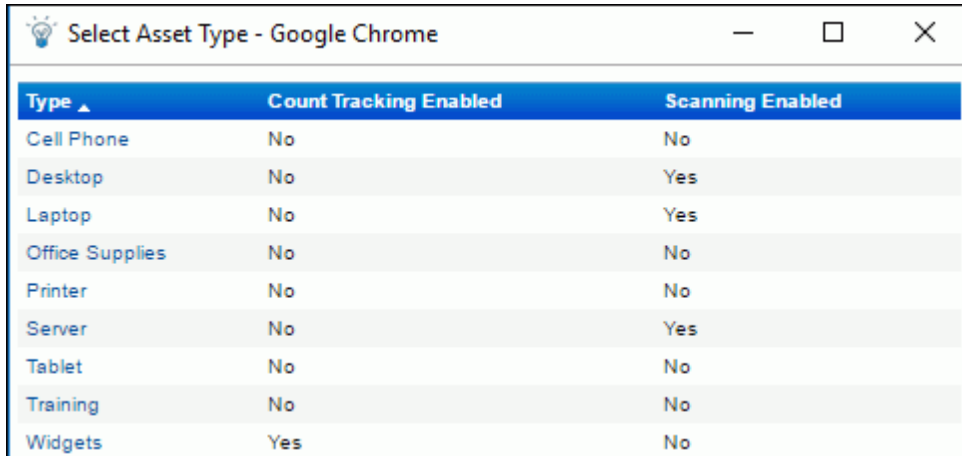# Using the iSupport® Asset Screen

Use the Asset screen (accessed via the Desktop [icon] Create menu) to record information about any type of item. This information can be associated with a customer and pulled into an incident, problem, or change (if enabled). The Asset entry screen allows you to record identification numbers and purchase, warranty, and maintenance information if applicable.

Before you can enter an Asset record, you'll need to select an asset type. Asset types enable you to track information on similar assets (for example, printers, laptops, furniture); custom fields (specific to your company) and fields such as Owner, Tag Number, and Location are associated with asset types. These fields will appear when an asset type is selected in the Asset screen, and in the Incident screen when an asset with the asset type is selected.

Type ▲	Count Tracking Enabled	Scanning Enabled
Cell Phone	No	No
Desktop	No	Yes
Laptop	No	Yes
Office Supplies	No	No
Printer	No	No
Server	No	Yes
Tablet	No	No
Training	No	No
Widgets	Yes	No

The fields and layout in the Asset screen are set up in the Configuration module. Different layouts may be configured for different asset types. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration. The following sections contain information on **all** asset fields.

Name - Enter the name of the asset. When the asset is selected in the Incident, Problem, Change, or Purchase Request screen, the entry in this field will be included on the Asset tab.

Type - The selected asset type appears; click this link to change it. When the asset is selected in the Incident, Problem, Purchase Request, or Change screen, the entry in this field will be included on the Asset tab.

Tag Number/Serial Number/Location/Model/Purchase Date/Manufacturer/Comments - One or more of these fields may appear depending on the selected asset type.

Maintenance Expiration Date - This field will appear if maintenance tracking is enabled for the specified asset type. Enter the date on which the maintenance contract ends. Expiration notifications may be configured to be sent before this date.

Warranty Expiration Date - This field will appear if warranty tracking is enabled for the specified asset type. Enter the date on which the warranty ends. Expiration notifications may be configured to be sent before this date.

Owners - If the Owners field is configured to display for the asset type, click the Add link to assign one or more owners to the asset. You can also click the Company link to associate a company with the asset; this enables targeted customer and asset lookups when you create an incident while viewing a saved Asset, Customer Profile, or Company record. (Note that only one company can be associated with an asset.) A prompt will appear for adding the company's customers added to the Owners field.

Using Count Tracking Fields

Count tracking functionality enables a support representative with the Edit Used Count permission to enter the number of units used and decrement the unit count for an asset selected in the Incident, Problem, or Change screen.

A notification can be configured to be sent when a specified count is reached. If a Product record with a count-enabled Asset type is selected on a purchase request and the flag to create an asset (when all items are received) is enabled, the received count will be added to the Asset Wizard for creating the Asset record.

Unit Count - Enter the total number of units to be tracked for the asset.

Unit Label - Enter a name describing one unit.

Unit Cost - Enter the cost for one unit.

Unit Price - Enter the price for one unit.

Associating Service Contracts

This tab appears if Service Contract functionality is enabled in configuration. Use iSupport's Service Contract functionality to track and restrict incidents and changes for customers, companies, and/or assets. Contracts can be based on work item count (a specified number of incidents and/or changes), hourly count (a specified number of hours), duration (time frame in days), or a combination (limiting the number of incidents and/or changes within a specified daily time frame).

On the Service Contracts tab, click the New link to create a new service contract and assign it to the asset, click the Add link to assign the existing contract to the asset, or click the Remove link to remove the assignment.
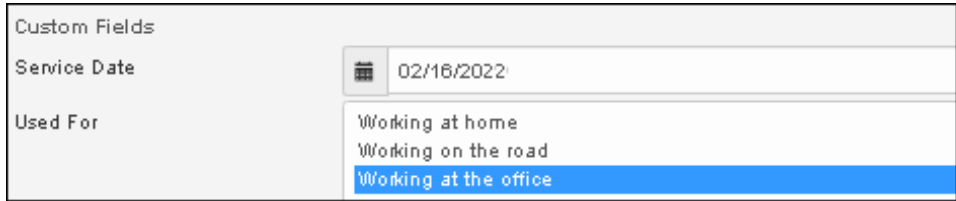

Associating a Configuration Item

Click the Associated Configuration Item link to select a configuration item to associate with the asset. If assets are configured to be an associated item for a configuration item type, the configuration items of that type will appear in

the Select Associated Configuration Item dialog. You can include information on associated configuration items in views, reports, and correspondence.

| Associated Configuration Item	Laptop - Windows

Completing Custom Fields

If custom fields have been set up for the specified asset type and/or for the Asset screen, the fields will appear on the Custom Fields tab. You may be required to enter information in these fields.

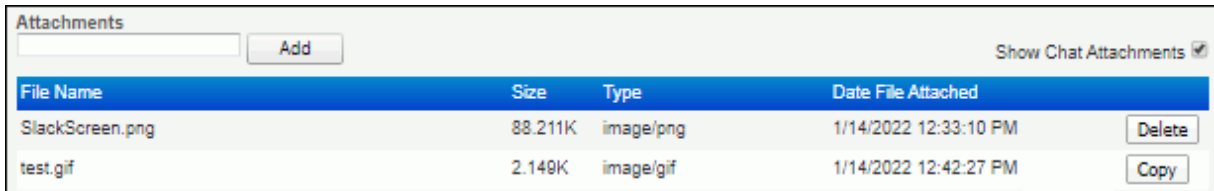| Custom Fields	
Service Date	📅 02/16/2022
Used For	Working at home
	Working on the road
	Working at the office

Assigning to Asset Groups

Asset groups enable you to associate assets for viewing and reporting. If you have Asset | Editor | Edit permission, you can add an asset to a group or remove an asset from a group. This can also be accomplished for selected assets on the Desktop. To assign the asset to an asset group, place your cursor in the Add a Group... field and select from the predefined groups that appear.

An asset group may be configured with group access restrictions; this allows only those in the related support representative group to edit Asset records in the asset group (or any other asset record not included in an asset group). If configured, a support representative can select only his/her groups to add to an asset. Other unrelated groups could be present on an existing asset; these unrelated groups could be removed but not added.

Groups	
Add a group...	🔍
Administrative Assets	
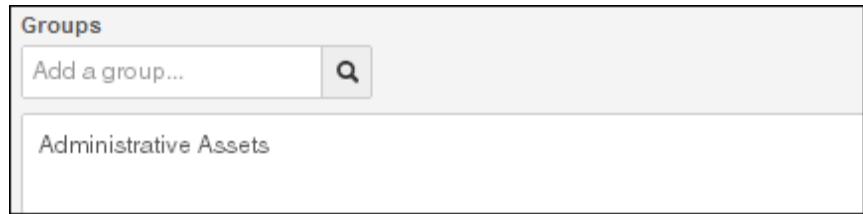
Attaching Files

To attach a file to the asset record, click on the Browse button on the Attachments tab, select the file, and click OK. The file name appears in the Attachment field. Click the Add button to add the file to the list. You can click the Show Chat Attachments checkbox to display attachments added when a chat is initiated with another support representative while the Asset record is open.

Attachments						
	Add				Show Chat Attachments ☑	
File Name		Size	Type	Date File Attached		
SlackScreen.png		88.211K	image/png	1/14/2022 12:33:10 PM		Delete
test.gif		2.149K	image/gif	1/14/2022 12:42:27 PM		Copy

Associating Scheduled Scans

Asset scans can be scheduled and run automatically according to a Scheduled Scan Definition set up in configuration. The Scheduled Scan Definition defines the system(s) to be scanned during a specified start time and duration.

To select an existing scheduled scan to be associated with the asset record, click the Scheduled Scan Source link in the Scheduled Scans field. The Select Scheduled Scan dialog appears with a list of all of the systems on which a scheduled scan has been performed; select the applicable system to display all of the scheduled scans that have run against the selected machine (up to 15 of the most recent scans) will appear. You can click on the date/time link to view a scan.

Scheduled Asset Scans
Scheduled Scan Source: DEV
Created ▾
1/17/2022 3:33:07 PM

Administrators can configure automatic creation of Asset records for machines that are involved in scheduled scans but not associated with an existing record. Note that Asset records are not automatically created via dynamic scanning.

Performing a Dynamic Scan

From the Asset entry screen, you can scan non-Windows SNMP-enabled devices in your network, computers with Windows 98 and above, or any other WMI-compliant machine (WMI must be installed and active). This allows you to collect hardware, software, and service details automatically. The login used to run the scan must be in the Administrators group on the machine to be scanned. If you do not have this login, it can be set during iSupport configuration and accessed automatically by iSupport.

Dynamic asset scans can be performed from the Desktop, Incident screen, or Asset screen. To perform a scan in the Asset or Incident screen, you can select New | 〜 Scan or click the New Scan link. The Dynamic Asset Scan dialog appears:

Computer Systems/System Ports/Peripherals/Hardware Controllers/System Hardware/Drives - Select the types of data to include in the scan. To select all checkboxes in a section, use the ✔ green checkmark icon; to clear the checkboxes in a section, use the ☐ blank checkbox icon. Use the Uncheck All and Check All links for all checkboxes.

Host Address - Enter the identifier of the system to be scanned (IP address, machine name to scan in the current domain, or domain\machine name).

User Name/Password - These fields will be enabled if:

• A default user name and password have **not** been entered for the selected asset type during configuration.

• No is selected in the Use Default Credentials field.

Enter a user name and password with rights for accessing the machine to be scanned.

Community - If you wish to track non-Windows devices on your local subnet, enter the SNMP community string (a text string that acts as a password for a network device). Community strings are configured by administrators of network devices that support SNMP to allow varying levels of access to the devices configuration and operational settings; this grants management tools read-only access to the remote device. The default community string for read-only access to network devices is normally the word "public".

Use Default Credentials - If the user name and password with administrative rights was set up for the asset type during configuration, select Yes to use that login (instead of completing the User Name and Password fields in this dialog) to perform the scan. Select No to enable the User Name and Password fields and enter the login for accessing the machine to be scanned.

When finished, click the Scan button.

After the scan has finished, the Scan Results dialog appears as shown in the example below. Use the links on the left to quickly move to a certain portion of the scan. Choose Save on the Selection menu to save the scan and enter a title.

Selection ▾ New ▾		
Summary	**Title:**	Preliminary Scan
Computer System	**Scan Date:**	7/19/2022 1:49:33 PM
Operating System		
	COMPUTER SYSTEM	
Processes	**Description:**	AT/AT COMPATIBLE

Choose Attach to Asset on the scan's Selection menu to attach the scan to the current Asset record. The scan appears in the Dynamic Scans section in the Asset screen as shown in the example below. You can click on the date/time link to view the scan. To detach the scan from the asset record, click on the date/time link to open the scan and choose Detach From Asset on the scan's Selection menu.

Dynamic Asset Scans
New Scan Delete

	Scan Date ▾	Title	Machine Name	Scanned By
☐	7/19/2022 1:49:33 PM	Preliminary Scan	xxxxx	Barry White

Performing Scan Comparisons

If you have sufficient permissions, you can select two scans (dynamic or scheduled) and then generate and save a side-by-side comparison. From the Desktop, you can select Create | Asset Scan Comparison; from a scan, select New | Scan Comparison. The Select First Scan for Comparison dialog appears; use the drop-down list to display either all dynamic scans or all scheduled scans for the first scan in the comparison.

Select First Scan for Comparison

All Dynamic Scans ▼

Scan Date ▾	Title	Machine Name
1/23/2023 2:27:12 PM	Second Scan	xxxxx
1/23/2023 2:16:49 PM	Initial Setup Scan	xxxxx

The following dialog appears; use the drop-down list to display either all dynamic scans or all scheduled scans for the second scan in the comparison.

Select Second Scan for Comparison

All Dynamic Scans ⌄

Scan Date ▾	Title	Machine Name
1/23/2023 2:27:12 PM	Second Scan	xxxxx
1/23/2023 2:16:49 PM	Initial Setup Scan	xxxxx

The scan comparison appears as shown in this example. Choose Save on the Selection menu to enter a title and save the scan comparison.

Selection ▾   New Comparison

Summary	**Scan Comparison Title:**	**Untitled**	
Computer System	**Date Created:**	3/25/2023 12:29:38 PM	
Operating System			
Processes	**Scan Title:**	**Initial Setup Scan**	**Second Scan**
	Scan Date:	1/23/2023 2:16:49 PM	1/23/2023 2:27:12 PM
Services			
Logical Drives	**COMPUTER SYSTEM**		
Software Titles	**Domain:**	xxxxx	xxxxx
Hot Fixes	**Domain Role:**	Member Workstation	Member Server
Network Adapters	**Name:**		
Parallel Ports	**Model:**	8307313	830731U
Serial Ports	**Processors:**	2	1

Creating Microsoft Outlook/Google Calendar Meetings

If configured, a 📅 New Meeting icon will appear in the Asset screen for scheduling a Microsoft Office Outlook calendar and/or Google Calendar meeting. You can view the schedules of meeting attendees, create a meeting, and configure a notification to be sent to meeting attendees.

Using Awareness and Chat Functionality

If configured, the Awareness feature displays a 💬 Connected Reps icon and alert if two or more support representatives have the same record open. You can click the icon to display the support representative(s) viewing the work item and initiate a chat by clicking on their name. If a support representative is viewing an asset and another support representative modifies and saves a field on that asset, an Asset Modified dialog will appear with the changes that were made. Note that this dialog will also appear for modifications done via Desktop views.

Viewing History

After you save an Asset record, an entry appears in the History field. The 📋 Feed option displays a list of all actions performed on the record, and the 📋 Audit option includes entries on functions performed by the system and

support representatives (for example, field changes), as well as correspondence entries. Work history and chat entries are not included.
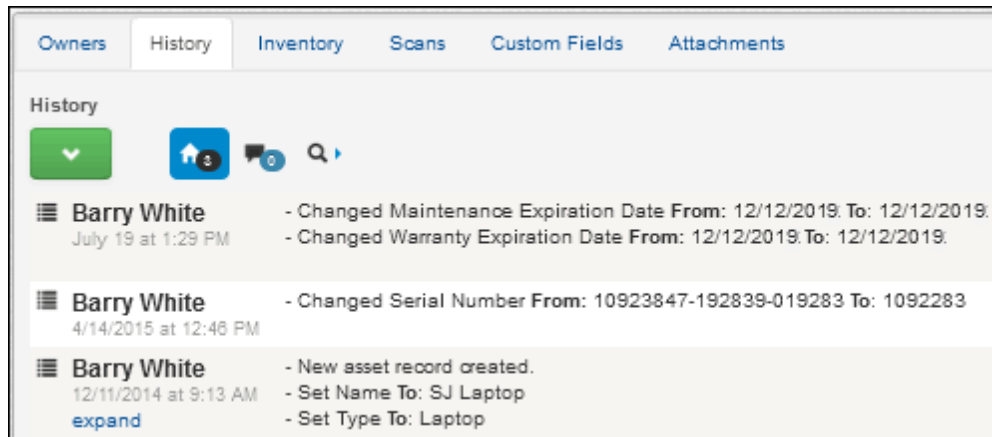
The Chat option displays information on chats initiated via the Awareness feature for the current asset.
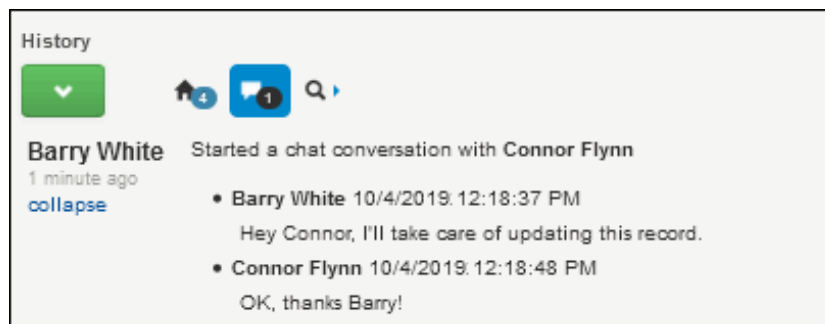
Using the View Menu

Use options on the View menu to display information on:

- All **incidents** that have the asset associated via the Assets field in the Incident screen.
- All **problems** that have the asset associated via the Assets field in the Problem screen.
- All **changes** that have the asset associated via the Assets field in the Change screen.
- All of the other assets associated with the owner of the current asset.

View results will display at the bottom of the screen in the view frame. The frame will be minimized by default; click the up ⬆ arrow icon to expand and collapse the frame. Select ▢ Open In New Window to display the view in a new window. Your selected view and settings will be stored in a cookie, so your selection will be retained until you change it again.

Viewing Rule Information

Rules can be configured to automatically perform actions when conditions are met upon save of a record or after a certain time interval. Actions can include changing Asset field values, sending notifications, and posting data to a web application. Rules are included in rule groups that are applied to Asset records through asset types; a default rule group will apply if none are applicable. When an Asset record is saved, the matching rule group is first determined and then all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed. The online help contains more information on rules.

Click the name of the rule group in the Rule Group field to display the Time-Based Rule dialog with actions that will be and have been taken by any time-based rules in the current rule group. The Hours of Operation link displays the time frames in which the rule group is in effect. Note that entries will include the term "fulfilled" if a rule is invalidated or

reset due to a change in rule configuration. Action dates and times will depend on execution of the Time-Based Rule agent.
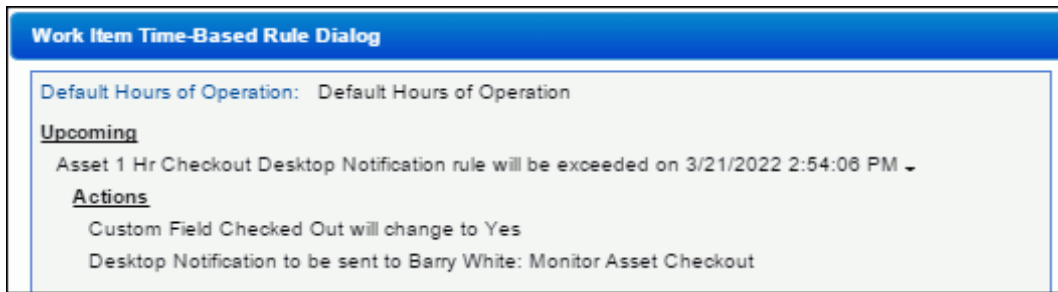
Click the 🕐 Countdown icon to display a dialog containing a countdown clock in the upper right corner with the time remaining until the next action. If a pending time-based rule has not been exceeded, a blue countdown clock will appear; if the time-based rule has been exceeded, a red countdown clock will and the numbers will increment to display the amount of time that has passed since the time at which the rule was last exceeded. You can use the Show Seconds on Countdown field in the Desktop Preferences screen to control display of the Seconds portion of the countdown clock.
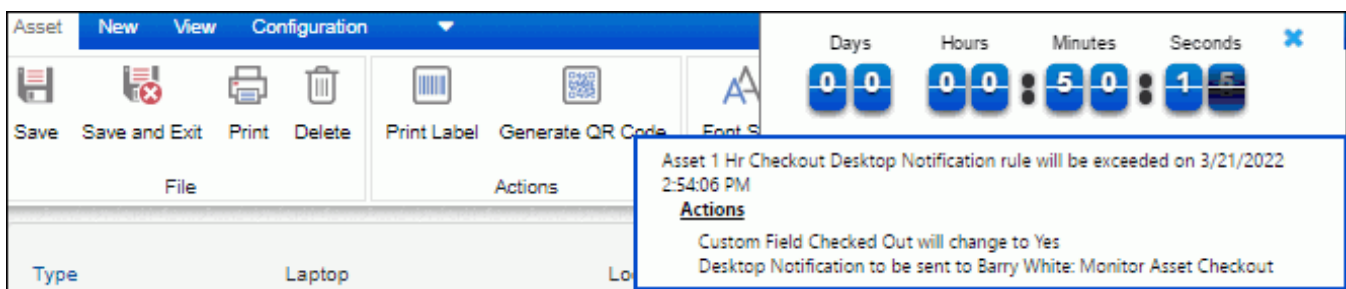
To display all actions that have been performed by rules, use the 🔽② Rule option in the History field.

Scanning Bar Codes and Printing Bar Code Labels

You can scan a bar code into an Asset record and print bar code labels via a Zebra® printer. You can use any Zebra printer that will accept ZPL commands.


If you wish to scan a bar code for an asset, place your cursor in the field in which the scanned bar code output string should be populated and perform the scan. After saving, use the ▥ Print Label icon in the Asset screen to configure and print the bar code label. The ZebraPrint application must be installed for this feature. If using Google Chrome, installation of the ZebraPrint application is handled via the ClickOnce for Google Chrome extension, so a prompt will appear for installing the ClickOnce for Google Chrome extension. Other browsers will prompt for running the ZebraPrint application.

The Asset Labels dialog will appear after installing the ZebraPrint application; you'll select the fields and footer to print on the label via this dialog. Once settings in this dialog have been saved, the settings will populate the fields by default for all Asset records of the same type.

The barcode symbol will be printed with the contents of the field selected for the first line. The footer is auto-calculated as you type to center align the text for a 2" wide label based on the Left Margin setting on the Advanced

tab; however, the footer settings can also be manually adjusted. Use the 🖨 Select Printer icon to select the Zebra printer that will print the labels.
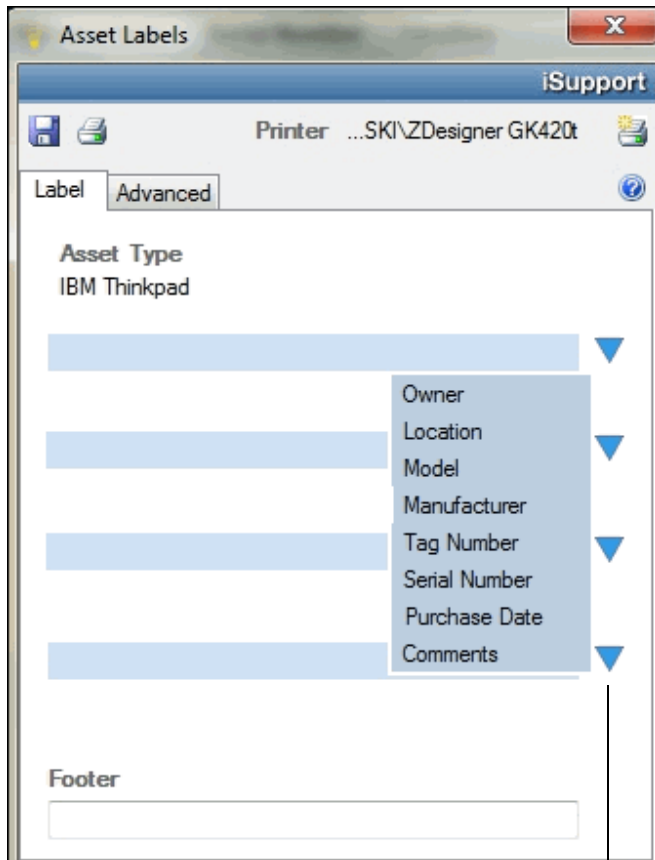

Click the dropdown next to each line to select the fields to print on the label; the barcode symbol will be printed with the contents of the field selected for the first line.
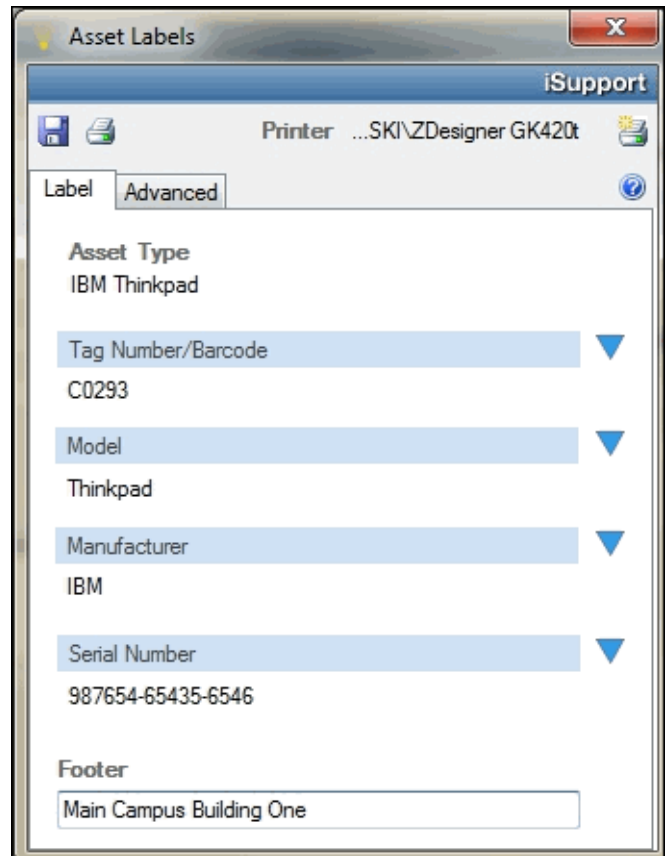
Completed fields

Click the ▼ dropdown icon to select the fields to print; the barcode symbol will be printed with the contents of the field selected for the first line, and the field contents will print below the symbol.

Use the Advanced tab to enter the number of copies to print, the level of darkness of the bar code and text, and the number of dots per inch for the position of the bar code, lines, and footer. Default label settings are for a 1x2 inch label; use the 🔄 Reset to Defaults icon to restore the settings to the defaults for the selected Zebra printer.
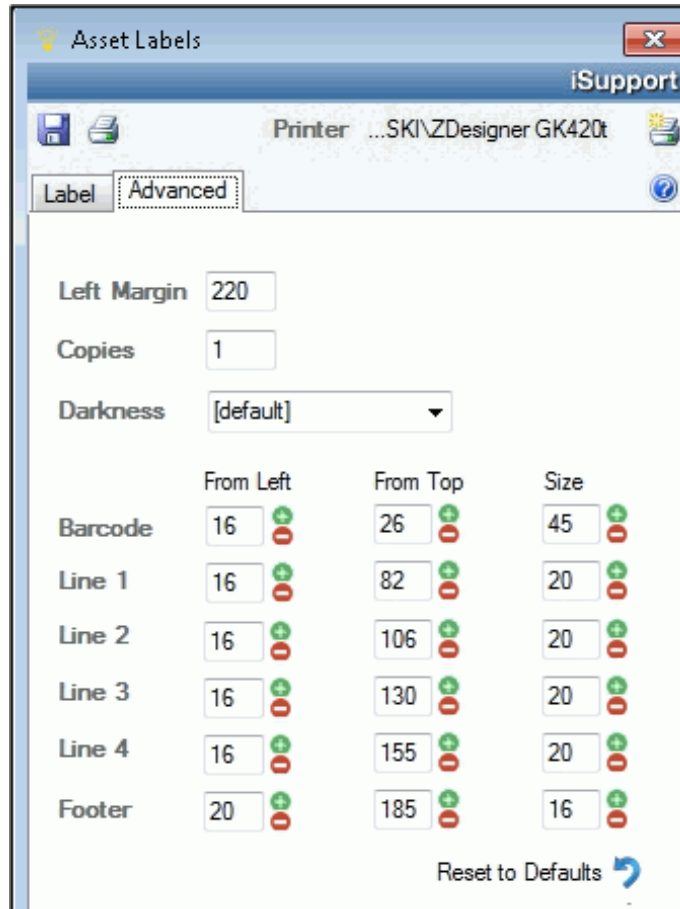
Generating QR Codes

Select the ▦ Generate QR code option in the toolbar to generate a QR code that contains a link that will display information about the record. Select the fields to include for the code in the Generate QR Code dialog and then select Generate; the QR code will appear. You can print it or click the Edit button to redisplay the fields for selection.
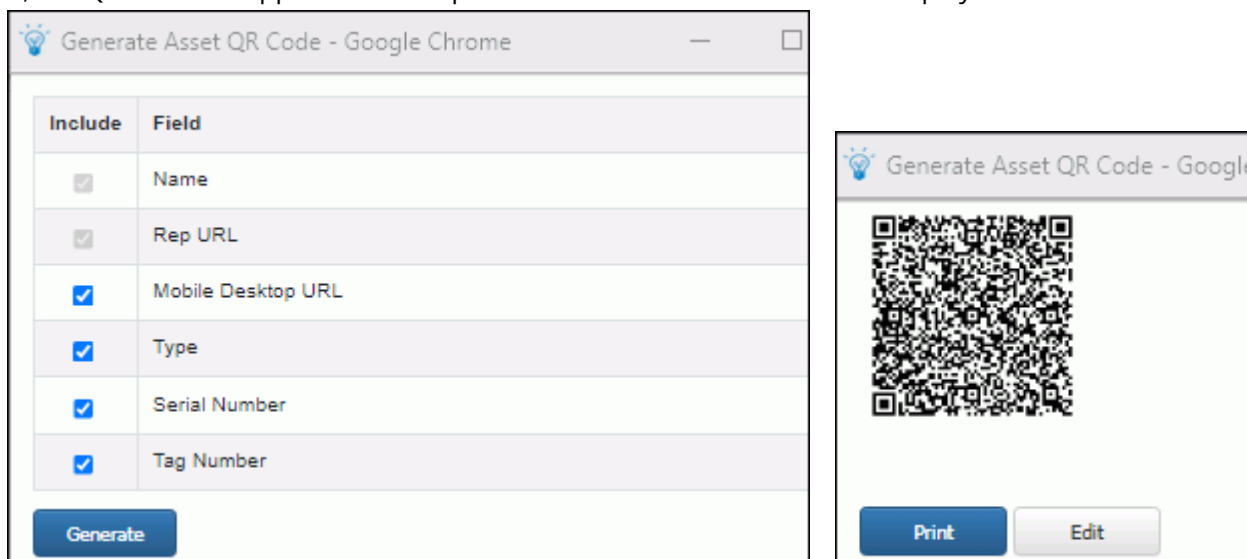
You can also use the QR code to add an asset to an incident, problem, or change via the mobile interface, but note that the QR code reader option for selecting an asset in the HTML5 mobile interface will be hidden if using an Android device.