Assets Select from Database

Select Base Asset/Cabinet: RACK 0200

Show Issues Only Show All Total Tags Found: 5 Tags Accepted: 5 Tags with Issues: 4

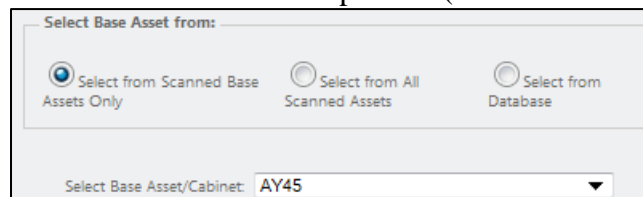
Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accepted	Error Condition	Action
A000004201212311340795				<input checked="" type="checkbox"/>	Tag Unknown	Add New Asset Select Existing Asset
80000414000	RACK 0200	RACK 0200	QA RoomB QA Location	<input checked="" type="checkbox"/>		
800004ERRORCAB01160	800004ERRORCAB01160	800004ERRORCAB01160	DATACENTER_A	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	Move Base Asset
		ANYWHERE USA				
E28011700000020209FSDAE	Bologtech Sm DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	Move Base Asset
		1410 RUSSELL RD	metal /cab			
E28011700000020209FSDCE	Bologtech Sm DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	Move Base Asset
		1410 RUSSELL RD	metal /cab			

SCAN PREVIEW SCREEN

- c. The **Base Asset / Cabinet** must be select from the drop-down items first (red underline in SCAN PREVIEW SCREEN)
- d. Scanned tags ‘*Not Expected...*’ to the **SELECTED** rack will show up with a **PURPLE** background
- e. Scanned tags which are ‘*Unknown*’ will show as **YELLOW** background.
- f. Assets that belong to the SELECTED rack will have a **WHITE** background

Scan Preview Options

- Select Base Asset Form: ‘Top Section’
 - Select from Scanned Base Assets Only:** This is the default and most common usage. If more than one base asset tag is scanned, select the intended Base Asset from the drop down (Select Base Asset/Cabinet)



Select Base Asset from:

Select from Scanned Base Assets Only Select from All Scanned Assets Select from Database

Select Base Asset/Cabinet: AY45

- Select from All Scanned Assets:** This option will be used if you would like to designate the Base Asset from a model that is not typically a Base, such as a floor mounted server. All Scanned Tags will be listed in the ‘*Select Base Asset/Cabinet*’ field to choose from.

Select Base Asset from:

Select from Scanned Base Assets Only
 Select from All Scanned Assets
 Select from Database

Select Base Asset/Cabinet: - please select -

Only Show All

Number	Name / Serial Number
	AR46
	444444
	testADD

- c. **Select from Database:** This option is used if the intended base asset is not found in the list of tags that were scanned. A search window will pop up to select the ‘intended’ base asset.

Select Base Asset from:

Select from Scanned Base Assets Only
 Select from All Scanned Assets
 Select from Database

Select Base Asset/Cabinet: - please select -

Only Show All

Location: -- ALL -- Room: Asset Status: 3 items checked

All Assets
 Base Assets
 Contained Assets
 SubContained Assets
 Non-Mounted Assets

Asset Name	Serial Number	Manufacturer	Model Number	Location	Description
No records to display.					

2. List of Assets scanned: **‘Bottom Section’**
- a. The assets associated with the tags scanned will be listed in this area. Once the **Select Base Asset/Cabinet** has been populated, the listed items will be color coded for easier navigation.
 - b. If more than one Base Tag is scanned, choosing one Base over another will produce different options in the preview list. See Example 1 and Example 2 below for multiple Base Tags scanned.

NOTE: The following options to resolve the extra tags scanned in the *Scan Preview* screen will be listed in the ACTION column on the right. These actions will take effect and update the database immediately!

EXAMPLE 1

Select Base Asset from:

Select from Scanned Base Assets Only
 Select from All Scanned Assets
 Select from Database

Select Base Asset/Cabinet: **RACK 0200**

Show Issues Only
 Show All
 Total Tags Found: 5 Tags Accepted: 5 Tags with Issues: 4

Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accept	Error Condition	Action
A00000420121231113400795				<input checked="" type="checkbox"/>	Tag Unknown	<input type="button" value="Add New Asset"/> <input type="button" value="Select Existing Asset"/>
B000041A00X	RACK 0200	RACK 0200 QA Location	QA RoomB B/1	<input checked="" type="checkbox"/>		
B00004ERRORCAB01160	B00004ERRORCAB01160	B00004ERRORCAB01160 ANYWHERE USA	DATACENTER A	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
E28011700000020D29DF5DAE	Boingtech Sm DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
E28011700000020D29DF5DCE	Boingtech Sm DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>

- c. **“MOVE BASE ASSET”** button will move a contained item to the Base Asset selected in the drop down
 - i. The **FIRST PURPLE** asset is currently in **B00004ERRORCAB01160** rack
 - ii. If **MOVE BASE ASSET** button is clicked, the asset *moves into* the Base asset selected where the drop-down is shown **(RACK 0200)** and a ‘popup’ allows you to assign the proper RU or SLOT to assign for the move.

Show Issues Only Show All Total Tags Found: 5 Tags Accepted: 5 Tags with Issues: 4

Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accept	Error Condition	Action
A00000420121231113400795				<input checked="" type="checkbox"/>	Tag Unknown	
B000041A00X	RACK 0200	RACK 0200 QA Location	QA RoomB B/1	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	
B00004ERRORCAB01160	B00004ERRORCAB01160	B00004ERRORCAB01160 ANYWHERE USA	DATACENTER A	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	
E28011700000020D29DF5DAE	Boingtech Sm DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	
E28011700000020D29DF5DCE	Boingtech Sm DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>

MOVE BASE ASSET

Please specify the bottom position of the asset in the new rack.

Position: 1/03

- d. **“Unchecking the ACCEPT”** check box will ignore this item, which will **not** change its information or display this device in the ‘rack elevation’.

EXAMPLE 2

Select Base Asset from:

Select from Scanned Base Assets Only
 Select from All Scanned Assets
 Select from Database

Select Base Asset/Cabinet: B00004ERRORCAB01160

RACK 0200
B00004ERRORCAB01160

Show Issues Only Show All Total Tags Found: 5 Tags Accepted: 5 Tags with Issues: 4

Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accept	Error Condition	Action
A000004201231113400795				<input checked="" type="checkbox"/>	Tag Unknown	<input type="button" value="Add New Asset"/> <input type="button" value="Select Existing Asset"/>
B000041AXXX	RACK 0200	RACK 0200	QA RoomB	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		QA Location	B/1			
B00004ERRORCAB01160	B00004ERRORCAB01160	B00004ERRORCAB01160	DATACENTER-A	<input checked="" type="checkbox"/>		
		ANYWHERE USA				
E28011700000020D29DF5DAE	Boingtech Sm DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		1410 RUSSELL RD	metal-/cab			
E28011700000020D29DF5DCE	Boingtech Sm DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		1410 RUSSELL RD	metal-/cab			

- e. “**MOVE BASE ASSET**” button will move the contained item to the Base Asset selected above B00004ERRORCAB01160
 - i. The **FIRST PURPLE** asset is currently in RACK 0200 rack
 - ii. If MOVE BASE ASSET button is clicked, the asset moves into the Base asset selected where the drop-down is shown B00004ERRORCAB01160 and a ‘popup’ allows you to assign the proper RU or SLOT to assign for the move.

Show Issues Only Show All Total Tags Found: 5 Tags Accepted: 5 Tags with Issues: 4

Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accept	Error Condition	Action
A000004201231113400795				<input checked="" type="checkbox"/>	Tag Unknown	
B000041AXXX	RACK 0200	RACK 0200	QA RoomB	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	
		QA Location	B/1			
B00004ERRORCAB01160	B00004ERRORCAB01160	B00004ERRORCAB01160	DATACENTER-A	<input checked="" type="checkbox"/>		
		ANYWHERE USA				
E28011700000020D29DF5DAE	Boingtech Sm DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	
		1410 RUSSELL RD	metal-/cab			
E28011700000020D29DF5DCE	Boingtech Sm DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		1410 RUSSELL RD	metal-/cab			

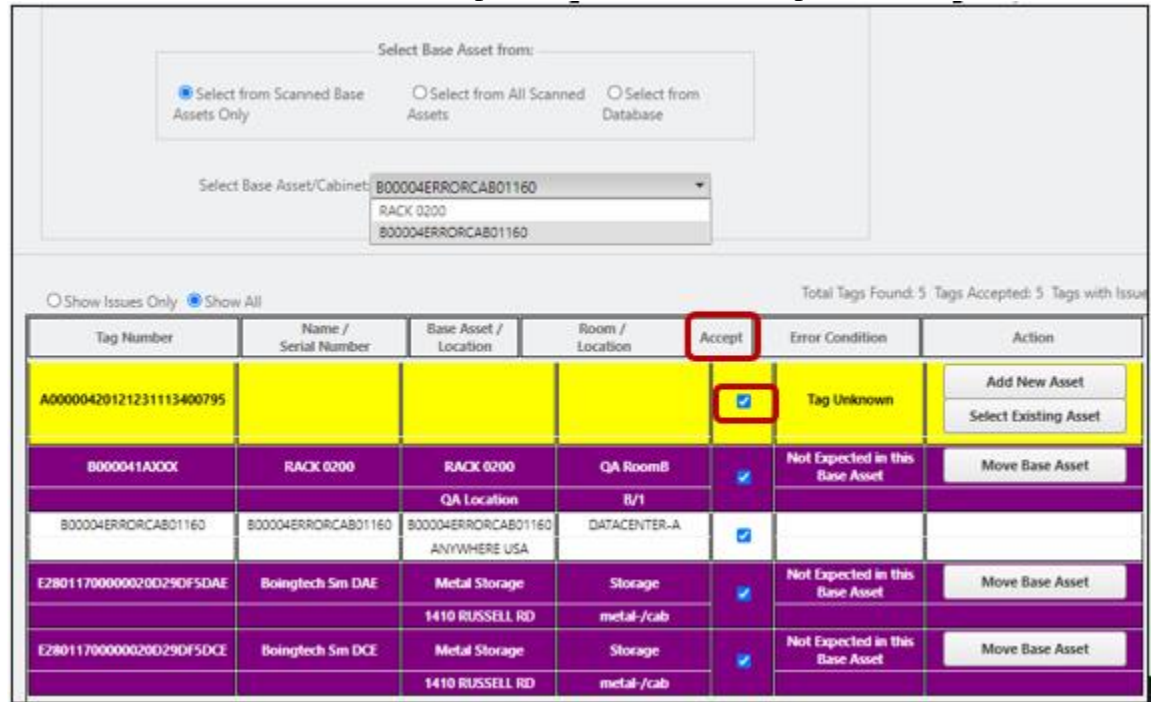
Move Base Asset

Please specify the bottom position of the asset in the new rack.

Position:

- f. “**Unchecking the ACCEPT**” check box will ignore this item, which will not change its information or location.
- g. **UNKNOWN** tags have two possible ACTIONS:
 - i. **Add New Asset:** This will add the **UNKNOWN TAG** to a new asset in the *selected rack* (Thru the ‘*ADD New Asset Wizard*’)

- ii. **Select Existing Asset:** This will change a Tag number to an Existing Asset you select from the SEARCH WIZARD. (This is useful if a server is replaced in the field as a repair)



Select Base Asset from:

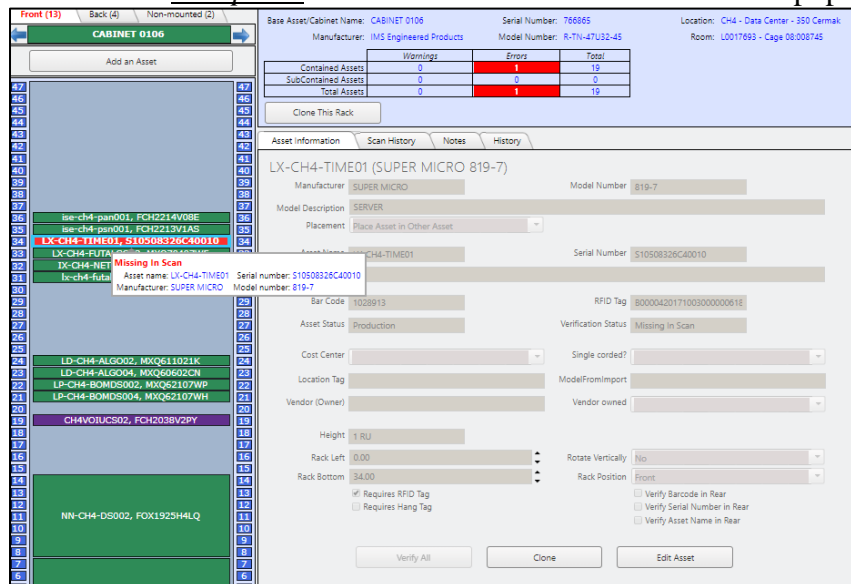
Select from Scanned Base Assets Only Select from All Scanned Assets Select from Database

Select Base Asset/Cabinet: B00004ERRORCAB01160

Show Issues Only Show All Total Tags Found: 5 Tags Accepted: 5 Tags with Issue: 0

Tag Number	Name / Serial Number	Base Asset / Location	Room / Location	Accept	Error Condition	Action
A00000420121231113400795				<input checked="" type="checkbox"/>	Tag Unknown	<input type="button" value="Add New Asset"/> <input type="button" value="Select Existing Asset"/>
B000041A00X	RACK 0200	RACK 0200	QA RoomB	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		QA Location	B/1			
B00004ERRORCAB01160	B00004ERRORCAB01160	B00004ERRORCAB01160	DATACENTER-A	<input checked="" type="checkbox"/>		
		ANYWHERE USA				
EZ8011700000200290FSDAE	Boingtech 5m DAE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		1410 RUSSELL RD	metal-/cab			
EZ8011700000200290FSDCE	Boingtech 5m DCE	Metal Storage	Storage	<input checked="" type="checkbox"/>	Not Expected in this Base Asset	<input type="button" value="Move Base Asset"/>
		1410 RUSSELL RD	metal-/cab			

- 3. If there is no **Action** to take, leave the Check in the ACCEPT box
- 4. Once all the “colored” excess scanned tags are RESOLVED or ACCEPT Unchecked; the Accept All button at the bottom will activate
- 5. Click on the Accept All button and the **Elevation Screen** will populate



Front (15) Back (4) Non-mounted (2)

CABINET 0106

Base Asset/Cabinet Name: CABINET 0106 Serial Number: 766865 Location: CH4 - Data Center - 350 Central

Manufacturer: IMS Engineered Products Model Number: R-TV-47U32-45 Room: L0017693 - Cage 08.000745

Warnings	Errors	Total
Contained Assets	0	19
Sub-Contained Assets	0	0
Total Assets	0	19

Clone This Rack

Asset Information Scan History Notes History

LX-CH4-TIME01 (SUPER MICRO B19-7)

Manufacturer: SUPER MICRO Model Number: B19-7

Model Description: SERVER

Placement: Place Asset in Other Asset

Asset Name: LX-CH4-TIME01 Serial Number: S10508326CA0010

Asset name: LX-CH4-TIME01 Serial number: S10508326CA0010

Manufacturer: SUPER MICRO Model number: B19-7

Bar Code: 1020913 RFID Tag: 8000042017100300000914

Asset Status: Production Verification Status: Missing in Scan

Cott Center: Single corded?:

Location Tag: ModelFromImport:

Vendor (Owner): Vendor owned:

Height: 1 RU

Rack Left: 0.00 Rotate Vertically: No

Rack Bottom: 34.00 Rack Position: Front

Requires RFID Tag Verify Barcode in Rear

Requires Hang Tag Verify Serial Number in Rear

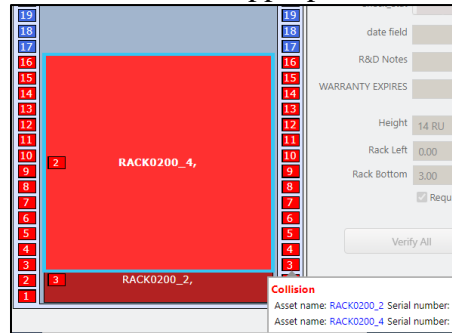
Verify Asset Name in Rear

Verify All Clone Edit Asset

ELEVATION VIEW WITH ASSET DETAILS

- 6. Existing devices whose RFID TAGS were not detected in the scan will populate as **RED** – Missing in Scan

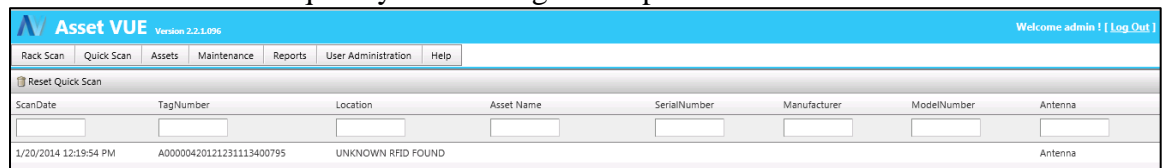
- Collisions** will appear with the RU values colored in **RED**. If you see a collision that means that 2 devices occupy the same RU space. Select the device that is in the wrong RU and move it to the appropriate RU location



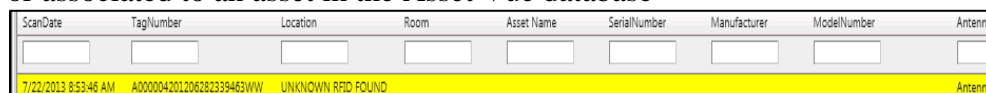
- Continue Scan
 - This button will not be visible from the Asset Search Screen
 - If you missed a few assets in the original scan, you can ‘continue’ the scan to capture any tags missed in the scan
 - Continue Scan option is only going to work if you have not selected / clicked on anything before continuing scan.

Quick Scan

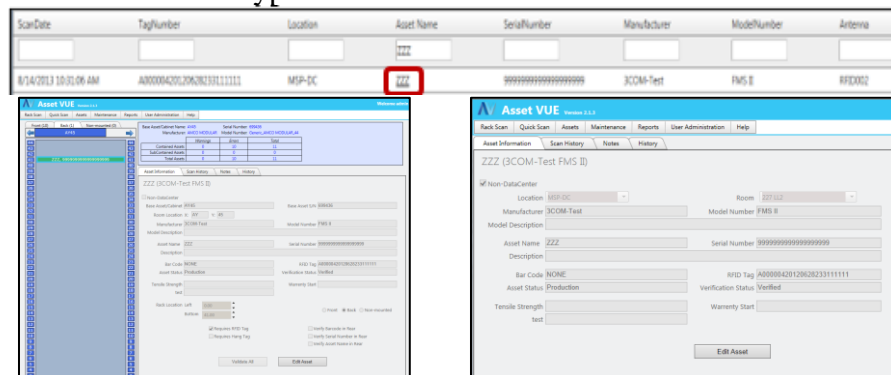
- Initiates the ‘spread sheet’ like display of assets actively being scanned. Scan all the assets in each area quickly without regard to specific rack locations



- Unknown tags found in Quick Scan mode are tags that are found but not defined or associated to an asset in the Asset Vue database



- Select the “Asset Name” hyperlink to see that assets details



Edit Base Asset

Edit Non-Datacenter Asset

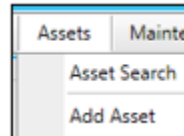
ASSETS

Asset Search

The Search screen provides a powerful combination of filtering, sorting combinations that result in unique views of the data.

Select **Assets** from the Menu Ribbon

- Click on ‘Assets’ from the top menu will open Search directly or hover over Assets and select ‘Asset Search’ from the sub menu
- Your search options will be remembered each time you enter the Search Screen. Custom Views can be saved as described below

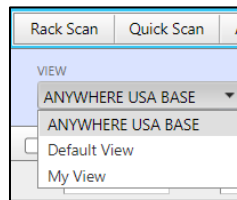


MENU

VIEW	LOCATION	ROOM	INVENTORY STATE	ASSET CLASS	COLUMNS	
My View	-- ALL --		4 items checked	All Assets	14 Items checked	Download CSV
Asset Name	Position	Tag Number	Manufacturer	Model Number	Home	X Grid
						Y Grid
						Found
						Last Seen
						Verification Status

SEARCH DIALOG OPTIONS

- View Section:** drop down allows the search screen to display with saved ‘preferred’ column choices.



- My View:** is the initial default view when you enter the Search screen.
 - Default View:** is a pre-set standard view for all users
 - “ANYWHERE USA BASE”:** is a user’s saved view named “ANYWHERE USA BASE”
- Update View** button: Any view you are in can be “Updated” with this button after altering the ‘filtered options’
- Save as New View** button: allows the current search ‘filtered’ view to be saved as a “NEW NAMED” view.
 - This is where you can name a view
 - The view can be PUBLIC or PRIVATE.
 - Public shares the view with all users vs. Private is only for your profile

To create a new view, provide a name for the view and specify whether the view should be accessible to other users in the organization. The view will save location, room, status, and class selections, as well as column selections, column filters, and sort column.

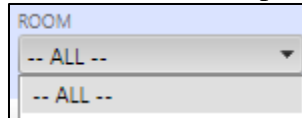
Name Private View

Saving a New View options

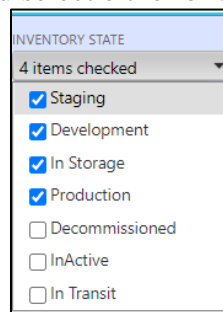
2. **Location** dialog box will appear
 - a. Choose from the **Location** drop down list (Default is “All” locations)



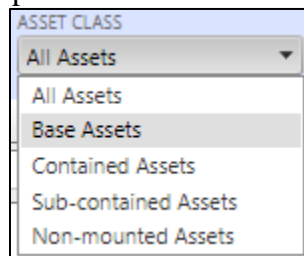
3. **Room** dialog box is a drop-down list
 - a. Choose from the **Room** drop down list



4. **Inventory State** allows you to filter by asset’s status
 - a. **Staging, In Storage, Development and Production** are the DEFAULT Inventory states that will appear in the search choices
 - ii. Please contact Asset Vue to add or remove the Default states:
Email: support@assetvue.com
 - b. **Decommissioned and Inactive** Status will **not** appear in the SEARCH results unless you select either of them or CHECK ALL



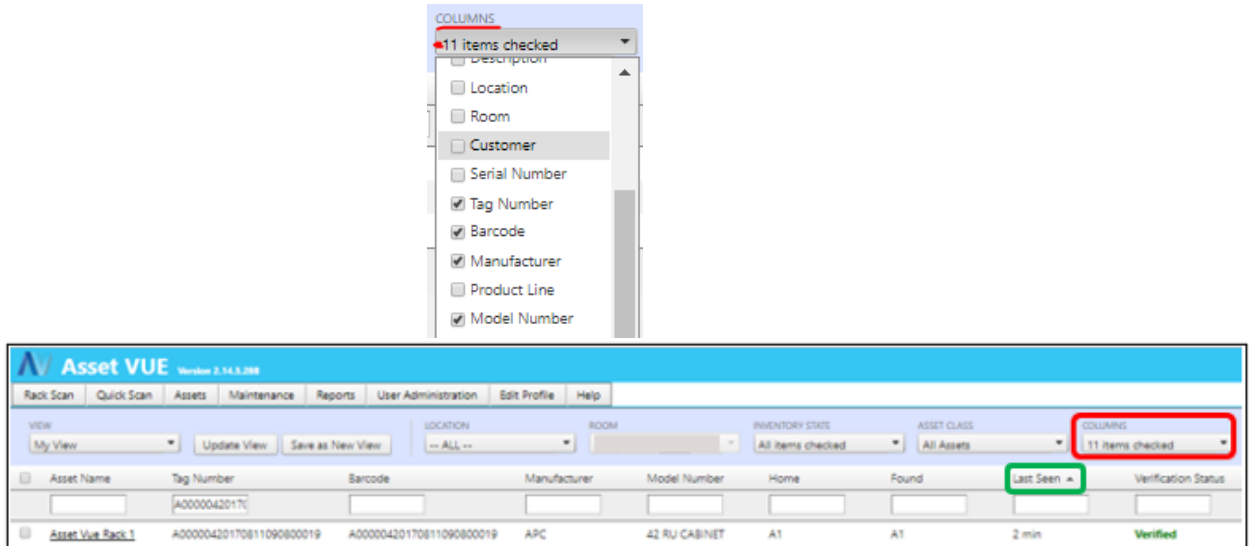
5. **Asset Class** drop down allows you to filter assets in the LIST by: *Base / Contained / Sub Contained / Non-Mounted Assets* model categories
 - a. Selecting any option will also refresh the data displayed



NOTE: Asset Class is based on the Model’s field: “Default Position” This position is associated to the typical position in a rack (i. e. Server, Blade, Vertical Power Strip)

6. **Columns:** Asset search Default columns include (See above screen shot) as the
 - Asset Name
 - Position
 - Customer
 - Serial Number
 - Tag Number

- Manufacturer
 - Model Number
 - Home
 - Found
 - Last Seen
 - Verification Status
- a. Selecting “Columns” allows all other columns to be searchable. These include User Defined Columns / Date Added (in database) / Last Modified / etc.



- b. Order Columns: Columns can be ordered one at a time by selecting column header.
- i. ‘Order By’ cycles through three (3) orders:
 1. “Random order” (default)
 2. “A to Z”
 3. “Z to A”
- c. See the above screen shot ‘**Last Seen**’ column.
7. **Search / Filtering:** Each column will filter on a specific asset by entering part or all the asset information in the search field at the top of the column. For example, if you wanted to find an asset with the Serial Number “123456789”, you can enter any portion of the serial number (i.e. 3456) or the full value (123456789) and the record will appear in the search. The more detailed your criteria the finer the results.
8. **Enhanced Search:** Multiple items can be entered in the same search field separated by a “comma”
- a. (i.e. TAG NUMBER column: A00000420170811090800019, A00000420170413142700327, A00000420170413142700409)

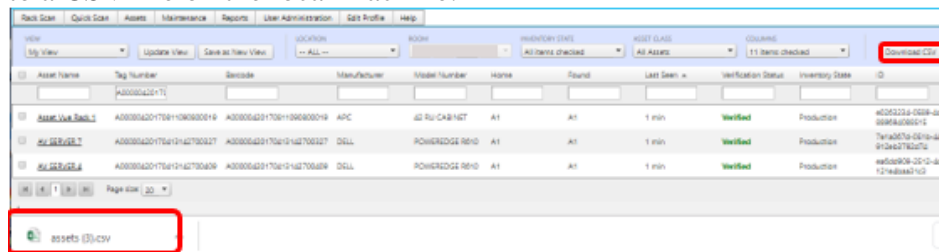
VIEW	LOCATION	ROOM	INVENTORY STATE	ASSET CLASS	COLUMNS	Download CSV					
My View	-- ALL --		All Items checked	All Assets	16 items checked						
<input type="checkbox"/>	Asset Name	Location	Room	Serial Number	Tag Number	Barcode	Manufacturer	Model Number	Home	Found	Last Seen
<input type="checkbox"/>	Asset_Vue_Rack_1	1410 RUSSELL RD	LAB	A0000420170811090800019	0019	A0000420170811090800019	APC	42 RU CABINET	A1	A1	52 sec
<input type="checkbox"/>	RACK101_RU9	QA Location	LOAD TEST	B00004123456789123450019	0019		DELL	POWEREDGE R640	AB11	AB11	4 min
<input type="checkbox"/>	B00004201805040000019780	qa1	qa2	B00004201805040000019780	0019780		GENERIC	1U SERVER	Z99	Z99	1 hour
<input type="checkbox"/>	B00004201805040000019997	1410 RUSSELL RD	LAB	B00004201805040000019997	0019997		GENERIC	1U SERVER	A1	A1	6 day

PARTIAL TAG NUMBER SEARCH

VIEW	LOCATION	ROOM	INVENTORY STATE	ASSET CLASS	COLUMNS	Download CSV					
Default View	-- ALL --		6 items checked	All Assets	11 items checked						
<input type="checkbox"/>	Asset Name	Position	Customer	Serial Number	Tag Number	Manufacturer	Model Number	Home	Found	Last Seen	Verification Status

9. Download CSV

- Selecting this button will output all selected columns and their current data to a CSV file on the local machine.



Action Panel Edits

Action Panel will allow mass changes to multiple assets at one time. You can select the assets you want to modify by checking the BOX on the left side of the search screen then selecting the Action to apply (location, status, room, etc.) changes in the fields on the action panel

Please contact Asset Vue at support@assetvue.com for help customizing the fields in the Action Panel

VIEW	LOCATION	ROOM	INVENTORY STATE	ASSET CLASS	COLUMNS	Download CSV
My View	-- ALL --		4 items checked	All Assets	14 items checked	
<input type="checkbox"/>	Asset Name	Position	Tag Number	Manufacturer	Model Number	
<input checked="" type="checkbox"/>	B00004ERRORCAB01160	0	B00004ERRORCAB01160	GENERIC	1U SERVER	
<input type="checkbox"/>	Boingtech Sm DAE	0	E2801170000020D29DF5DAE	GENERIC	1U SERVER	
<input checked="" type="checkbox"/>	Boingtech Sm DCE	0	E2801170000020D29DF5DCE	GENERIC	1U SERVER	
<input checked="" type="checkbox"/>	RACK_0200	0	B000041A00X	KNURR	42U CABINET	
<input type="checkbox"/>	NAME1	0	B00004201808060000040549	DELL	POWEREDGE R640	
<input checked="" type="checkbox"/>	NAME15	0	B00004201801100000012112	DELL	POWEREDGE R640	A1 A 1
<input type="checkbox"/>	NAME17	0	B00004201808060000040489	DELL	POWEREDGE R640	A1 A 1

Actions Panel

Inventory State
-- SELECT --

Verification Status
-- SELECT --

Room
-- SELECT --

Description

SAVE

Real-Time Rack (RTCabinet and RTLocation)

1. Configuration settings manage the Realtime Cabinet and Realtime Location actions and timings by the Administrator(s).
 - a. RTC and RTL can be set On/Off
 - b. RTC and RTL moves can be set On/Off
 - c. Threshold values can be determined and set for
 - i. Missing in Scan
 - ii. Auto Moves (Assets and Locations)
 - iii. Scan timings
 - iv. Auto Move (Cabinet moves, and Room moves) processing timings
 - v. Auto Move (Cabinet moves, and Room moves) counts and thresholds

Asset Vue support will guide the Admins with the configuration settings as necessary.
2. Within the Search Screen are the RTR Columns that provide the:
 - a. Assigned locations of the Assets (**HOME**)
 - i. This is the Base assets Labelx+Labely values
 - b. Where they were **FOUND** by the RTR Reader-Antenna
 - c. When they were **LAST SEEN**
 - d. The **VERIFIATION STATUS** of the asset according to the Scan Logic which can be found "[here](#)"

Home	Found	Last Seen	Verification Status
		48 day	Missing In Scan
ROOM-A RACK1	ROOM-A RACK1	61 day	Missing In Scan
ROOM-A RACK1		61 day	Missing In Scan

3. Real Time Cabinet: is based on the Antenna's being assigned to a rack. (*ReaderName-Antenna#*)
 - a. The RFID Tags are scanned by an antenna and reported as being found in the assigned Antenna's Rack.
 - i. If they are found in the home rack, the Status is Verified
 - ii. If they are found by an antenna in another rack, the Status changes initially to **Not Verified** then to Moved.
 - iii. If they are found by a Portal Antenna, the Status is changed to Portal Scan
 1. Portal Scan status must be manually changed upon verification of the assets location OR stays as Portal Scan if verified as a True status
 - iv. If they are not scanned after a designated period of time, the Status is Missing In Scan
 - v. If they are '**Not Verified**' when placed into the rack, the Status remains Not Verified (Starting Status typically based on Process)
 - vi. **Auto Rack Assignment:** Two conditions must be meet for an asset to be Auto Assigned into a Rack:
 1. The asset must be assigned to a room
 2. The asset must be a contained asset

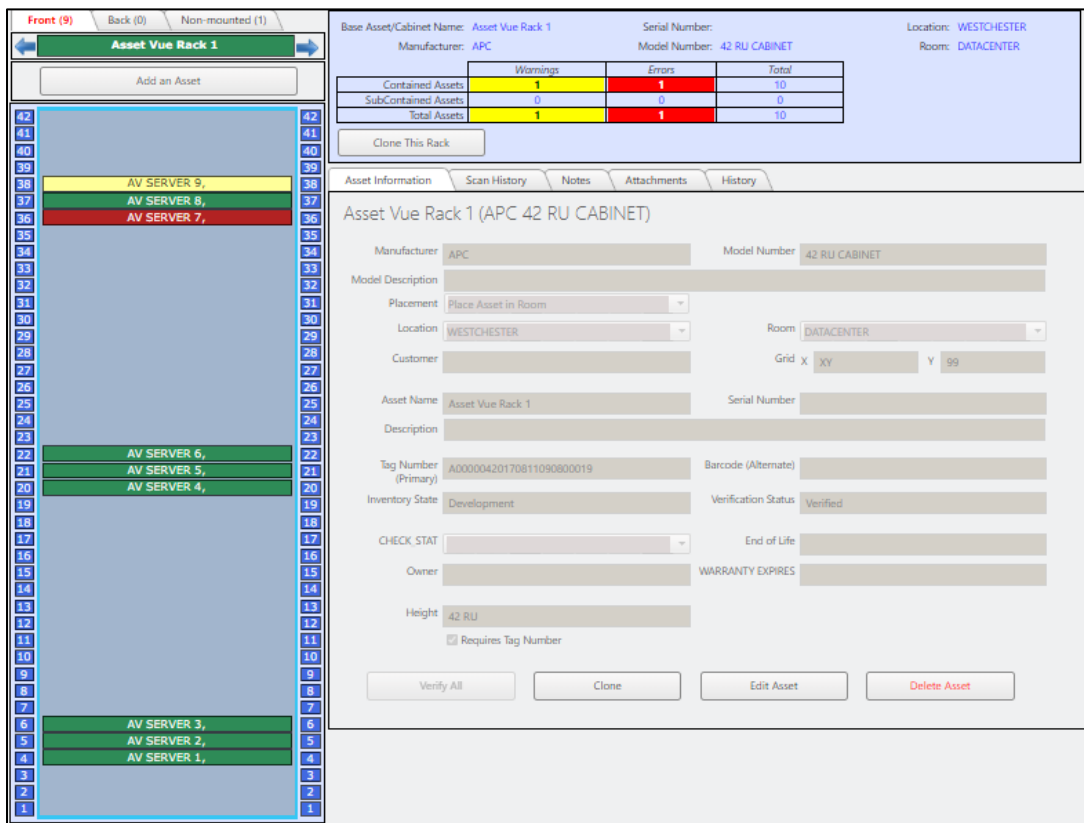
Once an asset's RFID tag has been seen by an RTR antenna, the read of the tag will:

3. Assign the device to the NON-Mounted Tab of the new Rack
4. Set the Inventory Status to Not Verified

This allows for proper manual update in Front or Rear of the rack and RU assignment

4. **Real Time Location:** is based on the Antenna's being assigned to a Room.
 - a. As assets travers through or are placed into the datacenters for placement, the Room Antenna's will assign the assets into the Location/Rooms as they are scanned
 - b. Relocation of Assets from room to room are automatically Moved to that location/room
5. **Reviewing the Scan History** will indicate the most recent scan Date/Time.
 - a. RTR scans throughout the day at customer defined intervals but at the end of the day only records the last scan. Previous scans for the same day are deleted, leaving one history record per day

Data Fields within Asset Vue



The screenshot displays the Asset Vue interface for 'Asset Vue Rack 1'. On the left, a rack layout shows slots 1-42, with servers 1-9 and 21-23 populated. The main panel shows asset details for 'Asset Vue Rack 1 (APC 42 RU CABINET)'.

	Warnings	Errors	Total
Contained Assets	1	1	10
SubContained Assets	0	0	0
Total Assets	1	1	10

Asset Information: Scan History | Notes | Attachments | History

Asset Vue Rack 1 (APC 42 RU CABINET)

Manufacturer: APC | Model Number: 42 RU CABINET

Location: WESTCHESTER | Room: DATACENTER

Tag Number (Primary): A00000420170811090800019 | Barcode (Alternate):

Inventory State: Development | Verification Status: Verified

Height: 42 RU | Requires Tag Number

Buttons: Verify All | Clone | Edit Asset | Delete Asset

Summary Pane (only for data center view)

The Summary Pane displays the following Base Asset / Cabinet information being displayed:

1. Base Asset / Cabinet Name
2. Serial Number
3. Manufacturer
4. Model Number
5. Location
6. Room

The Summary Pane will also break down the assets by type known in the database:

1. The expected number of Assets (Total Assets)
2. Type of assets (Contained / Sub-Contained)
3. Errors or warnings encountered with the asset assignments
 - a. Errors are colored **RED**
 - b. Warning are colored **YELLOW**

Base Asset/Cabinet Name: RACK51		Serial Number: NER-051		Location: Main Data Center	
Manufacturer: NER		Model Number: SR42UBDP		Room: Main Data Center	
	Warnings	Errors	Total		
Contained Assets	1	16	17		
SubContained Assets	0	0	0		
Total Assets	1	16	17		
Total Scanned Assets			0		

4. Total Scanned Assets (only when BASE is selected)
 - b. If the display is a result of a search, “0” is displayed
 - c. If the display is a result of a scan, “#” of tags scanned is displayed

Elevation pane (only for data center view)

5. The ‘Elevation Panel TABs’ are colored to indicate the highest level of error on that tab (i.e. a tab where all assets are OK except one asset that is **YELLOW** will be colored **YELLOW**).

Rack Scan	Quick Scan	Assets	Maintenance	Reports	User Administration	Help
Front (15)	Back (1)	Non-mounted (1)				
RACK51						
optica's, 8953-8964						
Base Asset/Cabinet Name: RACK51		Serial Number: NER-051		Location: Main Data Center		
Manufacturer: NER		Model Number: SR42UBDP		Room: Main Data Center		
	Warnings	Errors	Total			
Contained Assets	1	16	17			
SubContained Assets	0	0	0			
Total Assets	1	16	17			

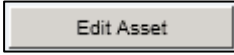
NON-MOUNTED TAB IS SELECTED

- a. **16** Errors relates to devices in the Front and Back tab.
 - b. **1** WARNING relates to a device in the Non-mounted tab.
 - c. In this example, none of these Errors or Warnings are Sub Contained Assets
6. Errors are considered:
 - d. Collisions between assets
 - e. Exceeding the Maximum RU range (or placing an asset below RU 1)



- f. Exceeding the Rack Location Left (The device extends beyond the ‘rack rails’ boundary)
 - g. Missing in Scan
 - h. Missing an RFID Tag (when “*Requires RFID Tag*” is checked)
7. Warnings are considered:
- a. Not Verified
8. The Summary is updated immediately when a warning occurs or is resolved

Edit

1. To edit any of the “*INFORMATION*” fields, Rack assignment, Device position, select the  button at the bottom of the information panel.

Save

2. Any edits to a **text field, Rack assignment, Device position**, are not saved unless you select the  button.

Asset detail pane

The information displayed is dependent on which asset is selected in the elevation view. In the Elevation Pane, a ‘**Blue**’ border around an asset will indicate which asset is selected. When a BASE Asset is selected, the border is around the **INSIDE** of the rack. Changing the Asset Information and Location information is described below:

Base Asset Information

1. These fields are not editable in the Edit mode for a Base Asset:
 - a. Manufacturer
 - b. Model Number
 - c. Model Description
2. The remaining fields may be modified directly by selecting with your cursor and typing over original data in EDIT ASSET mode.
 - a. Asset Name – Rack Name
 - b. Serial Number – Enter Serial number of the Rack
 - c. Description – Free text field
 - d. Bar Code – Free text field / Company existing Asset Tag information
 - e. RFID Tag – RFID Tag number of the asset
 - f. Asset Status is a “drop down selectable field”
 - i. Select: Staging / Development / Production / Decommissioned / In Active
 - g. Verification Status is a “drop down selectable field”
 - i. Select: Verified / Not Verified / Missing in Scan / Confirmed Missing / Tag Missing
 - h. “User Defined Fields”: Described under [MAINTENANCE](#) section
 - i. Check Box to Verify Asset Name in the Rear
 - j. Check Box to Verify Serial number in the Rear
 - k. Check Box to Verify Barcode in the Rear
 - l. Check Box for Requires Hang Tag

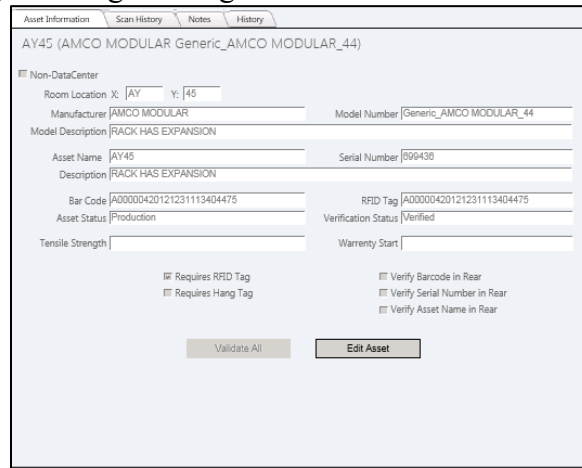
- m. Check Box for Requires Tag Number
- 3. Verify All button – will validate all assets in the Rack / Cabinet to “Verified”.

NOTE: Base Assets need to be manually verified.

4. **REQUIRES TAG NUMBER:**

This check box has logic built into the application.

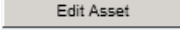
- a. Adding a tag will force the Status to Not Verified vs. leaving the status as Tag Missing.
- b. Conversely, if a Tag Number is blank and the “Requires Tag Number” is set, the “Tag Missing” status is forced as the Status

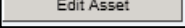
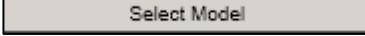


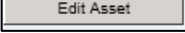
Changing the Base / Cabinet Location and Manufacturer Information:

1. Changing the Base Asset’s Location

NOTE: It is unlikely to place a Base Asset into another Base Asset. Be cautious to avoid placing a RACK into another RACK. Servers can be moved from a table (it is considered a base asset on the floor or table) into a RACK. Once it is inside a RACK, the server becomes a contained asset.

- a. Enter the EDIT MODE by clicking the “” button
- b. Select the **Placement** drop-down and choose the associated asset’s placement:
- c. Typically, “Place Asset in Room”
 - a. Place Asset in Room
 - b. Place Asset in Other Asset
 - c. Non-Data Center Asset
- d. Select the Location drop down for the Location List
- e. Select the Room drop down for the Room List
- f. Enter the “X” and “Y” grid location
- g. SAVE the edits

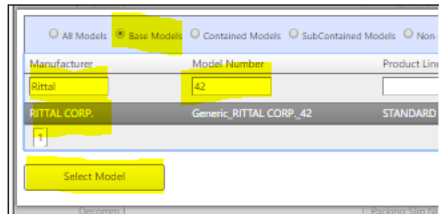
2. Changing the Base Asset Manufacturer information is done in the  mode with a wizard by clicking on the  bar and selecting the following:

- a. Enter the EDIT MODE by clicking the  button
- b. Select the “Select Model” bar
- c. Filter the type of asset using the RADIAL buttons (BASE in this case)
- d. Filter MFG / MODEL accordingly to a known MFG or Model
- e. Highlight and select the desired Rack
- f. Save

Adding a Base Asset

A Base Asset is a Freestanding Asset that is typically installed in a room or any Asset that may have another asset installed or mounted in it.

1. Select ASSET in the Menu Bar
2. Select Add Asset
3. “Select Model” Radio Button
 - a. Choose “Base Models” in the pop-up window
 - b. Enter Partial Manufacture and Model Name: ENTER
 - c. Highlight the correct model then click “Select Model” Radio Button



4. Placement Selection:
 - a. Select “Place Asset in Room” from drop down
 - b. Select Location from drop down
 - c. Select Room from drop down
 - d. Enter Asset Name
 - e. Set Asset and Verification Status from Drop Down menus
 - f. “Save” or “Save and New” Radio Button

Rack Scan Quick Scan Assets Maintenance Reports User Administration Edit Profile Help

Add New Asset

Model:

Manufacturer: Model Number:

Model Description:

Placement:

Location: Room:

Customer: Room Location:

Asset Name: Serial Number:

Description:

Bar Code: RFID Tag:

Asset Status: Verification Status:

Checkin: Contract:

Decomm: Packing Slip Number:

Received: Volume Price:

warranty: Weight:

WARRANTY EXPIRES: Invoice:

GMP Status: Asset Tag:

Requires RFID Tag
 Requires Hang Tag
 Verify Barcode in Rear
 Verify Serial Number in Rear
 Verify Asset Name in Rear

Cloning a Full Rack

1. Select "Clone This Rack" Radio Button

Rack Scan Quick Scan Assets Maintenance Reports User Administration Edit Profile Help

Sort (5) Back (0) Non-mounted (0)

AA-01

Box Asset/Cabinet Name: AA-01 Serial Number: 7034320 Location: ANYWHERE USA
 Manufacturer: RITTAL CORP. Model Number: Generic_RITTAL CORP_42 Room: DATACENTER A

Information	Items	Total
Contained Assets	0	0
Sub-contained Assets	0	0
Total Assets	0	0

Clone This Rack

Asset Information Scan History Notes History

AA-01 (RITTAL CORP Generic_RITTAL CORP_42)

Manufacturer: RITTAL CORP. Model Number: Generic_RITTAL CORP_42

Model Description: STANDARD ENCL

Placement: Place Asset in Room

Location: ANYWHERE USA Room: DATACENTER A

Customer: Room Location: 01 AA

Asset Name: AA-01 Serial Number: 7034320

Description:

Bar Code: 1316437 RFID Tag: R1714617

Asset Status: Production Verification Status: Verified

Checkin: Contract:

Decomm: Packing Slip Number:

Received: Volume Price:

warranty: Weight:

WARRANTY EXPIRES: Invoice:

GMP Status: Asset Tag:

Height: 42 RU temperature:

Requires RFID Tag
 Requires Hang Tag
 Verify Barcode in Rear
 Verify Serial Number in Rear
 Verify Asset Name in Rear

2. Enter all details for the new rack as well as all the devices within the rack.

Contained Asset Form

Asset Information Tab

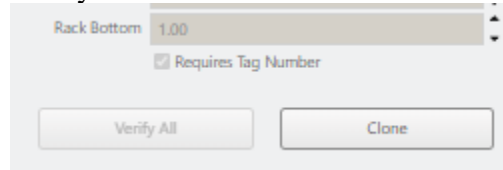
Location of the Contained Asset (Rack info) or the Floor Mounted Device

1. Since contained assets are located within a Base Asset, these fields are not editable while viewing the Contained asset
 - a. Base Asset/Cabinet Name
 - b. Base Asset Serial Number
 - c. Manufacturer
 - d. Model Number
 - e. Description of the Model
 - f. RU Height

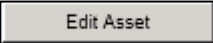
Contained Asset Information

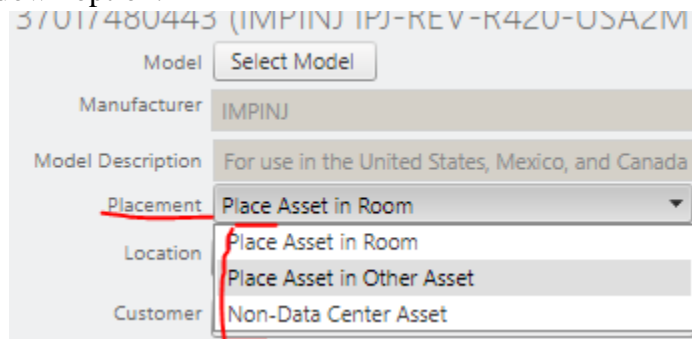
2. The fields you can edit for a Contained asset are as follows:
 - a. Asset Name – Device Name
 - b. Serial Number – Enter Serial number of the Rack
 - c. Description – Free Text Comment
 - d. Bar Code – Free Text Comment / Company existing Asset Tag information
 - e. Asset Status is a dropdown field
 - i. Select: Staging / Development / Production / Decommissioned / In Active
 - f. Verification Status is a dropdown field
 - i. Select: Verified / Not Verified / Missing in Scan / Confirmed Missing / Tag Missing
 - g. “User Defined Fields” is described in more detail under the [MAINTENANCE](#) section
 - h. Rack Location Left – off sets the asset for the left edge of the elevation in a proportionate number of inches (i.e. in a 19 inch wide rack using the value 9.5 will put the left edge of the asset roughly in the middle of the rack).
 - i. Bottom: Bottom RU value where the Asset is located in a Rack
 - j. Drop-down list to Rotate a device Vertically – i.e. a modem on its side
 - i. No (default)
 - ii. Yes (rotates asset 90°)
 - k. Drop-down list will assign the Asset to a RACK POSITION
 - i. Position will be Front of Rack / Rear of rack / Non-RU space in the Rack
 - l. Check Box for Requires Tag Number

- Verify All button – will validate all assets in the Rack / Cabinet to “Verified”

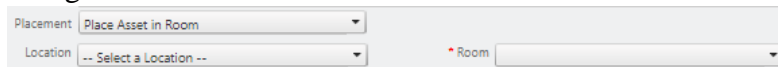


Changing an Asset's location: location.

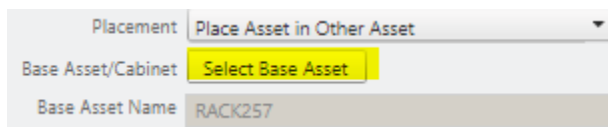
- To edit the **Assigned Base Asset (Rack)**
 - Select the  Button after selecting the Asset to be moved
 - Determine where the asset is being moved to and select the appropriate drop-down option:



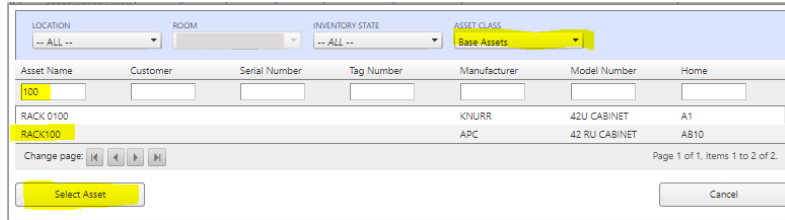
- Choose the ‘Place Asset in Room’ option to move the asset in storage room or in the corner of the data center floor area.



- Choose the ‘Place Asset in Other Asset’ to move it into another Rack / Cabinet.



- Complete the Location placement wizard above accordingly and select the base asset by using the Filter Boxes: Partial text or full field text filtering can be used
 - Once you enter the data, **initiate** the filter by hitting the ‘*Select Base Asset*’ button
- Highlight the desired Base Asset
- Select the “Select Asset” button to move the contained asset into the new Base Asset

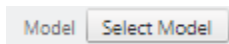


- vi. Adjust the **Bottom RU** value as appropriate
- vii. Select **SAVE** button to complete the move

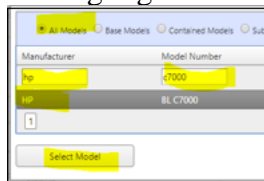
Adding a Contained Asset

A Contained Asset is an asset that is mounted or installed within a Base Asset.

1. Select **ASSET** in the menu bar
2. Select **Add Asset**
3. “Select Model” Button



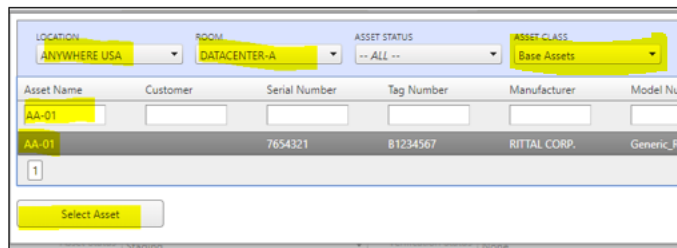
- a. Choose “All Models” in the pop-up window
- b. Enter Partial Manufacturer and Model Name: **ENTER**
- c. Highlight the correct model then click “Select Model” Radio Button



4. Placement Selection:
 - a. Select “Place Asset in Other Asset” From Drop Down
 - b. “Select Base Asset”

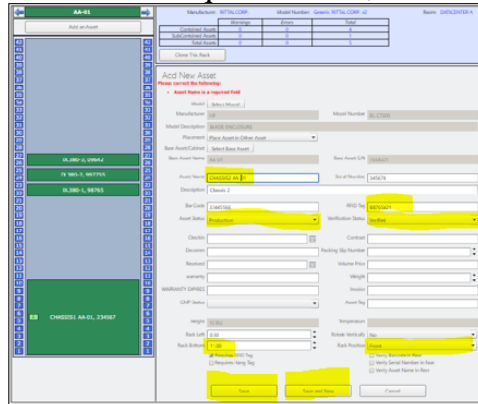


- c. Select Location From Drop Down
- d. Select Room From Drop Down
- e. Select Asset Class From Drop Down
- f. Choose the correct Asset From The List
- g. “Select Asset” Radio Button

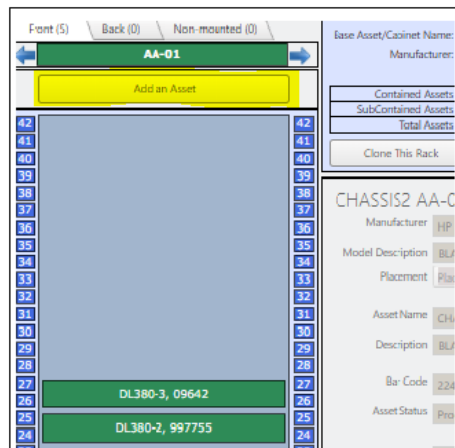


5. Placement in Rack or Cabinet:
 - a. Asset Name is Required
 - b. Bottom RU is Required
 - c. RFID Required if Box is Checked, Other text fields are optional.
 - d. Set Status and Verification Status(Not Required)

- e. Select “Front” “Back” or “Non Mounted” from drop down (Non Mounted is used for PDUs that don’t occupy RU Space in cabinet or rack)
- f. “Save”
- g. If Adding More Than 1 device Select “Save and New” (if this is selected, enter the required model, name and placement details for the new device)



6. Adding a contained asset from the Rack View
 - a. Select “Add an Asset” from the Rack or Cabinet View.



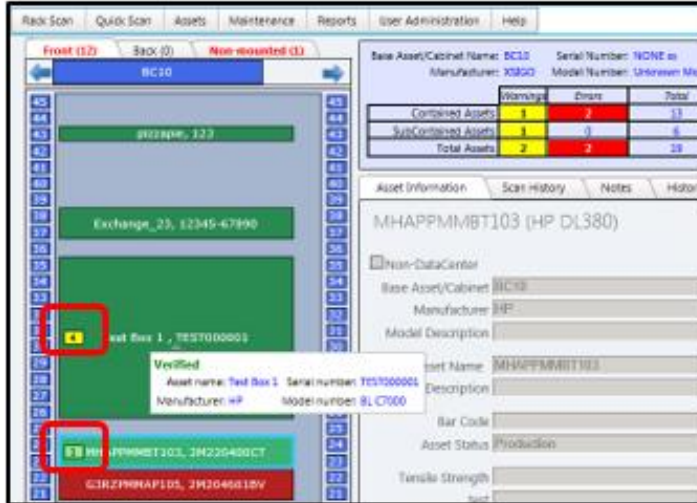
- b. Follow the same steps as “Adding a Contained Asset”

Sub Contained Assets

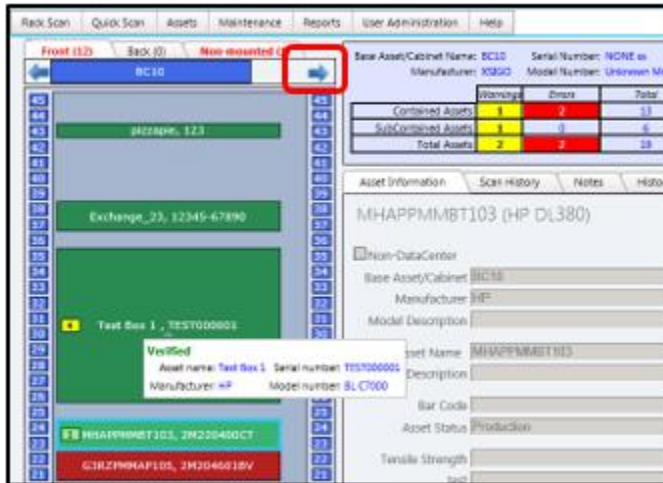
Sub-contained assets function very much like the Contained Assets, but these assets are contained within a **Contained Asset** versus being mounted in RU space (i.e.: blades, NIC cards). Slot Numbers are used instead of RU values

VIEW OF SUB-CONTAINED ASSET

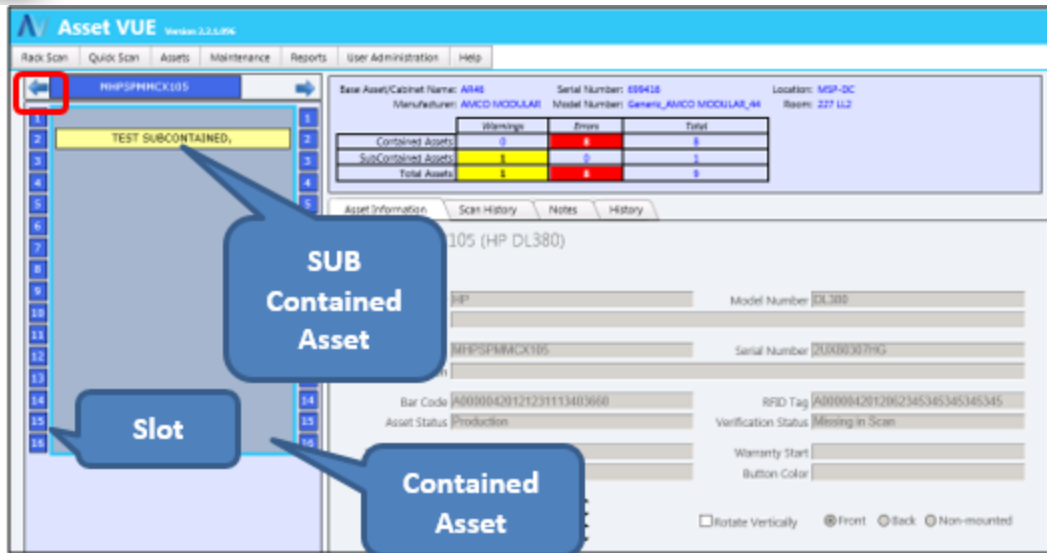
1. Starting from a Rack View, Observe a contained asset with a small colored square on the left side



2. Select the Contained Asset



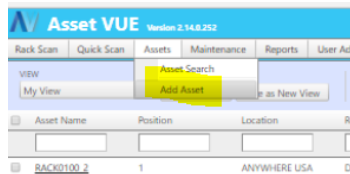
3. Select the Top Right Blue Arrow to 'ZOOM into' the Contained Asset and view the SUB Contained Asset



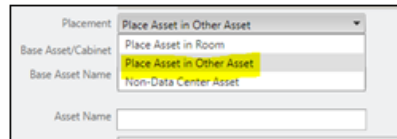
- To return to the BASE ASSET view, select the TOP LEFT BLUE ARROW to ZOOM Out

Adding a sub contained asset

- Select ASSET in the menu bar
- Select Add Asset

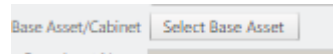


- Select 'Place Asset in Other Asset' from the drop down

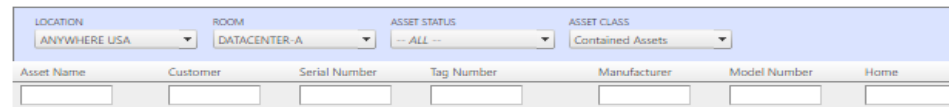


- Since Sub Contained Assets reside in a Contained Asset, the Contained Asset is the "Parent" or "Base" asset to the Sub Contained Asset.

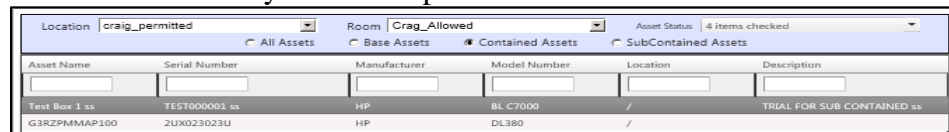
Select the "Select Base Asset" Button

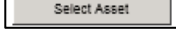


- Select the Location and Room where the Contained Asset is located



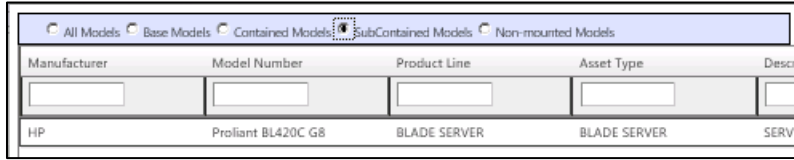
- Select the drop-down list to filter Contained Assets
- Select the Contained Asset you want to place the Sub Contained Asset into



8. Select the  button
9. Select the Select Model button to choose the Model of the Sub Contained Asset

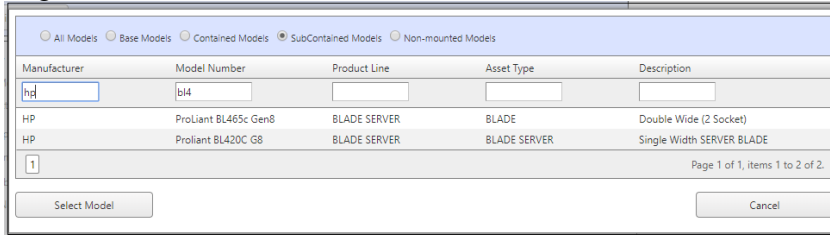


10. Select the radial button to filter the Sub Contained asset models to select from



Manufacturer	Model Number	Product Line	Asset Type	Description
HP	ProLiant BL420C G8	BLADE SERVER	BLADE SERVER	SERVER

11. Highlight the Sub Contained Model of interest and click on the  button



Manufacturer	Model Number	Product Line	Asset Type	Description
HP	ProLiant BL465c Gen8	BLADE SERVER	BLADE	Double Wide (2 Socket)
HP	ProLiant BL420C G8	BLADE SERVER	BLADE SERVER	Single Width SERVER BLADE

12. Enter the Asset Name, Serial Number, Description, and other text fields desired. The same information as listed above for the Contained Assets applies
 - a. Asset Name is a required field
 - b. Sub Contained assets reside in a *Contained Asset SLOT* versus a *Rack RU*
13. Select SAVE button

SLOTS

Asset Vue displays the slots as a “List”. We do not show the Actual Graphic representation currently. A future version will allow the actual Graphical View of Sub Contained Assets.

The basic “rule of thumb” for Slot assignments are as follows:

1. Use the “Bottom Left corner’ of the blade as the reference
2. Sub Contained Asset Dimensions are typically 1x1x1 indicating it uses one full slot (contact support@assetvue.com for information on how to set up a half slot or double slot asset).

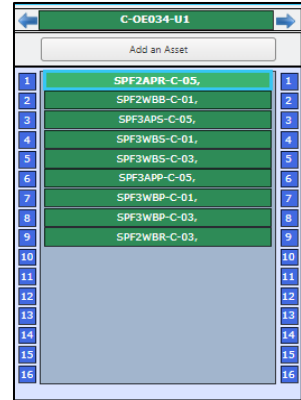
EXAMPLE:

Using the HP C7000 Chassis and HP Blades:

1. There are 4 blades in this example
2. The slot assignments for the 4 blades are: 1, 11, 13 and 16.

HP C7000 chassis							
1	2	3	4	5	6	7	8
9	10	11	12	13	14	15	16
power supply		power supply		power supply		power supply	
The Numbers are the MFG designation for the designed MAX Slot positions							
Slots with various blades in the slot							

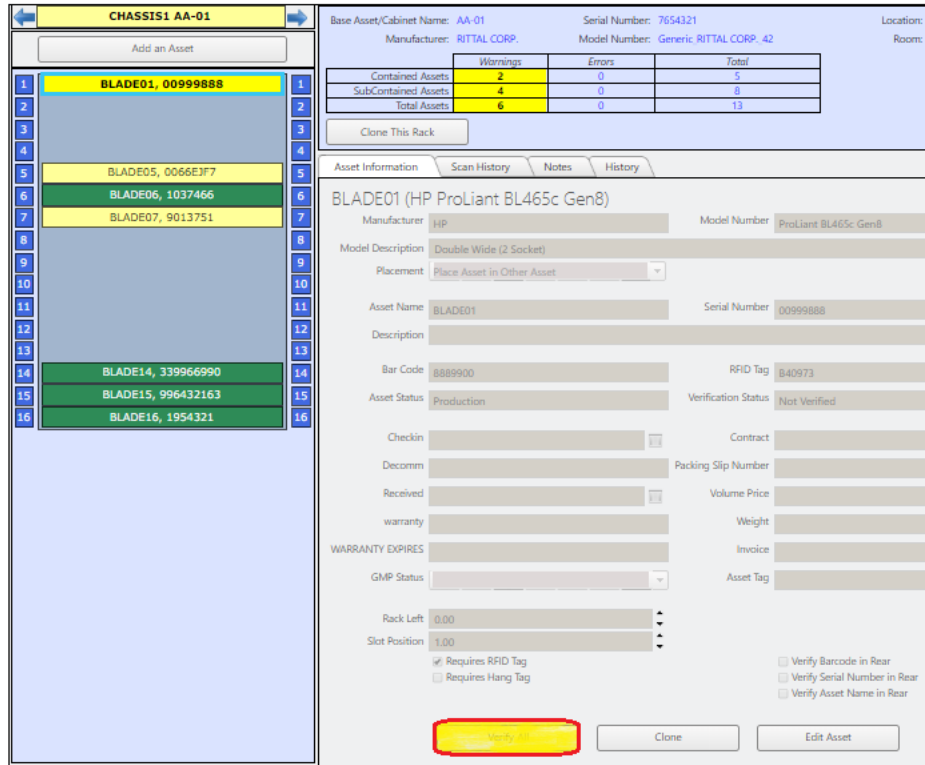
MFG Designed MAX Slots



Asset Vue Graphic

Sub Contained Asset Information

1. The fields you can edit for a Sub-Contained Asset are as follows:
 - a. Asset Name – Device Name
 - b. Serial Number – Enter Serial number of the Rack
 - c. Description – Free Text Comment
 - d. Bar Code – Free Text Comment / Company existing Asset Tag information
 - e. RFID Tag – RFID Tag assigned to the asset
 - f. Asset Status is a “selectable only field”
 - i. Select: Staging / Development / Production / Decommissioned / In Active
 - g. Verification Status is a “selectable only field”
 - i. Select: Verified / Not Verified / Missing in Scan / Confirmed Missing / Tag Missing
 - ii. In elevation view (not sub-contained view) “Verify All” will clear all Yellow warnings including Sub-Contained devices
 - iii. In Sub-Contained view, “Verify All” will clear all Yellow Sub-Contained asset warnings as well as Yellow warnings of the parent asset they are contained within.



Scan History Tab

The Scan History is the record of each time the Assets RFID Tag has been scanned into the database or changed

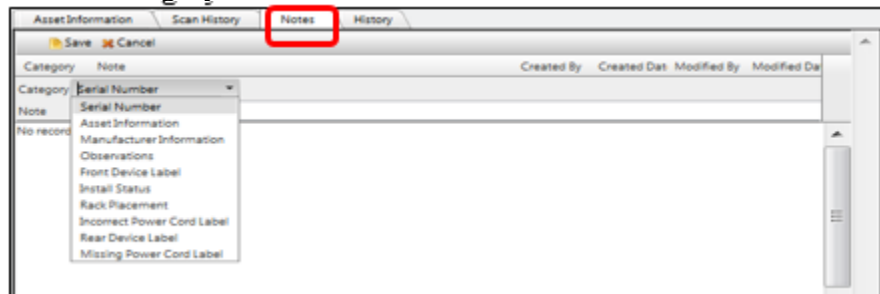
1. Items recorded are:
 - a. Scan Info
 - i. Accepted / Tag Number
 - ii. Scan Date / Scanned By
 - b. Base Asset/Cabinet
 - i. Asset Name / Serial Number
 - ii. Manufacturer / Model Number
 - iii. Location
 - c. Scanner
 - i. IP Address / Antenna

Scan Info		Base Asset/Cabinet		Scanner
Id/Tag Number	Scan Date/Scanned By	Asset Name/Serial Number	Manufacturer/Model Number	IP Address/Antenna
No 120910125400257	12/23/2013 1:16:02 PM admin	BC10 NONE ss	XSIGO Unknown Model	craig_permitted Crag_Allowed: Antenna

- d. Only “Accepted” Scan data is recorded
 - i. For example, if you ‘uncheck’ scanned items in the Scan Preview Screen, those scanned items are not recorded. They are not accepted.

Notes Tab

1. Category selection
 - Default **Notes** Categories include (please contact support@assetvue.com to modify):
 - Serial Number
 - Asset Information
 - Manufacturer Information
 - Observations
 - Front Device Label
 - Install Status
 - Rack Placement
 - Incorrect Power Cord Label
 - Rear Device Label
 - Missing Power Cord Label
2. Choose the category to **enter** Text note or **delete** a Text note



ENTERED 'INSTALL STATUS' NOTE

Category	Note	Created By	Created Date	Modified By	Modified Date
Install Status	This is installed	admin	1/22/2014 3:08:29 PM	admin	1/22/2014 3:08:29 PM

History Tab

Asset History records all activity for the life of the asset and the changes made to it. Any changes that are saved is recorded and used in Reports

1. The items recorded are:
 - a. Date
 - b. Modified by (whom)
 - c. Action – There are three actions: Create / Update / Delete
 - d. Field name that was changed
 - e. Original Value
 - f. New Value

Edit Asset Models

Maintain the Manufacturer and the Model information

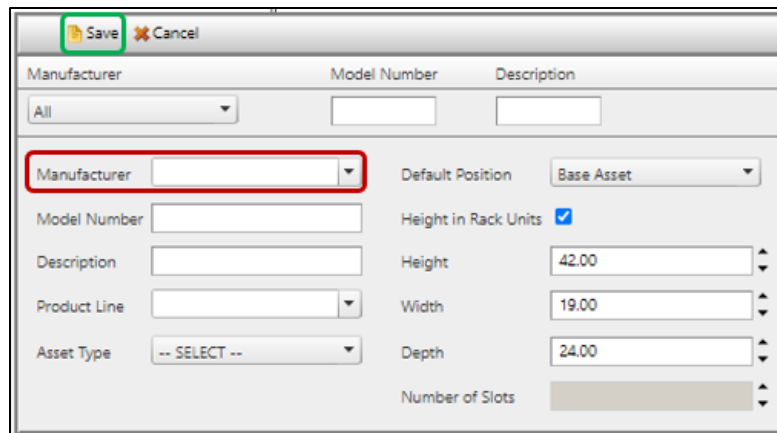
- Manufacturer’s maintenance includes the ability to Add, View, Update and Delete
- To delete a manufacturer, you must first delete the **PRODUCT LINE** dependency for that manufacturer.
- The Administrator can configure the application to turn off the Manufacturer / Model editing

NOTE: Once a Manufacturer is created, it cannot be edited in the application but can be updated in the database

MAINTAIN MODELS AND MANUFACTURERS								
Manufacturer	Model Number	Description	Product Line	Asset Types	Default Position	Height	Width	Depth
All				All	All			
AMCO	TITAN TCM 45RU	45 RU RACK	AMCO	RACK	Base Asset	45	19	30

Adding a Manufacturer:

1. Select **Add New** menu item



2. Type in the New Manufacturer name in the **Manufacturer** field
3. Complete the other fields for the Model information
 - a. See “Adding a Model” for details
4. Click on **Save**

Adding a Model

NOTE: Make sure the Asset Type exists or Add the Asset Type before adding the model

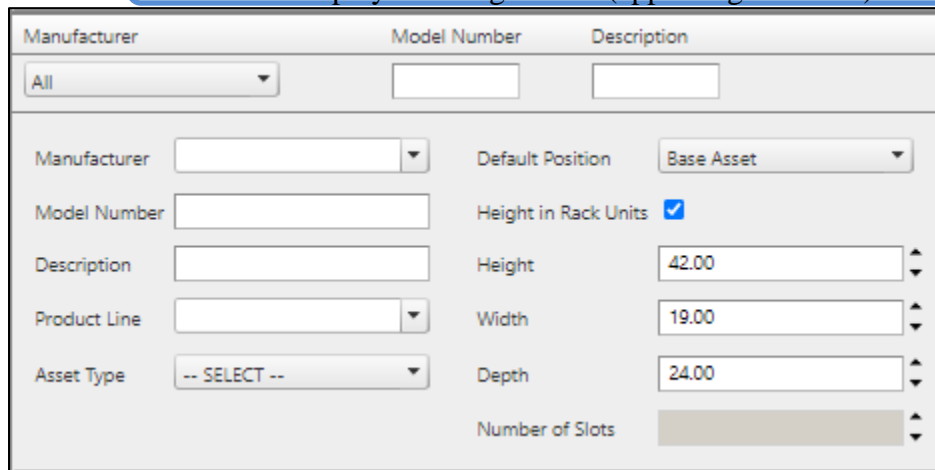
1. Select **Add New** menu item
2. Select the Manufacturer
3. Enter the Model information
 - a. Model Number
 - b. Description
 - c. Product Line: (Selectable List)
 - d. Asset Type: (Selectable List)
 - e. Default Position: This is the Default device designation or intended position. This can be edited or changed at any time.
 - i. Base Asset

- ii. Contained Asset
 - 1. Contained assets with Sub-Contained Assets must define the MAX number of slots (See RED outline in screen shot below)
- iii. Sub-contained
- iv. Non-Mounted Asset – Non-RU occupying device
- f. Height in Rack Units / Not checked is Height in Inches
- g. Default values for Height / Width / Depth for each Default Position:

	Base	Contained	Sub-Contained	Non-mounted
i. Height:	42	1	1	1
ii. Width:	19	19	1	19
iii. Depth:	24	24	1	24

iv. **Number of Slots** – This is the MFG, Designed MAX slot positions

NOTE: If this value is not populated for Chassis', switched, etc. Blades will display as a single asset (appearing as a rack) or Not at all.



View of Model in EDIT mode

- h. Select SAVE to keep the edits

Edit Scanners

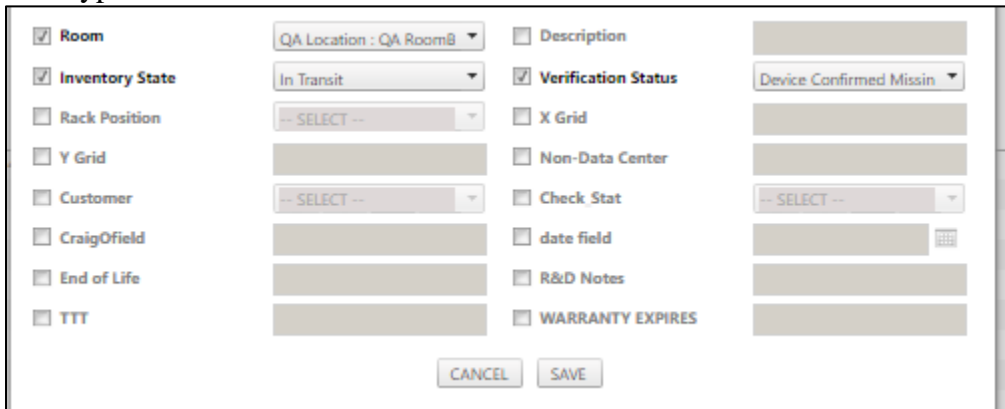
Maintain the *Scanner Types*

1. Includes the ability to search by scanner name, room, and cabinet.
2. Offers selection on choosing the type scanner, allowing Realtime Move and allowing Macros.
3. This page displays the scan count of a scanner and if the heartbeat functionality is turned on, the last communication of the reader itself.

MAINTAIN SCANNERS							
Scanner Name	Type	Room	Cabinet	Allow Realtime Move	Allow Macros	Scan Count	Last Communication
C0scan-1	Wedge			False	True	0	
Wedge	Wedge			False	False	39	5/29/2020 12:43:54 PM
MAINOFFICEXARRAY-*	Realtime Room	1410 RUSSELL RD : ROOM-A-TEST		False	False	0	3/25/2020 10:41:01 AM
37019322283-1	Realtime Cabinet		Asset Vue Rack 1	False	False	0	

From here you can add new scanners, create the name, set the type and choose if you wish to allow macros

If you were to allow macros you will be offered a selection of different customizable process for your scanner type

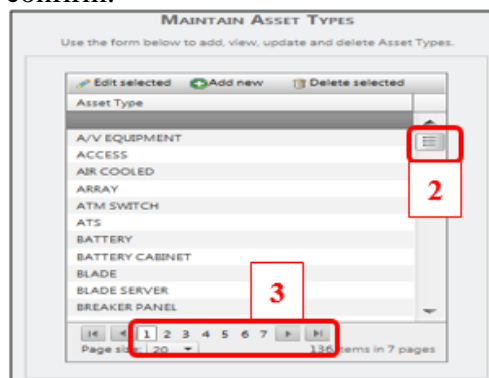


This also supports the User Defined Attributes in the specific integration.

Edit Asset Types

Maintain the *Asset Types*

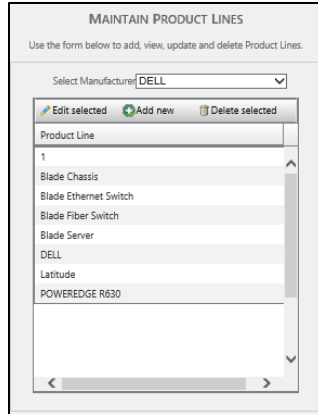
1. Asset Types maintenance includes the ability to Add, View, Update and Delete
2. To add a new Asset Type, simple hit “Add new”, Type the new Asset Type and select Save.
3. To edit or Delete scroll to the Asset type you wish to update
 - a. Select the Asset Type
 - b. Choose to Edit / Delete
 - c. Save the edited information
 - i. To delete, select the item that is to be removed and select Delete and confirm.



Edit Product Lines

Maintain the *Product Lines*

1. Product Line are associated to the Manufacturer
 - a. Click the drop-down selection to choose the MFG
2. Select action to take including: Edit / Add new / Delete Selected



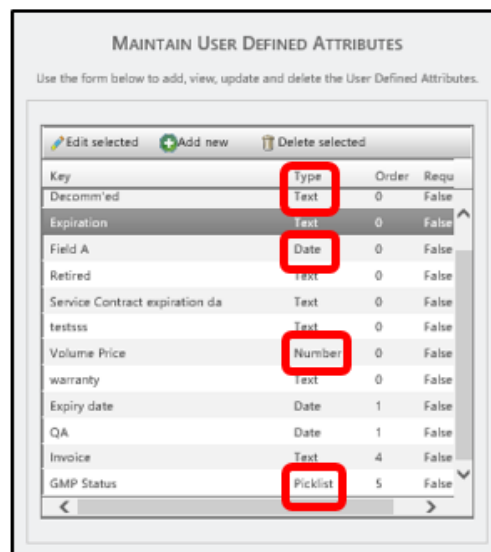
3. All Product Lines must be deleted for the MFG to be deleted

Edit User Defined Attributes

Maintain the User Defined Attributes (UDF)

1. Asset Types maintenance includes the ability to Add, View, Update and Delete
2. Add a new UDF the click Add new
 - a. **KEY:** Enter the name of the UDF in the Key field
 - b. **TYPE:** Select the TYPE of field: Text, Number, Date, Picklist (details below)
 - c. **Picklist Allowed Values:** values to select in the UDF drop-down field.
 - d. **Order:** Dictates sort order. The final sort order is decided by Order, then name of field(A-Z).
 - i. Fields are rendered left to right, then to bottom, like:

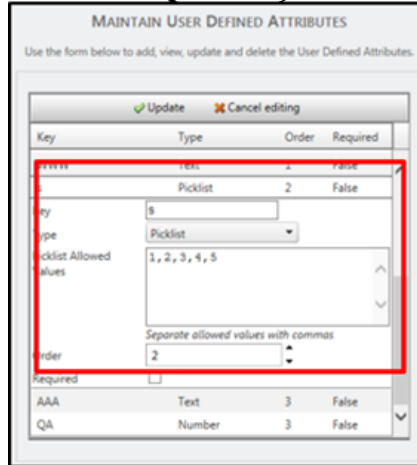
Field A Field B
 Field C Field D
- a. **REQUIRED:** Determines whether a required field validator is triggered on the asset edit screen



Highlighted is each TYPE of UDF

3. Edit or Delete

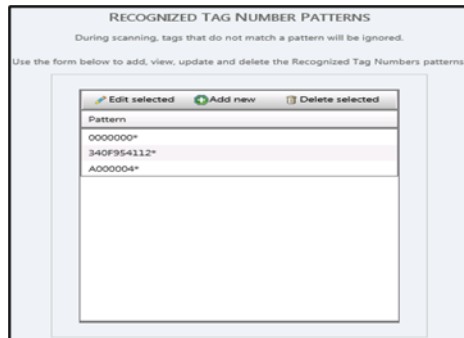
- a. Select the field you wish to Edit or Delete
 - i. Change the options or values of the field you wish to Edit
 - ii. Confirm the Delete action if you are deleting
4. Rules of each field
 - a. **Text:** Reserved words **cannot** be used as a UDF name (Key)
Examples of Reserved words are: Asset, Status, Customer, etc.
 - b. **Number:** UDF will only accept numeric values
 - c. **Date:** A calendar will appear in the Asset’s Data screen to select a date
 - d. **Picklist:** Comma separated values (no spaces) are entered into the “Picklist Allowed Values” field to setup the only values to select for this field



Editing the “S” Picklist user defined field

Edit Recognized Tag Number Patterns

1. This setting will only report on RFID TAG number sequence(s) that are listed
2. In the Recognized Tag Number Patterns section, you can Add / Edit / Delete Tag Number sequence(s)
 - a. Select Add menu option to ADD a new Tag Number Sequence
 - b. Select the Tag Sequence and the EDIT menu option to Edit the Tag Number Sequence
 - c. Select the Tag Sequence and the DELETE menu option to remove the Tag Sequence from the list



Edit Customers

Maintain the Customers

1. Click Add new menu item to add a New Customer
2. Gain focus on a listed customer and click Edit to modify an existing Customer
3. Gain focus on a listed customer and click Delete selected to remove a customer
 - a. If there are any customer assets associated to the Customer you want to delete, you will have to disassociate the Customer name from the Asset

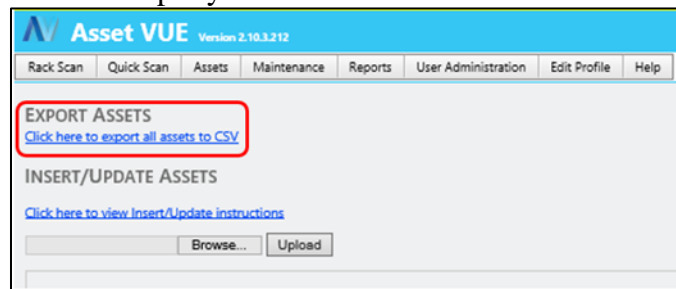
Data Export/Import

This Maintenance item is intended for Bulk Export and Import of new and existing asset data. You can contact Asset Vue for API updates or the AVIDI (Asset Vue Data Import) tools at:

support@assetvue.com

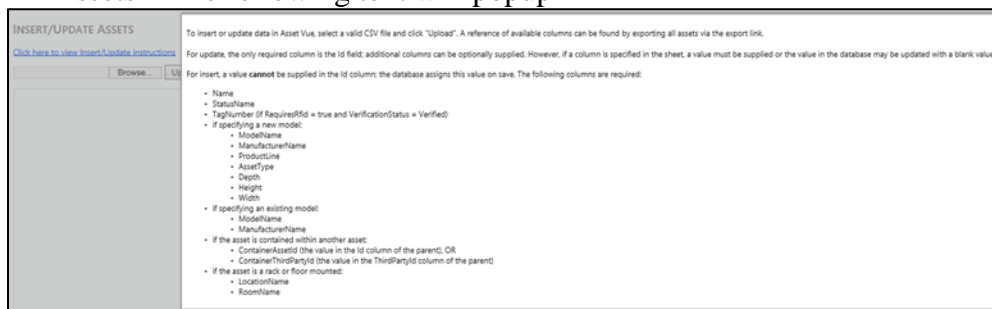
Export Assets

1. Click the Link to export to a CSV file all existing assets and fields
 - a. File will download to your Browser's Download folder
2. Manipulate the data by filtering the assets for updates you want to make
 - a. Examples of bulk updates:
 - i. Add a new User Defined field(s) and populate them quickly
 - ii. Standardize/Normalize the Model(s) to a single model (C-7000, c7000 C 7000 to C7000)
 - iii. Populate all assets that do not have a Thirdpartyid (Blank or NULL) to a valid Thirdpartyid



Insert/Update Assets

1. Click the Link for 'General Rules' to Bulk Insert New assets or Bulk Update Existing Assets – The following text will popup





2. To insert or update data in Asset Vue, select a valid CSV file and click "Upload". A reference of available columns can be found by exporting all assets via the [export link](#).
3. For update, use the *ID* column + fields to update. Additional columns can be supplied. However, if a column is specified in the sheet, a value must be supplied or the value in the database may be updated with a blank value.
4. For insert, a value **cannot** be supplied in the Id column. The database assigns this value on save. The following columns are required:
 - Name
 - StatusName
 - TagNumber (if RequiresRfid = true and VerificationStatus = Verified)
 - if specifying a **NEW MODEL**:
 - ModelName
 - ManufacturerName
 - ProductLine
 - AssetType
 - Depth
 - Height
 - Width
 - NumberOfSlots
 - Position
 - if specifying an **EXISTING** model:
 - ModelName
 - ManufacturerName
 - if the asset is contained within another asset:
 - ContainerAssetId (the value in the Id column of the parent)
 - if the asset is a rack or floor mounted:
 - LocationName
 - RoomName
 - LabelX
 - LabelY
5. Specific Rules Must be adhered to for the Import/Update tool to work.
 - a. Column Names must be exact spelling
 - i. The export file will have the proper column names to use in the Import CSV
 - b. Location and Room must be used together (For Base Assets only)
 - c. Manufacturer and Model must be used together
 - d. Tag Number adds must have RequiresRFID=True and VerificationStatus=Verified
 - e. User Defined Fields must exist and the data being inserted must match the data type (i. e. Date must have a Data type column data/ Pick list data must be the only data in that UDF/ etc.)
 - f. Parent Asset must be in the database before adding Child asset

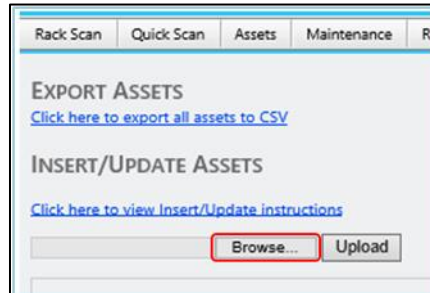
6. Asset Vue has pre-defined Templates for ADD, MOVE and UPDATE
 - g. Use this link to reference our Template Matrix:

<https://assetvue.egnyte.com/dl/1eZT2HQY8Q>

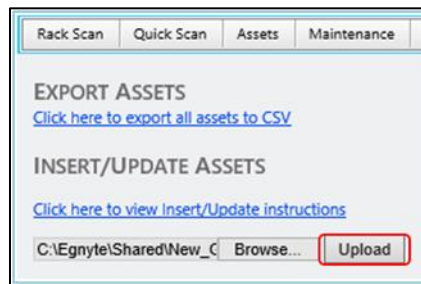
Contact Asset Vue at support@assetvue.com for any questions

IMPORT/UPDATE PROCEDURE

1. Determine the task (import or update)
2. Populate the .csv file with the appropriate columns according to the Matrix above
3. Save the file on your local machine at a known location
4. Click the “BROWSE” button and locate the .csv file

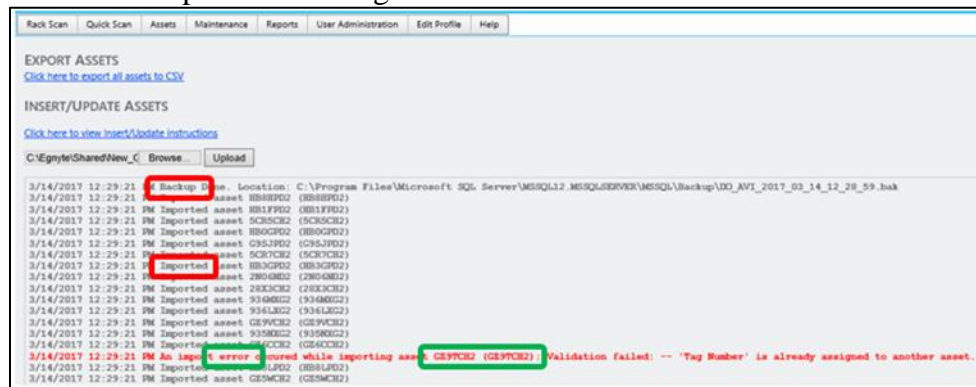


5. Click the “UPLOAD” button



6. Observe the comments and look for:
 - a. Backup being taken every time you run the Import tool
 - i. Backup location is local to the database server
 - b. Messages for the successful Imports/Updates
 - c. Message for the failed Imports/Update
 - d. Correct the .csv file to resolve the failed messages
 - e. Re-run the .csv file

EXAMPLES of possible messages: successful and errors





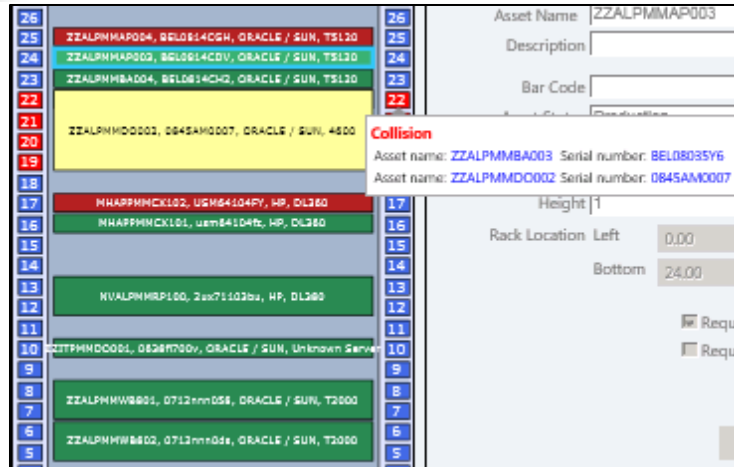
NOTE: The New Tag number can be entered manually or with the use of a Bar Code Scanner into the text field. Just Click in the TEXT box.

Validation

Validation is a scheduled process where routine areas or all assets are reviewed, scanned and resolved within an organization.

Use the **Rack Scan** mode and follow the “**Rack Scan**” steps above

1. View the Rack Elevation panel and validate the Base Asset and each Contained Asset.
2. The color of each Contained Asset or Sub Contained asset will help determine what needs to be addressed and/or corrected prior to Validation. When a device is validated the color turns **GREEN** to indicate all attributes are correct. (See [Color Codes below](#))
3. The color codes and meaning are as follows:
4. Device color codes
 - a. **YELLOW** – Assets not detected but are in the database or Assets detected but are not in the database
 - b. **GRAY** – Available space in rack
 - c. **RED** – Missing RFID tag / Missing in SCAN / Device Missing / Tag Missing
 - d. **GREEN** – Asset is in the correct location and Validated (Validated = the “Verified” option has been selected. Business rules for determining validation selections may vary).
 - e. **PURPLE** – Asset’s RFID tag was last scanned at an *AV Tracker* Portal OR “Moved” (RTR Status in the Search Screen)
 - i. See scan section for details
5. Rack RU color codes (Tips to get additional details)



- a. **RED** – Indicates a physical RU collision (data overlap) between two or more devices.
 - b. Collisions with the ‘Rack’ mean the device is assigned beyond the boundary of the Rack Rails.
6. Using the previously reviewed functions, resolve each condition accordingly.
- a. Examples of some corrective actions:
 - i. View the ‘Actual Physical’ asset placement(s) in the rack
 - ii. Determine which asset is present, validate the Bottom RU
 1. Update the Bottom RU value and Save to **MOVE RU**
 - iii. Determine if a ‘Decommission’ and New device combination (**REPLACED Device**) was not recorded and update Asset Vue record.
 1. Decommission will **NOT DELETE** a device not present
 - a. This device may need to be moved to the designated “Decommission Room”
 2. Add Asset wizard will **ADD** a new device
 - iv. Determine if one of the collisions is a device **MOVED** from a different location within the same datacenter or a different floor
 1. Change the “**Location**” of the device “Asset Information” field and **Save**.
 - v. Determine if the Dimensions of the MFG and Model are correct (Height and Width). Edit this in the Maintenance Mode for MFG / Models

Reports

There are various reports available with the Asset Vue application. These reports are intended to be generic by nature, but a customer can request custom reports if necessary.

Audit Reports

Asset Summary
Asset Verification



Asset Audit Report

Standard Reports

Contained Asset
Last Scanned Flattened
Last Scanned
Scanned Assets
Counts By Room
Collisions



Show Details	Field Name	Object	New Value	Original Value	Base Asset Name	Data Center	Contained Asset Name	Contained Asset RU/Bottom	Contained Asset RU	Contained Asset Validated
Assigned Base Assets										
	Contained Asset	103 G	103J	103 G	North Data Center	PACDCPWTD801A	19.00	2	TRUE	
		103 G	103J	103 G	North Data Center	PACDCPWTD801A	19.00	2	TRUE	
		103 G	103H	103 G	North Data Center	PACDCPADEVAL	2.00	2	FALSE	
3										
3 Is Bottom Starting RU Location										
	Base Asset	Bottom	Top	103J	North Data Center					
1										
1										

Custom Reports

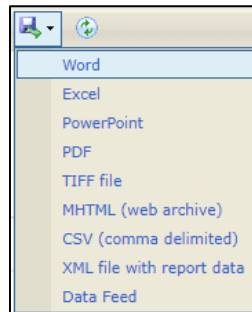
As Requested

Reporting Export Options

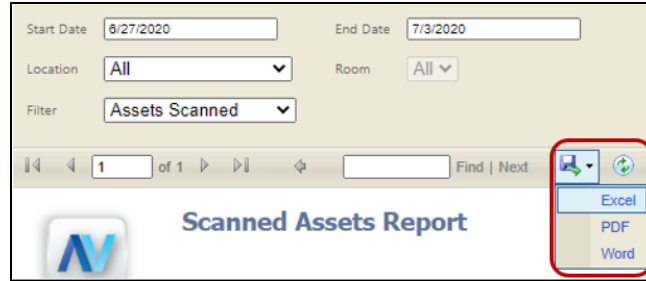
While reports natively render as web documents in a browser, the reporting tools will allow exporting to various formats. Please consider your options and provide the appropriate software on the laptop to complete your needs.

These SSRS reports offer the following export options:

1. Audit Summary Report
2. Last Scanned Asset Flattened
3. Custom Reports (If requested)
 - a. Microsoft Office Word/Excel/PowerPoint
 - b. Adobe Acrobat Reader
 - c. CSV (Comma Separated Value)
 - d. Web Archive
 - e. Image (TIFF)
 - f. XML
 - g. Atom



4. All other Custom Reports
 - a. Excel
 - b. PDF
 - c. Word



User Administration

Create New User

1. New users accounts are generated here
 - a. Enter a User Name
 - b. Enter an E-mail address
 - c. Enter Password (only requirement is 6 characters in length)
 - d. Confirm the Password by re-entering it
2. Read Only Access
 - a. No (Allows Scanner Selection)
 - b. Yes (Removes Scanner Selection)
3. Scanner
 - a. Select a Scanner (drop-down box)
 - i. Scanner names are **Cart** and **Handheld** scanners with Unique Names
 - ii. **Portal** Scanners and **Real Time Rack** Scanners are not included
 - iii. Contact support@assetvue.com to add or edit the scanner names
4. Select a **Role**
 - a. ADMIN – Default
 - b. Customer
 - c. General User
 - d. Super User
5. Based on the Role selected, secondary options will populate next
6. See [Manage Users](#)
7. Select the Add User Button to Save

Roles

Admin

1. Has full rights to all Menu items
2. Is the only role to access and change the Maintenance Menu
 - a. Add, Edit and Delete
 - i. Rooms and Locations
 - ii. Asset Manufacturers and Models
 - iii. Asset Types
 - iv. Product Lines
 - v. User Defined Fields

- vi. User Settings
- vii. Recognized Tag Patterns

Super User

Super User can do user administration (add/delete users) and manage General users and other Super Users.

1. Cannot view or change data related to:
 - a. Maintenance Menu
2. Functions Super User can view and perform are:
 - a. Rack Scan
 - b. Quick Scan
 - c. Asset: Add and Search
 - d. Reports
 - e. User Administration
 - f. Reset/Change Password (Requires Email Access)
 - g. Help

General User

General User has minimal permissions. The intent of the General User is for scanning, searching and reporting. Edit capabilities for this user are limited to asset level changes.

1. Cannot view or change data related to:
 - a. Maintenance Menu
 - b. User Administration
2. Functions General User can view and perform are:
 - a. Rack Scan
 - b. Quick Scan
 - c. Asset: Add and Search
 - d. Reports
 - e. Reset/Change their own Password
 - f. Help

Customer

Customer Role provides a level for user groups under control of the main user or administrator.

Manage Users

1. First option is a "[*click here*](#)" link to add a new user
 - a. Second option is a "[*click here*](#)" link to change a user's password for Password Retrieval / Locked out Accounts
 - b. If Asset Vue does not interface with your company's email service, you must contact an administrator to reset and or change your password.
If Asset Vue does interface with your company's email service, all users can reset/change their own passwords
 - i. **Admins and Super Users** can change passwords for all users.

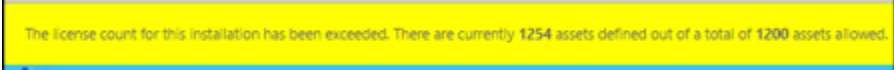


- ii. **General Users and Customer Users** can reset their passwords from the login screen (email required)
 - iii. All Users can change their own passwords from within the Edit Profile page of the application
 - c. If an account is locked out, there are descriptive messages to guide you through the process to get the account unlocked.
 2. Select a user to manage by clicking the ‘Drop Down List’
 - a. Select the User to Manage
 3. Items to manage:
 - a. E-mail: Edit / Update user email address. (Does not send emails or notifications)
 - b. Read Only Access
 - i. No (Allows Scanner Selection)
 - ii. Yes (Removes Scanner Selection below)
 - c. Scanner: Indicates the default scanner this user will be assigned.
 - d. Role
 - i. Drop down Selection to change Role
 - ii. Options: Admin/Super User/General User / Customer
 - e. Location
 - i. Useful for databases on a Central Server with more than one location
 - ii. Admin Role has access to all Locations
 - iii. Super User and General User access to Locations are managed by checking the Locations ‘Check Box’
 - f. Typically, there is only one *location* or site in a Standard Install

License Banner

1. A Yellow Banner will display when you log into Asset Vue Inventory if you have exceeded the defined licensed asset limit.
2. To resolve this issue, please notify Asset Vue when this occurs
 - a. Contact Asset Vue via email (Ticket will be created):
Support@AssetVue.com

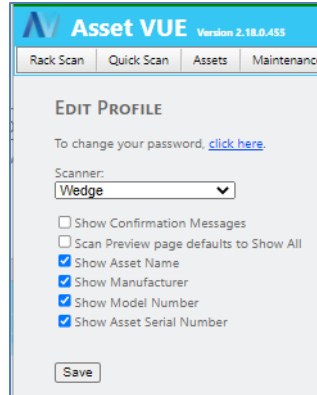
Once you have reached the 105 percentile of your asset amount you will not be able to make any additions of assets.



The license count for this installation has been exceeded. There are currently 1254 assets defined out of a total of 1200 assets allowed.

Edit Profile

1. This section will each user to manage their personal application settings.



2. Change Password link provided
3. Scanner:
 - a. Select a Scanner from the drop-down list
4. Click the Box to Check:
 - Show Confirmation Messages
 - Scan preview Check Box to Default to **Show All**
 - Show Name
 - Show Manufacturer
 - Show Model
 - Show Serial Number
5. Click Save button to Save

Help

1. Displays the Asset Vue version and a link to Asset Vue's User Guide documentation web page (**Customer Share Login Required**)
2. Tells you about our company
3. Why Choose Asset Vue section
4. API Documentation
5. Contacting support

Active Directory and Non-Active Directory

1. Asset Vue Inventory can connect to a company's Active Directory for authentication.
 - a. This would be at the request of the customer
 - b. Contact Asset Vue for specific details
 - c. Application User ID's not in Active Directory will not authenticate except for the ADMIN account
 - d. The Asset Vue Admin account would be used to add the first AD user account
 - i. Make the first AD account an admin ROLE so you can use that to add additional accounts
2. Non-Active Directory
 - a. The Standard installation is the Non-AD version
 - b. Maintains all the same functionality of the AD version without using AD



Glossary:

Definitions

- **Base Asset** - is a Floor Mounted Device or Rack
- **Contained Asset** - is a device which is mounted or placed within a Base Asset
- **Sub-Contained Asset** - is a device which is mounted within a Contained Asset
- **Antenna** - is the Wand which sends and receives a UF signal
- **Wand** - is a handheld Antenna emitting a radio frequency to read an RFID Tag
- **RFID Tag** - is a unique identifying tag placed on an Asset which can be read with either a Bar Code Reader (optional) or an RFID Antenna and Reader
- **Types of Tags** – Asset Vue has standardized on UHF (Ultra-High Frequency) Passive RFID tags for most projects
- **RFID Reader** – is a device which translates the RFID Tag information and submits this information to the Asset Vue database and Inventory application
- **Power Adapter** – charger for the battery on the cart or serves as the alternate DC power source for the RFID reader
- **Scan History** – each time a TAG is scanned, a record is written and kept
- **Record History** – Log of all device activity (MACD – Moves, Adds, Changes, and Deletes)
- **User Defined Values** – The fields define attributes that are important to the customer. These fields should be identified at implementation time.
- **Non-Mounted:** is a location in a rack where devices are not taking up RU space