

HP Asset Manager 5.x Software: Essentials

Instructor-Led Training



INTENDED AUDIENCE

- Customers: Administrators, developers, web developers, and managers who are managing the Asset Manager 5.x product
- Channel Partners and HP C&I Personnel: Consultants, system architects, integrators and planners who help customers with Asset Manager 5.x implementations
- HP Engineers: HP personnel who provide pre-sales and post-sales support for Asset Manager 5.x

DURATION: 5 DAYS

PREREQUISITES

- Experience with Windows operating systems
- Knowledge of relational databases and database terminology

OVERVIEW

This 5 day instructor-led training is designed to provide the essential skills and knowledge needed to configure, deploy, and use Asset Manager 5.10 to successfully implement an asset management solution in an enterprise-level business or large organization. The class consists of approximately 50% lecture and 50% hands-on lab exercises.

COURSE OBJECTIVES

At the end of this course, you will be able to:

- Describe an evolutionary approach to asset management
- Explain the capabilities provided by Asset Manager's core modules
- Install the Asset Manager Windows and Web clients
- Use the clients to navigate within Asset Manager's core tables
- Create a database
- Create and manage portfolio items
- Reconcile software installations with software licenses
- Write scripts to extend Asset Manager's functionality
- Create queries and views to filter data
- Configure Asset Manager security and control database access
- Import and export data using Asset Manager
- Schedule automatic processes

RECOMMENDED FOLLOW-UP COURSES

- HP Asset Manager 5.x Software: Modules (HE463S)
- HP Asset Manager 5.x Software: Tailoring (HE464S)

Day 1	<p>Course Introduction</p> <ul style="list-style-type: none"> • Administration and housekeeping • Preflight check • Class logistics • Course outline • Exercises and overarching scenario • Survey • Participant introductions
	<p>Module 1: Basics of Asset Management and Databases</p> <p>Lesson 1: Basics of Asset Management</p> <ul style="list-style-type: none"> • Define asset management and describe the phases of an evolutionary approach • Explain the capabilities provided by each of Asset Manager's core modules • Identify Asset Manager's related tools and describe their purpose • Describe HP's integrated asset management solution <p>Lesson 2: Basics of Databases</p> <ul style="list-style-type: none"> • Identify and describe common components of relational databases
	<p>Module 2: Getting Started</p> <p>Lesson 1: Install the Asset Manager Windows Client</p> <ul style="list-style-type: none"> • Describe Asset Manager installation options • Explain the use of the Microsoft Desktop Engine (MSDE) • Describe the Asset Manager folder structure • Install the Asset Manager Windows client <p>Lesson 2: Install the Asset Manager Web Client</p> <ul style="list-style-type: none"> • Explain the capabilities of the Asset Manager Web client • Describe the benefits associated with using the Web client • Describe Asset Manager's architecture • Identify the third-party components required to install the Web client • Install the Asset Manager Web client <p>Lesson 3: Navigate in the Windows Client</p> <ul style="list-style-type: none"> • Describe the main elements of Asset Manager's Windows client interface • Describe the field and link structure and identify the primary tables in the database • Use the Windows client to explore an Asset Manager database <p>Lesson 4: Navigate in the Web Client</p> <ul style="list-style-type: none"> • Describe the main elements of the Asset Manager's Web client interface • Use the Web client to explore an Asset Manager database <p>Lesson 5: Create a Database and Connect</p> <ul style="list-style-type: none"> • Identify the supported database engines • List the steps to create a database • Create and connect to a database

Day 2**Module 3: Portfolio Management****Lesson 1: Portfolio Management**

- Identify the main tables in the Portfolio module and describe their relationships
- Describe the purpose of natures
- Identify asset tracking options
- Describe the purpose and use of overflow tables
- Describe the purpose of behaviors
- Describe the use of models
- Identify the type of information stored in the Models table
- Identify the type of information stored in the Portfolio items table
- Describe the hierarchical structure of the Portfolio items table
- Identify the type of information stored in the Assets and batches table
- Create nature records
- Create model records
- Create portfolio item records
- Divide a batch portfolio item

Lesson 2: Software Management

- Identify the main tables used in storing software installation data and describe their relationships
- Identify the type of information stored in software installation portfolio item records and describe inheritance from nature and model records
- Describe the types of software installations in Asset Manager and their use
- Create a software installation model
- Create a compact software installation model
- Create software installation records
- Unlink an installation from a portfolio item
- Identify the main tables used in storing software license data and describe their relationships
- Identify the type of information stored in software license asset records and describe inheritance from nature and model records
- Create a software license model
- Create a software license portfolio item (asset) record
- Describe how software counters are used to manage rights compliance
- Describe the use of linked counters and upgrade counters
- Create and modify a software counter

Lesson 3: Virtual Machine and Mobile Device Management

- Explain how virtual assets are tracked and managed using Asset Manager
- Identify the type of information stored in virtual machine nature, model, and portfolio item records
- Explain how mobile devices are tracked and managed using Asset Manager
- Identify the type of information stored in mobile device nature, model, and portfolio item records

Day 3**Module 4: Scripts, Filters, and Views****Lesson 1: Scripts**

- Describe the purpose and use of scripts
- Identify the types of Asset Manager scripts and describe when they are used
- Identify commonly used BASIC functions and their parameters
- Describe the CurrentUser virtual link and its use
- Explain the purpose of calculated fields
- Describe how each type of calculated field can be used
- Create BASIC scripts
- Implement calculated fields

Lesson 2: Filters

- Describe the purpose of filters
- Identify the primary types of filters and describe their use
- Use a standard filter
- Create a simple filter
- Create query filters
- Apply a query filter to a table
- Create a configurable query filter

Lesson 3: Views

- Describe the purpose of views
- Identify the types of views and describe their use and limitations
- Explain how filters are transformed when views are created
- Create a custom view
- Create and modify a shared view

Module 5: User Management**Lesson 1: Access Management**

- Identify the elements that control database access
- Describe user logins
- Explain the purpose and use of user roles
- Describe the type of information stored in the User roles table
- Explain the purpose and use of user profiles
- Describe the type of information stored in the Elementary profiles table
- Describe how to control access to screens, actions, views, reports, and forms
- Describe the purpose and use of screen sets
- Describe how to control the functional operations that can be performed at the record level
- Describe how to restrict the records that users can view or modify
- Explain how to manage connection slots
- Configure logins
- Create user roles and user profiles
- Create functional and user rights
- Create access restrictions
- Add user profiles to user roles
- Assign user roles to users

Day 4**Module 5: User Management (continued)****Lesson 2: Password Management**

- Identify the available password management controls
- Describe how to manage passwords individually
- Describe how to manage passwords globally
- Explain how to configure password expirations
- Explain how to define account validity dates
- Explain how to configure error locking based on invalid password entries
- Explain how to control password composition including limiting password reuse
- Describe how to use scripts to customize allowable password formats
- Modify account validity for an individual user
- Configure allowable password formats for all user
- Configure password expiration and notification for all users

Module 6: Importing and Exporting Data**Lesson 1: Importing Data**

- Identify the sources from which data can be imported
- Identify the global points to consider before importing data into an Asset Manager database
- Identify the import considerations that are specific to portfolio items
- List and describe the steps required to successfully import data
- Explain how formulas can be used to map data from the source to Asset Manager fields and to manipulate the data that is imported
- Describe the purpose and use of import scripts
- Import location data
- Import cost center data
- Import department data
- Import employee data
- Use scripts to cleanse data during import

Lesson 2: Exporting Data

- Identify reasons for exporting data from the database
- Identify the different methods for exporting data
- Describe the capabilities provided by each export method
- Describe how to export data using copy and paste functionality
- List the steps required to export records from a table list
- Explain how scripts can be used to automate data exports
- Describe the steps required to create an export script using the Asset Manager Export Tool
- Describe how imports and exports can be scheduled using Automated Process Manager
- Export data to a text file
- Display statistics
- Display Crystal reports
- Create export scripts and define queries to export specific data

Day 5**Module 7: Automated Process Management****Lesson 1: Automated Process Manager**

- Describe the capabilities provided by Automated Process Manager modules
- Describe how Automated Process Manager can be launched
- Describe the main elements of the Automated Process Manager interface
- Identify the requirements for automatic activation of modules
- Describe how to configure modules
- Explain the various scheduling options
- Describe how to manually activate modules
- Describe how to add modules
- Explain the requirements for launching Automated Process Manager from more than one system
- Schedule the UpdateToken module
- Schedule an export