Product Documentation

Peregrine

AssetCenter

Asset Tracking solution

Part No. DAC-440-EN38

Peregrine SYSTEMS®

Build 24

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AssetCenter

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Introduction

What is the aim of this manual?

This manual aims to provide answers to the following questions:

- What is the Asset Tracking solution?
- What are the key benefits of AssetCenter?
- Who is AssetCenter aimed at?
- What solutions are possible with AssetCenter?
- How does AssetCenter work?

Who is this guide aimed at?

This guide is aimed at any person who would like to have an overview of the Asset Tracking solution. This guide aims to provide answers that are:

- **direct**: You are not required to install or use AssetCenter
- **comprehensive**: An **executive** presentation (▸ The Asset Tracking solution [page 11]) and a **practical** demonstration of the Windows interface functionality (▸ Guided Tour [page 14]) are included

In particular, this concerns anyone who wishes to evaluate the potential of AssetCenter, such as:

- Journalists
- Industry experts
- Consultants

How to use this guide

Chapter Positioning

This chapter enables you to understand:

- What Peregrine does
- What solutions are possible with AssetCenter

Chapter The Asset Tracking solution

This chapter helps you discover the Asset Tracking solution through the interfaces and functionalities of the various Peregrine Systems applications.

This "guided tour" includes numerous screen shots.

You are not required to install these applications.

1 Positioning

CHAPTER

What we do

Peregrine has over 20 years of experience helping customers achieve the highest return on their asset and service management investments. That experience has led us to build industry best practices, including those reflecting IT Infrastructure Library (ITIL) guidelines, into our products.

Asset Tracking with the Peregrine software suites

The architecture of Peregrine software reflects the problems that its customers are facing in their fields. Peregrine Systems' main software pieces are oriented towards asset and service management (AssetCenter, ServiceCenter), HelpDesk

(ServiceCenter) or Web client interfaces (AssetCenter Web, Get-It). Peregrine inventory tools (Peregrine Network Discovery, Peregrine Desktop Inventory) and data migration tools (Connect-It) guarantee the consistency of customer information across the various applications.

CHAPTER 2 The Asset Tracking solution

In order to share its customer experience, Peregrine Systems has created Value Path, a services and support program that combines Peregrine's best practices expertise with your field experience. Whether you are an existing or a new customer, Value Path enables you to get the best added value from our solutions.

Asset Tracking is the first component of the Value Path program. It is linked to the three other components, all three of them being Peregrine solutions: Expense Control, Process Automation and Asset Optimization.

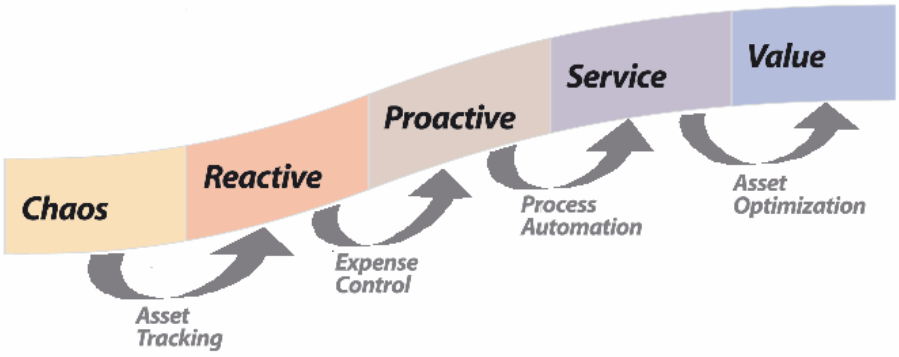
Asset Tracking at the enterprise level means cradle-to-grave asset management. The keyword is management. This means knowing who does what, with what assets, where those assets are located and what ownership costs arise from this.

It is important to realize that no effective management system can be successful unless a measurement system is present. Within Asset Management this measurement system is woven within the fabric of business and operational processes that form the infrastructure of the IT organization.

When using an asset management tool such as AssetCenter in addition to a network exploration tool such as Peregrine Network Discovery and Peregrine Desktop Inventory, both integrated with your field and operational processes, you put yourself in a position to manage your IT portfolio with effectively.

Peregrine has identified five stages through which companies evolve in their desire to achieve effective Asset Management within their infrastructure: chaos, reactive, proactive, service and value. To advance through each of these maturity

stages requires the implementation of processes to enable a smooth evolution towards a greater control of IT.



Today, software asset management is a pressing issue for 90% of companies. The IT department needs to know what software is used and by whom, where it is used, what costs are generated, and above all if usage is compliant with acquired licenses. In order to move beyond this first state of chaos, you need to deploy tools to help you manage assets (network discovery, inventory and cost tracking tools). Peregrine Systems offers a set of asset and services management solutions that can answer these needs.

Asset and service tracking is **the** fundamental step towards true asset management. The Asset Tracking solution identifies all IT equipment making up the environment, all configurations and tracking information, as well as specific installed software. This information is kept in a central repository that can be used as needed to manage equipment throughout their entire lifecycle, from acquisition through disposal. Information in this repository can be analyzed and used in other enterprise applications.

The Asset Tracking solution includes:

1. The Asset Tracking Assessment report. This report provides a clear review of a Peregrine customer's ability to track assets within their environment. The scope of this review will determine:
   - the assets that need to be tracked and their associated data
   - implementation constraints related to business and operational targets of the customer

- the effectiveness of the customer's Install, Move, Add, and Change (IMAC) processes and make recommendations for improvement and alignment to AssetCenter
- the desired level of granularity of asset tracking
- the next steps required to move to the reactive phase

2 Unique identification of hardware and software associated with a network component.
- Benefit: Basis needed to establish software license compliance.
- Benefit: Basis to establish standardized platform policies for hardware and software and for disaster recovery planning.
- Benefit: Accurate vision of a computer population available to helpdesk and technical support technicians.

3 Implementation of automated hardware and software inventory through out-of-box tools.
- Benefit: Document changes to asset inventory that can be reconciled utilizing Peregrine's reconciliation engine to ensure asset accuracy and integrity (user ID, machine name, memory change, and other asset attributes).
- Benefit: Provides management insight of existing asset environment to improve planning and preparation for major asset upgrades, replenishments or migrations.
- Benefit: Reduce need for physical inventories and asset audits within your environment by automating the identification of new assets.

4 Provide ad-hoc management reports of assets, and their attributes, via AssetCenter views.
- Benefit: Improves asset-reporting ability of hardware and software attributes to ensure compliance with laws governing control of assets and associated relationships.
- Benefit: Provides administrators the ability to analyze asset environment to improve service support, reduce costs of procurement, and respond to management requests.

5 The ability to create purchase requests through Get-Resources Portfolio.
- Benefit: Simplified and employee friendly use of request for resources to meet daily needs. This would include requests for hardware and software needs or information as well as request for desk side support due to hardware and/or software breakdowns.
- Benefit: Request management facility can launch workflows that ensure process integrity and can reduce cost through automation.

6 Basis established to provide future integrations to other applications and to pass important information about assets to other applications.

Guided Tour

This chapter emphasizes the information that you have at your fingertips with AssetCenter.

You do not need to install AssetCenter: Screen captures show you the result in the Windows interface.

Let's assume we are an IT manager who requires executive information on the computer population and its maintenance costs.

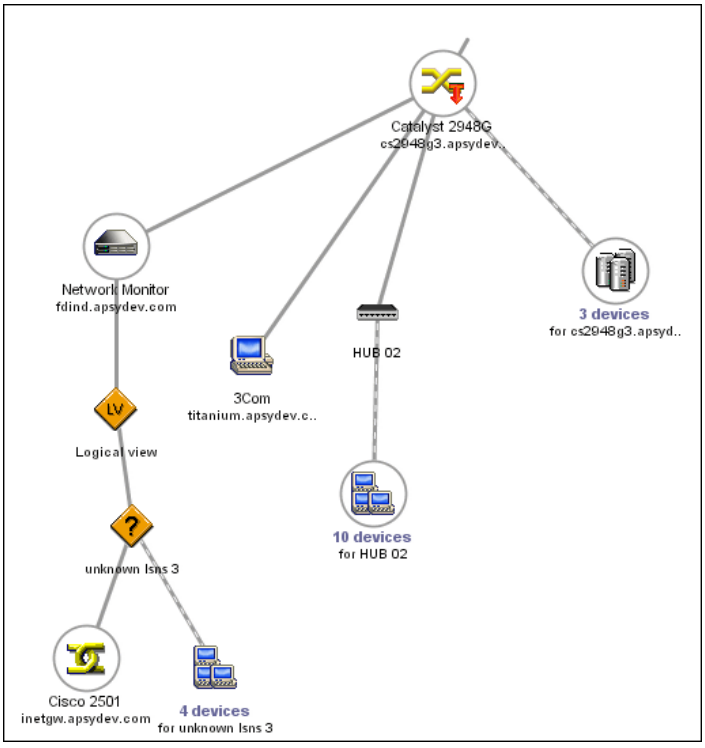
What is AssetCenter useful for?

AssetCenter enables you to manage your asset portfolio and all events associated to the lifecycle of each of your portfolio items: asset acquisition, related costs (taxes, property, maintenance contracts, work orders, etc.).

Inventory tools

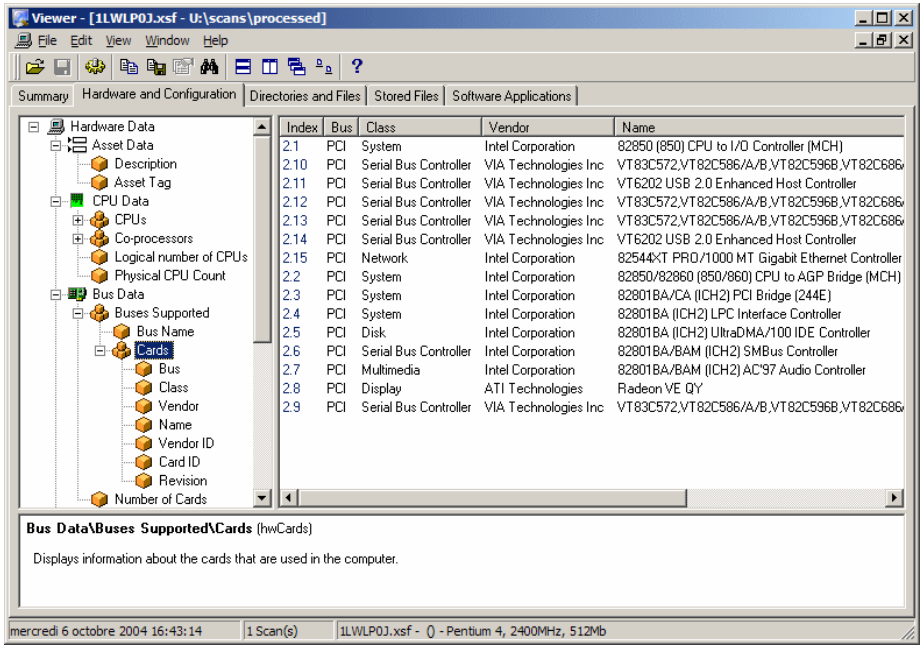
Using Peregrine Network Discovery and Peregrine Desktop Inventory makes it possible to obtain a global view of an IT portfolio.

Figure 2.1. Peregrine Network Discovery



Each portfolio item discovered by Peregrine Network Discovery is then examined with Peregrine Desktop Discovery and its technical features are collected.

Figure 2.2. Peregrine Desktop Discovery



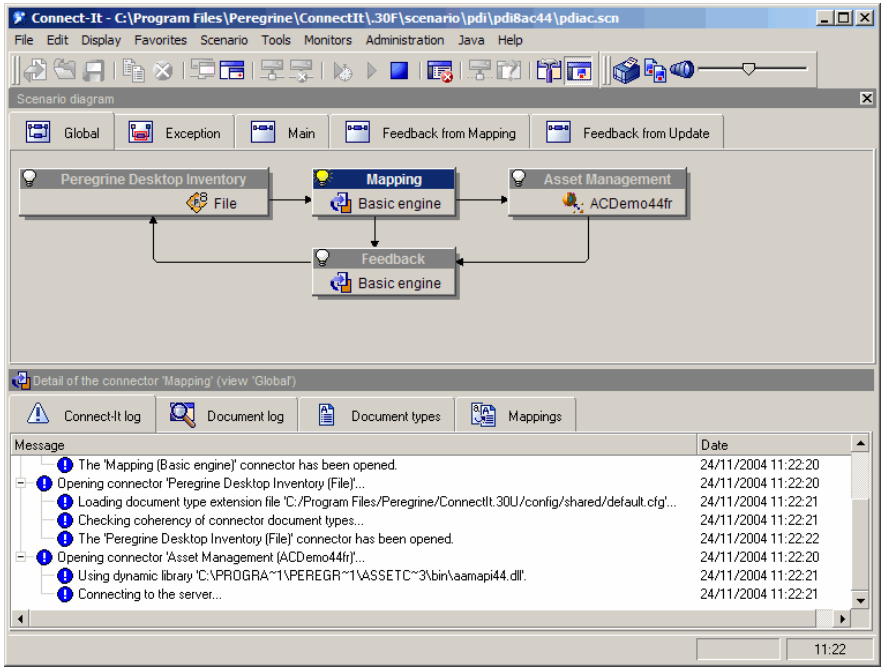
Information collected through Peregrine inventory tools are then transferred to the AssetCenter production database via Connect-It.

- **Peregrine Desktop Discovery** guide.
- **Peregrine Network Discovery** guide.

Data-migration tool

Connect-It enables data transfer between two applications; it queries a source application database in order to extract data that can be interpreted by a target database.

Figure 2.3. Connect-It - data transfer



Connect-It is delivered with the AssetCenter program in order to provide you with:

- Real-time replication of data shared by two applications, such as Peregrine Network Discovery and Peregrine AssetCenter.
- Data migration from a legacy database to an AssetCenter database

▸ **Connect-It User Guide**.

▸ **AssetCenter Reconciliation** guide.

The AssetCenter Asset Tracking solution

The following modules enable the asset tracking and management:

- Barcode Inventory
- Portfolio
- Reconciliation

- Contract
- Software Asset Management

Portolio tracking granularity

Before any physical and IT inventory of your assets, you should think of how detailed you would like your asset management to be.

Your portfolio structure should take into account the AssetCenter data model. The administrator's role will be to define natures and models that best reflect the reality of how the portfolio is managed.

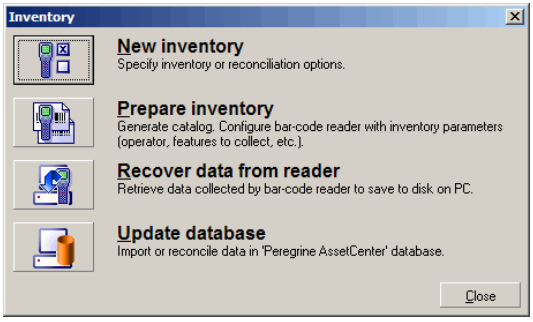
▸ **Portfolio and Software licenses** guide, chapter **Overview**.

Barcode Inventory

Asset and service management with AssetCenter starts with a physical inventory of all company assets.

The bar-code inventory module is used to:

- Collect with speed and accuracy, your company's assets in order to build an AssetCenter database.
- Uniquely identify each of the company's assets in order to keep track of changes in your inventory. This makes it easy to detect movements, acquisitions, loss or theft.

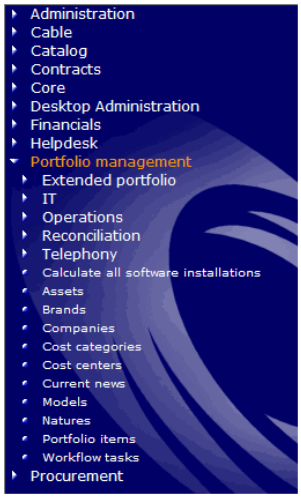


The administrator records each of the assets to be inventoried with a reader that has been configured for the purpose, and then transfers the data to AssetCenter. The data related to the inventory is visible in the Portfolio screen.

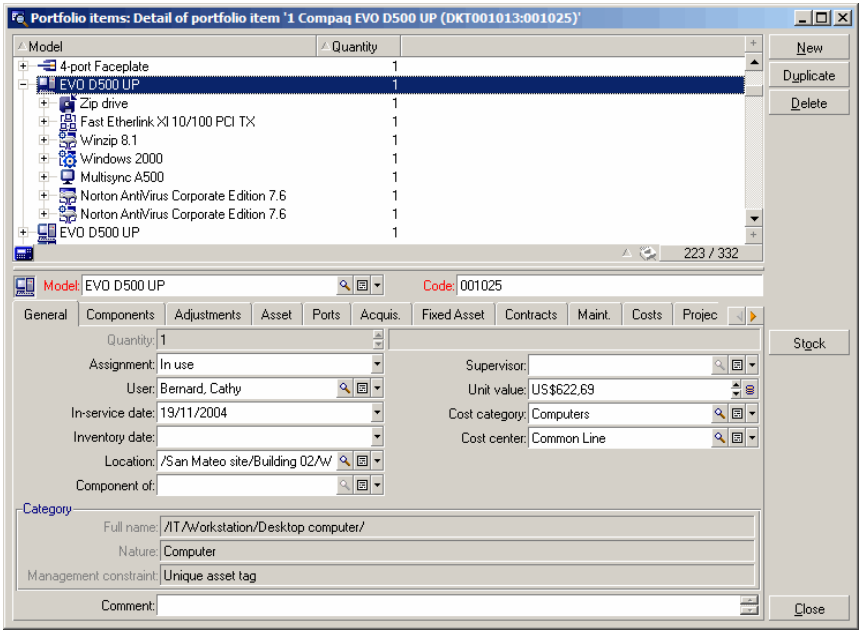
▸ **Bar-code Inventory** guide

Portfolio

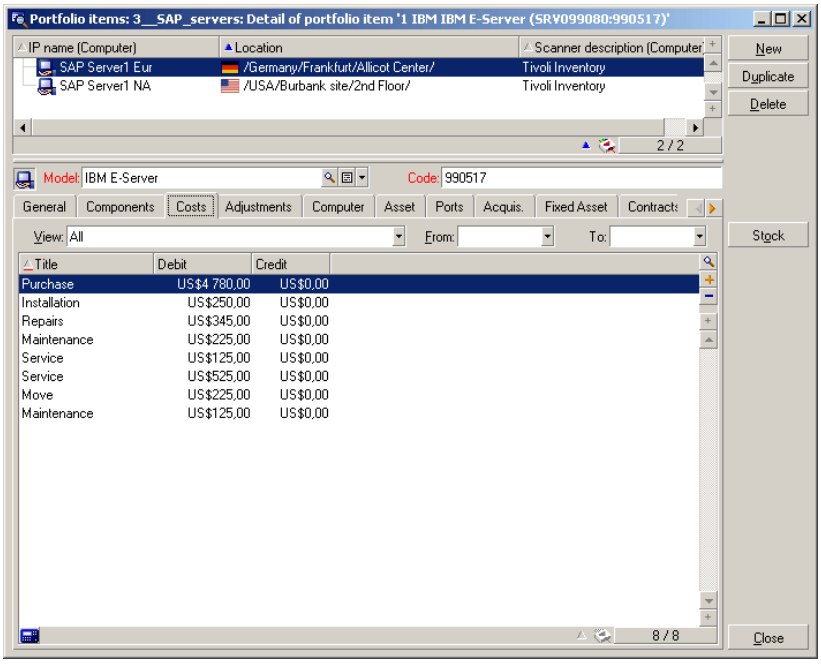
The administrator accesses the portfolio with the **Portfolio management** shortcut.



All the assets in your IT portfolio are visible from the **Portfolio items** screen.



With a single click, you can access information related to any given item of your IT portfolio.



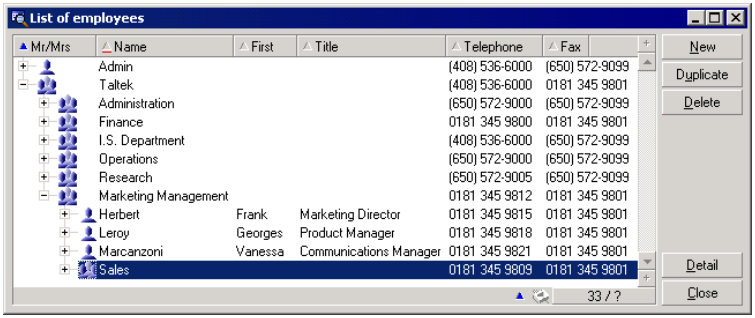
For each selected portfolio item, all information and dependencies are visible:

- Items attached to this item: Peripherals and software
- Technical features of this item: Memory, CPU, drives, etc.
- Identification of the asset: asset tag, barcode, etc.
- Acquisition cost
- Immobilization cost
- Contracts linked to the asset: leasing contracts, maintenance, warranty extension, etc.

Hierarchy

According to the level of granularity you have defined for your asset management system, you can manage items more or less closely. This level of granularity defines a hierarchy of the items making up your portfolio.

This granularity is visible for instance for departments and employees.



- **Portfolio and Software licenses.**

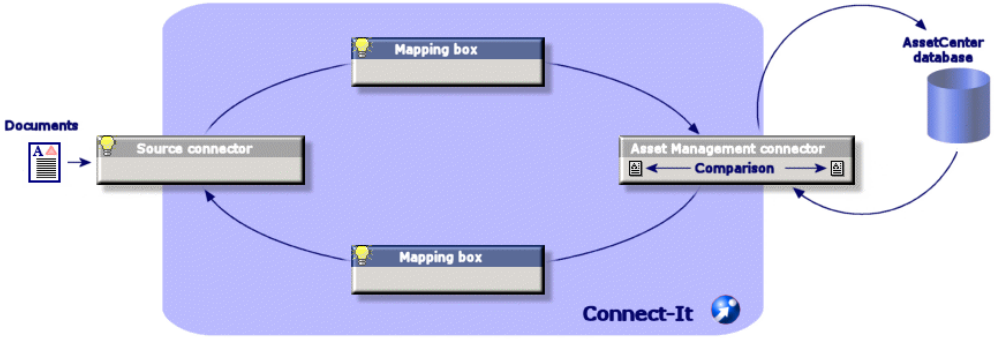
Reconciliation

Data reconciliation is performed using Connect-It.

Reconciliation is the process of integrating incoming data from a source application that is considered more up to date than the data already present in a target application.

This process is based on the following question: "Does the incoming data already exist in the target application?"

- If the answer is "no", the data is inserted
- If the answer is "yes", then the existing data is updated according to the new information contained in the incoming data



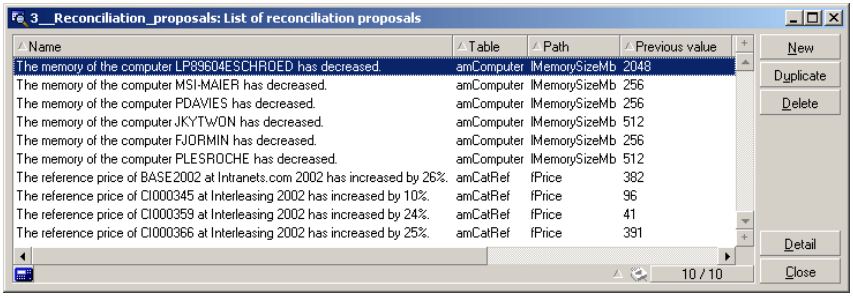
Properly incorporated in your operations cycle, reconciliation becomes transparent and enables you work on data in AssetCenter that is always up to date.

Reconciliation enables for instance to maintain up-to-date:

- the list of installed machines (Peregrine Network Discovery integration)
- the location of employees (SAP integration)
- the list of incidents (ServiceCenter integration)

The administrator accesses the items to reconcile using the **Portfolio management/ Reconciliation/ Reconciliation proposals** shortcut

The items to reconcile appear in the **Reconciliation proposals** screen.

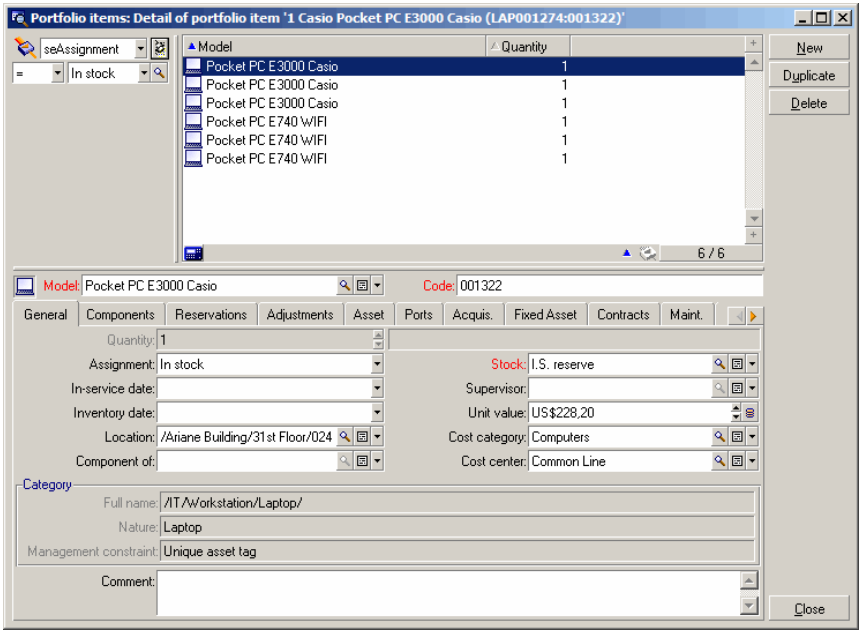


The administrator chooses to accept or reject the reconciliation proposals for each item in the list.

▸ **Reconciliation** guide.

Views

Each AssetCenter user is able to configure the application in order to only show what they need to get the job done. For instance, an employee in the IT department can create a view showing portfolio items in stock.



▸ **Tailoring** guide, chapter **Using views**.

Contract

Company assets are often linked to contracts.

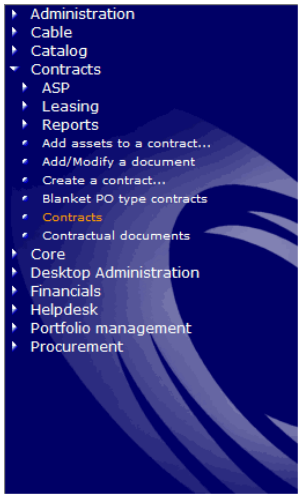
The **Contracts** module enables companies manage all kinds of contracts, such as leasing, license, maintenance, warranty or insurance contracts.

The different contract types managed are:

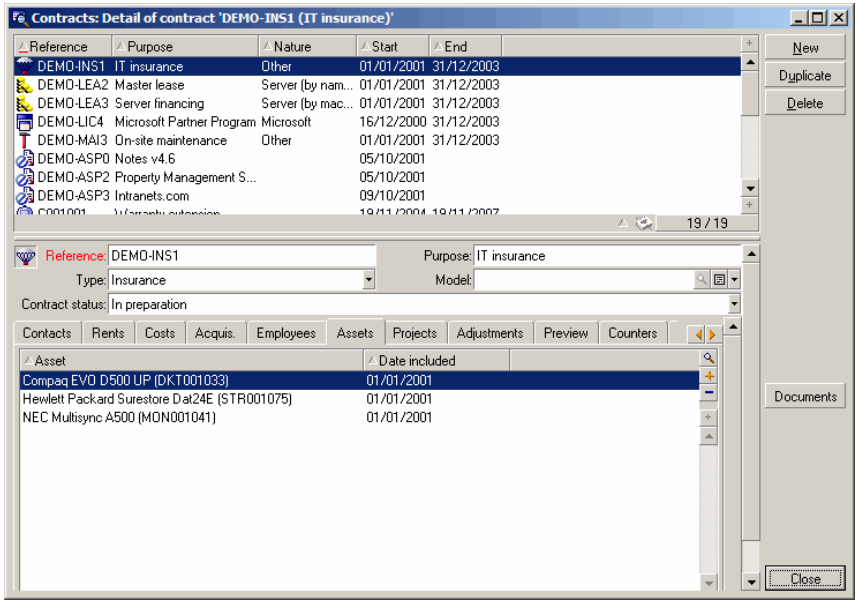
- Master lease
- Lease schedule

- Insurance contract
- License contract
- Blanket purchase order type contract
- Other

The administrator accesses the Contracts module with the **Contracts** shortcut.



All assets on the contact are visible in the **Assets** tab in the contract detail.

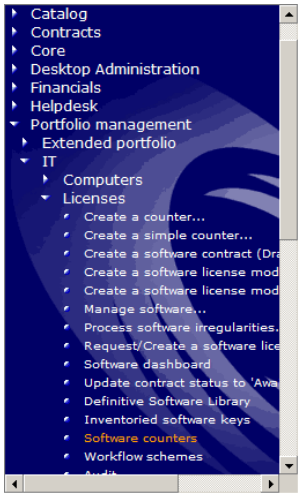


- **Contracts** guide.

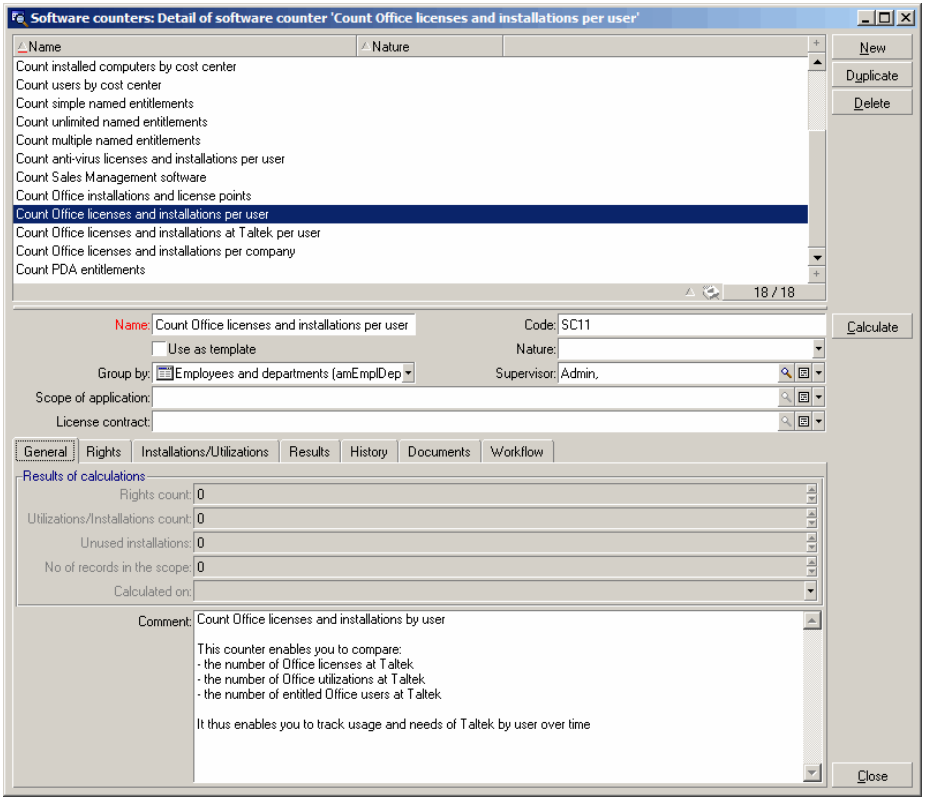
Software Asset Management

Using the wizards provided with AssetCenter, the administrator can know at any given time how what software is installed on the company's computers and compare this licensing information.

The administrator accesses the counters using the **Portfolio management/ IT/ Licenses/ Software counters** shortcut.



AssetCenter displays the list of software counters and the calculations perfomed



- **Portfolio and Software licenses** guide, chapter **Software**.

Asset Tracking in Get-Resources

Get-Resources simplifies the requisition process for assets and services and enables employees to track their requests. Get-Resources also enables the automation of enterprise processes in terms of budgets and request approval.

Web interface

For each use requiring Web access, the administrator defines:

- an identifier and a password
- which screens the user is allowed to access
- which operations the user is entitled to perform

As soon as they are identified, users have access to a simple, intuitive and customizable interface.

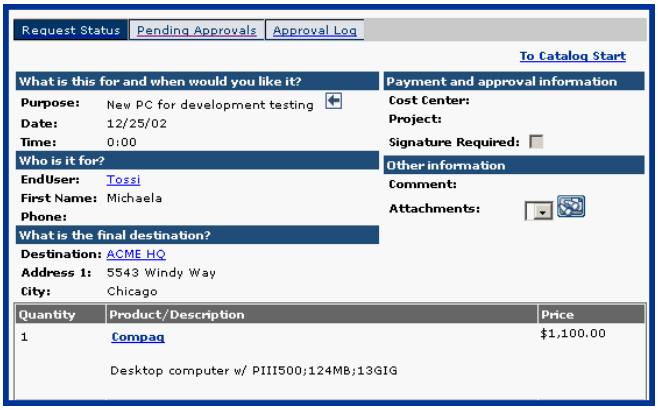
Each purchase request can then be transferred to AssetCenter's procurement module and be integrated in a decision-making workflow.

▸ **Get-Resources Tailoring** guide

Managing requests

All employees may submit a purchase request.

Requests are then fed into a decision-making process and may be consulted at any time by the requester.

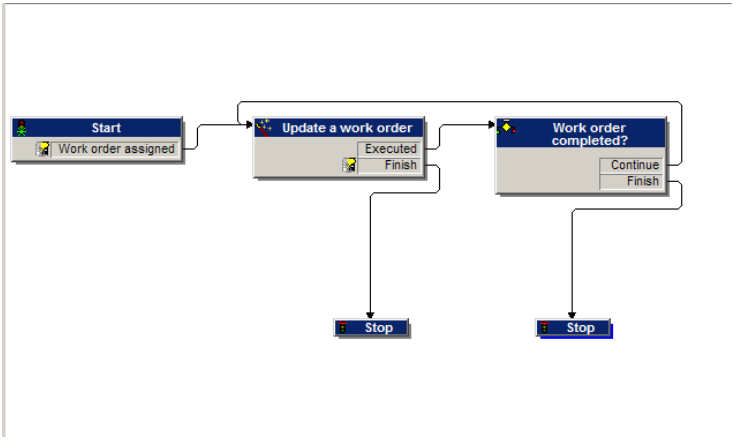


In general, the decision-making process is defined in a workflow created in AssetCenter.

- **Get-Resources Administration** guide

Workflows

AssetCenter enables workflow creation in order to automate decision making processes and to formalize business processes.



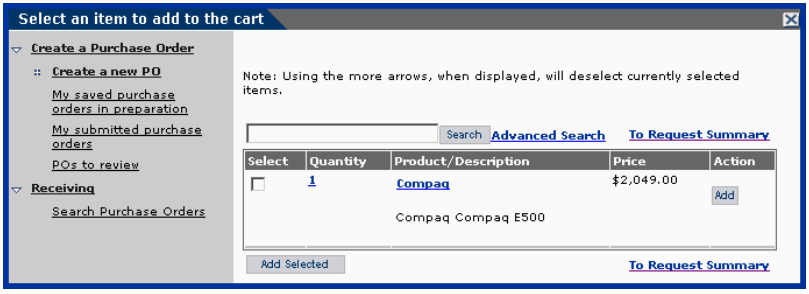
The workflows are defined by the administrator and make it possible, through the Get-Resources interface, to:

- Route a request
- Define its status (Awaiting approval, Validated, Refused)
- Approve a request
- Automatically generate a purchase order

▸ AssetCenter **Advanced Use** guide, chapter **Workflow**.

Managing purchase orders

The users with required permissions are able to generate purchase orders for the requested items.



Once the order has been created, it is integrated in the decision-making workflow until the ordered item has been received; it is then integrated into the portfolio.

▸ **Get-Resources Administration** guide

A Going further

APPENDIX

You have several ways of finding out more about AssetCenter:

AssetCenter compatibility matrix

For information on supported environments, refer to the Peregrine support site at **http://support.peregrine.com**.

Please contact Peregrine Systems for an identifier and a password.

Once you are logged on to the support site, you can browse the compatibility matrix pages via **Product Information/ Asset Management/ AssetCenter/ Compatibility Matrices**.

Information on the Peregrine Systems offering

The Peregrine Systems web site contains a wealth of information.

In particular, you will find product documentation, white papers, demonstrations, customer testimonials.

The address of the web site is **http://www.peregrine.com**.

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