

ivanti

ITAM (ENU)

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1. Ivanti Neurons for ITAM

Welcome to the Ivanti Neurons for ITAM online help. Use the left navigation pane to view all available topics (on mobile devices, click the menu icon). To find specific information, use keywords in the Search box above.



[What's New](#)



[Getting Started](#)

We'd love your feedback as you use this online help. At the bottom of each page, you'll find the question **Was this article useful?** Click **Yes** or **No**, then leave a comment—the more detailed, the better. We can't reply back, but we'll certainly use your feedback to improve the content.

2. What's new

For information on upgrading, see [Upgrading](#).

✓ New for 2026.3

Access App links and Universal Links The ITAM mobile apps for Android and iOS support App Links and Universal Links. For more details, see [Persistent Authentication and Universal Link Integration](#).

Persistent Login regardless of whether biometric authentication is enabled. This feature reduces repeated authentication and improves efficiency for users who access the app frequently. For more details, see [Persistent Authentication and Universal Link Integration](#).

Consumable Asset Tracking Consumable records can now be created to track inventory quantities, storage locations, financial ownership, inventory transactions, and assignments for non-returnable items. For more information, see [Hardware assets](#).

✓ New for 2026.2

ITAM Consumables Now you can group similar consumables, receive partial quantities from POs, and transfer any quantity with detailed history tracking. For more details, see [Handling Consumable Deliveries and Storage](#).

Help Info When you click help icon you can view ITAM help documentation.

✓ New for 2025.4

16 KB Memory Support for Android Devices The Android ITSM and ITAM app now supports Android devices with a 16 KB memory page size. For more details, see [Mobile app](#).

✓ New for 2025.3

Support for Data Matrix scan codes From release 2025.3, both ITAM and ITSM support **Data Matrix** scan codes. See [Scanning](#) for more info.

Support to scan assets without an existing purchase order. In the mobile application, mobile asset manager can scan assets without an existing purchase order. For details, see [Mobile app](#) > To scan assets without an existing purchase orders for more information.

✓ New for 2025.2

Ability to auto-upgrade to latest ITAM version From Enterprise Service Management version 2025.2, ITAM customers on version 2021.3 or higher having both ITAM and ITSM licenses will be automatically upgraded to the latest release version.

See [Upgrading](#) for more info.

✓ New for 2024.4

Ability to configure data-mapping rules for discovered assets You can configure data-mapping rules for the discovery scans that import asset data into ITAM from integrated 3rd-party sources (such as Ivanti Neurons). For details, see [Data Mapping Rules for Imported Assets](#).

✓ New for 2024.3

Neurons AI (Widget Generation). (For environments where ITSM is also in use.) Neurons AI allows you to create reports/widgets using text-based input. You can generate reports/widgets and add them to a new or existing dashboard without any complicated settings and configuration. For details, see the ITSM topics [Neurons AI](#) and [AI Configuration Hub](#).

✓ New for 2024.2

Ivanti Neurons Bots integration (For environments where ITSM is also in use.) Allows Neurons Bots defined on an Ivanti Neurons tenant to be executed from within Neurons for ITSM. This integration is provided in the form of a new Quick Action that enables users to configure the inputs required by the Neurons Bot, so that they are automatically populated from the current business object context at run time. For details, see the ITSM topic [Invoking a Neurons Bot](#).

Ability to configure a trusted agent with PowerShell (For environments where ITSM is also in use.) Workflows and tasks can be automated through trusted agents to receive and process requests using PowerShell scripts. For details, see the ITSM topic [Configuring Trusted Agent with PowerShell](#).

External integrations via an iPaaS platform. (For environments where ITSM is also in use.) ITSM can now be (optionally) extended via an iPaaS platform, which enables you to quickly and easily build out integration flows (recipes) with third-party systems. Administrators can leverage a library of 1000+ pre-built connectors and recipes, including pre-built recipes for common Service and Asset Management use cases, using a seamlessly integrated administrative UI. The UI includes a visual no-code editor to build integration flows and use cases that reliably run on an enterprise-grade integration platform.

✓ New for 2023.4

Ability to view dynamically updated shipping and invoice data for CDW purchase orders within ITAM Integration with the value-added reseller CDW now includes the ability to view purchase order shipping and invoice data within the ITAM user console. For details, see [Integrating with CDW](#).

Addition of a Deleted Assets Audit workspace To help maintain data integrity, the Deleted Assets Audit workspace enables Asset Administrators to track asset records that have been removed from the ITAM database. For details, see [Hardware assets](#) > Deleting asset records (and tracking them).

Ability to import patch data for hardware assets from the Ivanti Neurons Platform The displayed data (in the Hardware Assets workspace) includes the advisory and patch names, as well as the deployment status and date. For details, see [Patch data](#).

✓ New for 2023.3

Ability to integrate with vendors to streamline hardware asset procurement The first vendor available for integration with ITAM is the value-added reseller CDW. For asset requests requiring a purchase order, you can now raise the order to CDW with several clicks from the ITAM user console. For details, see [Integrating with CDW](#).

✓ New for 2023.2

Addition of an Asset Financials dashboard. This dashboard provides three charts that display the total asset spend by year, total spend on different asset subtypes by year, and total asset spend by business quarter. For details, see [Dashboards](#).

✓ New for 2023.1

Ability to assign consumables to individual users or financial owners From the Hardware Assets workspace, you can assign consumables to users and financial owners (similar to how you assign other types of assets). For details, see the procedure for assigning a consumable to a user or financial owner in [Hardware assets](#).

Support for creating a template record for consumables as part of a purchase order You can create template records for consumables to be purchased as part of a purchase order (similar to how you create template records for other assets). For details, see the procedure for creating a purchase order in [Procurement](#).

✓ New for 2022.4

Support for hardware asset DEX scores in ITAM Cloud environments integrated with Ivanti Neurons You have the ability to view a hardware asset Digital Experience (DEX) score imported from Neurons. This score is calculated based on a curated set of indicators, hybrid machine learning, and statistical models and enables you to gain valuable insights into most asset-related issues. For details, see [DEX scores](#).

Ability to enter a tenant URL into the smartphone app via a QR code When launching the app for the first time, you may not know the tenant URL to enter. You can use the app to scan a tenant QR code that automatically enters the URL for you. This feature works for both the Android and iOS versions of the app. For details, see [Mobile app](#).

Ability to disable the smartphone app QR code feature Asset Administrators can disable the QR code feature described above to prevent other users from using this feature. For details, see [Mobile app](#).

✓ New for 2022.3

Ability to take delivery of assets using the smartphone app The Ivanti Service Manager app for smartphones supports the ability to take delivery of hardware assets that are line items of a purchase order. Use the app to scan asset barcodes into the database at the point of delivery. For details, see [Procurement](#) > Taking delivery via the smartphone app.

Ability to integrate ITAM On-Premises with Ivanti Neurons for Discovery You can integrate your local implementation of ITAM On-Premises with Ivanti Neurons for Discovery. Integration enables you to transfer device and invoice data from Neurons for Discovery into the ITAM database. For details, see [Integrating with Ivanti Neurons for Discovery \(for ITAM On-Premises only\)](#).

✓ New for 2022.2

Ability to integrate with Ivanti Neurons for Spend Intelligence. You can link ITAM Cloud with Ivanti Neurons for Spend Intelligence so that a single set of data relating to software-asset contracts and contract line items is automatically passed between the two databases. For details, see [Integrating with Ivanti Neurons for Spend Intelligence](#).

ITAM Cloud support for multiple warranties per asset ITAM Cloud can sync with Ivanti Neurons to retrieve and display multiple warranties for a given asset (such as computers that often include separate warranties for their associated components). Additional warranties associated with an asset are located under a new **Warranties** tab in the Hardware Assets workspace. For details, see [Hardware assets](#).

Ability to schedule data syncs from Ivanti Neurons From the ITAM user interface, you can now schedule when and how often to run data imports from Ivanti Neurons. Do so from a new **Schedule Setting** page in the Asset Administrator Configuration Console. For details, see [Customizing imports from the Ivanti Neurons Platform](#).

✓ New for 2022.1

Enhancement for consumables For consumable asset records with more than one linked storage space, you can now specify the portion of the overall quantity to be stored at each space. This information displays under a new **Storage Space Transactions** tab in the Hardware Assets workspace (for the consumable record) and Stock Management workspace (for the linked storage space). For details, see [Hardware assets](#) and [Stock management](#).

✓ New for 2021.4

Enhancements to the smartphone barcode-scanning app When using the Ivanti Service Manager app to scan and track hardware assets, you can now switch between automatic and manual barcode scanning, toggle on a sound or vibration to indicate when an asset is scanned, and turn off the camera to avoid accidental scans. For details, see [Mobile app](#).

✓ New for 2021.3

New Cloud Service asset type The Hardware Assets workspace has a new asset type for Cloud Service devices that includes a number of corresponding subtypes. For details about asset types, see [Hardware assets](#).

Improved consumables workflow When you specify a quantity for a consumable record, you can now link that record to one or more storage spaces using a new Storage Space tab. This is useful when you want the same quantity to display in multiple storage spaces. For details, see [Hardware assets](#).

✓ New for 2021.2

New IoT hardware asset type The Hardware Assets workspace has a new asset type for IoT devices that includes a number of corresponding subtypes. For details about asset types, see [Hardware assets](#).

Offline barcode scanning Ivanti's smartphone app for scanning hardware assets now supports offline scanning. If internet connectivity is lost while you're logged into the app, you can continue scanning barcodes as you would normally. Once you're back online, the app will automatically sync the scans with the database. For details, see [Mobile app](#).

✓ New for 2020.4

Asset Manager 2020.4 is downloadable as content package Drop #23 (202004). Drop #13 (201813) or later must already be installed before applying this package. It includes:

Dashboard for unused software A new **Software License** dashboard tracks these categories: licensed software by title, licensed software unused in the past 90 days, and licensed software unused in the past 180 days. For details, see [Dashboards](#).

Enhancements to the Vendors workspace A new **Category** field automatically displays 'Asset Management' to differentiate between asset-specific vendors and other vendors and is useful when linking vendors to hardware assets. For details, see [Vendors](#).

Capability to link software assets to the Product Catalog You can now link software assets to software items in the Product Catalog. In the Software Assets workspace, use the **Catalog Item** field to link a software asset to a Product Catalog software item. In the Product Catalog workspace > Item Details tab, use the **Software Asset** field to create an association with a software asset. For details, see [Software assets](#) or [Product Catalog](#).

For Asset Manager Cloud only:

- **Enhanced integration with Ivanti Neurons** New MobileIron and MS Intune connectors for importing device data into Asset Manager.
- **Capability to override default device connector mappings** In the Asset Processor Configuration workspace, a new option enables you to override the default connector mappings configured in Ivanti Neurons.

✓ New for 2020.3

Asset Manager 2020.3 is downloadable as content package Drop #22 (202003), which is part of the Post Drop #15 (201902) consolidated package. It includes:

New hardware asset type. The Hardware Assets workspace has a new Medical Devices asset type that includes a number of corresponding subtypes. For details, see [Hardware assets](#).

New attributes for the licensed software data imported from Ivanti Neurons Under the Hardware Assets workspace > Licensable Software tab, newly added attributes are Last Used, Launch Count, Minutes Used, and End of Life.

Improved or enhanced integration with Ivanti Neurons Includes the following:

- Improved SNMP connector mapping for importing non-computer devices such as printers, switches, and so on.
- Improved CDW connector functionality for importing invoices and purchase orders, linking PO line items, and so on.
- Enhanced connector mappings for Ivanti Data Center Discovery (DCD) and Jamf Pro when synchronizing device data.

✓ New for 2020.2

Asset Manager Cloud: The ability to customize how asset data is imported from Ivanti Neurons Administrators can create filters and field mappings for device types and subtypes that define how the Ivanti Neurons connector will import source asset data into Asset Manager. These customizations provide a high level of control over how the data is displayed in Asset Manager.

You can export the connector customizations as a package, then test them in a staging or UAT environment before using in a production landscape to sync data from Ivanti Neurons. The package enables you to easily duplicate the customizations across multiple tenants installed with the most recent version of Asset Manager Cloud. For details, see [Customizing imports from the Ivanti Neurons Platform](#).

Facilities Management content package Primarily for use with Ivanti Service Manager, this package also includes new facilities asset workspaces for Asset Manager that enable you to manage the non-device assets common to many facilities (such as office furniture and building equipment) and to create work orders for maintenance jobs in and around a facility. For details, see [Facility assets](#).

✓ New for 2019.3.1

Improved Ivanti Neurons integration for Asset Manager Cloud Asset Administrators can use two workspaces—Asset Processor Configuration and Ivanti Neurons Asset Import Configuration—to set up the process for importing data records from Ivanti Neurons into the Asset Manager database. Importable record types include licensable software, invoices, and devices. For details, see [Importing from the Ivanti Neurons Platform](#).

✓ New for 2019.3

Improved asset fulfillment workflow In the Stock Management workspace, Product-Catalog-item quantity levels automatically update when you fulfill asset requests for customers or procurement. For details, see [Stock management](#).

Asset Mobile users can request assets for others Users assigned the Asset Mobile role can place an asset request for themselves or for others from the Self-Service Portal website. For details, see [Asset requests](#).

New Product Catalog request offerings New forms are available for requesting Product Catalog bundles, consumables, mobile devices, infrastructure, and peripheral devices. For details, see [Product Catalog](#).

Ability to automate the reordering process for Product Catalog items. You can enable automatic reorders for Product Catalog items (hardware and consumables—not software) using the **Reorder level Qty** and **Reorder Quantity** fields. For details, see [Product Catalog](#).

New Certificate subtype In the Hardware Assets workspace, a **Certificate** subtype now exists under the General Asset type. Use this subtype to link certificates to software assets. For details, see [Hardware assets](#).

Software Assets field is now mandatory for entitlement line items When adding software-entitlement line items to purchase-order contracts in the Contracts workspace, the **Software Asset** field is now mandatory. For details, see [Contract and Warranty Management](#).

Fixes

Assigned value for asset model type displays correctly in the Hardware Assets workspace Under the Hardware Assets workspace > Discovery tab, the Assigned Values Model field correctly displays the asset's assigned value, not the discovered value as in previous releases.

✓ New for 2019.1

New installer for 2019.1. The Ivanti Service Manager installer now includes the options to install Service Manager, Asset Manager, or both.

Ability to see results of asset fulfillment from the Stock Management workspace. Use the **Storage Space Summary** child tab to keep track of product catalog items (hardware and consumables) that are moved into and out of a storage space. Quantities increase when items are added via the Storage Space Item tab, and quantities decrease during asset fulfillment, when an item is transferred to a user's record under the Employee workspace > Asset tab. See [Stock management](#).

Unique requisition numbers automatically added for new purchase orders You no longer add your own requisition number to a purchase order. In the Purchase Orders workspace, requisition numbers are automatically added and incremented for new purchase orders. See [Procurement](#).

The Consumables workspace has been removed This information is now integrated into the Hardware Assets workspace, where a new asset type of **Consumables** is available for adding consumables (mice and keyboards) to your system. When creating a consumable here, you can also assign it to a storage space. This same action adds the consumable to the Stock Management workspace, under the storage space's tabs for both Assets and Consumables. Note that you can't specify a subtype for the Consumable asset type. See [Hardware assets](#).

User drop-down list includes both login ID and display name. When clicking the **Hardware Assets workspace > Assign User button** to assign an asset to a user, the user drop-down list shows both the login ID and display name of each user in your system. Unlike display names (where more than one user can have the same name), user login IDs are unique and will help you identify the correct user. See [Hardware assets](#).

Manufacturer workspace no longer has tabs Child tabs for **Configuration Item** and **Software Inventory** have been removed. Use this workspace simply to add the names of asset manufacturers to your system.

Add purchase orders that don't automatically create new asset records. When adding a new hardware line item to a purchase order, clear the **Create Asset** check box to prevent a template asset record from automatically being created when submitting the purchase order. See [Procurement](#).

Software product imports. Imported software products are matched up to existing asset records in the Software Assets workspace based on a combination of the Title, Version, and Edition fields. See [Software assets](#).

New workspaces. These workspaces are new:

- **Email Config:** Configure all settings for *outbound* Asset Manager email. Available to Asset Administrators only.
- **Inbox:** Configure all settings for *inbound* email that will be created by the HEAT Email Listener. Use in conjunction with the Email Config workspace. Available to Asset Administrators only.
- **Email:** View all outbound email records that are manually created by users, or automatically created via triggered actions or workflows. Inbound emails created by the HEAT Email Listener are shown here as well. Available to Asset Managers, Procurement Managers, Contract Managers, and Storage Managers.
- **Purchase Line Item:** Enables you to manage a single line item in a purchase order for a consumable, hardware, or software. Available to Asset Managers, Procurement Managers, Contract Managers, and Storage Managers.
- **Integration:** Enables you to integrate with Ivanti Service Manager data after discovery. Available to Asset Administrators only.
- **Asset Data Mapping:** Configure or troubleshoot asset records after discovery. Available to Asset Administrators only.

If your system is integrated with Ivanti Service Manager, see the *Ivanti Service Manager Admin online help* for details about working with email servers, data integration, and asset data mapping.

Product Catalog items You can create Product Catalog items for software or consumables—previously, items could only be hardware-related. Also, you can create bundles of those items by linking previously created catalog items into one offering. See [Product Catalog](#).

Fixes

- In the Purchase Orders workspace, a deleted purchase order now automatically deletes any associated purchase line items and invoices.
- If the Product Catalog includes an image of an item, you can now see that image when requesting the item from the Asset Requests workspace.

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- In the Hardware Assets workspace, when selecting an asset from the list view, the assigned values are displayed, not the discovered values.
 - In the Locations workspace, vendor details are no longer part of the parent location information.
 - When the Status field for an asset is changed to Assigned, Disposed, Lost, or Destroyed, the asset record is removed from its listed storage space in both the Hardware Assets and Stock Management workspaces.
 - In the Contract Line Items workspace, modifications have been made to the entitlement-line-item descriptions and Entitlement Details tab.
 - In the Invoices workspace, when an invoice is deleted, the shipments associated with that invoice are also deleted.
 - When a Product Catalog item is assigned to an existing asset, the asset record's Description field is properly populated by the Description field of the Catalog Item.
 - When data is imported, the system updates the financial transactions cost item (if the purchase price is available on import).
 - Currency size limit increased to 12 digits.
 - When you assign a user to an asset, the Inventory Transactions tab now includes the location for that event.
 - The full name of a location is updated when a record is created or updated.
 - The display name for MobileDevice and PeripheralDevice is updated for use in the CI Map display.
 - Asset Processor can process data from Uno Discovery with System.NullReferenceException.
 - Asset Processor can process data from Ivanti Neurons Discovery with an invalid character.

3. Getting started

Welcome to the Ivanti Neurons for ITAM online help. The getting-started information is intended for Asset Administrators of the product.

To set up Ivanti Neurons for ITAM Cloud or On-Premises in your environment, see [Setup](#).

After finishing that process, you'll need to import your asset data into the ITAM database using one of several methods. To find the best method for your situation, see [Data import](#).

Finally, you need to assign user roles to everyone who will be working within the ITAM user console. Roles define a person's responsibilities within the product and determine the workspaces they have access to. For details, see [User roles](#).

You'll find that Ivanti Neurons for ITAM is similar to the related product Ivanti Neurons for ITSM, upon which it runs. The products also share many of the same workspaces.

Next steps

Once the above tasks are completed, you can begin exploring the ITAM user console. Start with the following topics to gain an understanding of the workspaces you'll use the most:

- [Dashboards](#) – A number of asset-related dashboards are available as starting points to understanding the viewable data. Read about each dashboard, as well as the user roles that have access to them.
- [Hardware assets](#) – The Hardware Assets workspace provides access to all of your asset records. Learn about the asset details you can view from this workspace and how to manage those records.
- [Software assets](#) – The Software Assets workspace provides access to the software asset records in your environment. You can import records for licensable software into this workspace.

You can use ITAM to manage asset inventory, procurement, contracts, and vendors; set up an online Product Catalog for your organization; view asset reports, and so on. To find out more, use the left navigation pane to view topics of interest. To find specific information, use keywords in the Search box at the top of this page.

3.1. Setup

Follow the instructions below for your version of Ivanti Neurons for ITAM.

Ivanti Neurons for ITAM Cloud

You should have already received two emails from Ivanti—the first containing the URL to the Ivanti Neurons Platform website (along with your account details), and the second containing the encrypted password needed to access the account.

Once this account is established, your next step is to import asset data into the ITAM database. For details, see [Data import](#).

Ivanti Neurons for ITAM On-Premises

ITAM On-Premises is an enterprise-level, customizable asset-management product that runs on top of the Ivanti Neurons for ITSM infrastructure. You can implement ITAM On-Premises as a standalone product or in combination with service management by using the installer for Ivanti Neurons for ITSM 2019.1 (or later).

For existing Ivanti Neurons for ITSM customers, you'll need to map ITAM content with any customized objects in your service management environment. Contact your Ivanti representative for assistance with this.

The ITAM system requirements and configuration database are the same as those for Ivanti Neurons for ITSM. For this reason, we recommend using the guides under the Ivanti Neurons for ITSM link at help.ivanti.com to install and deploy ITAM On-Premises:

- Installation and Deployment Guide
- Configuration Database Guide
- System Requirements Guide
- Performance Tuning Guide
- Ops Console Guide
- Web Services Guide

Once ITAM On-Premises is fully deployed, your next step is to import asset data into the ITAM database. For details, see [Data import](#).

3.2. Data import

Asset Administrators can import asset-related data into the ITAM database via:

- The Ivanti Neurons Platform, using a connector designed for your data source (for ITAM Cloud only). For details, see [Importing from the Ivanti Neurons Platform](#).
- The Ivanti Neurons Platform, by integrating with Ivanti Neurons for Spend Intelligence (in this case, imports are restricted to software-related contracts and contract line items). For details, see [Integrating with Ivanti Neurons for Spend Intelligence](#). (For ITAM Cloud only)
- The Ivanti Neurons Platform, by integrating with Ivanti Neurons for Discovery (for ITAM On-Premises installations only). For details, see [Integrating with Ivanti Neurons for Discovery \(for ITAM On-Premises only\)](#).
- Ivanti Neurons for ITSM platform connectors. For details, see the Ivanti Neurons for ITSM online help at help.ivanti.com. As a starting point, refer to these topics:
 - [Ivanti Neurons for ITSM and Endpoint Manager Connector](#)
 - [Importing and Exporting Data](#)
- A set of Excel spreadsheets provided by Ivanti to import data (recommended for an *initial* data import only and discussed below).

After importing your data, see the **Next steps** section in [Getting started](#).

Importing data via Excel spreadsheets

Ivanti provides a set of spreadsheets with appropriate columns already created that you can populate with your data and then import directly into the product. These spreadsheets include some sample data to give you an indication of the form your data needs to take. Remember to remove these examples.

The set of spreadsheets you'll want to download depends on your region (USA, EMEA, or Asia) and system landscape (staging or production). In each .ZIP file, you'll find an **ImportGuide.DOCX** file that lists the recommended order for importing your spreadsheets.

Download the .ZIP file containing the spreadsheets most relevant to your environment as listed below:

USA

- Staging – [USA-Staging-Import-Templates.ZIP](#)
- Production – [USA-Production-Import-Templates.ZIP](#)

EMEA

- Staging – [EMEA-Staging-Import-Templates.ZIP](#)
- Production – [EMEA-Production-Import-Templates.ZIP](#)

Asia

- Staging – [Asia-Staging-Import-Templates.ZIP](#)
- Production – [Asia-Production-Import-Templates.ZIP](#)

Mandatory and allowed values

Some of the columns in the spreadsheets are mandatory, and some are optional. Mandatory columns have **bold** column headers that require values in every row.

Other columns can take only certain allowed values, which are documented in **AM_DataImport_AllowedValues.XLSX**. This file is included in each of the above .ZIP files and contains a worksheet for each of the spreadsheets. The worksheets have columns named to match the columns in the import spreadsheets that take only specific values and that show the allowed values for those columns.

It's vital that these columns in your import spreadsheets contain only values matching those in the **AM_DataImport_AllowedValues.XLSX** file or values that match any new values that you've added to the corresponding validation list.

Populating your import spreadsheets

The first stage of importing is to populate the import spreadsheets with your data.

▼ To populate your import spreadsheets

1. Open **AM_DataImport_AllowedValues.XLSX** (included in each of the above .ZIP files) and display the worksheet that matches the import spreadsheet you want to populate.
2. Open each of your import spreadsheets in turn and add your data, making sure you use only the allowed values from **AM_DataImport_AllowedValues.XLSX** in any columns that are included in that spreadsheet.

Importing the spreadsheets

The second stage is to import the spreadsheets via the Administrator Configuration Console's Settings page.

▼ To import the spreadsheets

1. Log in as Asset Administrator.
2. Click the  icon at the top right side of the user console. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration Tools > Data Import Connections**. We recommend that you import the spreadsheets in a specific order—refer to the Import Guide included in your .ZIP file, or use the table below for guidance.

Some of the spreadsheets are imported multiple times using different mappings and filters. For example, AM_Assets.XLSX is imported as part of the connection **AM Excel - Assets** for each asset type.

Only one of these mappings can be active at any time, so click the **OFF** switch to **ON** alongside the mapping that you want to import.

If you have specialized devices that are unmanaged or that don't map well to the available asset types (for example, various medical devices, IoT assets, Cloud Service assets, etc.), map them to the **General Assets** type in AM_Assets.XLSX. Once they're imported, you can manually change these records to a more accurate asset type if needed. For details, see the procedure below.

4. Click **Run Now** next to each connection you want to import, then follow the prompts. Import spreadsheets in the following order:

Purpose	Name	Connection Source	Mapping
Asset Sub Types	AM Excel - Asset Types	AM_Asset_Types.xlsx	Asset Types
Countries	AM Excel - Countries	AM_Countries.xlsx	Countries
Locations	AM Excel - Locations	AM_Locations.xlsx	Locations
Location Parents	AM Excel - Locations	AM_Locations.xlsx	Location Parents
Storage Spaces	AM Excel - Storage Spaces	AM_Storage_Spaces.xlsx	Storage Spaces
Consumable Types	AM Excel - Consumables	AM_Consumables.xlsx	Consumable Types
Consumables	AM Excel - Consumables	AM_Consumables.xlsx	Consumables
Financial Owners	AM Excel - Financial Owners	AM_Financial_Owners.xlsx	Financial Owners
Financial Owner Parents	AM Excel - Financial Owners	AM_Financial_Owners.xlsx	Financial Owner Parents
Teams	AM Excel - Teams	AM_Teams.xlsx	Teams
Job Titles	AM Excel - Job Titles	AM_Job_Titles.xlsx	Job Titles
Users Without Managers	AM Excel - Users	AM_Users.xlsx	Users
User Managers	AM Excel - Users	AM_Users.xlsx	Managers
Manufacturers	AM Excel - Manufacturer	AM_Manufacturers.xlsx	Manufacturers
Vendor Contacts (ExternalContact)	AM Excel - Vendor Contacts	AM_Vendor_Contacts.xlsx	Vendor Contacts
Vendors	AM Excel - Vendors	AM_Vendors.xlsx	Vendors
Vendor Contact Links External	AM Excel - Vendor Contact Links	AM_Vendor_Contact_Links.xlsx	External Contacts
Vendor Contact Links Internal	AM Excel - Vendor Contact Links	AM_Vendor_Contact_Links.xlsx	Internal Contacts
Product Catalog Items	AM Excel - Product Catalog Items	AM_Product_Catalog_Items.xlsx	Catalog Items
Product Catalog Item Replacements	AM Excel - Product Catalog Items	AM_Product_Catalog_Items.xlsx	Replacements
Approved Vendor Records	AM Excel - Catalog Approved Vendors	AM_Catalog_Approved_Vendors.xlsx	Vendor Items
Software Products	AM Excel - Software Products	AM_SoftwareProducts.xlsx	Software Assets
Contracts	AM Excel - Contracts	AM_Contracts.xlsx	Contracts
Contract Line Items: Entitlements	AM Excel - Contract	AM_Contract_Entitlements.xlsx	Entitlements

Purpose	Name	Connection Source	Mapping
	Entitlements		
Contract Line Items: Extended Warranties	AM Excel - Contract Extended Warranties	AM_Contract_Extended_Warranties.xlsx	Extended Warranties
Contract Line Items: Leases	AM Excel - Contract Leases	AM_Contract_Leases.xlsx	Leases
Contract Line Items: Maintenance	AM Excel - Contract Maintenance	AM_Contract_Maintenance.xlsx	Maintenance
Contract Line Items: NDAs	AM Excel - Contract NDA	AM_Contract_NDAs.xlsx	NDAs
Contract Line Items: Purchase Contracts	AM Excel - Contract Purchase	AM_Contract_Purchases.xlsx	Purchase Contracts
Contract Line Items: Services	AM Excel - Contract Services	AM_Contract_Services.xlsx	Services
Contract Line Items: Support	AM Excel - Contract Support	AM_Contract_Support.xlsx	Support
Contract Line Items: Volume Purchases	AM Excel - Contract Volume Purchases	AM_Contract_Volume_Purchases.xlsx	Volume Purchases
Purchase Orders	AM Excel - Purchase Orders	AM_Purchase_Orders.xlsx	Purchase Orders
Purchase Line Items	AM Excel - Purchase Line Items	AM_Purchase_Line_Items.xlsx	Purchase Line Items
Invoices	AM Excel - Invoices	AM_Invoices.xlsx	Invoices
Shipments	AM Excel - Shipments	AM_Shipments.xlsx	Shipments
Computers	AM Excel - Assets	AM_Assets.xlsx	Computers
Mobile Devices	AM Excel - Assets	AM_Assets.xlsx	Mobile Devices
Infrastructure	AM Excel - Assets	AM_Assets.xlsx	Infrastructure
Peripheral Devices	AM Excel - Assets	AM_Assets.xlsx	Peripheral Devices
General Assets	AM Excel - Assets	AM_Assets.xlsx	General Assets
Assign multiple Contract Line Items to an Asset	AM Excel - Asset to LineItems	AM_Assets_to_ContractLineItems.xlsx	Assets to LineItems
Assign users to multiple teams	AM Excel - User to Teams	AM_Users_to_Teams.xlsx	Users to Teams

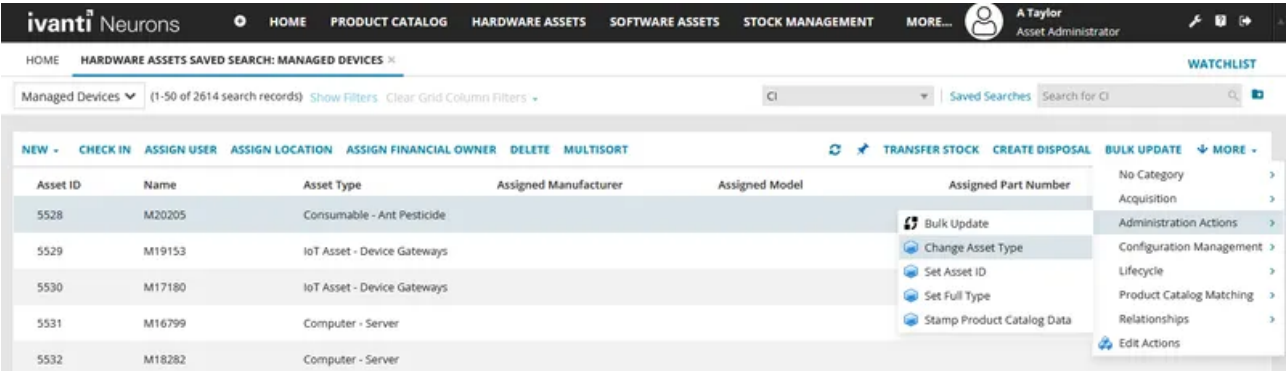
The final two items in the table correspond to many-to-many relationships and as such update the FusionLink table. We recommend that these are the final files you import.

Changing the asset type

Finally, for any specialized devices that imported as a **General Asset** but require a more accurate asset type, you can change the type using the **More** drop-down menu.

▼ To change the asset type of a device

- 1. Open the **Hardware Assets** workspace. The list of managed devices in your database displays by default.
- 2. Double-click a **General Asset** device to open its asset record.
- 3. Click the **More** drop-down menu at the top right of the page, then click **Administration Actions > Change Asset Type**.



- 4. Select the new Asset Type and Asset Subtype, then click **OK**. The asset record should update with the new type and subtype.

For details about working with managed asset records, see [Hardware assets](#).

3.2.1. Importing from the Ivanti Neurons Platform

Ivanti Neurons for ITAM Cloud enables you to import asset data from the Ivanti Neurons Platform using a connector (OData Connection) designed for your data source. To do this, you must be an Asset Administrator with an Ivanti Neurons Platform account that's set up and ready to use.

There are three types of records you can import from the Neurons Platform:

1. **Software inventory** – Licensable software records that will display in two places:
 - The **Hardware Assets** workspace > **Licensable Software** tab for individual devices with that software installed.
 - The **Software Assets** workspace > **Installations** tab for a manufacturer, listing all devices with that software installed.
2. **Invoices** – Records for vendor invoices that are associated with asset purchase orders. These will display in the **Invoices** workspace.
3. **Devices** – Hardware asset records that will display in the **Hardware Assets** workspace.

Before you begin

Ensure that you're current on all ITAM content package updates, which are available from the [Ivanti Marketplace](#).

You must also have all aspects of your Neurons Platform account set up and ready to use with ITAM. This includes:

- Contacting Ivanti customer support to request that the tenants for both the Neurons Platform and ITAM are set up to communicate with each other during the data transfer.
- Configuring the Ivanti Neurons connector for your data source. For details, see [Ivanti Neurons Connector](#) in the Configuring Ivanti Neurons for ITSM help. While configuring the connector, you may need guidance when mapping the target fields. If so, see [\(PDF\)](#).

 **Connector field mappings**



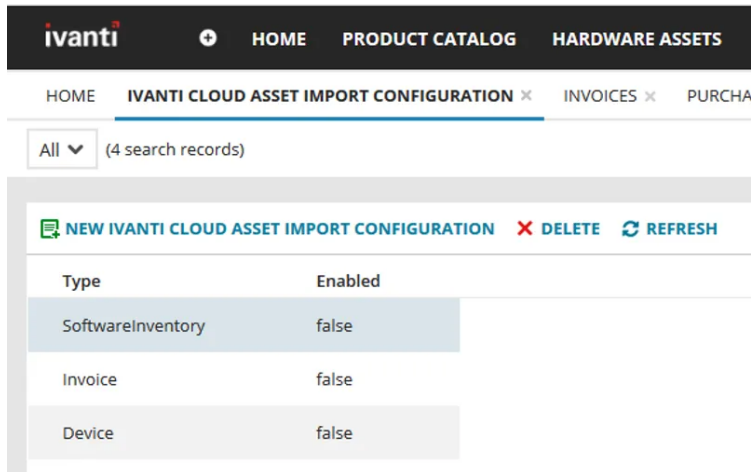
Next, in the ITAM user console, you need to select the types of records you want to import. This is a one-time configuration.

▼ To select record types for import

This procedure is applicable only for service bus-based syncs, not for API syncs. Whenever the connector is run for API syncs, it will import all record types whether or not they're enabled in this workspace.

The **New Ivanti Neurons Asset Import Configuration** option isn't currently functional and is for future use only.

1. Open the **Ivanti Neurons Asset Import Configuration** workspace.



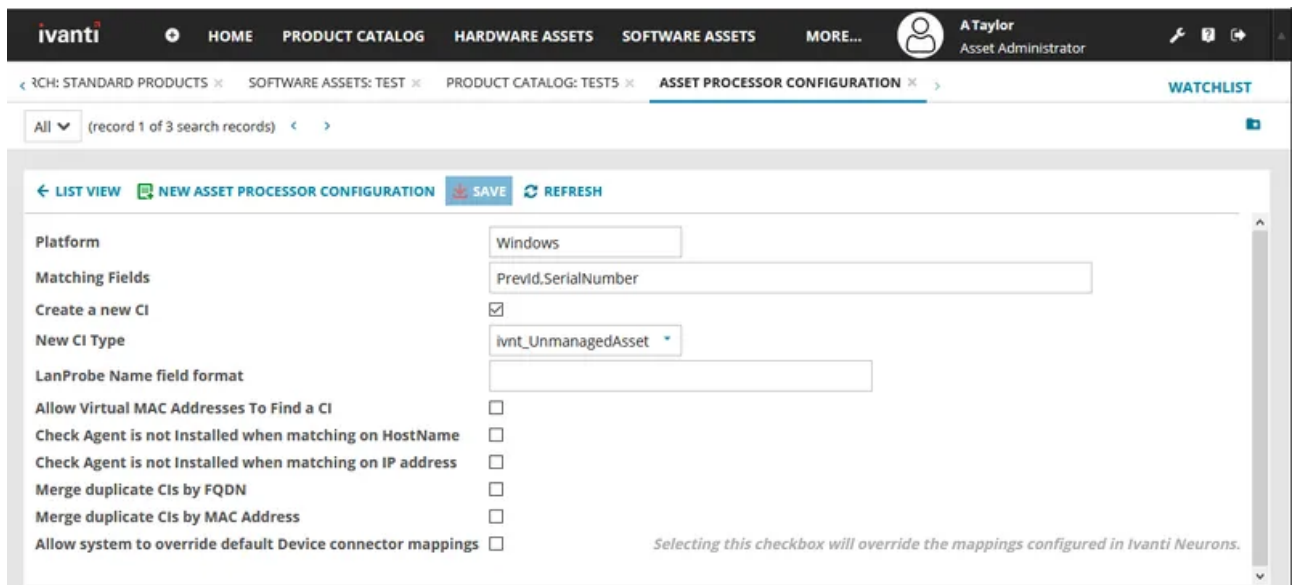
2. In the list view, double-click the record type you want to import. By default, all record types are turned off (shown as **false**).
3. Click the **Enabled** check box.
4. Click **Save**, then click **List View**. Repeat for each record type you want to import.

Selected record types should now display as **true**, which means that the Ivanti Neurons connector will actively import data for that type until you disable it again.

Finally, set the CI (asset) type settings for the imported data. This is a one-time configuration.

▼ To set the CI type settings

1. Open the **Asset Processor Configuration** workspace.
2. Double-click **Windows**.
3. Ensure that the **Matching Fields** are as shown below, and enable **Create a new CI**. By default, the **New CI Type** is set to unmanaged (ivnt_UnmanagedAsset), though you can change the type as needed. The selected type will be the category that all the imports are pulled into, as displayed in the Hardware Assets workspace.
4. Click **Save**, then click **List View**.



The screenshot shows the Ivanti Asset Processor Configuration workspace. The top navigation bar includes links for HOME, PRODUCT CATALOG, HARDWARE ASSETS, SOFTWARE ASSETS, and MORE... The user is logged in as A Taylor, Asset Administrator. The breadcrumb trail shows: < RCH: STANDARD PRODUCTS > SOFTWARE ASSETS: TEST > PRODUCT CATALOG: TESTS > ASSET PROCESSOR CONFIGURATION >. The main content area has a search bar with 'All' selected and '(record 1 of 3 search records)'. Below the search bar are buttons for LIST VIEW, NEW ASSET PROCESSOR CONFIGURATION, SAVE, and REFRESH. The configuration form includes the following fields:

- Platform: Windows
- Matching Fields: Previd.SerialNumber
- Create a new CI: ☒
- New CI Type: ivnt_UnmanagedAsset
- LanProbe Name field format:
- Allow Virtual MAC Addresses To Find a CI: ☐
- Check Agent is not Installed when matching on HostName: ☐
- Check Agent is not Installed when matching on IP address: ☐
- Merge duplicate CIs by FQDN: ☐
- Merge duplicate CIs by MAC Address: ☐
- Allow system to override default Device connector mappings: ☐

A note at the bottom right states: "Selecting this checkbox will override the mappings configured in Ivanti Neurons."

Optional but recommended

You can create device parent type/subtype filters and field mappings that define how the Ivanti Neurons connector will import your source asset data. These customizations provide a high level of control over how data is displayed in the Hardware Assets workspace and are useful when importing many records at once. For details, see [Customizing imports from the Ivanti Neurons Platform](#).

If you don't create field mappings for devices imported from Ivanti Neurons:

Device records will display in the Hardware Assets workspace as the CI (asset) type specified in the **Asset Processor Configuration** workspace (by default, unmanaged). Once the records are imported, you'll need to manually change their status to a managed asset type and subtype by following the procedure below.

The import process

You'll need to be logged into both the Neurons Platform (as Administrator) and ITAM (as Asset Administrator) to monitor the end-to-end process as it occurs.

The general steps for the import are:

- From the Ivanti Neurons console, run the data connector to start the process. The connector will begin pulling records into the Neurons Platform from the data source, then over to your ITAM database. If needed, you can set a schedule in the Ivanti Neurons console for recurring imports. You can only run one connector at a time.

It should take no longer than several minutes for the import process to begin populating the database. If this doesn't occur, contact Ivanti customer support for assistance.

- In the ITAM user console:
 - Open the **Integration Queue** workspace and monitor the progress, which may take a while. Refresh the page as often as needed. You'll see the status of the import job go from Queued to Running to Completed. The job will disappear from this workspace when completed.
 - Review the **Message Queue Journal** workspace for incoming messages processed from Ivanti Neurons.
 - Imported records will display in the correct workspace for the record type, as mentioned above. You may need to refresh those workspaces (Hardware Assets, Software Assets, and Invoices) before the data displays.

If you didn't customize how the Ivanti Neurons connector imports source asset data, device records will display in the Hardware Assets workspace as **unmanaged** by default. You'll need to manually change the status of these records to a managed asset type and subtype.

✓ To change the unmanaged status of imported device records

1. Open the **Hardware Assets** workspace.
2. In the list view, expand **Asset Type: ivnt_UnmanagedAsset**.
3. Manually select the records in the list.
4. In the upper-right area of the page, click the **More** drop-down menu and select **Administration Actions > Change Asset Type**.
5. In the Enter dialog, select the correct type and subtype from the drop-downs.
6. Click **OK**. The workspace list view will update accordingly.

3.2.2. Customizing imports from the Ivanti Neurons Platform

Asset Administrators can create device parent type/subtype filters and field mappings that define how the Ivanti Neurons connector will import source asset data. These customizations provide a high level of control over how data is displayed in the Hardware Assets workspace and are useful when importing many records at once.

You can export the connector customizations as a package, then test them in a staging or UAT environment before using in a production landscape to sync data from the Ivanti Neurons Platform. The package enables you to duplicate the customizations across multiple tenants, each of which must be installed with the most recent version of Ivanti Neurons for ITAM Cloud.

To access this feature, you're required to apply content package update Drop #21 (202002) and above, which is downloadable from the [Ivanti Marketplace](#). (Note that Drop #21 may be part of a consolidated package.)

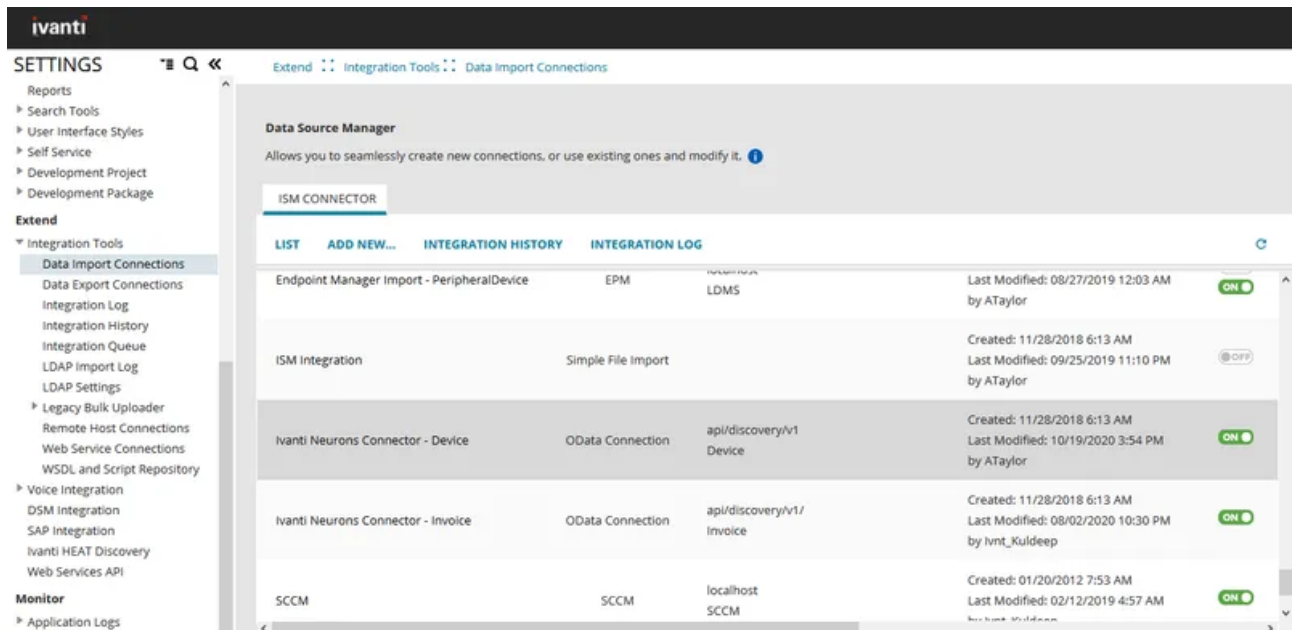
Non-computer asset type support

This content package also provides SNMP connector support for importing non-computer asset types from the Ivanti Neurons Platform. For example, printer data can be imported as a Printer subtype into the target database.

To enable support, you must first create a new subtype mapping for the non-device type in the **Asset Sub Type** workspace under one of the existing parent types. You can then add the required mapping for the SNMP connector by following the next procedure.

To customize asset data imports

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration Tools > Data Import Connections**. The Data Source Manager page lists all data import connections currently defined for your installation.
4. Scroll down the list to the **Ivanti Neurons Connector – Device** link. Ensure the connector is set to **ON** and click the link to open.



The screenshot shows the Ivanti Data Source Manager interface. The left navigation pane is expanded to 'Integration Tools > Data Import Connections'. The main area displays a table of data import connections.

Data Source Manager				
Allows you to seamlessly create new connections, or use existing ones and modify it.				
ISM CONNECTOR				
LIST	ADD NEW...	INTEGRATION HISTORY	INTEGRATION LOG	
Endpoint Manager Import - PeripheralDevice	EPM	LDMS	Last Modified: 08/27/2019 12:03 AM by ATaylor	ON
ISM Integration	Simple File Import		Created: 11/28/2018 6:13 AM Last Modified: 09/25/2019 11:10 PM by ATaylor	OFF
Ivanti Neurons Connector - Device	OData Connection	api/discovery/v1/Device	Created: 11/28/2018 6:13 AM Last Modified: 10/19/2020 3:54 PM by ATaylor	ON
Ivanti Neurons Connector - Invoice	OData Connection	api/discovery/v1/Invoice	Created: 11/28/2018 6:13 AM Last Modified: 08/02/2020 10:30 PM by Ivnt_Kuldeep	ON
SCCM	SCCM	localhost SCCM	Created: 01/20/2012 7:53 AM Last Modified: 02/12/2019 4:57 AM	ON

5. **Connection Setting page:** We recommend leaving the defaults as they are, though you can change as needed. Click **Test Connection** near the bottom of the page to verify that your connection settings work. If successful, click **Next**.

The screenshot shows the 'Connection Setting' page, which is the first step in a six-step wizard. The steps are: Connection Setting, Object Mapping, Filter Setting, Field Mapping, Schedule Setting, and Review and Publish. The 'Connection Setting' step is highlighted in orange. Below the step indicator, the page title is 'Connection Setting' with a subtitle 'Setup a new configuration or modify an existing configuration.' and an information icon. The 'Configuration Details' section contains four input fields: 'Connection Name' (Ivanti Neurons Connector - Device), 'Connection Type' (Ivanti Cloud Device Connector), 'Cloud Connector API Path *' (api/discovery/v1), and 'Cloud Connector Object *' (Device). Below these fields is a 'Test Connection' button with a lightning bolt icon. Underneath the button, it says 'Last verified on [Wed Jun 29 2022 14:22] - test result : undefined'. At the bottom are 'Back' and 'Next' navigation buttons.

2. **Object Mapping page:** We recommend leaving the defaults as they are, though you can change as needed. **Source mapping tables** is a list of populated tables based on settings defined on the previous page. **Batch size** is the number of records processed at a time for any given job. **Max size** is the number of records retrieved each time the connector queries the source database. **Root table** is the primary table containing the master data that defines all devices in your organization. **Unique key** uniquely identifies all devices in your organization. **Change-Time column** is not currently in use.
3. Click **Next**.
4. **Filter Setting page:** Define optional filter conditions for the records you want to import. Based on the filters defined, only those records will be imported from the source database. For example, you can choose to import an asset type of Laptop by creating the filter value **Laptop** as shown below.

The screenshot shows the 'Filter Manager' page, which is the third step in the setup wizard. The steps are: Connection Setting, Object Mapping, Filter Setting, Field Mapping, Schedule Setting, and Review and Publish. The 'Filter Setting' step is highlighted in orange. Below the step indicator, the page title is 'Filter Manager' with a subtitle 'Define filter conditions on the Source root object.' and an information icon. There are two radio buttons for logical operators: 'AND' (selected) and 'OR'. Below these are three input fields: 'Device.Type' (a dropdown menu), 'Equal' (a dropdown menu), and 'Laptop' (a text input field). To the right of the 'Laptop' field are green and red circular icons.

- In the left drop-down, select a field from the source database. For this procedure, select **Device.Type**, but you can create filters for different fields as well. *Do not* select a field that results in a collection of values being imported from Ivanti Neurons—filters will not work for those fields. For example, don't select a value such as Device.BIOS.BIOSSettings.
- In the middle drop-down, select an operator. In most cases, you'll want to select **Equal**.

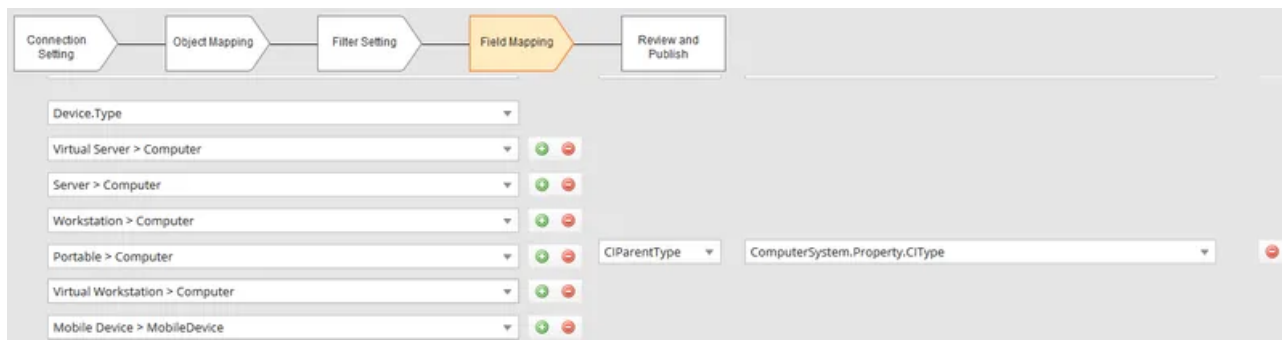
Important: The operator **IsNotEmpty** must be used for filtering out null parameters instead of **NoContain**. For example, use IsNotEmpty when syncing devices from Ivanti Neurons that don't have a serial number.

- In the field to the right, enter your filter condition. You can only add one filter per row.
- Use the AND/OR conditions as necessary and click the  icon to add more filters to the list. To remove a filter, click the  icon.

9. When finished, click **Next**.

10. Field Mapping page: Use this page to define how fields in the source database are mapped to fields in the target ITAM database. The newly added map types of **CIParentType** and **CISubType** reconcile the asset parent type and subtype of the imported records based on the "type" received from Ivanti Neurons (as defined in the Asset Sub Type workspace). Always ensure that both the parent type and subtype mapping are up to date in the **Asset Sub Type** workspace. This mapping will determine the asset import categorization. Also note the following:

- If CIParentType reconciliation doesn't find a proper parent type in the Asset Sub Type workspace, then the parent type will be mapped to the **New CI Type** category as defined in the **Asset Processor Configuration** workspace (by default, ivnt_UnmanagedAsset). The device record will display in the Hardware Assets workspace under the same category.
- If CISubType reconciliation doesn't find a proper subtype in the Asset Sub Type workspace, then the asset import will fail.



Source Field	Operator	Target Field
Device.Type		
Virtual Server > Computer		
Server > Computer		
Workstation > Computer		
Portable > Computer		
Virtual Workstation > Computer		
Mobile Device > MobileDevice		

Mapping Type: **CIParentType** Target Field: **ComputerSystem.Property.CIType**

- The left column displays the source field names, and the right column displays the target field names. It's assumed that you know the Source mapping names in advance. If you need sample mapping scenarios, see the section below.
- Scroll down the page until you find the Device.Type source field in the left column. (There will be two Device.Type sections. In the first, you'll select the **CIParentType** mapping. In the second section, you'll select the **CISubType**). Note that to have a CISubType field mapping, it's mandatory to first have a CIParentType mapping.
- Under the Device.Type source, use the drop-downs to select the asset parent type you want imported into the database.
- From the middle column drop-down, select **CIParentType**.
- From the right column drop-down, select **ComputerSystem.Property.CIType** for the field you want to map to.

- Scroll down to the second Device.Type source field in the left column. Use the drop-downs to select the asset subtype you want imported into the database.
- From the middle column drop-down, select **CISubType**.
- From the right column drop-down, select **ComputerSystem.Property.SubType**.

11. When finished, click **Next**.

12. **Schedule Setting page:** Use this page to schedule when the connector will sync with Ivanti Neurons to import data into ITAM. Available options are located in the Schedule List; click the schedule you want to enable. If needed, you can select more than one schedule using the Ctrl button on your keyboard. To create a custom schedule, see [About the Schedule Entry and Scheduled Jobs Workspaces](#) in the Ivanti Neurons for ITSM online help.

13. **Review & Publish page:** Click **Preview** to ensure that the mappings look as expected. Click **Back** to make any changes. When you're satisfied with the results, click **Publish** to save your settings and run the connector at the schedule(s) you set, or click **Publish & Run Now** to save your settings and run the connector immediately. In either case, once the connector is finished running, device records will display in the Hardware Assets workspace, and invoice records will display in the Invoices workspace. Click **Publish & Test Run** to conduct a test run of the connector but not save the records to the target ITAM database.



This is a one-time configuration that is saved until you manually change it again. After publishing, you'll want to test that the customizations work as intended. For details, see the following section.

Sample mapping scenarios

Use case 1: For the mapping **Portable > Computer = CIParentType = ComputerSystem.Property.CIType** shown below, the asset imported from Ivanti Neurons having Device.Type > Portable is mapped to the parent type Computer in the target database. Hence, the device is imported under the parent type of Computer.



The screenshot shows the 'Field Mapping' configuration page. On the left, a list of 'Device.Type' values is shown with corresponding mapping buttons (green plus and red minus). The mappings are:

- Virtual Server > Computer
- Server > Computer
- Workstation > Computer
- Portable > Computer
- Virtual Workstation > Computer
- Mobile Device > MobileDevice

On the right, the 'CIParentType' field is mapped to 'ComputerSystem.Property.CIType'.

Use case 2: If you create a mapping of **Laptop > Computer = CIParentType = ComputerSystem.Property.CIType**, it won't work if Laptop isn't also defined in the Asset Sub Type workspace. In this situation, devices of type Laptop will be moved to the **New CI Type** category defined in the **Asset Processor Configuration** workspace (by default, Ivnt_UnmanagedAsset) and will display in the Hardware Assets workspace under that same category.

Use case 3: If a CIParentType mapping is not defined in the Ivanti Neurons connector Field Mapping page, then the **New CI Type** category defined in the **Asset Processor Configuration** workspace will be used (by default, Ivnt_UnmanagedAsset), and the device will display in the Hardware Assets workspace under that same category.

Use case 4: With the subtype mapping **Portable > Laptop = CISubType = ComputerSystem.Property.SubType** shown below, the Device.Type received from Ivanti Neurons as Portable is imported as subtype Laptop under the parent type of Computer.



The screenshot shows the 'Field Mapping' configuration page. On the left, a list of 'Device.Type' values is shown with corresponding mapping buttons (green plus and red minus). The mappings are:

- Computer > Desktop
- Portable > Laptop
- Workstation > Desktop
- Peripheral Device > Printer
- Mobile Device > Smart Phone
- Virtual Workstation > Virtual Desktop

On the right, the 'CISubType' field is mapped to 'ComputerSystem.Property.SubType'.

Use case 5: If a Device.Type is received as Laptop, which does not exist in the mapping (left panel), then this subtype will be considered as Laptop in the target database.

Testing the connector customizations

It's recommended that you export your customizations as a metadata package and test them in a staging or UAT environment before importing into a production landscape. The process for doing so follows these general steps and is explained in the procedure below:

- Export the customizations (created in the procedure above) as a package.
- Contact Ivanti customer support to have them point the Neurons Platform to your staging or UAT tenant.
- Import the package to the same staging or UAT tenant and test it. Make any necessary changes.
- Contact Ivanti again to have them point the Neurons Platform to your production tenant.
- Import the package to your production tenant in preparation for importing data from the Neurons Platform.

In all cases, the latest version of Ivanti Neurons for ITAM must be installed on your tenants.

Important:

- The following procedure is applicable only for an update scenario; exported packages won't create new connections if the connector doesn't already exist as part of your installation.
- Before applying the package, **back up your database**.
- Clone and delete actions for Ivanti Neurons connectors (Device and Invoice) are currently disabled or have been removed.

✓ To test and verify the customizations

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration Tools > Data Import Connections**.
4. Scroll down the list to the **Ivanti Neurons Connector – Device** link. Scroll to the far right of that link and click the  icon to export the customizations as a package. In the Warning dialog that displays, click **Continue**. The package is exported to your Downloads folder.
5. Contact Ivanti to have them point Ivanti Neurons to your staging or UAT tenant.
6. From your browser, log into a staging or UAT tenant and open the Configuration Console.
7. In left navigation pane, click **Build > Development Package > Packages**. Ensure that you're in the list view, then click **Import Package** (top right of the toolbar).
8. Browse for and open the customization package. In the dialog that displays, click **Preview Impact** to view details about how this package may impact your database. Click **Execute** to apply it; this process may take a few minutes to complete.
9. Verify that the package works as intended and make any necessary changes.
10. Contact Ivanti again to have them point the Neurons Platform to your production tenant.
11. Import the package to your production tenant. If needed, you can duplicate the package across multiple production tenants.

Once you've completed this procedure, you can begin importing asset data. For details, see **The import process** section in [Importing from the Ivanti Neurons Platform](#).

3.2.3. Integrating with Ivanti Neurons for Spend Intelligence

If you're using both Ivanti Neurons for ITAM Cloud and Ivanti Neurons for Spend Intelligence (a licensed feature accessed via the Ivanti Neurons Platform), you can integrate the products so that any software-asset contracts that you add, edit, or delete in one database are automatically reproduced in the other. Contract line items of type Entitlement in ITAM correspond to license transactions in Spend Intelligence.

This feature works only with ITAM Cloud—ITAM On-Premises does not currently support data transfers with Spend Intelligence.

Getting started

To get started with the integration, you need to obtain the appropriate license from Ivanti for using Spend Intelligence.

Next, contact Ivanti customer support and request that the tenants for both the Neurons Platform and ITAM Cloud are set up to communicate with each other for the data transfers.

Finally, see the [Ivanti Neurons for Spend Intelligence](#) help for details about:

- How the data is mapped between databases.
- Enabling the integration.
- Loading initial data from Spend Intelligence into ITAM. See the next section for loading initial data from ITAM into Spend Intelligence.

Even though all contract line items in ITAM require an associated contract, Spend Intelligence permits the transfer of contract line items *without* a parent contract. Be aware that ITAM *does not* sync those types of transfers, so the record counts may not match after a sync.

Loading initial data from ITAM into Spend Intelligence

Once integration is enabled between the products, any existing data in your source database will not be automatically transferred to the other database, so you need to initiate this transfer. (For integration details, see the link above.)

All contract data transferred into Spend Intelligence *must* have an associated vendor; otherwise, the data will not import correctly. For this reason, we recommend that you consistently include a vendor name with all contracts in ITAM.

Additionally, if contracts and their associated contract line items have *different* vendors in ITAM, the contract line items will be de-linked from the contracts during the transfer into Spend Intelligence and saved separately.

✓ To load initial data from ITAM into Spend Intelligence

Before starting this procedure, you must complete the preliminary steps in the **Getting started** section above.

This procedure initiates a full transfer of software-asset contract data from a single ITAM database or tenant.

1. Log in as Asset Administrator.
2. Open the **Ivanti Neurons for Spend Intelligence Configuration** workspace.
3. Under Message Type, double-click **Outgoing** (this option should already be set to **true**).

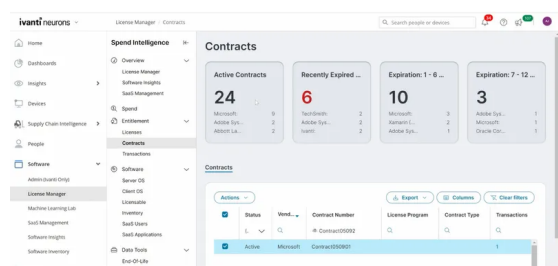
X DELETE REFRESH	
Message Ty...	Enabled
Incoming	true
Outgoing	true

4. Click the **Initiate Outgoing Data Full Load** button to transfer the data into Spend Intelligence. This process may take several minutes to complete. **IMPORTANT:** *Click this button only once.* Each click initiates a full-load transfer onto the queue, which will slow the entire process down.

← LIST VIEW
SAVE
REFRESH

Type Enabled ☒
Initiate Outgoing Data Full Load Send the whole message information for Contract and associated Contract Line Items.

After the initial data transfer is complete, you can view the synced data in the Spend Intelligence console—open **Software > License Manager > Contracts** or **Transactions** (for contract line items of type Entitlement in ITAM). You may need to refresh the page to see that the active contracts or transactions have increased in number.



Status	Vendor	Contract Number	License Program	Contract Type	Transactions
Active	Microsoft	Contract000001			1

As long as the integration remains enabled between the databases, all contract modifications made in the ITAM workspaces for Contracts and Contract Line Items will be reproduced in Spend Intelligence, as well as the other way around.

To disable the integration, see the [Ivanti Neurons for Spend Intelligence](#) help > **Enabling the integration** section. Basically, you'll need to reset the incoming and outgoing data options to **disabled**.

3.2.4. Integrating with Ivanti Neurons for Discovery (for ITAM On-Premises only)

This topic describes how to integrate your local implementation of ITAM On-Premises with Ivanti Neurons for Discovery (accessed via the Ivanti Neurons Platform). Integration enables you to transfer data from Neurons for Discovery, such as device and invoice records, into your ITAM database. The transfer of data goes one way, meaning you can't transfer updated records back into Neurons for Discovery.

At this time, **Installed software** information for device records is transferable from Neurons for Discovery, but **Licensable software** information is not.

Getting started

Before getting started with the integration, make sure:

- You're running ITAM On-Premises 2022.3 or higher. For details on setting up ITAM On-Premises, see [Setup](#).

For existing ITSM customers, upgrade to ITAM by applying the latest ITAM content package (available from the [Ivanti Marketplace](#)).

- You're licensed to access the Neurons Platform.
- You have an Neurons for Discovery tenant set up with data you want to transfer.

Next, follow the sections below, in the order listed, to complete the integration.

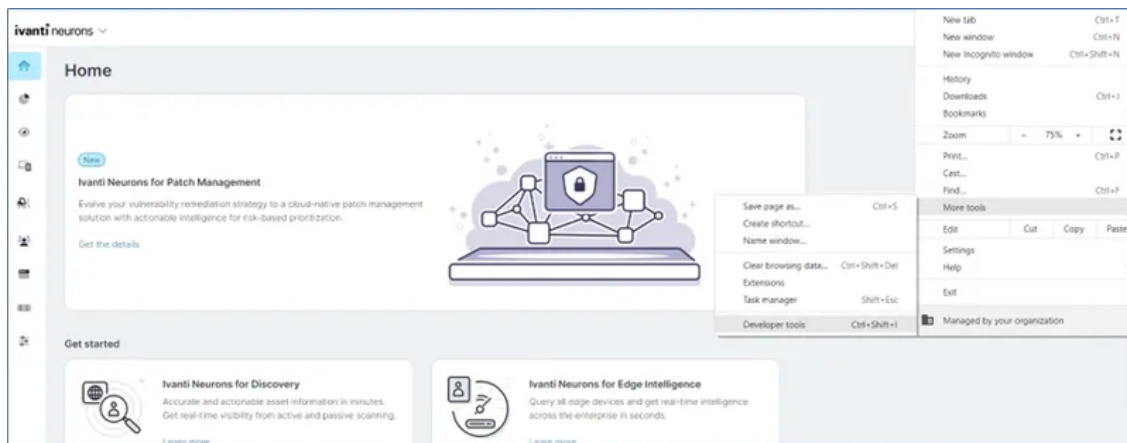
Updating the UNO Landscape configuration

This is a one-time update required to integrate with Neurons for Discovery. If you need assistance or details about the Neurons for Discovery tenant settings, contact Ivanti customer support.

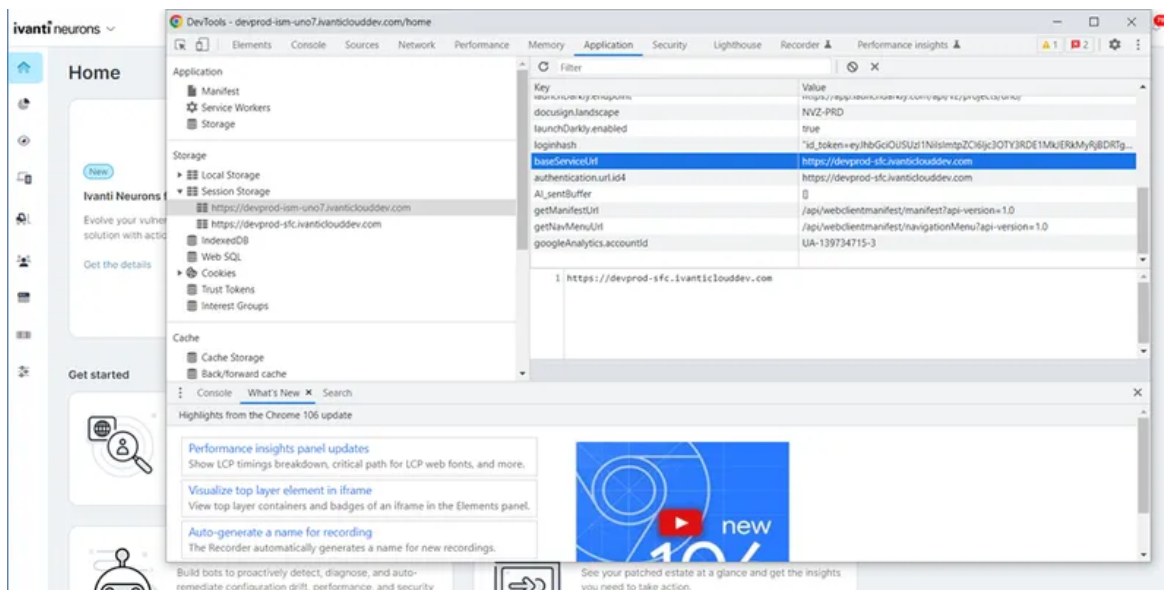
Before you can update the UNO Landscape, you first need to obtain URL and tenant ID values from the Neurons Platform. Obtain these values by following the procedure below.

▼ To identify the APIBaseURI and tenant ID needed for the UNO Landscape update

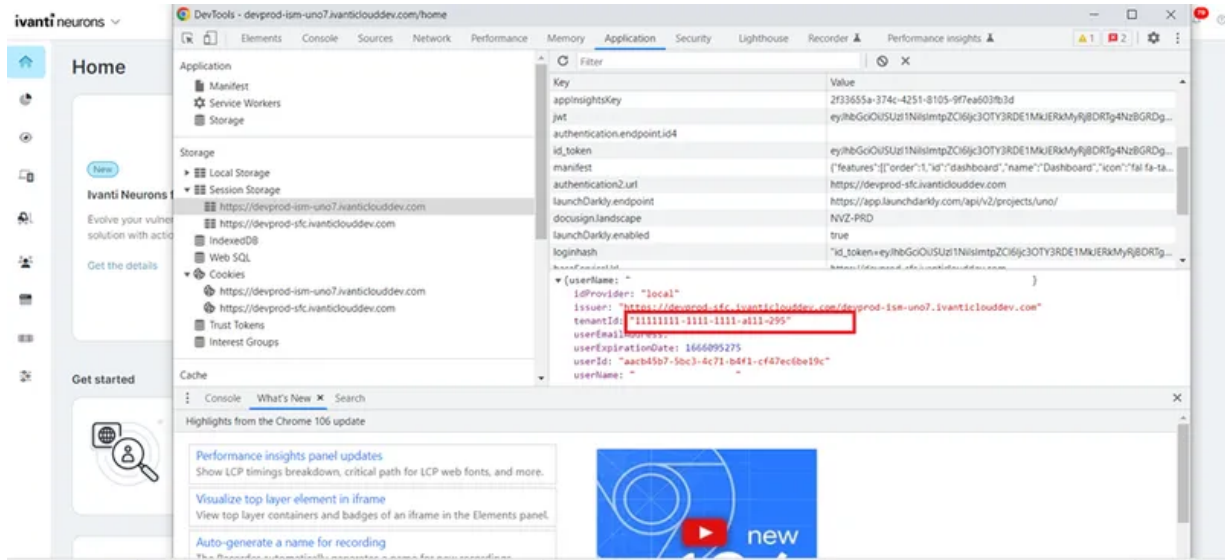
1. Log in to the Neurons Platform as Administrator using Chrome (or any other supported browser).
2. Click the browser's menu and open **More tools > Developer tools**.



3. Under **Application > Session Storage**, copy the **baseServiceURI** value. This is the APIBaseURI value needed in step 3 of the next procedure.



2. Under **Application > Session Storage**, copy the **tenantId** value (in the userName section). This is the UNOTenantRecId value needed in step 5 of the next procedure.

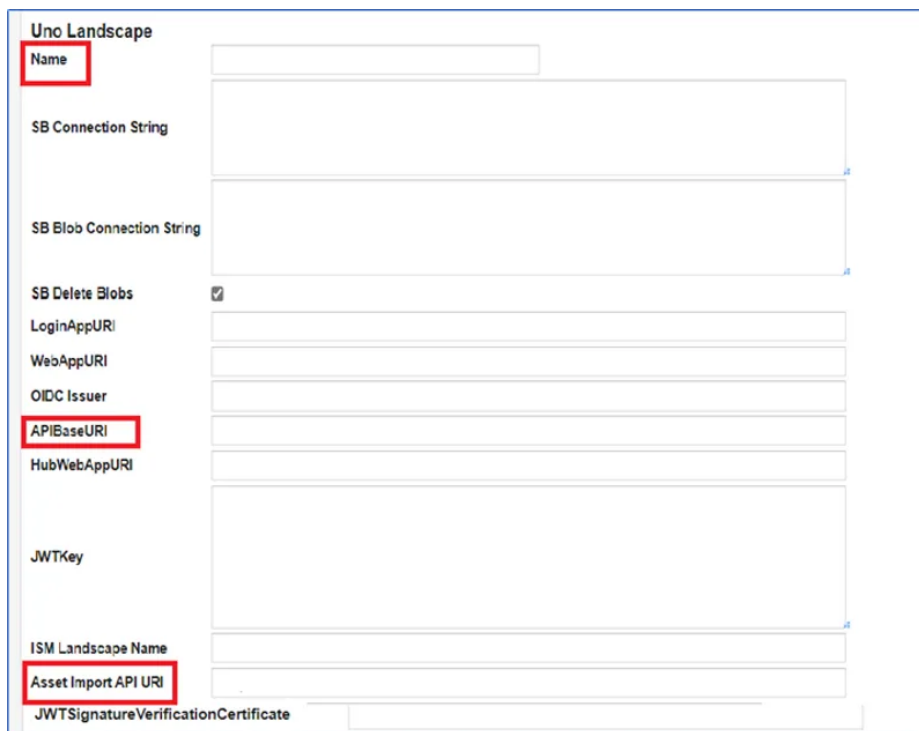


✓ To update the UNO Landscape configuration

1. Log in to the ITAM tenant **CentralConfig** application as Administrator. If you need assistance accessing this application, contact Ivanti customer support.

If your ITAM installation doesn't currently display the Administrator user role, log in as Asset Administrator, then add the role via the Configuration Console > Roles and Permissions menu. For details, see [Setting up Roles](#) in the Configuring Ivanti Neurons for ITSM help.

2. Open the **UNO Landscape** workspace.
3. Click **New UNO Landscape**, then enter the following values:
 - **Name:** Any identifiable name, such as "Neurons-OnPrem."
 - **APIBaseURI:** This is the Neurons Service fabric URL (without an http/s prefix) identified in the procedure above.
 - **Asset Import API URI:** This should be the same value as the APIBaseURI, also without an http/s prefix.



The screenshot shows a web form titled "Uno Landscape". It contains the following fields and controls:

- Name:** A text input field, highlighted with a red box.
- SB Connection String:** A large text area.
- SB Blob Connection String:** A large text area.
- SB Delete Blobs:** A checkbox that is checked.
- LoginAppURI:** A text input field.
- WebAppURI:** A text input field.
- OIDC Issuer:** A text input field.
- APIBaseURI:** A text input field, highlighted with a red box.
- HubWebAppURI:** A text input field.
- JWTKey:** A large text area.
- ISM Landscape Name:** A text input field.
- Asset Import API URI:** A text input field, highlighted with a red box.
- JWTSignatureVerificationCertificate:** A text input field.

4. Click **Save**.
5. Open the **Tenants** workspace.
6. From the list, select the ITAM tenant where the data import from Neurons Platform is to occur, then enter the following values:
 - **UNO Landscape:** From the drop-down list, select the name created above in step 3.
 - **UNOTenantRecId:** This is the Neurons Platform tenant ID identified in the procedure above.
 - **UNOTenantURL:** This is the Neurons Platform tenant URL.

Uno Landscape

1 of 2 search records)

New Tenants

Save

Refresh

Add Certificate

Certificate Password

Configuration

ce Mode

☐

o Name

NEURONSONPREM3

SAAM

Active

ste

se Seats

icense Seats

ver Host

NEURONSONPREM3

me

HEATSM

EPMAAdmin

d

BF

Bypass Remote Host Execution

☒

Is FedRamp

☐

Landscape Type

Uno Landscape

Attachment Save Type

UNOmatrix2

Attachment Path

Database

MetaRevision

697

UnoTenantRecId

Primary Product Name

Secondary Product Name

Monthly Cadence

Tag Name

UNOTenantURL

Number Of License Devices

Search Endpoint

Search Password

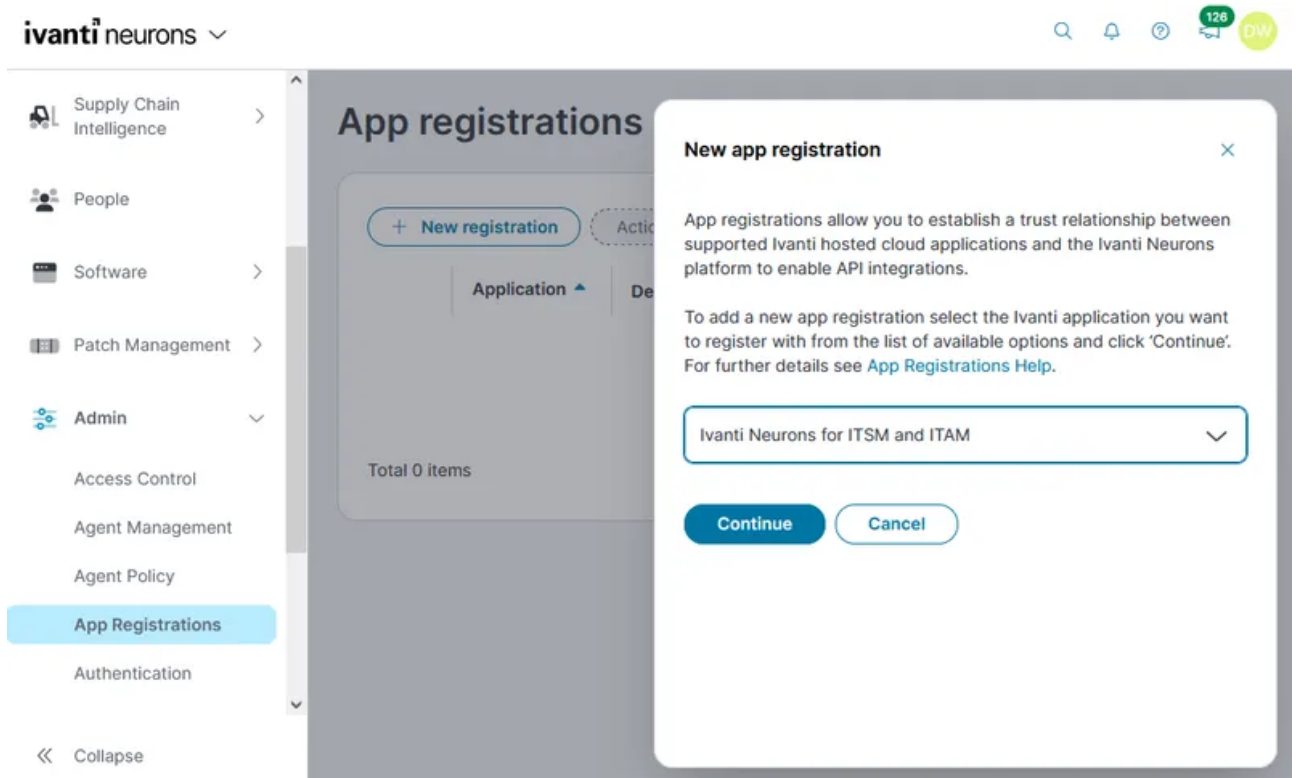
7. Click **Save**.
8. Click the **Reset Tenant Cache** button (top right of page) to ensure that the updates will take effect immediately.

Setting up the app and client registrations

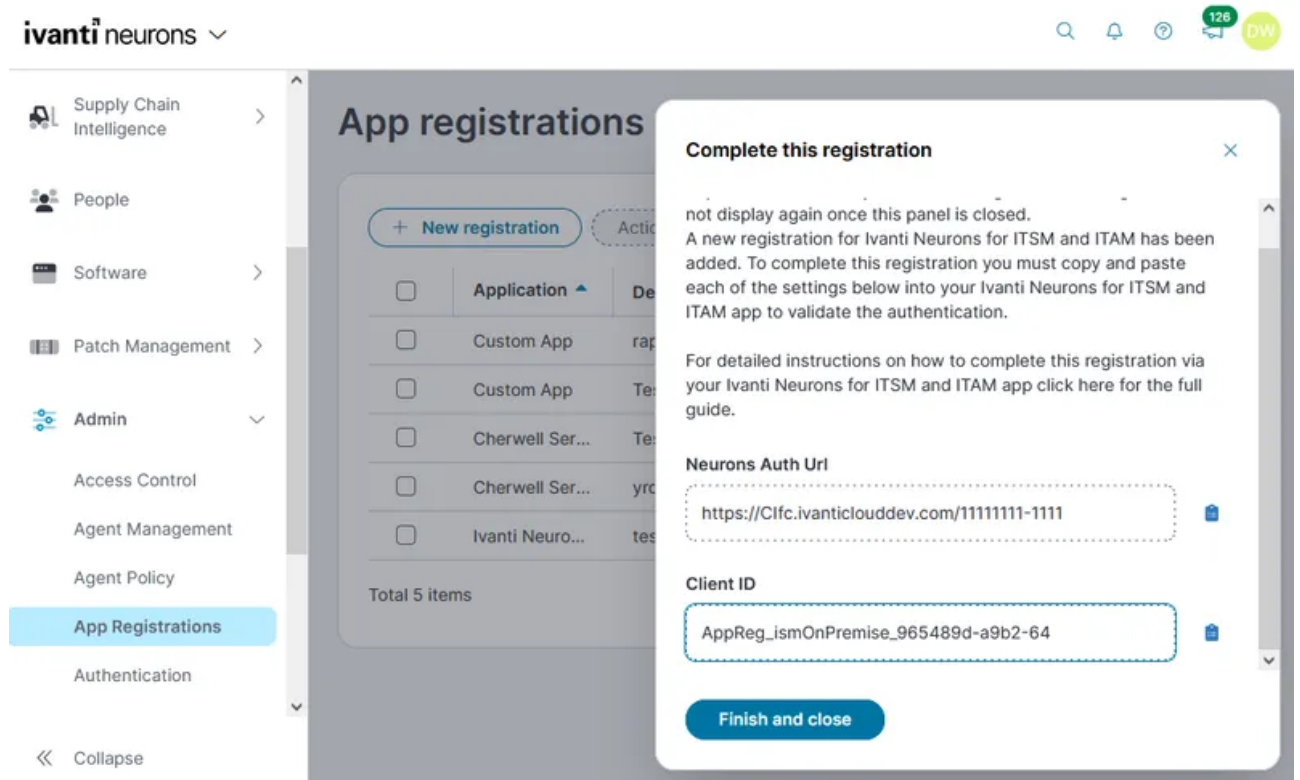
Complete these procedures to enable the tenants for Neurons for Discovery and ITAM to communicate with each other.

To set up app registration

1. Log in to the Neurons Platform as Administrator.
2. In the left navigation pane, click **Admin > App Registrations**.
3. Click **New Registration**.
4. From the New app registration drop-down, select **Ivanti Neurons for ITSM and ITAM**, then click **Continue**.



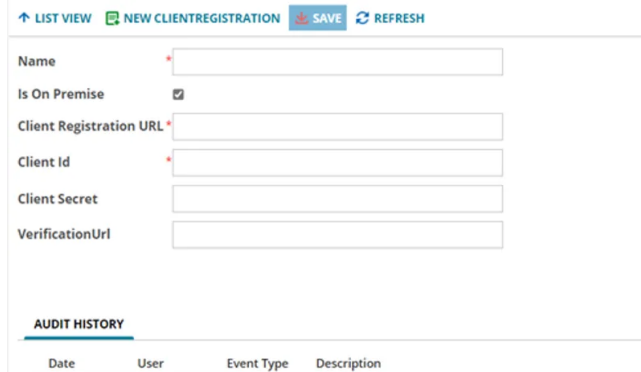
5. Add a meaningful description, such as "ITAM on-premises," then click **Register**.
6. Copy both the **Neurons Auth URL** and **Client ID**. (You'll need these for the next procedure when you set up client registration in the ITAM user console).



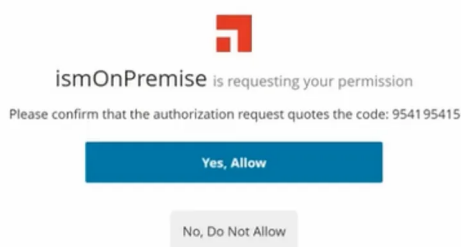
7. Click **Finish and close**.

To set up client registration

1. Log in to ITAM as Administrator.
2. Open the Client Registration workspace and click **New Client Registration** at the top.



3. Add the following details from Ivanti Neurons:
 - **Name:** Any identifiable name, such as "Neurons."
 - **Is On Premise:** This option is selected by default—leave as is.
 - **Client Registration URL:** The Neurons Auth URL copied from the procedure above.
 - **Client ID:** The Client ID copied from the procedure above.
 - **Client Secret** isn't needed here and **VerificationUrl** will auto-fill in step 9 below.
4. Click **Save**.
5. In the upper right corner, click **Register Device** to register your ITAM tenant with Neurons.
6. A pop-up message displays, telling you to enter the URL into a web browser to finalize the registration. Copy this URL and click **OK**.
7. Open a browser and paste in the URL. (Log in as Administrator if prompted.) The following screen displays:



8. Click **Yes, Allow**. "Success" will display if verification was successful.
9. In the Client Registration workspace, click **Get Token** (upper right corner). The **VerificationUrl** field should update.
10. Click **Save**.

Important: You cannot access data discovered from Neurons for Discovery from more than one ITAM tenant at a time because of way app registration works—this is by design to prevent unauthorized access. The prior ITAM tenant ceases receiving data from Neurons for Discovery if the same Neurons for Discovery tenant is configured to communicate with another ITAM tenant.

Enabling the ability to transfer data into ITAM

Next, enable the ability to transfer data from Neurons for Discovery. Invoice transfers require an additional procedure to update a Web.config file.

▼ To set up data transfers

1. Log in to ITAM as Asset Administrator.
2. Click the icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**.
4. Scroll down the list to **EnableNeuronsSyncByAPI** and set the value to **True**.

The screenshot shows the ivanti Neurons Configuration Console. The left sidebar has a 'Build' section with 'Global Constants' selected. The main area displays a table of global constants:

Name	Value
RecordLockingTimeOutValue	30
EnableRecordLocking	False
EnableNeuronsSyncByAPI	True
ActivateTheme	Modern
EnableSelfServiceMobilePerf...	False
IMFileInstanceArchivePeriod	7
EnableEnhancedObjectPermi...	False
EndChatSessionByAnalysts	False

5. Click **Save**. An Information dialog will display; click **OK**.
6. Expand **Configure > Cache Management**.

The screenshot shows the ivanti Neurons Configuration Console with 'Cache Management' selected in the left sidebar. The main area contains a text block explaining cache management and two buttons: 'Remove all cache items' and 'Reset cached validation lists only'. Below this is a section for 'Externally synchronized business objects' with a dropdown menu and an 'Invalidate synchronized data' button.

7. Click **Remove all cache items**, then click **Yes**.
8. Click **Reset cached validation lists only**, then click **OK**.

Important: By clearing the cache and then resetting it, you can speed up the process for enabling the connection between the tenants. The data transfer may not work immediately if this step isn't performed.

Complete two final procedures:

From the ITAM user console, open the **Asset Processor Configuration** workspace and enable the configurations as shown below:

HOME

CLIENT REGISTRATION ×

ASSET PROCESSOR CONFIGURATION ×

All ▾ (3 search records) Clear Grid Column Filters ▾

REFRESH

Platform	CreateNewCI	New CI Type	MatchingFi...	LanProbe N...	Allow LanPr...	Allow Virtu...	Check Agen...	Check Agen...
Windows	true	ivnt_Unman...	Previd,Serial...					
Unix	true	ivnt_Unman...	Previd,Serial...					
LanProbe	false	ivnt_Unman...	SerialNumb...	!NAME !DES...	false	true	true	true

On the ITAM tenant, open the **IntegrationServiceHost.exe.config** file (located by default at C:\Program Files\HEATSoftware\HEAT) and do the following:

- Update the **IsOnpremise** flag by setting it to **true**. The flag is case sensitive and should be in lowercase.
- Restart IIS and the Integration service.

▼ To update a Web.config file for invoice transfers

1. On the ITAM tenant, open the **Web.config** file in the installation folder (located by default at C:\Program Files\HEATSoftware\HEAT\IMServer\IMServices\AssetProcessor).
2. Copy the data displayed below this section:

<CentralConfigApiKeyconfigProtectionProvider="DataProtectionConfigurationProvider">

For example:

Bash

<EncryptedData>

Bash

<CipherData>

Bash

<CipherValue>AQAAAN...AAAEACAAADQ6</CipherValue>

Bash

</CipherData>

Bash

</EncryptedData>

Bash

</CentralConfigApiKey>

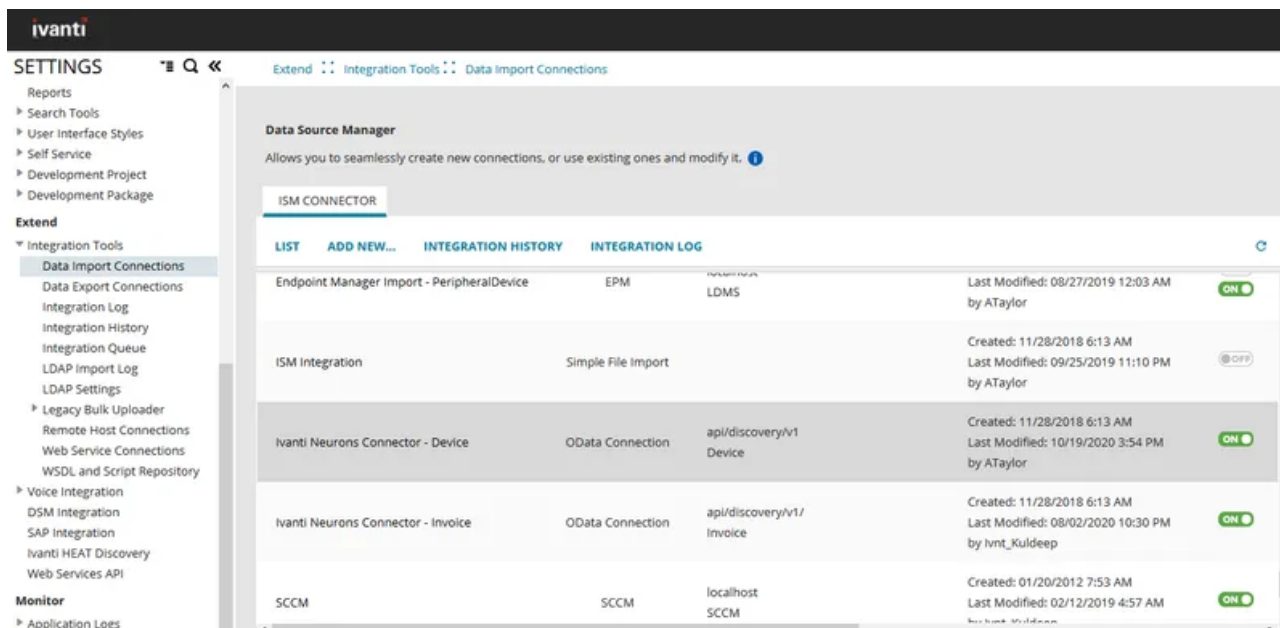
3. Paste the copied data into the **Web.config** file in the IvantiCloudDataProcessor folder (located by default at C:\Program Files\HEATSoftware\HEAT\IMServer\IMServices\IvantiCloudDataProcessor).
4. Confirm **<section name="CentralConfigApiKey" type="System.Configuration.NameValueSectionHandler"/>** is available in the IvantiCloudDataProcessor Web.config file.
5. Restart IIS.

Configuring the Neurons connector settings

Finally, configure the Neurons Device and/or Invoice connector settings for importing the data into ITAM. Settings include data filters, field mappings, and the import schedule. This is a one-time configuration that is saved until you manually change it again.

To configure the Neurons connector settings

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration Tools > Data Import Connections**.
4. Scroll down the list to **Ivanti Neurons Connector – Device** or **Ivanti Neurons Connector - Invoice**. Ensure the connector is **ON** and set to **Run Now**. Depending on the type of records you want to import (device or invoice), click the corresponding link to open and edit the connector.



SETTINGS    Extend :: Integration Tools :: Data Import Connections

Data Source Manager
Allows you to seamlessly create new connections, or use existing ones and modify it. 

ISM CONNECTOR

LIST	ADD NEW...	INTEGRATION HISTORY	INTEGRATION LOG	
Endpoint Manager Import - PeripheralDevice	EPM	LDMS	Last Modified: 08/27/2019 12:03 AM by ATaylor	
ISM Integration	Simple File Import		Created: 11/28/2018 6:13 AM Last Modified: 09/25/2019 11:10 PM by ATaylor	
Ivanti Neurons Connector - Device	OData Connection	api/discovery/v1/Device	Created: 11/28/2018 6:13 AM Last Modified: 10/19/2020 3:54 PM by ATaylor	
Ivanti Neurons Connector - Invoice	OData Connection	api/discovery/v1/Invoice	Created: 11/28/2018 6:13 AM Last Modified: 08/02/2020 10:30 PM by Ivnt_Kuldeep	
SCCM	SCCM	localhost SCCM	Created: 01/20/2012 7:53 AM Last Modified: 02/12/2019 4:57 AM	

5. **Connection Setting page:** We recommend leaving the defaults as they are, although you can change as needed. Click **Test Connection** near the bottom of the page to verify that the connection settings work. It's important to test each connector that you're using. If the test connection fails, it's most likely a configuration issue and the data will not transfer into the ITAM database. Contact Ivanti customer support for assistance.
6. If the test connection is successful, click **Next**.

Connection Setting

Setup a new configuration or modify an existing configuration. ⓘ

Configuration Details

Connection Name: Ivanti Neurons Connector - Device

Connector Type: Ivanti Cloud Device Connector

Cloud Connector API Path *: api/discovery/v1

Source Connector Object: Device

7. **Object Mapping page:** We recommend leaving the defaults as they are, although you can change as needed. **Source mapping tables** is a list of populated tables based on settings defined on the previous page. **Batch size** is the number of records processed at a time for any given job. **Max size** is the number of records retrieved each time the connector queries the source database. **Root table** is the primary table containing the master data that defines all devices in your organization. **Unique key** uniquely identifies all devices in your organization. **Change-Time column** is not currently in use.

8. Click **Next**.

9. **Filter Setting page:** Click **Create Filter** to define optional filter conditions for the records you want to import. Based on the filters defined, only those devices or invoices will be imported from the source database. For example, you can choose to import an asset type of Laptop by creating the filter value **Laptop** as shown below.

Last verified on [Wed Jun 29 2022 14:22] test result: undefined

Filter Manager

Define filter conditions on the Source root object. ⓘ

☒ AND ☐ OR

Device.Type Equal Laptop

- In the left drop-down, select a field from the source database.
- In the middle drop-down, select an operator. In most cases, you'll want to select **Equal**.
- In the field to the right, enter your filter condition. You can only add one filter per row.
- Use the AND/OR conditions as necessary and click the  icon to add more filters to the list. To remove a filter, click the  icon.

10. When finished, click **Next**.
11. **Field Mapping page:** Define how fields in the source database are mapped to fields in the target ITAM database. The left column displays source field names, the middle column displays transformation functions, and the right column displays target field names. It's assumed that the Source mapping names are known or identified in advance. For an overview of available functions, see [\(PDF\)](#). For guidance about target field mappings, see [\(PDF\)](#).

12. When finished, click **Next**.
13. **Schedule Setting page:** Schedule when the connector will sync with the Neurons Platform to import data into ITAM. Available options are located in the Schedule List. You can select more than one schedule using the Ctrl button on your keyboard.
14. Click **Next**.
15. **Review & Publish page:** Click **Preview** to ensure that the mappings look as expected. Click **Back** to make any changes. When you're satisfied with the results, click one of these options:
 - **Publish** to save your settings and run the connector at the schedule(s) you set.
 - **Publish & Run Now** to save your settings and run the connector immediately. With this option, you can monitor the data transfer in real-time. See the next section for details.
 - **Publish & Test Run** to conduct a test run of the connector but not save the records to the target ITAM database.

Confirming the data is importing correctly

After integration is complete, you can view details about an import job as it's occurring. From the ITAM user console:

- Open the **Integration Queue** workspace to monitor the job progress, which may take a while. Refresh the page as often as needed. You'll see the status of the import job go from Queued to Running to Completed. The job will disappear from this workspace when completed.
- Open the **Message Queue Journal** workspace to view incoming messages related to the transferred data. Click **Decompress Message** (top right of page) to view details about specific, discovered records. By default, this option is disabled. To enable it, see the **Troubleshooting** section below.
- Open the **Integration Log** workspace to view any errors associated with the import job. If a job was successful, Stats display under **LogType**. When errors are encountered, Stats and ErrorStats display. Double-click **ErrorStats** to view a summary of the errors.

Imported data will display in the correct workspace for the record type—devices display in **Hardware Assets** and invoices display in the **Invoices** workspace. You may need to refresh those workspaces before the data displays.

At this time, **Installed software** information for device records is transferable from Neurons for Discovery, but **Licensable software** information is not.

Troubleshooting

The **Integration Log** workspace may display an error during token renewal for the ITAM tenant. You can ignore this error or use the following workaround to prevent it from happening.

▼ To work around a token renewal error

1. Log in to ITAM as Asset Administrator.
2. Click the icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration tools > Web Service Connections**.
4. Scroll down the list to **Renew JWT for Neurons** and click the Edit icon.
5. Click **Next** to open the Integration Script page.
6. Update the **Scripts** section with the following text:

Bash

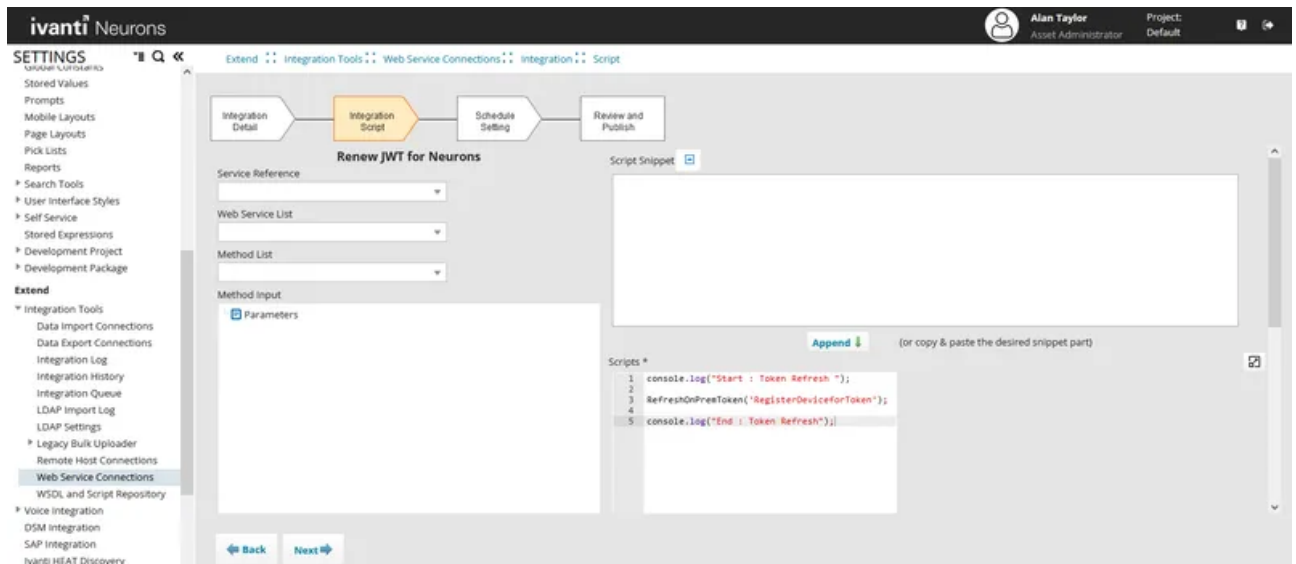
```
console.log("Start : Token Refresh");
```

Bash

```
RefreshOnPremToken('RefreshTokenfromNeurons');
```

Bash

```
console.log("End : Token Refresh");
```



7. Click **Next** until you reach the Review and Publish page.
8. Click **Publish and Run now**.

The following tips address issues you may encounter when viewing the **Message Queue Journal** workspace during a data transfer.

▼ To fix Invoice messages struck in a Dispatched state or marked as Timed Out

Before updating the Web.config file in this procedure, make sure you make a backup of the original.

1. On the ITAM tenant, go to C:\Program Files\HEATSoftware\HEAT\IMServer\IMServices\IvantiCloudDataProcessor.
2. Open the **Web.config** file.
3. Under the **<client>** section, do the following:
 - Ensure there's only one element with an attribute binding of **NetTcpBinding_IMessageQueueService**. If there are multiple elements, remove all except one.
 - Ensure the address attribute of that element is this address: **net.tcp://localhost:7200/**

For example:

Bash

```
<endpoint address="net.tcp://localhost:7200/" binding="netTcpBinding" bindingConfiguration="NetTcpBinding_IMessageQueueService"
```

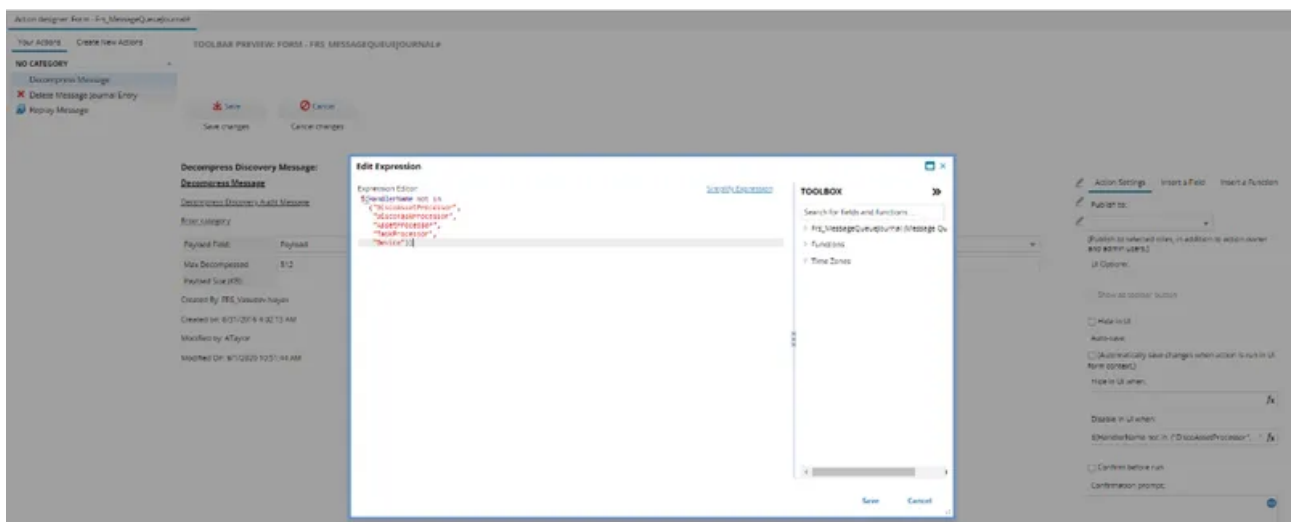
You can use the host name/server name instead of localhost. Update the port number to 7200 if any other port is configured.

4. Save the file.

▼ To enable the Decompress Message option

Enable this option to view details about specific records as they're being processed during a data transfer.

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Automation Tools > Quick Actions** to open the Quick Actions workspace.
4. Scroll down the list and click **Frs_MessageQueueJournal**.
5. Click the **Quick Actions** tab.
6. In the left side panel, click **Decompress Message**.
7. Click **Edit** to open the Edit Expression window.
8. Add the **Device** type in the **Disable in UI when** expression field as shown below:



9. Click **Save**.

3.3. User roles

Ivanti Neurons for ITAM provides a default set of roles that define a user's responsibilities while working within the product. Access to the different product workspaces is controlled by the roles that a user account is associated with.

From the Roles workspace, the Asset Administrator can assign a single user more than one role if necessary. The roles are then made available to that person upon logging in.

If your database is integrated with Ivanti Neurons for ITSM, you may see user roles in the drop-down list that are related to that product.

Roles defined

User roles are predefined and can't be modified; you also can't create new ones. When a role is selected, it determines the default set of workspaces, forms, and dashboards available to a user.

If you apply ITAM content packages to your system environment at a later date, some of those packages may include additional user roles not listed here. For details, see [Optional content packages](#).

The default set of ITAM user roles is as follows:

- **Asset Administrator** – Responsible for all ITAM-related administrative functions. Has access to all workspaces and dashboards and can add and edit records for assets and employees, assign user roles, create locations, create new values in validation lists (such as asset subtypes), and so on.

- **Asset Manager** – Has access to all of the workspaces used on a daily basis to manage an organization's assets, minus the administrative features. Also has access to all dashboards. Note that the other manager roles have overlapping responsibilities with the Asset Manager role, so those users have access to many of the same workspaces.
 - Available workspaces: Approvals, Asset Requests, Contract Line Items, Contracts, Disposals, Email, Employee, External Contact, Hardware Assets, Home, Invoices, Locations, Manufacturer, Product Catalog, Purchase Line Item, Purchase Orders, Reports, Request Offerings, Service Catalog, Shipments, Software Assets, Stock Management, Subnet Mapping, Vendors

- **Asset Mobile** – For end users who will use the product Self-Service Portal website to request Product Catalog assets for themselves or others. For details, see [Asset requests](#).

- **Asset Scanner** – Has access to the barcode scan functionality used on dedicated, Android-based scanner devices. For details, see Scans via dedicated scanners.
 - To scan and track assets via smartphone, you need an additional user role, **Mobile Asset Manager**, which is only available when you apply the content package for using Ivanti's smartphone app. For details, see [Mobile app](#).

- **Contract Manager** – Manages your organization's contract agreements with vendors. For details, see these relevant topics:
 - [Hardware assets](#)
 - [Contract and Warranty Management](#)
 - [Vendors](#)
 - [Software assets](#)
 - Available workspaces: Approvals, Contract Line Items, Contract Management, Email, Employee, External Contact, Hardware Assets, Home, Manufacturer, Purchase Line Item, Service Catalog, Software Assets, Vendors

- **Procurement Manager** – Buys assets, manages vendor relationships, and maintains the Product Catalog (which is the list of approved assets that have associated approved vendors and costs). For details, see these relevant topics:
 - [Hardware assets](#)
 - [Product Catalog](#)
 - [Asset requests](#)
 - [Procurement](#)
 - [Vendors](#)
 - [Software assets](#)

- Available workspaces: Approvals, Asset Requests, Email, Employee, External Contact, Hardware Assets, Home, Invoices, Manufacturer, Product Catalog, Purchase Line Item, Purchase Orders, Request Offerings, Service Catalog, Shipments, Software Assets, Vendors
- **Storage Manager** – Maintains stock levels, tracks the location of assets, and looks after storage spaces and warehouses. For details, see these relevant topics:
 - [Hardware assets](#)
 - [Stock management](#)
 - [Procurement](#)
 - [Asset requests](#)
 - [Asset disposals](#)
 - Available workspaces: Asset Requests, Disposals, Email, Employee, Hardware Assets, Home, Invoices, Manufacturer, Purchase Line Item, Purchase Orders, Service Catalog, Shipments, Stock Management
- **Report Manager** – Has access to all the SQL Server Reporting Services (SSRS) reports that provide in-depth reporting information about your assets. For a full list of supplied reports and what they display about assets, see [Reports](#).

For an overview of all available workspaces and the roles that can access them, see [Workspaces defined](#). For details about how to organize employees in the database, see [Employees, departments, teams, and contact groups](#).

✓ To assign a role to a user

Use the Roles workspace to assign a user role to an existing or new employee. New employees that you manually add here will then display in the **Employee** workspace.

1. Log in as Asset Administrator.
2. Open the **Roles** workspace.
3. In the list view, double-click the user role you want to associate with a user account. (If your database is integrated with Ivanti Neurons for ITSM, you may also see roles related to that product.) The Employees form displays:
 - To assign an existing employee to this role, click **Link** and scroll down the list until you find the employee name. Select the name and click **Select**. The employee name will display in the list view for this role.
 - To add a new employee into the database for this role, click **New**, fill in the New Employee form fields, then click **Save**. The new employee name will display in the list view for this role.
 - To remove an employee from this role, select the name, then click **Unlink**.
4. Click **Save**.

3.4. Employees, departments, teams, and contact groups

Asset Administrators can use the workspaces listed below to manage and organize user records. A high-level overview of these workspaces is provided here; for more details, see the Ivanti Neurons for ITSM online help at help.ivanti.com.

For details about assigning user roles, see [User roles](#).

Employee workspace

This workspace displays a list of all the employees in your database—employees are both users of ITAM and customers who can request assets. Employees are typically imported from your primary employee data source, though you can manually add them here as well.

All employee records must include details such as name, email address, login ID, org unit, and primary team the employee belongs to. As you add data to the database, you'll also be able to view an employee's assigned user roles and contact groups, associated assets, allocated software entitlements, and more from this workspace.

Asset Administrators can edit and create new employee records using this workspace; all other user roles have read-only access.

As best practice, we recommend that you define your employee **departments** and **teams** (in the Department and Teams workspaces respectively) *before* importing or manually adding employees to the database.

Department workspace

This workspace enables you to define departments within an organization, such as IT or Marketing, which can be used to categorize employees in the Employee workspace.

Teams workspace

This workspace enables you to create and manage teams of employees. A team is a more specific category than the department an employee belongs to—individual employees can be on more than one team, and teams can be created from employees working in separate departments.

Teams are responsible for adding items to the Product Catalog and fulfilling asset requests. Asset requests *must* be associated with at least one team, because request assignments are given to teams and use team email rather than individual email.

An asset request may also include one or more tasks that another team needs to complete before the request can be fulfilled.

Contact Group workspace

You can configure ITAM to use an approval process for setting up contracts, purchase orders, and Product Catalog items. In doing so, the process advances only after the majority of a group of approvers has approved the item.

Use the Contact Group workspace to add employees to a contact group that's responsible for advancing an approval process. After a person is added to a group, they'll receive an email when a process has begun that requires their approval. Managers, supervisors, and senior personnel are common members of contact groups.

If your database is integrated with Ivanti Neurons for ITSM, the list view will show contact groups for both products. The contact groups specific to ITAM are:

- **Purchase Order Approvers** – For details about configuring, see [Procurement](#).
- **Product Catalog Item Approvers** – For details about configuring, see [Product Catalog](#). Note that if a *non-standard* catalog request is made by a user, the approval process must go through members of this group. If a *standard* request is made, approval is based on the manager associated with the person requesting the item.

After configuring a contact group, you have the option of deactivating it at any time.

✓ To deactivate a contact group

1. Open the **Contact Group** workspace.
2. From the list view, click the group you want to make inactive.
3. Change the **Status** to **Inactive** and click **Save**.
4. Click **List View** to return to the main list.

3.5. Workspaces defined

Ivanti Neurons for ITAM has 40+ workspaces that comprise the user console. Each workspace performs a separate function that enables you to manage your organization's assets. Asset Administrators have access to all of the available workspaces, while a subset of workspaces is available to the other user roles.

The alphabetically ordered list below describes what each of these workspaces is used for and the user roles that have access to them.

If your database is integrated with Ivanti Neurons for ITSM, you'll notice that many of these workspaces are used for service management as well.

Address Country – Add countries to a master list that are part of your records for asset storage locations, vendor contacts, and so on. *Available to Asset Administrators*

Approvals – View a list of purchase orders that need approval before fulfillment can occur. By default, purchase orders do *not* need approval. *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers*

Aspect – View which content packages have been applied to an ITAM tenant. Content packages are available for existing customers and can be downloaded from the [Ivanti Marketplace](#). *Available to Asset Administrators*

Asset Data Mapping – Use as an advanced function to specify how asset data is mapped during data discovery. *Available to Asset Administrators*

Asset Requests – Place requests on behalf of customers for Product Catalog items such as hardware, software, and consumables. Also manage those requests from this workspace. For details, see [Asset requests](#). *Available to Asset Administrators, Asset Managers, Procurement Managers, Storage Managers*

Asset Processor Configuration – Configure the platforms from which to import data into the database. For details, see [Importing from the Ivanti Neurons Platform](#). *Available to Asset Administrators*

Asset Sub Type – Create a new globally-available asset subtype that goes under one of the predefined parent types of Computer, Consumable, General, Infrastructure, Mobile, and Peripheral in the Hardware Assets workspace. For details, see [Hardware assets](#). *Available to Asset Administrators*

CI Named Rel Constraints – Define logical relationships between parent and child configuration items (CIs). *Available to Asset Administrators*

CI Named Rel Data – Add the items that populate the lists found in the CI Named Rel Constraints workspace. *Available to Asset Administrators*

Contact Group – Create groups of employees to be contacted as part of an approval process for setting up contracts, purchase orders, and Product Catalog items. In doing so, the process advances only after the majority of a group has approved the item. For details, see [Employees, departments, teams, and contact groups](#). *Available to Asset Administrators*

Contracts – Set up the vendor contracts needed for purchasing assets. For Contract Managers, this workspace is called **Contract Management**. For details, see [Contract and Warranty Management](#). *Available to Asset Administrators, Asset Managers, Contract Managers*

Contract Line Items – Set up specific line items for vendor contracts (such as entitlements, maintenance, extended warranties, and so on), that you can link to a specific contract and reuse for other contracts. For details, see [Contract and Warranty Management](#). *Available to Asset Administrators, Asset Managers, Contract Managers*

Currency – Add to a master list the currencies that are part of your records for Product Catalog items, purchase orders, and so on. *Available to Asset Administrators*

Department – Define the departments in your organization that will be used in your employee records. Define departments *before* importing employee records so they're ready for selection. Do the same with teams in the Teams workspace. For details, see [Employees, departments, teams, and contact groups](#). *Available to Asset Administrators*

Disposals – Create disposal records for assets that are no longer needed. For details, see [Asset disposals](#). *Available to Asset Administrators, Asset Managers, Storage Managers*

Email – View all outbound emails that are manually created by users, or automatically created via triggered actions or work flows. Inbound emails created by the HEAT Email Listener are shown here as well. (The HEAT Email Listener is a component of Neurons for ITSM.) All email records in this workspace are initially configured in the Email Config and Inbox workspaces, which are available to Asset Administrators only. *Available to Asset Managers, Procurement Managers, Contract Managers, Storage Managers*

Email Config – Configure all settings for *outbound* email. *Available to Asset Administrators*

Employee – Manage employee records that have been imported into or manually created in the product. Employees are both *users* and *customers* who can request assets (similar to the ITSM customers who can request services). For details, see [Employees, departments, teams, and contact groups](#). *Available to Asset Administrators. Available as read-only to Asset Managers, Contract Managers, Procurement Managers, Storage Managers*

External Contact – Create a list of external contacts that weren't imported from your primary data source, such as new vendor contacts that you can associate with vendors in the Vendors workspace. Note that any vendor contacts added via the Vendors workspace > Contacts tab also display in this list. If your database is integrated with Neurons for ITSM, external contact records will include fields and tabs that are only relevant for that product. *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers*

Financial Owner Allocation – Use as a quick way to allocate unassigned asset records to certain organizational units (financial owners). To do so, expand the organizational units tree, as well as the Unassigned CIs, then drag and drop CI items onto a specific owner. *Available to Asset Administrators*

Financial Owners – Create new organizational units and any hierarchies associated with them. Org units are departments in your organization that are assigned as the financial owners of the assets tracked in the product. Also link asset records to these owners from this workspace. *Available to Asset Administrators*

Hardware Assets – Access and manage all asset records that have been imported into or manually created in the database. For details, see [Hardware assets](#). *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers, Storage Managers*

Inbox – Configure all settings for *inbound* email created by the HEAT Email Listener, which is a component of Neurons for ITSM. Use this workspace in conjunction with the Email Config workspace. *Available to Asset Administrators*

Integration – Set up and maintain your data across two databases after data discovery. *Available to Asset Administrators*

Integration History – View a history of all data-discovery or data-import jobs related to database integration, including canceled jobs. If you ever need to troubleshoot an import job that has failed, your first step would be to view this workspace. *Available to Asset Administrators*

Integration Log – Use to spot database-integration errors that may have occurred during data discovery or data import. *Available to Asset Administrators*

Integration Queue – View active database-integration jobs that are part of data discovery or a data import from the Ivanti Neurons Platform. Once the import is completed or aborted, the job disappears from the list. *Available to Asset Administrators*

Invoices – Track vendor invoices that are associated with asset purchase orders. For details, see [Procurement](#). *Available to Asset Administrators, Asset Managers, Procurement Managers, Storage Managers*

Ivanti Neurons Asset Import Configuration – Select the data records (licensable software, invoices, and devices) that you want to import from the Neurons Platform into the database. For details, see [Importing from the Ivanti Neurons Platform](#). *Available to Asset Administrators*

Journal Category – Create a new category for the journal notes or emails that may be part of an asset record. Categories further explain why an email was sent or why a note was added to a record. For details, see [Journals](#). *Available to Asset Administrators*

Journal Notes Sources – Create a source for journal notes (such as email, voice mail, and so on) that may be part of an asset record. For details, see [Journals](#). *Available to Asset Administrators*

Locations – Define the inventory locations that correspond to the different sites your organization has, as well as the storage spaces of your in-stock items. Set up locations *before* you begin managing in-stock assets with the Stock Management workspace. For details, see [Locations and storage spaces](#). *Available to Asset Administrators, Asset Managers*

Logs – View ITSM-related logs that have occurred for various events. Logs display here after being configured in the Logging Configuration workspace. ITAM barcode scans are logged in the Scan Log workspace, *not* here. *Available to Asset Administrators*

Logging Configuration – Configure logging services for ITSM-related events that may occur. ITAM barcode scans are *not* configured here. *Available to Asset Administrators*

Manufacturer – Add manufacturers to a master list for use in asset records. For details, see [Manufacturers](#). *Available to Asset Administrators. Available as **read-only** to Asset Managers, Contract Managers, Procurement Managers, Storage Managers*

Message Queue Journal – View details related to data-record imports as they're occurring in the Integration Queue workspace. *Available to Asset Administrators*

Product Catalog – Define catalog items for purchase that have agreed costs from approved vendors; also assess stock levels and active orders. Make items available for request by adding them to the catalog's user interface via the Request Offerings workspace. Once the Product Catalog is online, Asset Mobile users can request items via the Self-Service Portal, and managers can request items on behalf of a customer via the Asset Requests workspace. For details, see [Product Catalog](#). *Available to Asset Administrators, Asset Managers, Procurement Managers*

Purchase Line Item – Add and manage the purchase line items that are part of a purchase order. For details, see [Procurement](#). *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers, Storage Managers*

Purchase Orders – Order an asset as a custom purchase that's not one of the approved items in the Product Catalog. Manage invoices, shipments, and associated contracts here, as well as update vendor scorecards. For details, see [Procurement](#). *Available to Asset Administrators, Asset Managers, Procurement Managers, Storage Managers*

Reports – View a full list of supplied reports and what they display about your assets. These are SQL Server Reporting Services (SSRS) reports that provide in-depth reporting information about assets. For details, see [Reports](#). *Available to Asset Administrators, Asset Managers, Report Managers*

Request Offerings – Design the Product Catalog form, which is the catalog's user interface. You design the form *after* defining the items for purchase in the Product Catalog workspace. Once the Product Catalog is online, Asset Mobile users can request items from the Self-Service Portal, and managers can request items for customers from the Asset Requests workspace. For details, see [Product Catalog](#). *Available to Asset Administrators, Asset Managers, Procurement Managers*

Roles – Assign one or more of the eight ITAM user roles to employees in the database. The roles are then made available to that person upon logging in. When a role is selected, it determines the default set of workspaces (forms and dashboards) available to a user. For details, see [User roles](#). *Available to Asset Administrators*

Schedule Entry – Create a variety of ITSM-related schedules to be used for different functions. These schedules then display in a drop-down within the corresponding workspaces. *Available to Asset Administrators*

Self-Service Portal – A website that enables Asset Mobile users to place an asset request for themselves from the Product Catalog, as well as review any recently submitted requests and their approval status. Users can also view their currently assigned assets. It's up to managers to make this URL available to users. For details, see [Asset requests](#). *Available to Asset Mobile users*

Service Catalog – Order from a variety of ITSM-related request offerings and services. *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers, Storage Managers*

Shipments – View and manage a list of shipments that are associated with your purchase-order invoices. Shipments display in this workspace after you add them to invoices in the Invoices workspace. For details, see [Procurement](#). *Available to Asset Administrators, Asset Managers, Procurement Managers, Storage Managers*

Software Assets – View which software products exist in your database, and what your current level of entitlement is for those products. For details, see [Software assets](#). *Available to Asset Administrators, Asset Managers, Contract Managers, Procurement Managers*

Stock Management – Manage in-stock assets and the storage spaces where they're stored. For details, see [Stock management](#). *Available to Asset Administrators, Asset Managers, Storage Managers*

Subnet Mapping – Create a list of your subnets and associate them with a location. The product uses this information to produce an exceptions report that identifies when an asset's assigned location doesn't match the discovered or imported location. For details, see [Missing assets](#). *Available to Asset Administrators, Asset Managers*

Task – Manage the tasks that are part of an asset request. All associated tasks must be completed before an asset request can be approved. The Task workspace also includes any ITSM-related tasks that may be part of your integrated database. For details, see [Asset requests](#). *Available to Asset Administrators*

Teams – Define the teams of employees who will be responsible for adding items to the Product Catalog and fulfilling asset requests. Define teams *before* importing employee records so they're ready for selection. Do the same with departments in the Department workspace. For details, see [Employees, departments, teams, and contact groups](#). *Available to Asset Administrators*

Vendors – Define the vendors you use, as well as details about current vendor contracts and performance to get the best out of your ongoing relationships. For details, see [Vendors](#). *Available to Asset Administrators, Asset Managers, Procurement Managers*

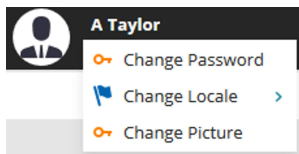
3.6. Passwords

You can change your password for accessing Ivanti Neurons for ITAM at any time. If you forget the password, you can receive a temporary one to log into the product.

You can also add an image next to your username in the user console.

✓ To change your password

1. Log into ITAM.
2. Click your username. From the drop-down menu, click **Change Password**.

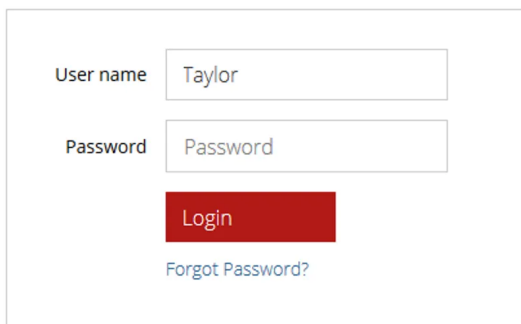


3. In the Change Password dialog, enter your old password, then enter the new password and confirm it. Passwords need to be at least 8 characters long and are case sensitive.
4. Click **Change**.
5. Log out and log in again to use the new password.

✓ To log in after forgetting your password

This feature is only available for internal authorization and does not work for external logins.

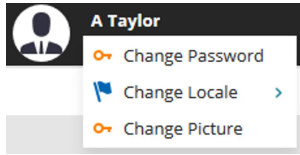
1. From the login page, click **Forgot password?**


 A screenshot of a login form. It contains two input fields: 'User name' with the text 'Taylor' and 'Password' with the text 'Password'. Below the fields is a red 'Login' button. Below the button is a blue link that says 'Forgot Password?'.

2. On the Password Recovery page, enter your username or your email address and click **Submit**. A temporary password will be sent to your email address.
3. Use the temporary password to log in, then change it as described in the procedure above.

▼ To add an image next to your username

1. With the ITAM user console open, click your username.



2. From the drop-down menu, click **Change Picture**.
3. In the resulting dialog, click **Browse** and select an image file from your saved files.
4. Click **Save**. The console will automatically refresh with the image next to your username.

4. Dashboards

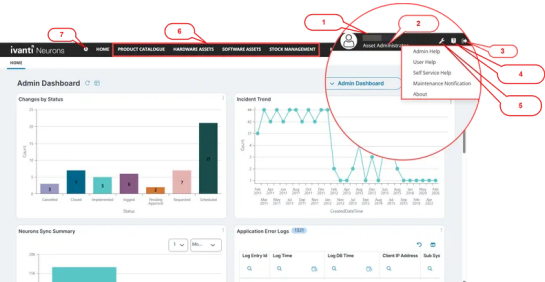
Access to the Homepage

- 1. Enter the URL for Neurons for ITAM in a browser.
- 2. Enter your user name and password and click **Login**.
- 3. Select a role and click **Submit**.

By default **Home** page is displayed.

Home Workspace

When you log in to ITAM, by default the home workspace is displayed. A sample Home workspace is shown in the figure below.



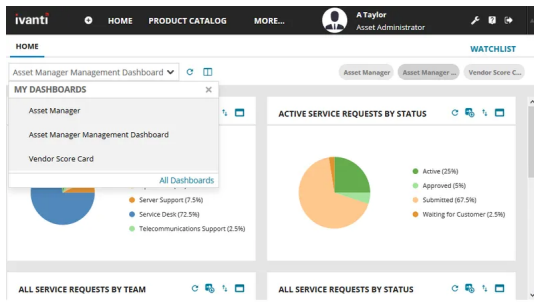
The following table shows the callouts, field names, and descriptions for the figure above.

Call outs	Field	Description
1	User name	Displays your user name.
2	User role	Specifies your logged-in user role.
3	Log out	Click the icon to log out of the application.
4	Help icon	Click the icon to open the help documentation. The following help options are available: • Admin Help - Click to view the ITAM help documentation. Only the following user roles can access the ITAM help documentation: ◦ Asset Administrator, Asset Manager, Asset Mobile, Asset Scanner, Contract Manager, Procurement Manager, Storage Manager, Report Manager. • User Help - Click to view Service Desk Console help information. • Self Service Help - Click to view self service help documentation. • Maintenance Notification - Click to view maintenance related notifications. • About - Click to view ITAM version and compatibility mode
5	Configuration console icon	Click the icon to navigate to the Configuration console page.
6	Workspace	Click the required workspace to open the related page.
7	+	Click the icon to select the required workspaces from the list.

- **Dashboards** - It provide insights into assets and related activities. Available dashboards depend on your user role. Select the required dashboard from the dropdown.

To see all available dashboards for your user role

1. Open the **Home** workspace.
2. In the **Home** tab, open the dashboards dropdown, scroll down to the bottom, and click **All Dashboards** in the bottom right.



3. In the resulting list, select the check box next to each dashboard you want to view.
4. At the top of the list view, click the **More Actions** drop-down and select **Add to my dashboards**. You can also use this drop-down to remove a dashboard from view, pin a dashboard to the watchlist, and so on. For details about the watchlist, see [Watchlist](#).
5. Click the  icon to save the changes and go back to the dashboard view. Dashboards you selected will now be available as an option from the drop-down below the **Home** tab.

▼ Manage Dashboards

1. On the home page, select **All Dashboards**.
2. In the **All Dashboards** window, select the check boxes next to dashboards you want to add.
3. The **All Dashboards** window displays the following fields:
 - **Name** - Displays the title of the dashboard.
 - **Description** - Provides a brief summary of the dashboard's purpose and contents.
 - **Category** - Indicates the type or classification of the dashboard.
 - **Published** - Shows whether the dashboard is published for the user's role.
 - **Created** - Shows the user name of the dashboard creator.
 - **Modified By** - Shows the user name of the last person who updates the dashboard.
 - **Modified On** - Shows the date and time of the most recent update.
4. In the **All Dashboards** window, you can perform the following:
 - **Set as Default** - Select a dashboard and click to set it as your default.
 - **+Add to my Dashboards** - Select and click to add it to your list.
 - **Pin it** - Select a dashboard to your **Watchlist**. For details about the watchlist, see [Watchlist](#).
 - **Remove from my Dashboards** - Select a dashboard and click to remove it from your list.
 - **+Create New Dashboard** - Click to open a form to create a custom dashboard
 - **Search** field - Enter a dashboard name to search.
 - **Close** - Click to close the current window.
 - In **Actions** column:
 - **Edit** - Modify a dashboard.
 - **Clone** - Copy a dashboard to create a new one.
 - **Delete** - Remove a dashboard.

Available dashboards

The **Asset Administrator** and **Asset Manager** user roles can access *all* dashboards. If other roles can access a dashboard, they're mentioned with the descriptions below.

Asset Contracts – Contract Managers can also access this dashboard, which shows:

- **Contracts by Status** – A column chart showing the number of contracts at each status.
- **Contracts by Vendor** – A pie chart of contracts grouped by vendor.
- **Contract Line Items by Type** – A column chart showing the number of contract line items of each type.
- **All Contracts** – Lists all contracts.
- **Contract Line Items due for Renewal** – A list of all contract line items that are due for renewal.

For details, see [Contract and Warranty Management](#).

Asset Exceptions – This dashboard shows these reports:

- **Asset Location Exceptions** – Lists all discovered assets with subnets that do not match the asset's assigned location. For details, see [Missing assets](#).
- **Asset User Exceptions** – Lists all assets where the last discovered logged-in user does not match the assigned user.
- **Lost and Stolen Assets** – Lists all assets where the status is **Lost** or **Stolen**.
- **Assets without Disposal Records** – Lists all assets where the status is **Destroyed**, **Disposed**, **Lost**, or **Stolen** and there is no associated disposal record.

Asset Financials – This dashboard provides three charts that show the total spend on assets:

Total Asset Cost by Year – A line graph that displays the total spend on assets by year.

Cost by Asset Type by Year – A bar graph that displays the total annual spend on assets by subtype. Bars are color coded by year.

Total Asset Cost by Quarter – A line graph that displays the total spend on assets by business quarter. Each line represents a given year.

Asset Lifecycle Activity – Contract Managers can also access this dashboard, which provides an overview of asset status:

- **Assets by Status** – A pie chart of assets grouped by status.
- **Assets On Order** – A pie chart of on-order assets grouped by asset type.
- **Assets without Disposal Records** – Lists all assets where the status is **Destroyed**, **Disposed**, **Lost**, or **Stolen** and there is no associated disposal record.

Asset Manager – Default Home dashboard for the Asset Manager user role:

- **Assets by Type** – A pie chart of assets grouped by asset type.
- **Asset Distribution** – A column chart showing the number of assets in each location.
- **Asset by Financial Owner** – A column chart showing assets sorted by financial owner.
- **Assets not seen in over 30 days** – A list of assets with the status **Assigned** that have not been discovered for more than 30 days.

Asset Manager Analyst – Contract Managers, Procurement Managers, and Storage Managers can also access this dashboard, which provides details about asset requests and associated tasks:

- **My Active Asset Requests** – A list of requests that are not Closed, Cancelled, or Fulfilled, and where the current user is the owner.
- **My Asset Requests** – A list of all requests where the current user is the owner.
- **My Open Tasks** – A list of tasks that are not **Cancelled, Completed, Logged, or Rejected**, and where the current user is the owner.
- **My Team's Active Asset Requests** – A list of requests that are not **Closed, Cancelled, or Fulfilled**, and where the current user is a member of the team that owns the request.
- **My Team's Unassigned Tasks** – A list of tasks owned by my team that do not have a specific user set as the owner.
- **My Team's Open Tasks** – A list of tasks owned by my team that are not **Cancelled, Completed, or Rejected**.
- **All Asset Requests Not Assigned To Any User** – A list of requests that have no owner set.

Asset Manager Management – Contract Managers, Procurement Managers, and Storage Managers can also access this dashboard, which provides manager-related information for requests and associated tasks:

- **Active Asset Requests by Team** – A pie chart showing active requests grouped by team.
- **Active Asset Requests by Status** – A pie chart showing active requests grouped by status.
- **All Asset Requests by Team** – A pie chart showing all requests grouped by team.
- **All Asset Requests by Status** – A pie chart showing all requests grouped by status.
- **All Asset Requests Not Assigned To Any User** – A list of requests that have no owner set.

Asset Manager Procurement – Contract Managers, Procurement Managers, and Storage Managers can also access this dashboard, which displays procurement information:

- **Purchase Orders by Vendor** – A column chart showing the number of purchase orders for each vendor.
- **Purchase Orders by Status** – A pie chart of purchase orders grouped by status.
- **My Purchase Orders** – Lists active purchase orders that were submitted by the current user.

Asset Manager Reports – Contract Managers, Procurement Managers, and Storage Managers can also access this dashboard, which displays links to Microsoft SQL Server Reporting Services (SSRS) reports related to ITAM. For details, see [Reports](#).

Asset Manager Stock Levels – Procurement Managers and Storage Managers can also access this dashboard, which shows stock levels against Product Catalog items:

- **Asset Stock Levels** – Lists all assets linked to a Product Catalog item where the status of the asset is **In Stock**.

Product Catalog Overview – Procurement Managers and Storage Managers can also access this dashboard, which provides an overview of the Product Catalog:

- **My Team's Products** – A column chart showing the number of my team's products at each status.
- **Approved Products by Type** – A pie chart of approved products grouped by asset type.
- **Products In Stock** – Lists catalog items that are in stock.
- **Products Awaiting Approval** – Lists catalog items at the status **Under Review**.
- **Products Expiring in the next 30 Days** – Lists catalog items where the expiry date is within 30 days.
- **Low Stock Products** – Lists catalog items where there are fewer than ten assets in stock.

Software License – This dashboard shows information about licensable software assets that have been manually added to the database or have been imported via Ivanti Neurons:

- **Licensed Software by Title** – Lists all licensed software assets by product title.
- **Unused Licensed Software in Last 90 Days** – Lists each hardware asset installed with licensed software that has been unused for the last 90 days.
- **Unused Licensed Software in Last 180 Days** – Lists each hardware asset installed with licensed software that has been unused for the last 180 days.

Software Product – Contract Managers and Procurement Managers can also access this dashboard, which shows information about software assets:

- **Software Products by Type** – A column chart showing the number of software products of each type.
- **Software Products by Manufacturer** – A pie chart of software products grouped by manufacturer.
- **Software Suites** – Lists all software products where the **Is Suite** check box has been selected.

Vendor Score Card – Contract Managers and Procurement Managers can also access this dashboard, which shows information about the performance of all active vendors.

4.1. Reports

Ivanti Neurons for ITAM has a set of Microsoft SQL Server Reporting Services (SSRS) reports to provide you with advanced information about your assets. Asset Administrators and the **Report Manager** user role can access the full list of reports from the **Reports** workspace or from the **Home** workspace.

For details about working with reports and report management, see the Ivanti Neurons for ITSM online help at help.ivanti.com.

✓ Available reports

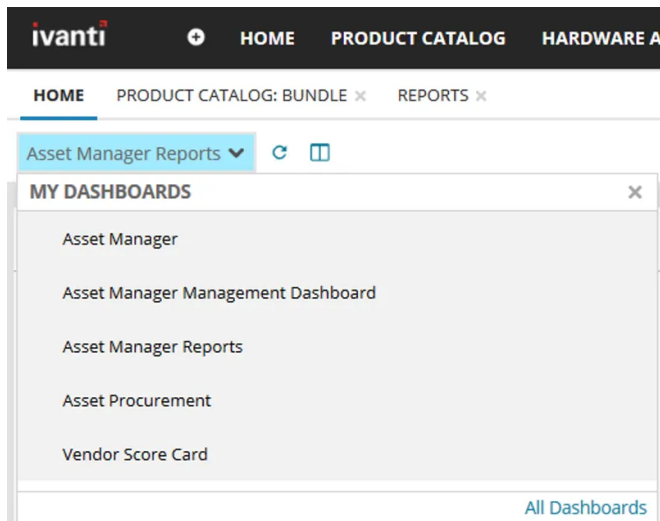
- **Asset Depreciation Report** – Provides asset age and straight-line depreciation when you provide the asset type, organizational unit, asset subtype, vendor, and the statuses you're interested in. For details about asset age and depreciation, see the **Finance** section in [Hardware assets](#).
- **Total Cost of Ownership By Criteria** – Displays the total cost of ownership for the current organizational unit and as a rollup when you specify a date range and an asset status.
- **Total Cost of Ownership By Criteria Detail** – Displays the total cost of ownership of assets when you specify an organizational unit, a date range, and a set of asset statuses.
- **Total Cost of Ownership Overall** – Displays the total cost of ownership for individual organizational units and as a rollup.
- **Total Cost of Ownership Overall Detail** – Displays details of the total cost of ownership for a specific organizational unit.
- **Total Market Value By Criteria** – Displays the total market value for organizational units when you specify a date range and an asset status.
- **Total Market Value By Criteria Detail** – Displays details of the market value for a specific organizational unit when you specify a date range and an asset status.
- **Total Market Value Overall** – Displays the total market value for all organizational units.
- **Total Market Value Overall Detail** – Displays details of the total market value for a specific organizational unit.
- **Total Purchase Price By Criteria** – Displays the total purchase price for each organizational unit and as a rollup when you specify a date range and an asset status.
- **Total Purchase Price By Criteria Detail** – Displays details of the total purchase price for a specific organizational unit when you specify a date range and an asset status.
- **Total Purchase Price Overall** – Displays the total purchase price for all organizational units.
- **Total Purchase Price Overall Detail** – Displays details of the total purchase price for all assets for a specific organizational unit.
- **Total Straight Line Depreciation By Criteria** – Displays total straight-line depreciation for the current organizational unit and as a rollup when you specify a date range and an asset status. For details about depreciation, see the **Finance** section in [Hardware assets](#).
- **Total Straight Line Depreciation By Criteria Detail** – Displays details of the total straight-line depreciation for a specific organizational unit when you supply the date range and asset statuses you're interested in. For details about depreciation, see the **Finance** section in [Hardware assets](#).
- **Total Straight Line Depreciation Overall** – Displays the total straight-line depreciation for individual organizational units and as a rollup.
- **Total Straight Line Depreciation Overall Detail** – Displays details of the total straight-line depreciation of all assets for a specific organizational unit.

✓ To view reports

To view a single report at a time, open the **Reports** workspace, and click a report title in the list.

To include reports as part of your **Home** workspace dashboards view, complete the following procedure.

1. Open the **Home** workspace.
2. Below the **Home** tab, open the drop-down, scroll down to the bottom, and click **All Dashboards** in the bottom right.



3. In the resulting list, enable the check box next to **Asset Manager Reports**.
4. At the top of the list view, click the **More Actions** drop-down and select **Add to my dashboards**.
5. Click the  icon to go back to the dashboard view.
6. Open the My Dashboards drop-down again and click **Asset Manager Reports** in the list. A list of all available reports will display. Click the one you want to view.

Each time you log in, the reports will be accessible from the Home workspace until you actively remove them from your dashboards.

Calculating aggregate values

Some reports require you to run a **Calculate Aggregate Values** quick action on the underlying data to return accurate results. You must do so each time before viewing the report. The reports that necessitate this action are:

- Total Cost of Ownership by Criteria / Criteria Detail
- Total Market Value by Criteria / Criteria Detail / Overall / Overall Detail
- Total Purchase Price by Criteria / Criteria Detail
- Total Straight Line Depreciation by Criteria / Overall

To calculate aggregate values for reports

1. Open the **Financial Owners** workspace.
2. Select all the records in the list.
3. Click the **More** drop-down menu (top right of the page) and select **Calculate Aggregate Values**. This action calculates the various totals for each of the records selected and displays the data in extra columns in the list view. To view this data in report

format, follow the procedure above.

5. Product Catalog

The **Product Catalog** workspace lists standard items that users can request. The **Procurement Manager** role typically manages this workspace, although the Asset Administrator and Asset Manager roles can access this workspace.

Users can request items that are not in the Product Catalog, however, this process is typically longer and involves additional steps. Items in the Product Catalog have agreed costs from selected, approved vendors. If an item needs to be purchased because it is not in stock, much of the procurement process can be bypassed.

Catalog items include standard hardware, software, consumables, or bundles of these items.

Hardware - Physical devices, such as computers, servers, or peripherals. Users must return hardware when the warranty period ends or upon separation from the organization.

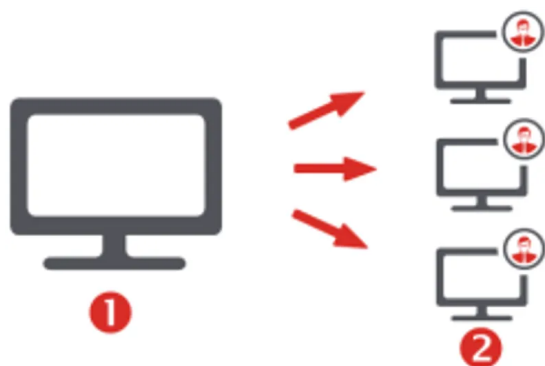
Software - Applications installed on devices to perform specific tasks. Renew licenses upon expiration, or reclaim them when no longer needed or when the user leaves the organization.

Consumables - Items that are used and not usually returned, such as printer ink, paper, or accessories like a mouse.

Bundle - A **bundle** is a grouping of items currently available in the Product Catalog list view. Bundles help streamline the request process when certain items are commonly purchased together. The pricing of a bundle is the sum of all items within it.

Currently, a bundle can include only one instance of each catalog item. For example, you cannot create a bundle that contains two of the same monitor.

When you create a catalog item, you are not creating a record for an actual asset, but rather defining an item that can be requested:



1 – Product Catalog item - the template for requested assets

2 – Asset record - created after the item is requested

The Product Catalog workspace displays a list of price list items in your database. You can use the saved searches drop-down to view different lists, such as all products, products in stock, and products out of stock.

After creating the catalog items, the next step is to design the Product Catalog forms that will enable users to select those items online. For details, see the section below.

✓ To create a new catalog item

1. Open the **Product Catalog** workspace.
2. Click the **New** dropdown to select the item type you want to create (bundle, consumable, hardware, or software).
3. Enter summary information at the top of page, such as
 - **Status**
 - **Requestor**
 - **Item Name**
 - **Expiry Date** (after which time the item will no longer be available in the catalog),
 - **Support Team**
 - **Support Lead** (the team member responsible for adding item added to the catalog).
4. Enter pricing details:
 - **Est External Cost** (price paid by the organization)
 - **Est Internal Price** (price charged internally, including additional costs such as maintenance)
5. Complete the associated tabs as required (tabs vary depending on the item type)
 - Catalog item tabs
 - **Bundle Items** – For bundles only. Add existing catalog items to the bundle by linking them here.
 - **Item Details** – This information is used to create a corresponding asset record when procurement is completed for a user's order. Fields vary by item type and may include: **Manufacturer**, **Model**, and **Asset Type**, and a check box that indicates if the item is a standard catalog Item.
 - The **Manufacturer** and **Model** fields are used to reconcile the catalog item with existing assets in the database.

When the catalog item becomes obsolete, complete the **Replacement Model** field to indicate the item that is to be used in its place.

To automate the reordering process for catalog items, the Asset Administrator can turn on a global constant to display two fields that are disabled by default - **Reorder level Qty** and **Reorder Quantity**. For details, see the "To enable automatic reorders" procedure below.

Click **Browse** beneath **Catalog Image** to associate an image with the catalog item. This image will also display in the **Hardware Assets** workspace > asset record page for all assets with this item set as the **Catalog Item** on the **Details** tab, and in the **Purchase Line Item** workspace for a purchase order associated with this item. We recommend that you use images that are either .PNG or .JPG and no larger than 150 × 150 pixels.

When you update the **Description** field or a value under the **Item Details** tab, this change is also made to all asset records associated with the catalog item.

- **Assets** – Maintain the list of assets that are associated with this catalog item by linking them here. You can also see the **Status** of the assets associated with the catalog item, which helps you to identify which assets are suitable to fulfill an asset request.
- **Stock Levels** – Shows the locations where this catalog item may be currently in stock.
- **Active Orders** – Lists the purchase orders associated with the catalog item that are not at one of the statuses of **Cancelled**, **Rejected**, or **Completed**.
- **Organizational Units** – Link to relevant organizational units that you want to associate with this catalog item.

- **Approved Vendors** – Shows details about the vendors that have been approved as suppliers for the catalog item:
 - Click **Add Approved Vendor** to add vendors that have been approved for this catalog item and, if appropriate, enter the associated **Vendor's SKU** for the item from that vendor. Enter the **Retail Price** and any **Discount** you have negotiated. The product can then automatically calculate the **Price** that you are charged.
 - Click **Assign Recommended Vendor** to select one of the vendors as the preferred supplier.
 - **Suggested Alternatives** – Link to alternative items already in the Product Catalog that are appropriate substitutes if this item is unavailable when fulfilling a request.
 - **Journal** – Add emails or notes to the catalog item.
 - **Attachments** – Attach a document to the record, or add a URL link to a relevant website. URLs must include the https:// prefix.
 - **Audit History** – Automatically tracks changes made to key attributes of this record.
6. After entering the required data, click **Save** or **Submit for Approval**. Saving the item changes its status to **Created**, which is an interim status allowing you to change the item details if necessary. Submitting the item changes the status to **Approved** for adding to the Product Catalog, or if an approval process is in place, submitting starts that process and changes the status to **Under Review**.

✓ To enable automatic reorders

The Asset Administrator can enable automatic reordering by turning on a global constant that displays the following fields:

- Reorder level Qty
- Reorder Quantity

When a reorder level is set, a purchase order is automatically triggered when stock reaches or falls below the threshold. The order appears under the **Active Orders** tab. Enter a **Reorder Quantity** for the number of items to be automatically reordered each time the **Reorder level Qty** threshold is met.

Even if the reorder threshold is met, users can continue to request this item if the quantities specified are currently available in inventory (as viewable from the **Stock Management** workspace > **Storage Space Summary** tab). If requested quantities *exceed* the number of available items, an email is sent to the customer stating that their request is on hold. The request status changes to **Waiting for 3rd Party** until the restock purchase order is completed. At that point, asset fulfillment can continue.

The **Asset Administrator** and **Storage Manager** user roles can edit these fields; for other roles, these fields are read-only.

1. Click the  icon in the menu bar at the top of the page. The Configuration Console displays in a new browser tab.
2. In the left navigation pane, expand **Build > Global Constants**. Look for **Show Reorder level and Reorder Quantity** in the list.
3. Double-click in the **Value** column and type **True**, then click **Save**.
4. Close the Configuration Console and refresh the Product Catalog workspace.

To turn this global constant off again, enter a value of **False** and click **Save**.

✓ To set up an approval process

By default, when you submit a new catalog item, its status changes to **Approved**. However, the Asset Administrator can configure an approval process to ensure that the catalog item becomes approved only after the majority of the **Product Catalog Item Approvers** contact group has approved the item.

1. Click the  icon in the menu bar at the top of the page. The Configuration Console displays in a new browser tab.
2. In the left navigation pane, expand **Build > Global Constants**. Look for **ivnt_ProductCatalogThreshold** in the list.
3. Double-click in the **Value** column and set the number to something other than **0**, then click **Save**.
4. Under **Configure** in the left navigation, click **Users and Permissions > Groups**.
5. Double-click the group called **Product Catalog Item Approvers**.
6. On the **Member** tab, click **Link** and select the users you want on the approvers list. Click **Select**.
7. Click **Save** and close the Configuration Console. Refresh the Product Catalog workspace.

Now when you click **Submit for Approval** when creating a new catalog item, the status changes to **Under Review** and approval requests are sent out to the appropriate people.

When over 50% of the group has approved the item, the approval is completed and the status changes to **Approved**. If a majority rejects the request, the status changes to **Rejected**. The status can also change to **Canceled**, **Timed Out**, or **No Approvers Found** depending on the outcome. For each change of status, the Audit History is updated as part of the request record.

For more information, see [Employees, departments, teams, and contact groups](#).

✓ To discontinue catalog items

If a catalog item can no longer be purchased, you can set its **Status** to **No Longer Purchasable**. The item remains in the catalog, but can no longer be purchased. You can use the **Item Details** tab > **Replacement Model** field to direct users to the catalog item that you want to use as a replacement.

Alternatively, set the **Status** to **Expired** to remove the item from the Product Catalog completely.

Designing the Product Catalog forms

Use the **Request Offerings** workspace to design the Product Catalog forms, which comprise the user interface that enables users to request assets from the online Product Catalog. The **Procurement Manager** user role has access to this workspace, as do the Asset Administrator and Asset Manager roles.

You should design the forms *after* adding items to the Product Catalog workspace. Once the forms are created, relevant manager user roles can assign assets to employees from the Asset Requests workspace, or employees can place requests for themselves from the Self-Service Portal. For details, see [Asset requests](#).

If your database is integrated with Ivanti Neurons for ITSM, you'll see request offerings in this workspace for both products.

✓ To design the Product Catalog form

1. Open the **Request Offerings** workspace.
2. In the left pane, click **General Services**.

A list displays showing the available form templates that you can modify for your specific needs. Some of the templates are for ITSM, but the ones that mention the Product Catalog are specific to ITAM—these include bundles, computers, consumables, general assets, infrastructure, mobile devices, and peripheral devices.

3. Click the request offering you want to modify for the Product Catalog, or click **New > Request Offering** (top of page) to create a new form. The form template designer opens with four tabs for completing the form:
 - Define the request offering
 - Design a request form
 - Plan a request fulfillment
 - Publish the action access

For details about creating and editing request offerings, see the ITSM help topic [About Request Offerings](#), as well as related information in the table of contents (located under that topic in the left pane).

2. Click **Save & Exit**.

5.1. Asset requests

Use the **Asset Requests** workspace to assign standard Product Catalog items to employees. The **Procurement Manager** and **Storage Manager** user roles have access to this workspace, as do the Asset Administrator and Asset Manager roles.

Users assigned the **Asset Mobile** user role have the ability to place an asset request for themselves using the Self-Service Portal. If you're also using Ivanti Neurons for ITSM, the Self Service and Self Service User roles also have the ability to place asset requests.

You can keep track of all active asset requests by viewing them in the **Home** workspace > **Asset Manager Analyst** dashboard.

For details about creating purchase orders to fulfill an asset request, see [Procurement](#).

✓ To assign a Product Catalog item to an employee

1. Open the **Asset Requests** workspace and click **New**.
2. Enter the **Customer** this request is for, **Status**, **Team**, and **Owner**. Team and Owner refer to the team and team member responsible for fulfilling this request on behalf of the customer.
3. Under the **Parameters** tab, open the template for the Product Catalog. If the template isn't displayed, you may have to search for it. There may also be multiple Product Catalog templates, one for each asset type—if so, click the one that's relevant for this request.
4. Scroll down the template fields and enter the required information.
5. Fill out the other tabs as needed:
 - **Details** – Add emails, notes, or attachments to the request.
 - **Approval** – If an approval process is in place for asset requests, this tab shows the names of the approvers.
 - **Task** – Add and manage any tasks that are part of fulfilling this request. When adding a task to a request, you assign it to a team. The task status is set to **Logged**, and an email is sent to the team owner. As the task progresses, you can update the status from this tab. Asset Administrators can also manage outstanding tasks in the **Tasks** workspace.
 - **Fulfillment Item** – Add new fulfillment items to this request.
 - **Cost Item** – Add new price cost items that are associated with any task that's part of this request.
 - **Purchase Order** – If the asset request has been associated with a purchase order, select it and click **Go to** to view that purchase order.
6. Upon completion, click **Save**. The process advances as follows:
 - The asset request is submitted and will display in the requests list view. In databases integrated with Ivanti Neurons for ITSM, this list also displays service requests.
 - An email is automatically sent to the customer stating that the request has been submitted and is awaiting approval.
 - Upon approval, you must manually assign the item to the customer from the **Hardware Assets** workspace. The assigned asset will transfer to the customer's record under the **Employee** workspace > **Asset** tab. Once that occurs, another email is automatically sent stating that the request has been fulfilled.
 - Note that a record of this transfer displays under the **Inventory Transactions** tab for both the storage space (in the Stock Management workspace) and the asset (in the Hardware Assets workspace).

✓ To request an item from the Self-Service Portal

It's recommended that you request standard catalog items only. When requesting a non-standard item (one not currently available in the Product Catalog), the approval process takes longer, and the request may be rejected.

For standard catalog items from CDW that may require a purchase order, select the **Deliver to Office** check box on the Asset Request form (if it's available). This will ensure that your requested assets are automatically delivered to the correct office address.

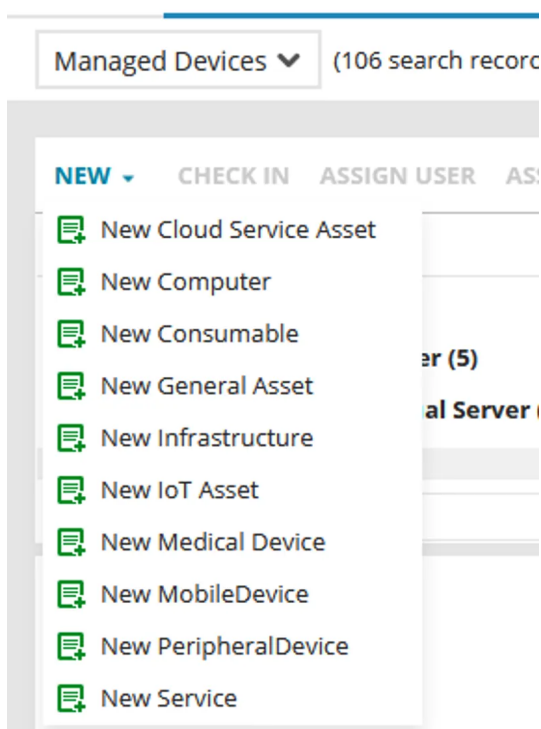
1. Access the portal website using the URL given to you by the Asset Administrator.
2. Open the **Service Catalog > General Services**. The Self-Service Portal may not look the same for each user role, so the following steps are general guidelines.
3. Select the appropriate Product Catalog form for the item you want to request—options can include bundle, computer, consumable, general asset, infrastructure, mobile device, or peripheral device. Next, follow the prompts:
 - In the **Requested for** drop-down, select your name. The rest of the fields in this section will auto-populate.
 - In the **Request type** drop-down, select the asset type you're requesting. All catalog items of this asset type will display below. Enter the quantity needed, then click the check box next to the asset being requested.
 - If you want an item not listed in the catalog, scroll down and click the **Non-Standard Request?** check box, then fill out the comment box with a detailed description of the item. If known, include details such as manufacturer and model number.
4. At the bottom of the form, click **Review & Submit**. Review that your request details are accurate, then click **Submit**. If an approval process is in place, a contact group will first need to approve this request before asset fulfillment begins.

6. Hardware assets

The **Hardware Assets** workspace gives you access to all of the asset records imported into your database. From here, you can view all details about an asset record, as well as manage those records. To view dashboards of this same data, access the **Home** workspace—for details, see [Dashboards](#).

Use the Hardware Assets workspace to:

- Categorize assets by type (click the **New** drop-down to see all available types). For each type (other than Consumable), you can also specify a subtype to further identify the asset. Note that available types will depend on the specific version of ITAM you have installed and cannot be modified. In contrast, Asset Administrators can add, edit, and delete asset subtypes. For details, see [Asset validation lists](#).



Software assets don't display as an asset type in the Hardware Assets workspace. Create and manage them instead in the **Software Assets** workspace. For details, see [Software assets](#).

- View categories of assets in multiple ways by selecting from the Favorite Searches drop-down above the asset list.
- Find specific assets by clicking **Show Filters** (to the right of the Favorite Searches drop-down) or by using the **Saved Searches** feature above the asset list, then clicking the  icon.
- Convert an unmanaged device to a managed one. For details, see [Managed and unmanaged devices](#).
- Take action by selecting an asset in the list view, then clicking one of the links at the top of the list to:
 - **Check In** – Check the asset into a storage space and add this record to both the Locations and Stock Management workspaces for tracking. Once an asset is checked in, you can transfer it at a later date to a new storage space by clicking **Transfer Stock**. For details about storage spaces, see [Locations and storage spaces](#) and [Stock management](#).
 - **Assign User** or **Assign Location** – Assign the asset to a specific user or location. When assigning a user, the drop-down shows both the unique login ID and display name of each user in the database. When assigning consumables to users, see

the procedure below for extra details.

- **Assign Financial Owner** – Specify the organizational unit that requested the purchase of this asset. For consumables, see the procedure below for extra details.

To manage any Ivanti Neurons for ITSM CI items after importing them into the database, the Asset Administrator must first generate a unique identifier, or asset ID, for each one in the Hardware Assets workspace. For details, see [Asset quick actions](#).

✓ To create a new asset record

After initially importing the bulk of your asset data, you may need to manually add new asset records on occasion. To create a new consumable record, see the procedure below.

1. Open the **Hardware Assets** workspace.
2. Click the **New** drop-down and select the type of asset you want to create. The asset record page displays.
 - If you're curious about what subtypes are available for any of the asset types, select the type, then under the **Details** tab on the Asset form, click the **Asset Subtype** drop-down to get an idea of the available options.
 - If you're an Asset Administrator, you can create your own asset subtype if needed (for asset types other than Consumable).
 - You must create software assets in the **Software Assets** workspace. Once created, the Software Asset asset type will display in the Hardware Assets workspace with the other asset types. For details, see [Software assets](#).
3. Three fields are required before saving—the asset **Name** and **Serial Number**, as well as the **Status** (see the **Details** tab > middle column). The serial number is especially important as the unique identifier that is used to track an asset. For details about other information you can add and access for an asset record, expand the **Asset tabs defined** link below.
4. Click **Save**. The asset record is created. You can now enter more information under the tabs, as explained below.

Asset tabs defined

Double-clicking an asset in the list view opens the full record, enabling you to edit it. Use the following tabs to update and access additional information. Not all tabs are available for all asset types.

- Details** – Records basic details about the asset.
 - The left column provides physical details about the asset. The **Asset Subtype** field is a validation list that enables you to categorize similar assets into different subtypes. For example, the type Computer has the subtypes Laptop, Desktop, and so on. Asset Administrators can Add, Edit, or Delete asset subtypes by clicking the  icon. For details, see [Asset validation lists](#). For details about adding and editing manufacturers, see [Manufacturers](#).
 - The middle column provides location and usage details. The **Status** field shows where the asset is in the asset lifecycle, and **Environment** indicates where the asset is being used—in production, test, QA, and so on. The remaining fields enable you to specify the **Use Policy** (such as any encryption requirements), the **Service Level**, and the asset's security and regulatory requirements.
Note that when the **Status** field for an asset is changed to Assigned, Disposed, Lost, or Destroyed, the asset record is removed from its listed storage space here and in the **Stock Management** workspace.
 - The right column provides lifecycle, warranty, and identification details. The read-only **Asset Age (mo)** field calculates the number of months since the purchase date to either the current date or the date when the asset's **Status** was changed to Disposed, Lost, Stolen, Retired, or Destroyed. This field, along with the **Useful Life (mo)** field, are used for the calculation of the asset's **Depreciated Value** on the **Finance** tab. If an asset has associated child warranties, you can view those from the **Warranties** tab.
- Custom Attributes** – By default, ITAM provides most of the fields about an asset that an organization needs, but this is an additional, configurable tab for any asset information that doesn't display by default. For details, see [Asset custom attributes](#).
- Discovery** – A read-only tab that enables you to compare assigned values for an asset with the values that were discovered by an automated tool such as Ivanti Endpoint Manager, Microsoft SCCM, or even a recent barcode scan. It's critical to understand the movement of assets within your organization so that you can proactively update asset details and then refine the processes that govern asset movement.
 - This tab displays discovery information, including the **Original Import Source** (the source where the asset record originated, such as Ivanti Neurons Platform, Endpoint Manager, SCCM, and so on) and the **Last Import Source** (the source of the most recent changes to the asset record). The values for both import sources must be configured in the individual connector mappings (Endpoint Manager, SCCM, and so on).
 - The **Last Scan Date** is the date that the asset was most recently scanned during discovery.
 - You can also compare **Assigned Values** with **Discovered Values** for the asset so that you can see what these properties *should* be (assigned) and what they *actually* are (discovered).
- Licensable Software** – Displays a list of the licensed software installed on a hardware asset. These records are grouped by manufacturer and are imported from Neurons Platform using the data connector for your data source. For details, see [Importing from the Ivanti Neurons Platform](#).
- Installed Software** – Displays a list of the software installed on the asset as discovered via the discovery services. Records are grouped by manufacturer. This list is inclusive of the software displayed under the **Licensable Software** tab.
- Network** – Displays a list of network adapters linked with the asset, showing information such as Manufacturer, IP Address, MAC Address, and Subnet Mask. You can link, unlink, delete, or create new network adapters.
- User Assets** – Provides a list of other assets that are also owned by the **Assigned User** of the current asset, grouped by type—this can be useful when you're reclaiming assets. (You can assign a user to an asset from the **Details** tab.)

- **Relationships** – Provides a visual relationship mapping of how the asset is connected in your IT system.
- **Contracts** – Provides information about the contract line items associated with the asset. You cannot create contracts or contract line items from here—they're created in the Contracts workspace. For details, see [Contract and Warranty Management](#).
- **Vendor** – Provides details about the vendor of the asset. To update details about the vendor, or see the full record for the vendor, click **Go to**. To associate a vendor with this asset or change the vendor association, use the **Finance** tab.
- **Vendor Scorecards** – If you've specified the **Vendor** on the **Finance** tab, you can add vendor scorecards to record the performance of the vendor for each interaction you have with them. For details, see [Vendors](#).
 - Scorecards enable you to rate vendors and the products they provide. You can add scorecards to the asset record, a purchase order, or a contract line item. The details of all scorecard entries and a performance score calculated from these scorecards display on the vendor record, so that you can see how well the vendor is meeting the needs of the organization.
- **Finance** – Provides financial information about the asset.
 - You can record and view details about the purchase of the asset here. Specify the **Vendor** and **Vendor SKU**, and provide information about the **Purchase Order**, **Purchase Date**, **Freight Cost**, **Purchase Price**, **Ownership Type**, and **Acquisition Method**.
 - Note that when you enter information into the **Purchase Order** and **Vendor** fields, ITAM will attempt to populate the fields with purchase order numbers and vendors that match ones already added to the **Purchase Order** and **Vendor** workspaces. Only Asset Administrators can add new purchase orders or vendors here if needed. For details, see [Procurement](#) and [Vendors](#).
 - The **Purchase Date** and **Purchase Price** are taken from the purchase order for the asset. You can add to and edit the values available in **Acquisition Method** and **Ownership Type** by clicking the  icon. To see the complete Purchase Order record, click the  icon alongside **Purchase Order**, then click **Go to**.
 - The second column provides details about the value of the asset to the business. You can record who the **Financial Owner** is (populated by information in the Financial Owners workspace), the **Fixed Asset GL**, the **Salvage Value**, and the current **Market Price** for the asset. Financial ownership is tracked at the cost center or organizational unit level. The **Fixed Asset GL** enables you to assign a General Ledger Code to the asset record, which is useful when you need to conduct a capital audit and need to know which assets are impacted. The salvage value for an asset is its value at the end of its useful life, as recorded on the **Details** tab.
 - This section also reports the current **Depreciated Value** for the asset. This value is calculated by determining the monthly straight-line depreciation from the **Purchase Price** to the **Salvage Value** using the **Asset Age (mo)** calculated on the **Details** tab. The monthly depreciation is calculated by subtracting the **Salvage Value** from the **Purchase Price** and multiplying this value by the **Asset Age (mo)** divided by the **Useful Life**. Each month, this depreciation value is subtracted from the purchase price to give the **Depreciated Value** until it matches the salvage value at the end of its useful life.
- **Financial Transactions** – Displays a list of additional costs incurred by the asset. You can add new items to this list using either the **New ITFM Cost item** or **New from price list item** buttons. Contract renewals also display here. For details, see [Contract and Warranty Management](#).

- **Journal** – Enables you to add notes to the asset record using the **New** button. Asset Administrators can customize the available journal categories and sources. For details, see [Journals](#).
- **Attachments** – Attach a document to this record, or add a URL link to a relevant website. URLs must include the https:// prefix.
- **Inventory Transactions** – Enables you to track the movement of the asset over its lifespan as it moves between locations, storage spaces, and users.
- **Audit History** – Automatically tracks any changes made to key attributes of this record.
- **Warranties**: Displays all child warranties associated with the asset. For example, computers often include separate warranties for their associated components. The asset's child warranty information is obtained during a sync from Neurons Platform (where it's located on the **Device** page for the asset under **Details > Warranties**). This tab is available for use with ITAM Cloud only and must be enabled by the ITSM Administrator before it displays here.

▼ To create a new consumable record

Users with the **Asset Administrator** or **Asset Manager** role can create consumable records to track inventory quantities and storage locations for non-returnable items. Consumables can be associated with storage spaces, assigned a financial owner, monitored through inventory transactions, and assigned to users after the record is created.

1. Open the **Hardware Assets** workspace.
2. Click the **New** drop-down and select **New Consumable**.

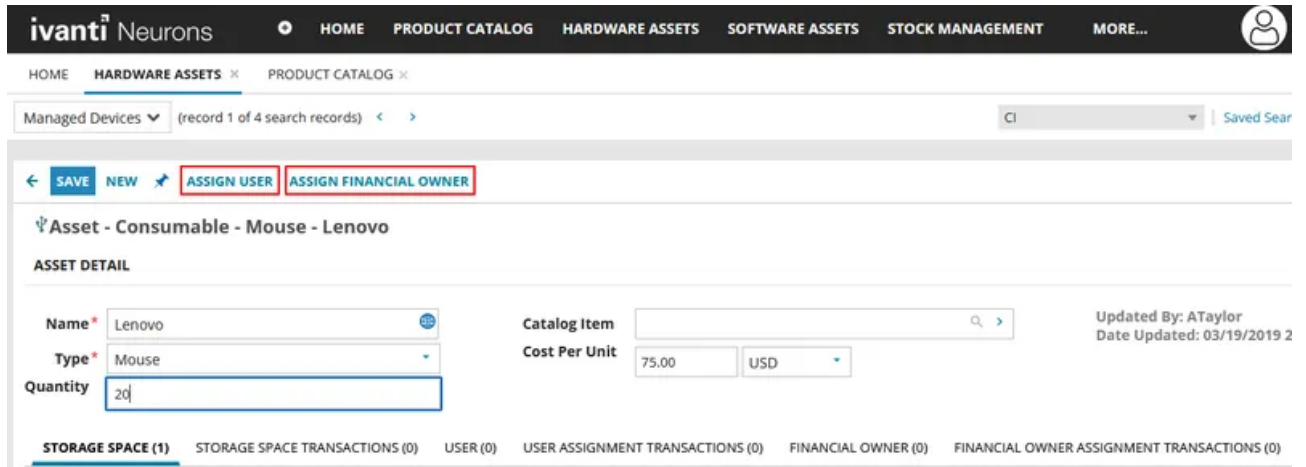
The asset record page displays.

3. Enter the required information:
 - **Name** and **Type** - These fields are required before you can save the record.
 - Enter the total **Quantity** of consumables being added to inventory.
 - (Option) You can specify a **Financial Owner** for the consumable.
 - If the consumables will be stored in multiple storage spaces, enter the overall quantity and then allocate quantities to each storage space..
4. Under the **Storage Space** tab, click **Link** and select where this consumable will be stored.
5. Click **Save**. You'll be prompted to enter the portion of the overall quantity to be stored at this space. Repeat for each linked space. The **Storage Space Transactions** tab will update (here and in the Stock Management workspace) to display the quantity stored at each linked space.
6. Click **Save** to save the record.

After the consumable record is saved, the overall quantity becomes read-only. To increase the overall inventory quantity, create a new consumable record.

▼ To assign a consumable to a user or financial owner

1. Open the **Hardware Assets** workspace.
2. From the list view, expand **Asset Type: Consumable** and open a record.
3. Click either **Assign User** or **Assign Financial Owner** at the top of the page.



The screenshot shows the Ivanti Neurons interface. The top navigation bar includes links for HOME, PRODUCT CATALOG, HARDWARE ASSETS, SOFTWARE ASSETS, STOCK MANAGEMENT, and MORE... The main content area is titled 'Managed Devices' and shows a list of assets. The 'Asset - Consumable - Mouse - Lenovo' record is selected. The 'ASSET DETAIL' section shows the following information:

- Name:** Lenovo
- Type:** Mouse
- Quantity:** 20
- Catalog Item:** [Searchable field]
- Cost Per Unit:** 75.00 USD
- Updated By:** ATaylor
- Date Updated:** 03/19/2019 2

At the top of the asset detail section, there are two buttons: **ASSIGN USER** and **ASSIGN FINANCIAL OWNER**, both of which are highlighted with red boxes. Below the asset detail section, there are tabs for **STORAGE SPACE (1)**, **STORAGE SPACE TRANSACTIONS (0)**, **USER (0)**, **USER ASSIGNMENT TRANSACTIONS (0)**, **FINANCIAL OWNER (0)**, and **FINANCIAL OWNER ASSIGNMENT TRANSACTIONS (0)**.

4. Follow the prompt to select a user or financial owner, then enter the quantity you're assigning to them.
5. Click **Save**. The updates will display under the consumable record's tabs for **User** and **User Assignment Transactions** or **Financial Owner** and **Financial Owner Assignment Transactions**.

The consumable quantity will automatically decrement by that same number in the linked storage space, as shown under the **Storage Space Transactions** tab (here and in the Stock Management workspace). You can repeat this action for as many users or financial owners as needed.

If more than one storage space record is linked, the assigned quantity will decrement from the **Storage Space Transactions** tab by looping through each record. The decrement won't be specific to any one storage space, even if highlighted.

For assigned users, consumables will display under their employee record in the Employee workspace. If the consumable is part of the Product Catalog, you'll see its catalog description under the **Consumables** tab; the assigned quantity will display under the **Consumable Transactions** tab.

For assigned financial owners, consumables will display under the org unit's record in the Financial Owners workspace. If the consumable is part of the Product Catalog, you'll see its catalog description under the **Consumables** tab; the assigned quantity will display under the **Consumable Transactions** tab.

← NEW SAVE ↺

Organizational Unit: Finance

DETAILS CHILD OUS (1) ASSETS (0) CONSUMABLES (1) **CONSUMABLE TRANSACTIONS (1)**

→ Go to

Organizational Unit	Consumable Item	Quantity
Finance	Lenovo 1	10

Updating asset records

Double-clicking an asset in the list view opens the full record for the asset, enabling you to edit it.

The **More** drop-down at the top right of the page enables you to perform certain actions on an asset record, such as changing the asset type. For details, see [Asset quick actions](#).

Create Disposal enables you to dispose of an end-of-life asset. For details, see [Asset disposals](#).

Bulk Update enables you to change the value of an attribute on several asset records at the same time. Note that not all attributes are available for bulk update; for example, you can't change the asset type this way.

✓ To update several asset records at once

1. Open the **Hardware Assets** workspace to view a list of assets in your database.
2. Hold SHIFT and click to select a range of assets in the list, or hold CTRL and click to select several individual assets in the list.
3. Click **Bulk Update** (next to the More menu).
4. Select the **Field** that you want to update.
5. Either select the **Replace All Values** check box or set the current **Value** that you want to replace in the field.
6. Set the value you want to update the field to in **Replace with value**.
7. Select **Find all results in current Saved Search** (which will override any range of assets selected above in step 2) or **Find results in selected rows**, then click **Replace**. A dialog displays the number of updated records.

Filtering, sorting, and grouping asset records

In most workspaces, you can filter, sort, and group the list of displayed records. To access these options, hover over a column header and click the  icon. A menu opens enabling you to:

- Sort the column by ascending or descending order.
- Filter the viewable columns.
- Group records by field (i.e., by this column). To clear a grouping, click **Show in Groups**.
- Filter column results by typing text in the **Filter** text box. To clear the filter text, highlight and delete it.

In most workspaces, you can sort by more than one column at a time using the Multisort feature.

▼ To multisort columns

1. Click **Multisort** in the Hardware Assets workspace toolbar. In the resulting dialog, select the first column to sort by, then click the **+** icon and select another column. Repeat as needed. Click the **×** icon to delete a selected column.

Multisort Column Picker ✕

Sort by

Then by

Reset **Sort** **Close**

2. When you're finished, click **Sort** then **Close**.

To remove the multisort and reset the list view, click **Multisort** again, then click **Reset** and **Close**.

Deleting asset records (and tracking them)

Asset Administrators can delete an asset record from the ITAM database via the Hardware Assets workspace. Do so by selecting the asset in the list view and clicking **Delete** in the toolbar. You'll be prompted to confirm the delete before it happens. To delete more than one record at a time, use your keyboard's Ctrl key to select specific assets or the Shift key to select groups of assets.

To help maintain data integrity, the **Deleted Assets Audit** workspace enables you to track asset records removed from the database. This workspace displays the users who created and deleted the record, as well as the dates those actions occurred. Other details include the asset name, type, subtype, serial number, tag, and discovery ID.

Asset Name	CI Type	Asset Tag	Serial Number	Discovery ID	Created By	Created On	Deleted On
SA-S00001	Computer		C2C3D0M025		InternalServices	10/04/2023 12:...	10/04/2023 12:...
IN00A-S00002	Computer		C2C3D0M046		InternalServices	10/04/2023 12:...	10/04/2023 12:...
00B-S00001	Computer		8407-0011-79		InternalServices	10/04/2023 12:...	10/04/2023 12:...

Page Size: 100 of 100

Asset Name: SA-S00001 Asset Tag: Asset Subtype: Discovery ID: C2C3D0M025
 CI Type: Computer
 Serial Number: C2C3D0M046
 Created By: InternalServices Created On: 09/05/2011 1:30 AM
 Deleted By: ATaylor Deleted On: 10/04/2023 12:14 PM

If you're also using Ivanti Neurons for ITSM, you'll see an extra **Linked Incidents** column for incidents that were linked to the assets before deletion.

For auditing purposes, you can also export the data from this workspace into an Excel (.XLSX) file. To do so, click the icon in the top right corner of the list view and confirm.

6.1. Patch data

As of ITAM Cloud 2023.4, you can import patch data for your hardware assets from the Ivanti Neurons Platform. The displayed data includes the advisory and patch names, as well as the deployment status and date.

You can view this data as part of an asset's record under the **Hardware Assets** workspace > **Patch Info** tab. This is the same data found in the Neurons user console under the views for:

- Patch Management > Deployment History
- Devices > Patches

Getting started

To set up the ability to import patch data for assets, ensure that:

- The **ITAM 202304** package installed. Download this package from the [Ivanti Marketplace](#). If you need to update from more than four releases back, contact Ivanti's [Professional Services Organization \(PSO\)](#) prior to downloading the package.
- The Ivanti Neurons connector is correctly configured for your data source. For details, see [Ivanti Neurons Connector](#) in the ITSM help.
- The Neurons device sync API global constant in ITAM is enabled, which allows the connector to import the patch data into ITAM.

✓ To enable the Neurons device sync API global constant in ITAM

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**.
4. From the global constants list, locate **EnableNeuronsSyncByAPI** and set it to **True**.
5. Click **Save**.

Next, if you're an existing ITAM user who is upgrading to 2023.4, you need to complete an extra procedure to update the Hardware Assets workspace to include patch data. (New users can skip this procedure.)

▼ To update the Hardware Assets workspace to display patch data

1. Log in to ITAM as Asset Administrator.
2. Click the icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. In the Find box, type "CI," then click it in the drop-down list.

The screenshot shows the Ivanti Neurons Configuration Console interface. The user is logged in as 'A Taylor, Asset Administrator'. The left navigation pane is expanded to 'Build > Business Objects'. The main area shows a search for 'CI' with a list of results including 'ivnt_SecurityIncident', 'Authentication Principal (AuthenticationPrincipal)', 'Configuration Item (CI)', 'Cloud Service Asset (CI.CloudServiceAsset)', 'Computer (CI.Computer)', 'Consumable (CI.Consumable)', and 'Contract (CI.Contract)'. The 'Configuration Item (CI)' result is highlighted.

5. Click **Layouts** at the top of the page. From the Layouts list, click **AMC.CI**.

The screenshot shows the Ivanti Neurons Configuration Console interface. The user is logged in as 'A Taylor, Asset Administrator'. The left navigation pane is expanded to 'Build > Business Objects'. The main area shows the 'Layouts' section for 'CI - Business Object'. The 'Layouts' list is displayed, showing 'AM.Asset.Default' and 'AMC.CI'. The 'AMC.CI' layout is highlighted. The 'AMC.CI' layout details are shown below, including roles and the date it was edited.

2. From the Views in this Layout list, click **Computer**.

ivantiNeurons

SETTINGS

Home

Configure

- Users and Permissions
- Organization Profile
- Security Controls
- Communication Templates
- Email Configuration
- Cache Management
- Announcements
- Alerts

Build

- Automation Tools
- Business Objects
 - Object Explorer
 - Validation Business Objects
- Workflow
- Charts and Graphs
 - Counters
 - Global Constants
 - Stored Values
 - Stored Prompts
 - Mobile Layouts
 - Page Layouts
 - Pick Lists
 - Reports
- Search Tools
- User Interface Styles
- Self Service
 - Stored Expressions

Build :: Business Objects :: Business Object CI# :: Layouts :: Layout: AMC.CI

Save Translation Tool Layout 3 of 11 records

Edit Layout: AMC.CI

Layout definition for CI business object.

Display name: AMC.CI

Search configuration:

- Enable Simple Search
 - Use Type Ahead Search
 - Search all full-text indexed fields
 - Partial word results
 - Search primary display field only
 - Do not sort
- Show Saved Search Link
- Enable Saved Search

Permissions: (These are set internally and are not configurable by the Administrator)

- Update
- Delete

Views in this layout:

	View Name	Type
	gridView	List
	Computer	Form

2. Scroll down to the bottom of the page and click **Add Child Panel**.

ivanti

Neurons

SETTINGS

Build :: Business Objects :: Business Object CI# :: Layouts :: Layout: AMC.CI

Home

Configure

Build

Users and Permissions

Organization Profile

Security Controls

Communication Templates

Email Configuration

Cache Management

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Alerts

Automation Tools

Business Objects

Object Explorer

Validation Business Objects

Workflow

Charts and Graphs

Counters

Global Constants

Stored Values

Stored Prompts

Mobile Layouts

Page Layouts

Pick Lists

Reports

Save

Translation Tool

Layout 3 of 11 records

Vendor	Vendor
Finance	CI.Computer
Finance Transactions	Frs_ITFM_Transaction
Disposal	CI.Computer
Journal	Journal
Inventory Transactions	ivnt_InventoryTransaction
Scan Log	ivnt_ScannedAsset
Workflow Instance	Frs_data_workflow_instance
Automation Request	IVNT_Automation_Request
Warranties	FRS_CIComponent.Warranties

Add Child PanelAdd Custom Child Panel

Child panels can be specified using direct relationships to child objects, rollup relationships to grandchild objects, or rollup relationships to grandchild objects. Assume that the current object is Incident. which has a child Problem object. which has a child Problem object. which has a child Problem object.

2. On the Edit Layout page: under the Display Name column, click **<Not Set>** and enter the tab name "Patch Info" or something similar.
3. On the Edit Layout page: under the Object column, click **<Not Set>**. The FormView Child Panel Relationship Editor opens.
4. Next to Direct Relationship, click **not set** and select **ivnt_PatchInformation (via ivnt_PatchInformationAssocCI)** from the drop-down list.

FormView Child Panel Relationship Editor

Edit relationship for Child Panel[]

Select relationship(s) type

☒ Use only direct relationship to child object(s)

☐ Use only rollup relationship(s) to grandchild objects

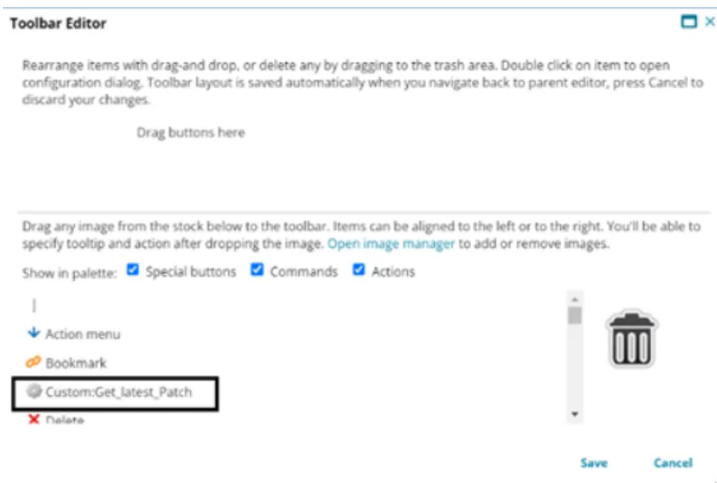
☐ Use both direct and rollup relationships

Direct Relationship: not set

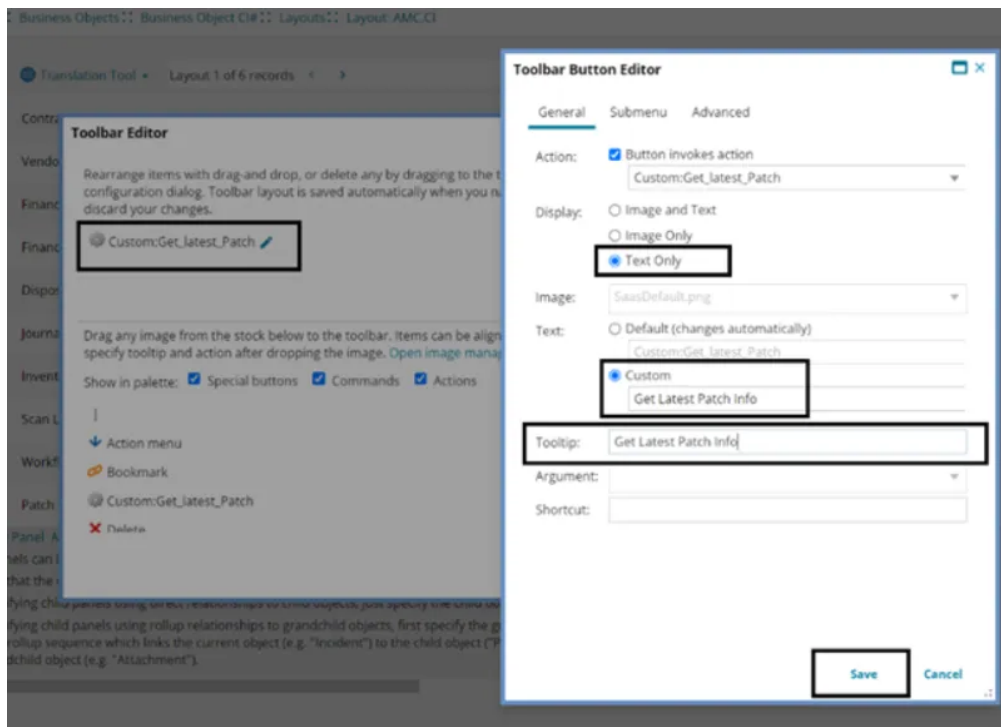
Business Object: not set

11. Click **Save**. Ivnt_PatchInformationAssocCI will automatically display in the Relationship(s) column (third column on the page).

12. Scroll to the right and click **Edit** in the row you just created.
13. In the Toolbar Editor, remove unwanted buttons and only add the quick action **Custom:Get_latest_Patch**.



14. Click the edit icon, then set the following options:
 - **Display:** Select **Text Only**.
 - **Text:** Select **Custom** and type **Get Latest Patch Info**.
 - **Tooltip:** Type **Get Latest Patch Info**.



2. Click **Save**.
3. On the Edit Layout page: under the List column, select **PatchDetailsList** from the drop-down list.
4. On the Edit Layout page: under the Initially Visible column, click **<Not Set>**. The Expression Editor opens. Type **True**, then click **Save**.

Initially Visible Expression - Expression Editor

Expression Editor:

[Simplify Expression](#)

True

TOOLBOX

Search for fields and functions ...

▶ CI.Computer (Computer)

▶ Functions

▶ Time Zones

Save

Cancel

18. Click **Save** to save all of your updates.

Finally, you need to complete the following three procedures.

▼ To enable the patch integration global constant in ITAM

1. Log in to ITAM as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**.
4. From the global constants list, locate **EnablePatchIntegration** and set it to **True**.
5. Click **Save**.

▼ To set up app registration in Neurons

1. Log in to Neurons as Administrator.
2. Navigate to **Admin > App Registrations**.
3. Click **New Registration**.
4. From the New App Registration drop-down, select **Custom App**, then click **Continue**.
5. Enter a meaningful **Description**, then click **Register**.
6. Complete the registration by copying all of the settings to the clipboard. You will need these in the next procedure.
7. Click **Finish and close**. The custom app will display in the App registrations list.

▼ To set up client registration in ITAM

1. In the ITAM user console, open the **Client Registration** workspace.
2. Click **New Client Registration**. Type a meaningful **Name**, such as "ITAM Patch," clear the **Is On Premise** check box (since this feature is only available for ITAM Cloud), and enter the **Client Registration URL** (i.e., the Neurons Auth URL), **Client ID**, and **Client Secret** using the copied settings from the previous procedure. You can leave the **VerificationUrl** field empty.

ivanti Neurons + HOME PRODUCT CATALOG MORE...

HOME HARDWARE ASSETS: DATA SERVER x CLIENT REGISTRATION: NEW RECORD x

All (no records found) < >

← LIST VIEW NEW CLIENTREGISTRATION SAVE REFRESH

Name * ITAM Patch

Is On Premise ☐

Client Registration URL *

Client Id *

Client Secret *

VerificationUrl

3. Click **Save**.

Viewing patch data for assets in ITAM

Once the procedures above are completed, you should be able to view patch data for assets from the ITAM user console.

To view patch data for an asset

1. In the ITAM user console, open the **Hardware Assets** workspace.
2. From the list view, double-click an asset to open its record.
3. Click the **Patch Info** tab. (You may have to scroll to the end of the tab list to see this tab.) All deployed patches for this asset are displayed in the list.

To view the most recently deployed patches, you may need to click **Get Latest Patch Info**.

ivanti Neurons + HOME PRODUCT CATALOG HARDWARE ASSETS SOFTWARE ASSETS MORE... A Taylor Asset Administrator

HOME SELECTED ASSETS ASSET - HARDWARE ASSETS SEARCH MANAGED DEVICES HARDWARE ASSETS DEPOT-SERV0202 WATCHLIST

Managed Devices (found 1 of 34 search records) Saved Searches Search for ID

NEW SAVE CHECK IN ASSIGN USER ASSIGN LOCATION ASSIGN FINANCIAL OWNER TRANSFER TO STOCK

Asset - Computer - DEPOT-SERV0202

ASSET SUMMARY

Name* DEPOT-SERV0202

Asset Tag

Serial Number* C2CF954E

DETAILS DISCOVERY LICENSEABLE SOFTWARE (5) INSTALLED SOFTWARE (46) NETWORK (1) INCIDENTS (5) SUPPORTED SERVICES (2) RELATIONSHIPS CONTRACTS USER ASSETS

Get Latest Patch Info

Advisory Name	Patch Name	KB	Release Date	Deployment Status	Deployment Start	Elapsed Time
---------------	------------	----	--------------	-------------------	------------------	--------------

6.2. Mobile app

Role: Asset Administrator

Ivanti Neurons for ITAM (Drop #22 and above) supports the use of the Ivanti Neurons for ITSM & ITAM mobile app to track existing hardware assets. Use the app to scan asset barcodes, edit record details, apply a range of quick actions, and then sync those updates with the database. As of the latest version, you can also take delivery of hardware assets that are part of a purchase order. For details, see [Procurement](#).

By default, supported asset types include computer, mobile device, general asset, peripheral device, and infrastructure (not consumables). To add support for other asset types, the Asset Administrator must first configure forms for them. For details, see the Ivanti Neurons for ITSM help topic [Creating a Form](#).

This app is for use with existing asset records. You **cannot** use it to scan hardware assets into the database for the first time.

An exception to this is if you're using the app to take delivery of assets that are line items of an existing purchase order. You can scan the barcodes of these new assets because as part of a purchase order, they already exist in the database as template records (which act as placeholders for the newly scanned data). For details, see [Procurement](#).

✓ Which barcodes can be scanned?

The app supports these barcode types:

- **Linear formats:** Codabar, Code 39, Code 93, Code 128, EAN-8, EAN-13, ITF, UPC-A, UPC-E
- **2D formats:** Aztec, Data Matrix, PDF417, QR Code

Unsupported barcodes:

- 1D barcodes with only one character
- Barcodes in ITF format with fewer than six characters
- Barcodes encoded with FNC2, FNC3, or FNC4
- QR codes generated in the ECI mode

Setting up the app

The app is for use in an environment where both Ivanti Neurons for ITSM and ITAM are installed (*not* an ITAM-only environment). It works on both Android- and iOS-based smartphones.

The app consists of two parts that you need to set up before using:

1. The **tenant** software, which the Asset Administrator needs to download onto each tenant to be accessed via the app. Download the latest version from the [Ivanti Marketplace](#). It's recommended that you first test this package on a staging server before using it in a production environment.

In addition, ensure that each app user is assigned the **Mobile Asset Manager** user role (*not* the Asset Mobile role).

2. The **smartphone** software, which each app user needs to download onto their phone from the Google Play Store [here](#) (Android) or the Apple App Store [here](#) (iOS).

Scanning

The procedures in this section are written for the Android-based version of the app, but the general information works for the iOS version as well.

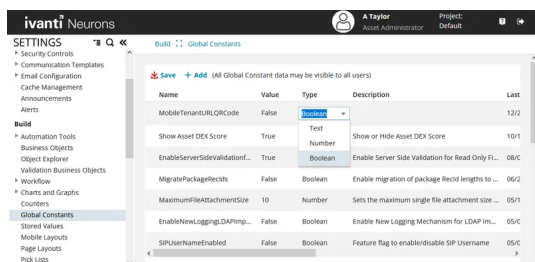
With each scan, the app enables you to pull up an existing asset record to edit the details and apply a range of quick actions. By default, supported actions include assigning assets to a new location, user, or financial owner; checking assets into a storage space; transferring assets as stock to a new location; and creating a new incident related to the asset.

If the app is idle for too long or is simply closed, it will require you to log in again.

To disable the QR code feature

By default, the  icon displays for users assigned the Mobile Asset Manager role, enabling them to scan a QR code to obtain the tenant URL. Asset Administrators can disable this feature if needed.

1. Log in as **Asset Administrator**.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**.
4. At the top of the list, click **Add** to add a new global constant.
5. Name the global constant **MobileTenantURLQRCode** with a value of **False** and type of **Boolean**.



6. Click **Save**.

Now, when a Mobile Asset Manager user logs into ITAM (or Mobile Analyst or Self-Service Mobile user logs into Ivanti Neurons for ITSM), the  icon will not display.

To display the  icon again, simply change the value of this global constant to **True** and save the change.

Troubleshooting

Here are a few tips if you're having problems using the app:

✓ Asset Tag field required

The app requires that the Asset Tag field be present in the Hardware Assets workspace. If the Asset Tag field was previously deleted for any reason, the Asset Administrator must recreate it to prevent an error message when users are updating the scan log.

To recreate the Asset Tag field

1. Log in as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. Search for and open the **CI** (Hardware Assets) business object.
5. Click **Fields**, then click **Add New**. For field type, click **Text**.
6. The original Asset Tag field details are as follows:
 - Field type: **Unicode Text**
 - Text length: **Variable, max 255**
 - Field attributes: **Nullable**, **Stored**, and **Full-text indexed**
7. Click **Save** when finished.

✓ Quick Actions Field Match

- Fields in **Hide in UI when** or **Disable in UI when** must be present in the Mobile Asset Manager grid layout.
- Edit layout: CI (Hardware Assets) > Layouts > MobileAssetManager.Asset.DefaultLayout > gridView

If the defaults for the expressions or layout have been customized in a way that the fields no longer match, the Asset Administrator must update the settings in the Configuration Console.

To edit quick action expressions

1. Log in as Asset Administrator.
2. From the **Hardware Assets** workspace > **More** drop-down menu (top right of the page), click **Edit Actions** to open the Configuration Console.
3. In the left navigation pane, expand **Lifecycle** and select one of the app quick actions, such as Assign to User.
4. Click the **Edit** button at the top of the page, then edit the **Hide in UI when** or **Disable in UI when** expressions as needed (located at the bottom right of the page).

For more details about editing expressions, see the Ivanti Neurons for ITSM help topic [About Expressions](#).

To edit the Mobile Asset Manager layout / grid view

1. Log in as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. Search for and open the **CI (Hardware Assets)** business object.
5. Click **Layouts** at the top of the page, then scroll down the list and click **MobileAssetManager.Asset.DefaultLayout**.
6. Under Views in this layout, click **gridView**, then edit the fields as needed.

For more details about editing a layout, see the Ivanti Neurons for ITSM help topic [Using Layouts](#).

Scanned locations must match those in the database

To prevent an error message when users are updating the scan log, the app requires that the locations of all scanned assets match the names of those same locations currently in the database.

Asset Administrator and Asset Manager user roles can update the location names in the database. Do so from the **Locations** workspace: select all records in the list view and click **Update Full Name**.

NEW

UPDATE FULL NAME

✈

DELETE

↺

Name	Parent Location	Full Name
Canada	North America	Canada
Central	USA	Central
East Coast	USA	East Coast

Editing the barcode look-up fields

Asset Administrators have the option of editing the barcode look-up fields that the app uses to identify scanned assets. By default, the serial number and asset tag are scanned. An easy way to edit these fields is to use the procedure below, where you can access the look-up fields via a saved search in the Hardware Assets workspace.

The guidelines for look-up fields are these:

- Look-up fields should match the fields currently defined for the Scan Log workspace. By default, these fields are Asset Tag and Serial Number.
- You can use any number of fields as a look-up, though 2-3 should be sufficient.
- The app requires that at least one field be used as a look-up in the saved search, as shown in the next procedure.

✓ To edit the look-up fields

1. Log in as Asset Administrator.
2. In the **Hardware Assets** workspace, open the saved searches drop-down and click **All Saved Searches** in the bottom right.
3. Scroll down the list to **Barcode Scan Lookup Fields** and click **Edit**. This action opens the following page:

HOME SCAN LOG ✕ **HARDWARE ASSETS SAVED SEARCH: BARCODE SCAN LOOKUP FIELDS** ✕ WATCHLIST

Barcode Scan Lookup Fields (no records found)

[List All Searches](#)
[Save](#)
[Save As...](#)
[Favorite](#)
[Dependency](#)
[Settings](#)

Find 'CI'

where	CI	Serial Number	Equal to	"	fx	+ - ✕
or	CI	AssetTag	Equal to	"	fx	+ - ✕
or	CI	MACAddress	Equal to	"	fx	+ - ✕

[Run Search](#)
[Run & Close](#)
[Export](#)
[Email](#)

4. Change the look-up fields as needed:
 - To add a field, click the **+** icon at the end of a row and select **OR**. Select a field from the field drop-down. Leave **Equal to** as is, then use the same expression found in the other rows. Note that sub-queries aren't currently supported.
 - To delete a field, click the **✕** icon at the end of the row that the field is in.
5. Click **Save** when finished.

Role: **Mobile** Asset Manager

Once assigned by the Asset Administrator, the users can scan, view, update, and perform actions on hardware assets from mobile devices using the app.

If you upgrade to version 2025.4, the android ITSM and ITAM app now supports devices with a 16 KB memory page size, expanding compatibility across more android devices.

Getting Started

1. Download app from Play Store (Android) or App Store (iOS).
2. Launch the app, enter Tenant URL (or scan QR code if enabled).
3. Log in with credentials.

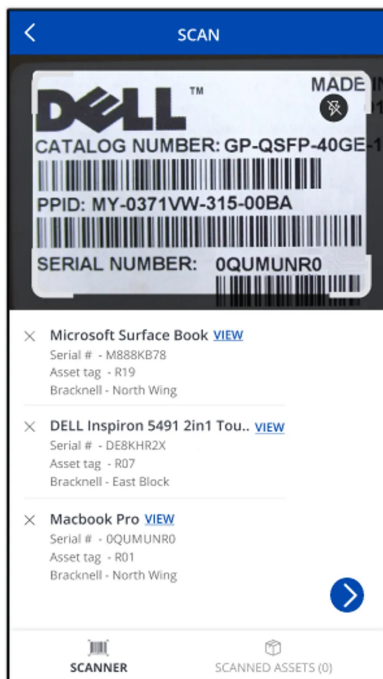
✓ To scan assets

You can also turn the camera off to prevent accidental scans. Do so by tapping the camera icon.

1. Open the app on your phone. Enter the **Tenant URL**, then tap **Continue**.

When launching the app for the first time. If you don't know the URL, you can scan a tenant QR code that will enter the URL for you. For details, see the next procedure.

2. Enter your account username and password to log into the tenant.
3. To begin scanning, tap **Scan Assets** to display the scanner screen. Focus the barcode viewer (in portrait mode) on an asset barcode and scan the image. The asset record details will display. If the scanned barcode does not belong to a unique asset, you'll get an error message. Continue scanning as many barcodes as needed. If you scan one by mistake, click the x icon to the left of the asset to remove it from the list.

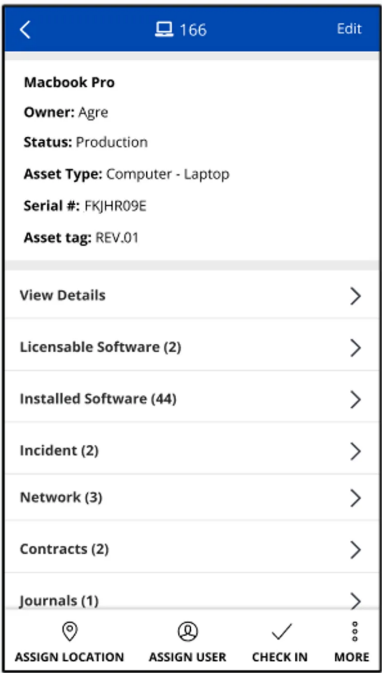


The barcode viewer enables you to zoom in or use a flash if necessary when scanning. To zoom in or out on a barcode, swipe left or right on the zoom slider. Turn the flash feature on or off by tapping the lightening bolt icon in the top right of the viewer.

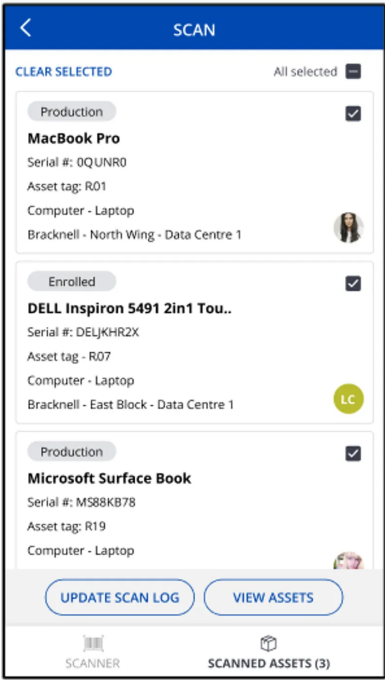
You can also turn the camera off to prevent accidental scans. Do so by tapping the camera icon.

From release 2025.3, both ITAM and ITSM support **Data Matrix** scan codes. For android based smart phones, hold the camera close to the code to scan it. You can upload a scan code using an existing image. Make sure the image contains only the barcode else, processing will fail.

4. To view or edit the record details of a single asset or to apply a quick action, tap **View** to the right of the asset. From the asset details screen, you can edit some of the information and apply available quick actions (located at the bottom of the screen). Once you're finished, tap the  icon to return to the scanner screen.



- 2. Once you're finished scanning, tap the  icon to save the updates.
- 3. From the scanned assets list, you can update the scan log. Tap the check box next to each asset to update in the log, or tap **Select All** for a bulk update, then tap **Update Scan Log**. A record of the scan will be added to the Scan Log workspace, as well as the Hardware Assets workspace > Scan Log tab of the asset record.



- 7. To apply a quick action on one or more assets, tap **View Assets**. This action brings up the assets list, where you can do the following:

- Apply a search filter to narrow the list. Do so by tapping the **Assets by Type** drop-down and selecting one of the favorite searches. To return to the default view, tap the drop-down again, then tap **Assets by Type** in the searches list.
- Apply a filter or sort the list by tapping the  icon, adding conditions, then tapping **Apply**. To remove a filter or sort action, tap the  icon again and tap **Clear all**.
- Apply a quick action to one or more assets at a time. The asset records will be updated with the new values in both the app and the Hardware Assets workspace. Available actions are based on the asset type and current status.

8. To log out, tap the  icon in the title bar, then tap **Logout**.

✓ To enter the tenant URL via a QR code

When launching the app for the first time, you may not know the tenant URL to enter. You can use the app to scan a tenant QR code that automatically enters the URL for you. Do this just once when launching the app; the app will store the URL for future use. This feature works for both the Android and iOS versions of the app.

If it's more convenient, you can use a QR code generator of your choice to encode the tenant URL as a QR code. There are many online resources for creating QR codes, and you can circulate the generated QR code for quicker access.

To enter the tenant URL via a QR code

You must be logged into ITAM at your desktop and on the app as the same user.

1. Log into ITAM at your desktop as a **Mobile Asset Manager** (or as a **Mobile Analyst** or **Self-Service Mobile** user if using Ivanti Neurons for ITSM).
2. Click the  icon in the upper right corner of the page. A QR code for the tenant will display as shown below:



3. Open the app on your phone, aim it at your desktop screen, and tap **Scan Tenant QR** to scan the tenant URL into the app.
4. Enter your account username and password to log into the tenant, then begin using the app as you normally would.

✓ To adjust scan settings

Adjustable scan settings include:

- **Auto Scan:** Toggle off the default auto-scan mode to enable manual scans. Once Auto Scan is off, the app will stop scanning barcodes automatically. To scan assets in manual mode, aim the barcode viewer on an asset barcode, then tap the **Scan Now** button.
- **Beep Sound:** Toggle on a sound to indicate that a scan has occurred.
- **Vibrate:** Toggle on a vibration to indicate that a scan has occurred.

To access the Scan Settings screen, tap the  icon on the scanner screen and select **Settings**. Toggle the options on or off, then tap the **Apply** button at the bottom of the screen.

Offline scanning

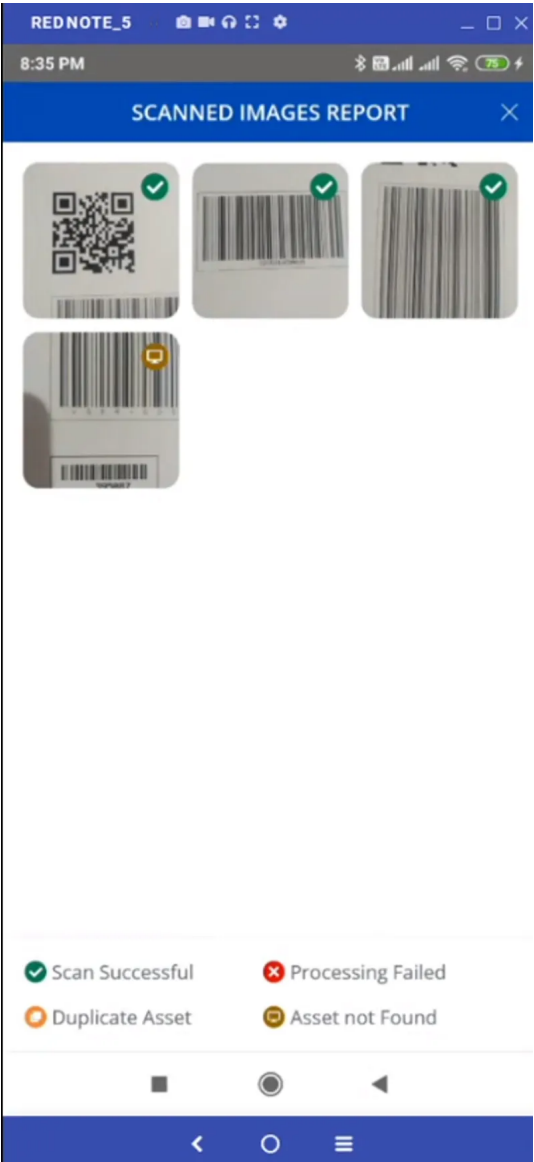
The details in this section are written for the Android-based version of the app, but the general information works for the iOS version as well.

If internet connectivity is lost while you're logged into the app, you can continue to scan barcodes as you would normally. For example:

- If you're logged in but lose internet connectivity *before* scanning begins, go ahead and scan. Later, when you're logged in and back online (using the same user account), the app will automatically sync the scans with the database and display the asset details.
- If you're logged in but lose internet connectivity *while* scanning, continue to scan. Later, when you're logged in and back online (using the same user account), the app will ask if you want to sync the barcodes that were scanned offline or start over. Click **Use items** to sync the scans with the database, or click **Start new** to discard those barcodes and start over.

In a third scenario, if you're *not* logged into the app and are offline, you can take photos of the barcodes, then use the app to scan the images once you're logged in and back online. To do this:

- From the app's **Home > Scan Assets > scanner** screen, click the  icon (top right of the screen) to open your list of photos. Manually select the photos to scan. The app will automatically scan the barcodes from those images, then fetch and display the asset details. You can perform the actions you would normally, then sync the updates with the database.
- To view which images were successfully scanned, click **View Scanned Images Report** (near the top of the screen). If there's a problem, the app will indicate that one of several issues has occurred:
 - **Processing Failed:** The barcode wasn't in focus or was cut off when the photo was taken.
 - **Duplicate Asset:** The barcode is a duplicate of a previously scanned asset.
 - **Asset not Found:** The asset record isn't currently in the database.



Note that you can't scan *new* barcodes into the database with the app. If you attempt this, the app will be unable to sync those barcodes once you're back online (since they don't already exist in the database).

To scan assets without an existing purchase orders

In the mobile application, you can scan assets without an existing purchase order.

Prerequisite

Before scanning assets in the mobile app, ensure the following data is entered:

- Vendor name
- Vendor list in standard parts catalog

After entering the details, wait for the workflow to be generated by the system.

Procedure

In the mobile app, mobile asset manager can scan assets without an existing purchase order. To scan the assets do the following:

1. Open the mobile app, enter the **Tenant URL**, then tap **Continue**.
2. Sign in as **Mobile Asset Manager**.
3. Tap **Scan New Assets**.
4. Tap **Create Purchase Order and Line Item**.

The **Generate PO** window is displayed.

GeneratePO

Purchase order Name

Select Vendor Name

Select...

Select Catalog

Select...

Enter quantity

Apply

5. Enter the following details:
 - **Purchase Order Name:** Enter purchase order name.
 - **Select Vendor Name:** Select a name from the dropdown list.
 - **Select Catalog:** Select a catalog from the dropdown list.
 - **Enter quantity:** Enter the number of assets you desire to create.

6. Tap **Apply**.

The **Purchase Order** and **Purchase Order line item** is created.

7. Enter the purchase order name in **Search** bar to view its details.
8. Check the line item to confirm the number of assets.
9. Tap **Menu** > **Scan** to scan each asset and create the asset records.

▼ Persistent Authentication and Universal Link Integration

From Release 2026.3, users can remain signed in after closing and reopening the ITAM mobile application, regardless of whether biometric authentication is enabled. This feature reduces repeated authentication and improves efficiency for users who access the app frequently.

- If biometric authentication is enabled, the application restores the previously selected role when the app is reopened. Users must authenticate with their registered biometric method to access the session.
- If biometric authentication is not enabled, the application restores the previous session, including the selected role and home page, when the app is reopened.

The ITAM mobile apps for Android and iOS support application links and Universal Links. When a users select supported HTTPS ITAM cloud domains, the link opens directly in the ITAM app if it is installed. If the app is not installed, the link opens in the device's default web browser.

If the user is not signed in, the app prompts the user to sign in and then opens the selected item. If the user is signed in but connected to a different server URL, the app displays a dialog that allows the user to:

- Sign in using the required server URL or
- Open the item in a web browser.

6.3. DEX scores

For ITAM Cloud environments integrated with the Ivanti Neurons Platform, this topic explains how to add a Ivanti Neurons Digital Experience (DEX) score to your hardware asset records. By default, Asset Administrator and Asset Manager user roles can view the DEX score in the Hardware Assets workspace and click it to access more details in the Neurons user interface.

If you're also using Ivanti Neurons for ITSM, you can set up an **Incidents** workspace > **DEX** tab that will display the DEX score of any asset linked to an incident.

✓ About DEX scores

With the expansion of remote work and an ever more complex technology set, it's more important than ever to measure and manage the digital employee experience.

A DEX score is calculated based on a curated set of indicators, hybrid machine learning, and statistical models. The score ranges between 0 and 100, with higher scores indicating better experiences.

The data DEX uses comes from Ivanti Neurons connectors and agents. The DEX score is calculated each time a device returns an inventory scan with an indicator value that has changed. The measured indicators are divided into these areas:

- Device Insights
- Security Insights
- Application Insights
- Service Insights

To view the details behind an asset's DEX score, click the score in the Hardware Assets workspace or Incidents workspace. This action will open the Ivanti Neurons user console, where you can view the details. To understand more about this score, see [Device details](#) > **DEX Score** in the Neurons Platform help.

For more information on DEX and how it works, see this Ivanti blog post: [Measuring Digital Experience with Artificial Intelligence](#).

Getting started

Whether you're a new or existing customer, it's assumed that your ITAM Cloud environment is currently integrated with the Neurons Platform.

For new customers using ITAM 2022.4 or higher, the asset DEX score data is already configured. You need to complete just two of the following procedures:

- To map the DEX data to be imported from Neurons Platform.
- To turn on a feature flag to display the DEX data.

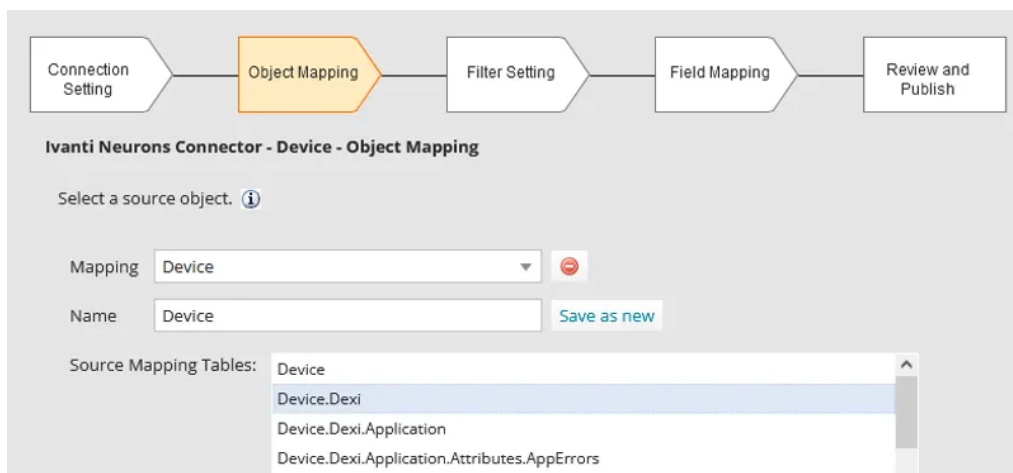
For customers upgrading to ITAM 2022.4 or higher (and using ITSM as well), complete all of the following procedures. For ITAM-only users, skip the "To configure a DEX child tab to display in the Incidents workspace" procedure.

To map the DEX data to be imported from Neurons Platform

1. Log in to ITAM as an Asset Administrator.
2. Open the **Asset Data Mapping** workspace.
3. In the Business Object Name column, double-click **CI#**.
4. Click the **Field Mappings** tab.
5. Click **New Asset Data Mapping Field**.
6. Add the mappings shown below for Field Name, XML Property, and Data Source, clicking **Save** after each one. Leave Default Value empty for each mapping.

Field Name	XML Property	Default Value	Data Source
Dexi	//Identity/Property[@Name='Dexi']		All
DexiClass	//Identity/Property[@Name='DexiClass']		All
LastCalculatedDateTime	//Identity/Property[@Name='LastCalculatedDateTime']		All

7. Click **Save** to save the entire configuration.
8. Click  to open the Configuration Console.
9. In the left navigation pane, expand **Extend > Integration Tools > Data Import Connections**.
10. Scroll down the list and click **Ivanti Neurons Connector – Device**.
11. On the Connection Setting page, click **Next**.
12. On the Object Mapping page, next to Source Mapping Tables select **Device.Dexi**, then click **Next**. Click **Next** again.



13. On the Field Mapping page, define the mappings as shown below. You may need to wait a few minutes for the mappings created above to display on this page.

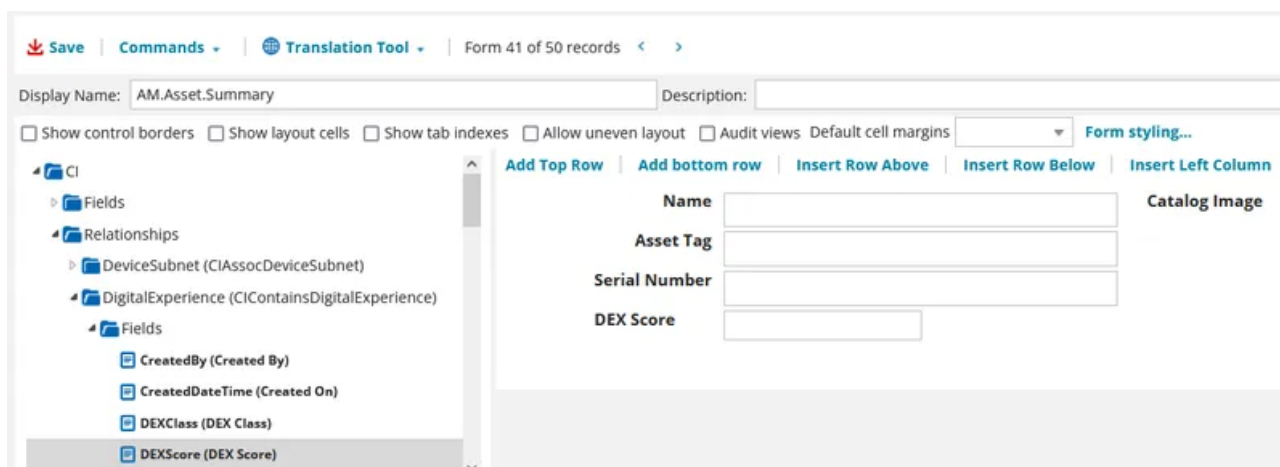
Device.Dexi.Score	-->	Identity.Property.Dexi
Device.Dexi.ScoreDate	-->	Identity.Property.LastCalculatedDateTime
Device.Dexi.Class	-->	Identity.Property.DexiClass

2. Click **Next**, then **Next** again.
3. On the Review and Publish page, click **Publish**.

▼ To add a DEX Score field to the Hardware Assets workspace form view

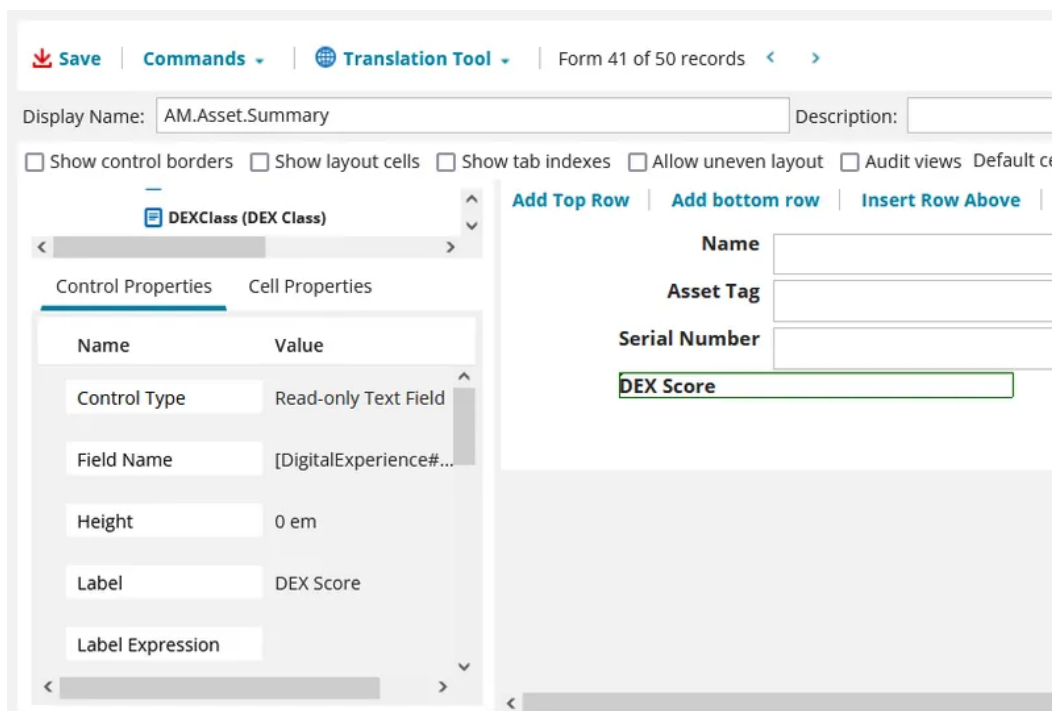
Once it's added, the DEX Score field will display on the Asset Summary page for an asset record.

1. Log in to ITAM as an Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. In the **Find** text box, search for **CI** and click to open the CI Business Object.
5. Click **Forms** at the top of the page, then scroll down the Forms list and click **AM.Asset.Summary**.
6. Expand **CI > Relationships > DigitalExperience > Fields**, then drag and drop the **DEX Score** into the middle pane. This will create the DEX Score field.



The screenshot shows the Configuration Console interface. At the top, there are tabs for 'Save', 'Commands', and 'Translation Tool', along with a status bar indicating 'Form 41 of 50 records'. Below this, the 'Display Name' is set to 'AM.Asset.Summary'. A list of checkboxes includes 'Show control borders', 'Show layout cells', 'Show tab indexes', 'Allow uneven layout', and 'Audit views'. The left navigation pane shows a tree structure: 'CI' > 'Fields' > 'Relationships' > 'DeviceSubnet (CIAssocDeviceSubnet)' > 'DigitalExperience (CIContainsDigitalExperience)' > 'Fields'. The 'DEXScore (DEX Score)' field is selected. The middle pane shows the form layout with fields for 'Name', 'Asset Tag', 'Serial Number', and 'DEX Score'. The 'DEX Score' field is highlighted with a green border.

7. Highlight the **DEX Score** you just dragged and dropped and configure the Control Properties as shown below:



The screenshot shows the Configuration Console interface with the 'AM.Asset.Summary' form. The 'DEX Score' field is highlighted with a green border. The 'Control Properties' pane is open, showing the 'Control Type' as 'Read-only Text Field' and the 'Field Name' as '[DigitalExperience#...]'.

Name	Value
Control Type	Read-only Text Field
Field Name	[DigitalExperience#...]
Height	0 em
Label	DEX Score
Label Expression	

- **Control Type:** Read-only Text Field

- **Field Name:** [DigitalExperience#.CIContainsDigitalExperience]DEXScore
- **Height:** 0 em
- **Label:** Dex Score
- **Label Pos:** On the left
- **Label Style Rule:** DexScoreivanti_RightAlign

- **Style:** Default
- **Style Rule:** Add the following and click **Save**:

Bash

```
$(if ToLowerCase([DigitalExperience#.CIContainsDigitalExperience]DEXClass) == "red" then "DexScoreivanti_RedBackgroundLabel"
```

- **Tab Index:** 0
- **Visible Expression:** Add the following and click **Save**:

Bash

```
$([DigitalExperience#.CIContainsDigitalExperience]DEXScore != null &&[DigitalExperience#.CIContainsDigitalExperience]DEXScore
```

- **Width:** 4 em
- **Wrapping:** Overflow

8. Once complete, click **Save** (upper left corner) to save the entire configuration.

The result should look like this on the Asset Summary page for an asset record:

Search: "DUBRM0" (second 1 of 1 search records)

NEW SAVE CHECK IN ASSIGN USER ASSIGN LOCATION ASSIGN FINANCIAL OWNER TRANSFER STOCK SERVICE MAP

Asset - Computer - DUBRM0

ASSET SUMMARY

Name: DUBRM0

Asset Tag:

Serial Number: SCGS304ZDT

DEX Score: 74

No image

DETAILS DISCOVERY EVENT (0) INCIDENT (1) PROBLEM (0) CHANGE (0) RELEASE CHANGE LOCKOUT (0) CHANGE WINDOW (0) INSTALLED SOFTWARE RELATIONSHIPS NETWORK ATTACHMENTS

Asset Subtype: [dropdown]

Catalog Item: [dropdown]

Assigned Manufacturer: [dropdown]

Assigned Model: [dropdown]

Assigned Part Number: [dropdown]

Description: [text area]

Assign User [button] Assign Location [button] Check In [button]

Assigned User: [dropdown]

Location: [dropdown]

Status: Production [dropdown]

Environment: [dropdown]

Purchase Date: [text]

Asset Age (mo): [text]

Useful Life (mo): [text]

In Service Date: [text]

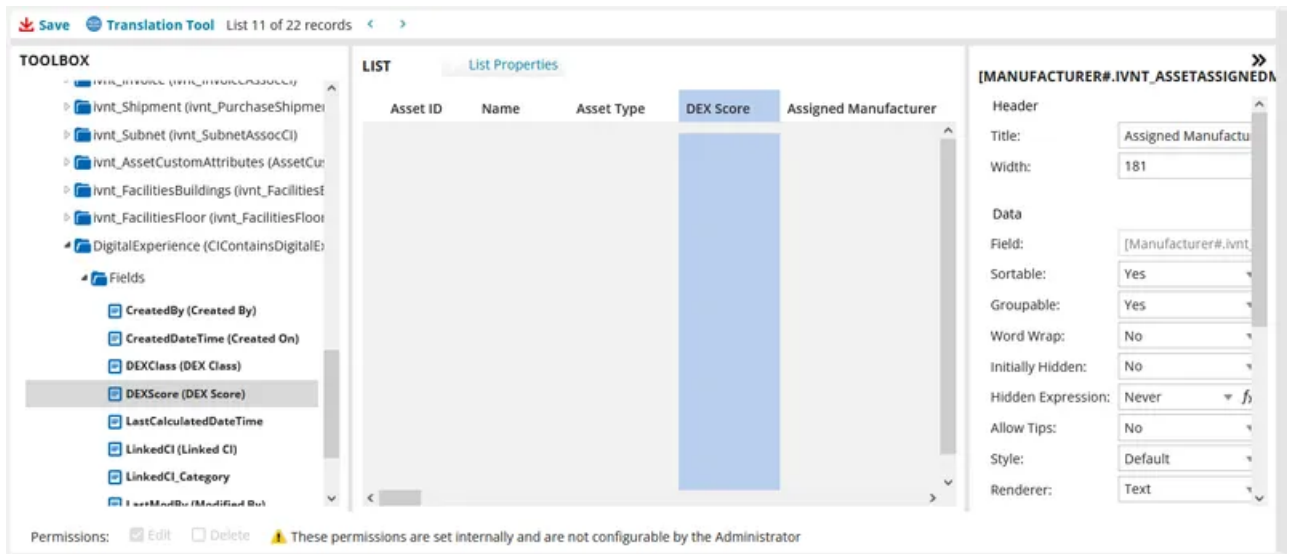
Warranty Term: [text]

Warranty Start Date: [text]

Warranty Expiry: [text]

▼ To add a DEX Score column to the Hardware Assets list view

1. Log in to ITAM as an Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. In the **Find** text box, search for **CI** and click to open the CI Business Object.
5. Click **Lists** at the top of the page, then scroll down the Lists list and click **AM.Asset.Default**.
6. In the Toolbox, expand **CI > Relationships > DigitalExperience > Fields**, then drag and drop the **DEX Score** into the middle pane. This will create the DEX Score column. The column position here will be the same position in the Hardware Assets workspace list view. You can reposition the column if needed.



7. Highlight the **DEX Score** you just dragged and dropped and configure the properties in the right pane as described below:
 - For **Hidden Expression**, add the following in the Edit Expression dialog, then click **Save**:

Bash

```
$(!GetGlobal("Show Asset DEX Score"))
```

- For **Style**, select **Expression** from the drop-down list, add the following in the Edit Expression dialog, then click **Save**:

Bash

```
$(if ToLowerCase([DigitalExperience#.CIContainsDigitalExperience]DEXClass) == "red" then "DexScoreivanti_RedBackgroundLabel" )
```

8. Once complete, click **Save** (upper left corner) to save the entire configuration.

✓ To configure a DEX child tab to display in the Incidents workspace

This procedure is only necessary for environments where ITSM is also used.

1. Log in to ITSM as an Administrator.
2. Click the icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. Click **Incident**.
5. Click **Layouts** at the top of the page, then scroll down the Layouts list and click **IncidentLayout.ServiceDesk**.
6. In the **Views in this layout** area, click **formView** to open the Form View Editor.

7. Scroll down to the bottom of the page and click **Add Child Panel**.

Child panels can be specified using direct relationships to child objects, rollup relationships to grandchild objects, or both. Assume that the current object is Incident, which has a child Problem object, which in turn has child Attachment objects. For specifying child panels using direct relationships to child objects, just specify the child object (e.g. "Problem"). For specifying child panels using rollup relationships to grandchild objects, first specify the grandchild object (e.g. "Attachment") as the business object, then add the new rollup sequence which links the current object (e.g. "Incident") to the child object ("Problem"), followed by the link from the child object (e.g. "Problem") to the grandchild object (e.g. "Attachment").

2. Add the following new child panel settings under the various columns:
 - **Display Name:** Type **DEX**
 - **Object:** Set to the following options and click **Save**:

FormView Child Panel Relationship Editor

Edit relationship for Child Panel[]

Select relationship(s) type

☒ Use only direct relationship to child object(s)

☐ Use only rollup relationship(s) to grandchild objects

☐ Use both direct and rollup relationships

Direct Relationship: IncidentAssociatesCI

Business Object: CI

Save

Cancel

- **Display:** Set to **List**
- **List:** Set to **Digital Experience**
- **Hidden Expression:** Set to the following and click **Save**:

Bash

```
$(!GetGlobal("Show Asset DEX Score"))
```

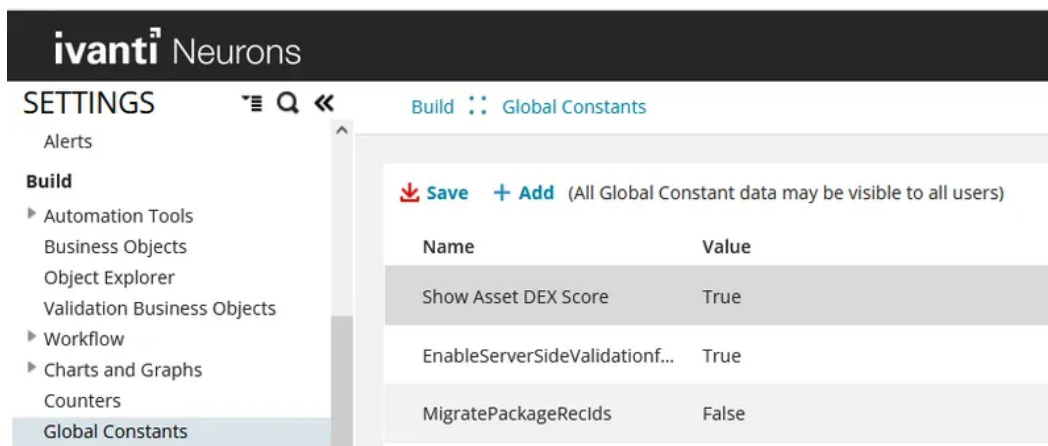
- **Initially Visible:** Set to **False**.

9. Once complete, click **Save** (upper left corner) to save the entire configuration.

✓ To turn on a feature flag to display the DEX data

This flag will enable the mapped DEX data to display in the Hardware Assets workspace (and Incidents workspace if ITSM is also used).

1. Log in to ITAM as an Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**.
4. Find **Show Asset DEX Score** in the list and set the value to **True**.



5. Click **Save**.

6.4. Managed and unmanaged devices

The **Hardware Assets** workspace displays asset records for managed and unmanaged devices.

Managed devices typically have a unique serial number and can be conveniently mapped during import or discovery to one of the five known asset types (computer, mobile device, general asset, peripheral device, and infrastructure). Managed devices display by default.

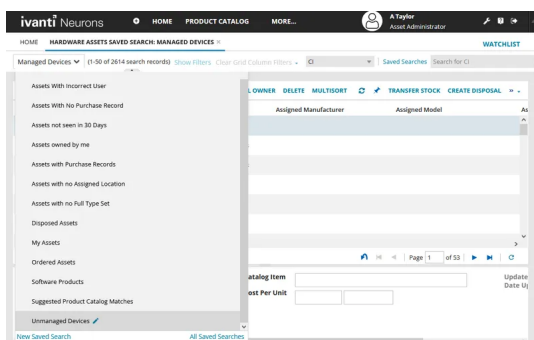
Unmanaged devices are usually specialized devices (such as medical devices, IoT assets, and Cloud Service assets) that generally don't have a serial number and don't map conveniently to an asset type when discovered. By default, these devices display in the **Unmanaged Devices** saved-searches list. The asset record page for unmanaged devices contains only the tabs for **Details**, **Discovery**, **Installed Software**, and **Audit History**.

To change an unmanaged device to a managed one, you need to re-allocate it to one of the known asset types mentioned above, or to one of the newer asset types of **Medical Device**, **Cloud Service Asset**, etc. that are available in the **More** drop-down menu. As part of this process, you'll also want to select a subtype that further defines the device.

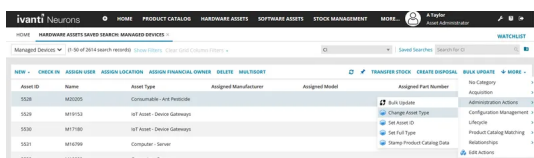
To change an unmanaged device to a managed one

You must be an Asset Administrator to complete this procedure.

1. Open the **Hardware Assets** workspace. The list of managed devices in your database displays by default.
2. In the saved-searches list, select **Unmanaged Devices** to view the list of unmanaged devices.



3. Double-click an unmanaged device to open its asset record.
4. Click the **More** drop-down menu at the top right of the page, then click **Administration Actions > Change Asset Type**.



5. Select a suitable Asset Type and Asset Subtype, then click **OK**.

You can't create new asset types in ITAM, but you *can* create new subtypes if needed. For details, see [Asset validation lists](#).

For details about working with managed asset records, see [Hardware assets](#).

6.5. Missing assets

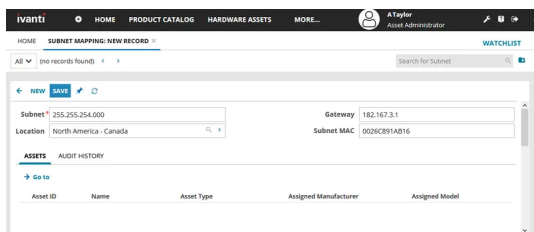
An important part of asset management is knowing where your assets are, as well as knowing when assets aren't where they should be. Ivanti Neurons for ITAM supplies an Asset Location Exceptions report that identifies when a discovered or imported asset isn't in the location that you may have manually assigned it to in the Hardware Assets workspace. Using the report, you can reassign the asset to the correct location under the **Hardware Assets** workspace > **Details** tab.

Before ITAM can produce the report, you need to create a list of your subnets and associate each one to a location in the **Subnet Mapping** workspace. Alternatively, you can also associate a subnet to a location using the **Locations** workspace > **Subnets** tab. Only Asset Administrators or users with the Asset Manager role can do this.

You can view the report in the **Home** workspace > **Asset Exceptions** dashboard. For details about how to access this dashboard, see [Dashboards](#).

To create a subnet mapping

1. Open the **Subnet Mapping** workspace and click **New**.



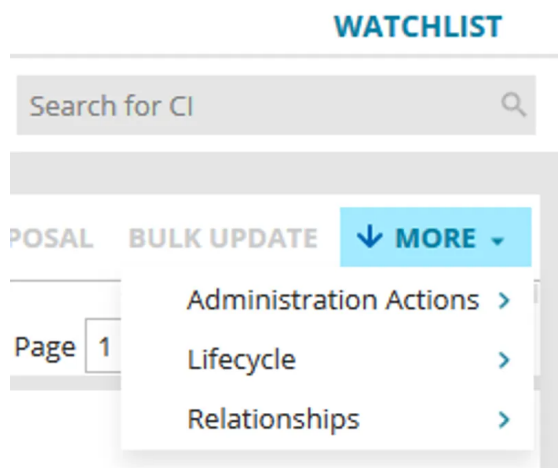
2. Type the subnet address in the **Subnet** field. Do not use CIDR notation for the format.
3. Select a **Location** to associate with this subnet address. The mapping between the subnet and location is used to identify the exceptions. The list of available locations is populated from the Locations workspace.
4. Enter the **Gateway** and **Subnet MAC** for informational use only. These fields are not used in the Asset Location Exceptions report.
5. Click **Save**. Repeat as necessary for each subnet that you want to associate with a location.

Once you're finished, two things will occur:

- In the **Subnet Mapping** workspace, assets discovered in a mapped location will automatically populate the **Assets** tab for that location.
- In the **Locations** workspace, the **Subnets** tab for each mapped location will automatically populate with the information you entered.

6.6. Asset quick actions

You can use a menu of quick actions on the **Hardware Assets** workspace to perform common functions. These actions are available from the right-side **More** drop-down menu. Quick actions are role specific, so not all of them are available for all user roles.



If your database is integrated with Ivanti Neurons for ITSM, you will also have access to quick actions that are related to that product.

✓ Administration Actions

These actions are for Asset Administrators only.

Bulk Update – Enables you to change the value of an attribute for several assets at the same time. Note that not all attributes are available for bulk update. For details, see [Hardware assets](#).

Change Asset Type – Enables you to change the type and subtype for an asset. For details, see [Hardware assets](#).

Set Asset ID – You must associate an asset ID, or unique identifier, with each Ivanti Neurons for ITSM CI item that you import. Asset IDs display in the first column of the asset records list.

Set Full Type – For use if you're implementing the product on top of an existing Ivanti Neurons for ITSM environment. This quick action concatenates the Asset Type and Sub Type into a single meaningful string. During normal operations, the product does this for you.

Stamp Product Catalog Data – When an asset is created from a Product Catalog Item, any values that are set on the Product Catalog Item are copied to the related asset records. You can then change these values on the asset record page. This quick action resets the values on the asset record to the original values of the related Product Catalog Item.

✓ Lifecycle

Use these actions to quickly update an asset record.

Assign Financial Owner – Enables you to assign the financial owner to an asset. This field displays under the **Finance** tab of the asset record page.

Assign Temporary Storage – Enables you to assign a location and storage space for an asset that is linked to a disposal. For details, see [Asset disposals](#).

Assign to Location – Enables you to assign an asset to a location. For details, see [Stock management](#).

Assign to User – Enables you to assign an asset to a user. For details, see [Stock management](#).

Assigned – Enables you to change the status of an asset to **Assigned**.

Awaiting Disposal – Enables you to change the status of an asset to **Awaiting Disposal**. For details, see [Asset disposals](#).

Check In – Enables you to check an asset in to a storage space. For details, see [Stock management](#).

Create Disposal Record – Creates a new disposal record and links the selected assets to that record. For details, see [Asset disposals](#).

Destroyed – Enables you to change the status of an asset to **Destroyed**.

Dispose Asset – Enables you to dispose of an asset.

Disposed – Enables you to change the status of an asset to **Disposed**.

In Repair – Enables you to change the status of an asset to **In Repair**.

In Stock – Enables you to change the status of an asset to **In Stock**.

Lost – Enables you to change the status of an asset to **Lost**.

On Loan – Enables you to change the status of an asset to **On Loan**.

On Order – Enables you to change the status of an asset to **On Order**.

Purchase Approved – Enables you to change the status of an asset to **Purchase Approved**.

Requested – Enables you to change the status of an asset to **Requested**.

Stolen – Enables you to change the status of an asset to **Stolen**.

Transfer Stock – Enables you to transfer assets that are in storage to a different storage space. For details, see [Stock management](#).

✓ Relationships

Show Relationship Map – Displays the relationship map for the asset.

6.7. Asset validation lists

When entering asset record data in the Hardware Assets workspace, some fields require you to select from a fixed drop-down list of values. These fields are called validation lists and are designated by the  icon. Examples include the fields for Asset Subtype, Status, Environment.

Asset Administrators can add, edit, and delete values in most of these validation lists, though some lists include protected values that have a special meaning and usage within the product and cannot be deleted.

To change the items in a validation list, click the  icon in that list to display the validation list dialog. Next, click **Add**, **Edit**, or **Delete** at the bottom of the dialog as needed.

Asset subtypes

The **Asset Subtype** field (in the **Hardware Assets** workspace > **Asset Summary** page > **Details** tab) is an example of a validation list that provides a convenient way of creating different subtypes for an asset type. For example, you can use this field to identify if an asset of type Computer is a subtype of desktop, laptop, server, and so on. Similarly, you can specify that an asset of type Mobile Device is a subtype of smart phone, tablet, and so on.

You can create a new asset subtype for a single asset record by clicking the  icon next to the **Asset Subtype** field, then clicking **Add** to define the new subtype. Or, you can create a new globally-available subtype for an asset type by using the **Asset Sub Type** workspace.

To create a new globally-available asset subtype

1. Open the **Asset Sub Type** workspace. You will see a list of existing asset subtypes in your database.
2. Click **New Asset Sub Type**.
3. In the **Parent Asset Type** list, select the parent asset type from the drop-down, then enter the **Sub Type**.
4. Click **Save**. The new subtype is created and becomes available for selection.

6.8. Asset custom attributes

Ivanti Neurons for ITAM provides a large number of fields that store most of the information about an asset that your organization will need. However, Asset Administrators can configure an additional Custom Attributes tab in the Hardware Assets workspace to record further information about assets.

Once enabled, the Custom Attributes tab displays globally for all asset records in the Hardware Assets workspace.

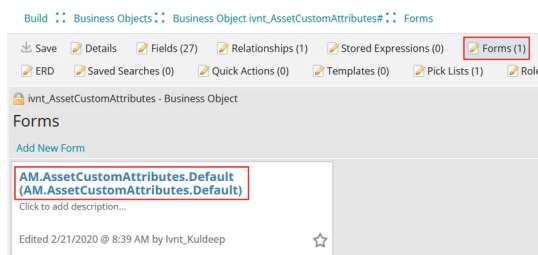
Configuring custom attributes for asset records is a two-step process: You need to turn on the Custom Attributes tab, then you need edit the resulting generic form (that displays under the tab) to meet your specific needs.

To turn on the Custom Attributes tab

1. Log in as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Global Constants**. The Global Constants list displays.
4. Scroll down to **Show Asset Custom Attributes** and set the value to **True**.
5. Click **Save**. After refreshing the Hardware Assets workspace, you'll see a Custom Attributes tab display for each asset record, containing a number of generic fields.

To edit the Custom Attributes form

1. Log in as Asset Administrator.
2. Click the  icon in the menu bar at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Business Objects**.
4. In the Find box on the top-right, type **Asset Custom Attributes** and select it from the drop-down.
5. On the top of the resulting page, click **Forms**, then click **AM.AssetCustomAttributes.Default** to open the form for editing.



6. Edit the form by labeling each control you want to keep, deleting controls, inserting new rows or columns, merging cells, and so on:
 - For each generic control you want to edit, first select that control in the form, then scroll down the **Control Properties/Cell Properties** list to make the changes. Repeat for each control that will display under the Custom Attributes tab.
 - You can refresh the **Hardware Assets** workspace > **Custom Attributes** tab to see each saved edit as you make the changes.
7. When you're done editing, click **Save**.

For details about using and editing forms, see this topic in the Ivanti Neurons for ITSM online help: [Using forms](#).

6.9. Manufacturers

The **Manufacturer** workspace enables Asset Administrators to create and maintain a master list of manufacturers for use in the asset records that display in a number of workspaces. The Manufacturer workspace is read-only for other user roles.

To create a new manufacturer

1. Open the **Manufacturer** workspace. This workspace shows a list of existing manufacturers in your database.
2. Click **New Manufacturer** at the top of the list. The Manufacturer page displays.
3. Enter a **Name** for the manufacturer.
4. Click **Save**.

6.10. Managing Financial Roles and Financial Tab

Overview

The **Financial Owners** workspace allows you assign, view, and manage financial responsibility for assets, ensuring accurate reporting, budgeting, and accountability.

Financial owner role defines who holds financial responsibility for an asset throughout its lifecycle. It determines how the system records, depreciates, and reports asset related costs.

Key areas that **Financial Owners** impact are:

- Financial reporting - The system reports asset costs and depreciation under the financial owner’s cost center and organizational hierarchy.
- Depreciation - The system calculates depreciation at the asset level and applies the expense to the cost center associated with the financial owner.
- Cost allocation - Capital and operational costs, such as purchase price, freight, and maintenance, flow to the assigned financial owner through the Organizational Unit.

This procedure explains how to access the **Finance** tab, assign **Financial Owners**, manage **Purchase Orders**, and maintain accurate financial data for assets in Neurons for ITAM.

Configuring Financial Owners Allocations

1. On homepage, click **More**, and then select **Financial owners**

The **Financial Owners** window appears.
2. To create new financial owner, select **New**.
 - Enter the details in **Organizational Unit** and click **Save** to create new financial owner.
3. To edit the existing financial owner:
 - Select the required **Organizational Unit**, edit the details and click **Save**.

Managing Organizational Units

Organizational Units (OUs) can be structured hierarchically (Parent OU and Child OU). You can assign different Financial Owners or allocation percentages at each level.

- Expand or collapse OU nodes to view **External**, **Internal**, or **Unassigned Configuration Items** (CIs).
- Select an OU to view or modify its allocation details.

The following table shows the field displayed in Organizational Units window.

Field	Description
Name	The name of the Organizational Unit.
Owner	The designated Financial Owner . Select a value from the dropdown.
IT Overhead Allocation (%)	The percentage of IT costs allocated to this OU.
Parent OU	The parent Organizational Unit, if applicable.
Customer ID	Internal or external customer identifier.
Vanity URL	Optional friendly URL for easier access.
Deleted	Select this check box to mark the OU as deleted. Use with caution.

Additional Tabs

Each Organizational Unit record includes the following tabs:

- Child OUs - View or add subordinate Organizational Units.
- Assets - View assets linked to this OU.
- Employees - View employees associated with this OU.
- Consumable Transactions - Manage related consumables or financial transactions.

Audit information

Each record displays the following audit details:

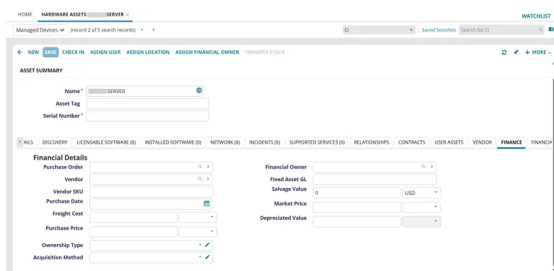
- Created By/On – The user who created the record and the date of creation.
- Modified By/On – The user who last modified the record and the date of modification.

Assigning Finance Owner

1. Open the **Hardware Assets** workspace.
2. Use **Search** icon and open the required asset.
3. In the **Asset** record, select **Finance** tab.

The **Finance** window appears

4. In the tab, select search icon in **Financial Owner** text field.
5. Select the required financial owner from the folder and click **Select**.
6. In the Finance tab, the following field appears, enter the required details:



- **Purchase Order** - Linked PO number. Select the **search** icon and select the PO, the field auto-populates if available.
- **Vendor** - Supplier name. Search for or enter the vendor name.

- **Vendor SKU** - Supplier stock keeping unit.
- **Purchase Date** - Asset purchase date. Select the date using the calendar icon.
- **Freight Cost** - Shipping or delivery charges. Enter the amount in the text field and select the currency from the dropdown.
- **Purchase Price** - Cost of the asset. Enter the amount in the text field and select the currency from the dropdown.
- **Ownership Type** - Type of ownership for the asset. Available options: Full ownership, Part ownership, Lease, or Other.
- **Acquisition Method** - Procurement method (for example, Purchase Order, Off the Shelf, Company Merger).
- **Financial Owner** - Assigned cost center or responsible owner.
- **Fixed Asset GL** - General ledger reference.
- **Salvage Value** - Residual value at the end of the asset lifecycle. Enter the amount in the text field and select the currency from the dropdown.
- **Market Price** - Current estimated market value. Enter the amount in the text field and select the currency from the dropdown.
- **Depreciated Value** - Accounting value after depreciation. Enter the amount in the text field and select the currency from the dropdown.

7. In the Asset window, click **Save**.

6.11. Journals

Many of the data records in the ITAM database include a **Journal** tab where you can store related notes (and in some cases, emails).

Asset Administrators can globally configure new categories and note sources for the Journal tab that are part of a data record.

For journal notes and emails, you can specify a **Category**, which further explains the nature of the email or note that was added to a record. Some category examples for email include outgoing, incoming, or bounced. For notes, category examples include customer feedback, complaints, or follow-up.

To create a new journal category

1. Open the **Journal Category** workspace to see a list of all existing journal categories in your database.
2. Click **New Journal Category**. The Journal Category page displays.
3. In the **Journal Type** drop-down, select **Email** or **Notes**.
4. In the **Category** field, type the name of the new category, then click **Save**. The new category will now display under the Journal tab for all records.

For journal notes, you can also specify a **Source**, which could be email, voice mail, phone/fax, and so on.

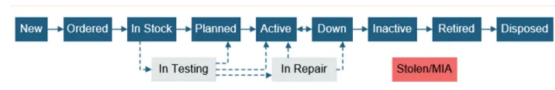
To create a new journal notes source

1. Open the **Journal Notes Source** workspace to see a list of all existing journal note sources in your database.
2. Click **New Journal Notes Source**. The Journal Notes Source page displays.
3. Type a **Source**, then click **Save**. The new source will now display under the Journal tab for all records.

6.12. Configuration Item Workflow

Configuration Item (CI) assets use two distinct workflows based on their classification of either hardware or software.

The following figure shows the high-level Hardware CI (Computers, Mobile Devices, Printers, Network Devices, Servers, Systems, Telephony Equipment, and Other CIs) process workflow in the OOTB system.



Select **View more status** options in the **Actions** list to access additional statuses, including Stolen/MIA, In repair, and In testing, at any time.

A CI progressing through the Hardware CI workflow encounters the following main statuses:

1. **New:** CI is being logged and initial details are being recorded.
2. **Ordered:** CI is being ordered.
3. **In Stock:** CI has been received.
4. **Planned:** CI use and location are being determined.
5. **In Testing:** CI is being tested.
6. **Active:** CI is operational.
7. **In Repair:** CI is being repaired.
8. **Down:** CI is being taken out of service temporarily.
9. **Stolen/MIA:** CI has been stolen or lost.
10. **Retired:** CI is being taken out of service.

The following figure shows the high-level Software CI (Software License) process workflow in the OOTB system.



A CI progressing through the Software CI workflow encounters the following main statuses:

1. **Requested:** Software License has been requested.
2. **Planned:** Software License use and location are being determined.
3. **Ordered:** Software License is being ordered.
4. **Active:** Software License is operational.
5. **Expire:** Software License is expired.

7. Software assets

Use the **Software Assets** workspace to manually add software asset records in your environment. These records can help you keep track of the current level of entitlement, enabling you to make informed decisions about purchasing additional licenses or reclaiming under-used licenses.

You also have the option of importing licensable software records from the Ivanti Neurons Platform. These records import into two places—the **Software Assets** workspace > **Installations** tab for a manufacturer and the **Hardware Assets** workspace > **Licensable Software** tab for individual devices. For details, see [Importing from the Ivanti Neurons Platform](#).

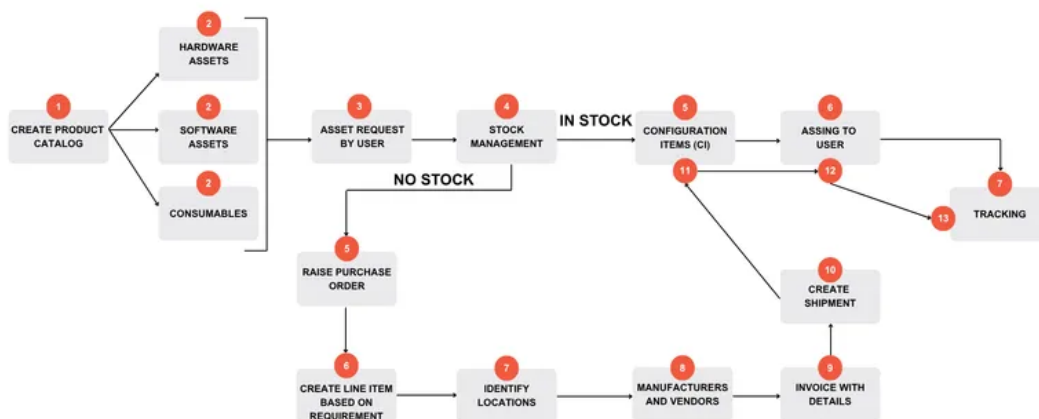
Contract Manager or **Procurement Manager** user roles have access to this workspace, as do the Asset Administrator and Asset Manager roles.

To create a software asset record

1. Open the **Software Assets** workspace and click **New**.
2. Required fields are the software **Manufacturer** and the software **Title**. Use **Catalog Item** to link this record to a software item in the Product Catalog.
3. Complete the associated tabs as needed:
 - **Contract Line Items** – Link line items from the Contract Line Items workspace that are appropriate for this record, such as maintenance agreements, extended warranties, and so on.
 - **Installations** – Displays the hardware assets that have licensable software installed from the selected manufacturer. This data is imported from Ivanti Neurons.
 - **Entitlements** – Link entitlement line items from the Contract Line Items workspace that are appropriate for this record. For details about contract line items and entitlements, see [Contract and Warranty Management](#).
 - **Entitlement Assets** – View details about the hardware asset records associated with entitlements for this software product.
 - **Relationships** – Create a visual relationship mapping of how this software asset is connected within your IT system.
 - **Journal** – Add any relevant notes to this record.
 - **Attachments** – Attach a document to this record, or add a URL link to a relevant website. URLs must include the https:// prefix.
 - **Audit History** – Automatically tracks any changes made to key attributes of this record.
4. Click **Save** to save the software asset record in this workspace, as well as the **Hardware Assets** workspace (where the Software Asset asset type will display with the other available asset types).

8. Asset lifecycle Work flow

This procedure defines the asset lifecycle, which includes requesting assets, fulfilling requests from stock or through procurement, creating configuration items (CIs), assigning assets to users, and tracking assets across inventory and asset management workspaces.



1. Create Product Catalog

Administrators create and maintain catalog items.

- On the ITAM home page, go to **Product Catalog** workspace.
- Click **New** and select item type (bundle, hardware, software, consumable). For more information, see [To create a new catalog item](#).

2. Create Assets

- On the **Product Catalog** workspace, create and categorize assets into:
 - Hardware - Open **Hardware Assets** workspace, click **New** → Select asset type. Enter **Name**, **Serial Number**, **Status** and then click **Save**. For more information, see [To create a new asset record](#).
 - Software - Open **Software Assets** workspace and click **New**. Enter mandatory details such as Manufacturer. For more information, see [Software assets](#).
 - Consumables - Open **Hardware Assets** workspace → **New** → **New Consumable**. For more information, see [To create a new consumable record](#).

3. Asset Request by User

Users can request assets by ITAM portal using **self service** roles or **Asset mobile** role. For more information, see [Asset requests](#).

4. Stock Management

Administrators verify inventory availability. Open **Stock Management** workspace and check asset availability. For more information, see [to check an asset into a storage space](#).

- If the asset is available in stock, continue with step **11** configuration items (CI).
- If the assets are out of stock continue with step **5**.

2. Raise Purchase Order

Administrator can initiate procurement and create purchase order for out of stock assets. Open **Purchase Orders** workspace, and click **New**. Enter required details. For more information, see [Create and manage purchase order](#).

2. Create Line Item

Administrator can create line item in purchase order to add the required assets such as hardware, software, or consumables. For more information, see [Create and manage purchase order](#).

2. Identify Locations

When the ordered assets arrive, you can manage their delivery and storage from the Assets tab on the Purchase Order, Invoice, or Shipment workspace as needed. To take deliveries for existing location, see [To take delivery of an asset](#). To create a new location with a storage space, see [Locations and storage spaces](#).

2. Manufacturers and Vendor

Administrators manage vendor associations. Select and associate Vendor with purchase order. Link contracts and contract line items. Validate vendor-item relationship. For more information, see [Integrating with CDW](#).

2. Invoice with details

You can associate one or more invoices with a purchase order to help you to track the invoices from your vendor and highlight any differences between the total cost from all of the invoices and the expected cost that was recorded on the purchase order. Open the required purchase order, and click the **Invoices** tab. For more information, see [To add an invoice to a purchase order](#).

2. Create Shipment

You can associate one or more shipments with an invoice. Shipments enable you to specify a destination location and storage space for the shipment. Open the Invoices workspace. Under the **Shipments** tab, click **New Shipment**. For more information, see [To add a shipment to an invoice](#).

2. Create Configuration Items (CI)

After receiving assets. Create CI based on asset type: hardware or software. For more information, see [Configuration Item Workflow](#).

2. Assign to User

Administrators assign assets to users or locations. Open asset record, select **Assign User** or **Assign Location**. For more information, see [Configuration Item Workflow](#).

2. Tracking Assets

Administrators track assets throughout their lifecycle:

- Movement across locations
- Assignment changes
- Status updates (in use, in stock, disposal)

For more information, see [Assets Tracking](#).

9. Watchlist

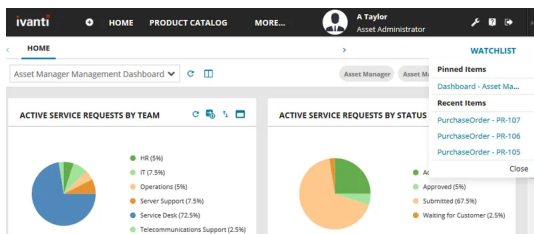
In many of the Ivanti Neurons for ITAM workspaces, you can pin important items to a watchlist (such as individual assets, purchase orders, Product Catalog items, and so on) that you want to access with a single click. The watchlist also includes links to items that you've recently created or updated.

To pin items to the watchlist

1. Select an item in a list, such as an asset in the Hardware Assets workspace.
2. Above the list, click the  icon. The item is added to the watchlist.

To access items in the watchlist

1. At the top right of the page, click **Watchlist**. The watchlist displays, listing all of the items you've added or recently created or updated.



2. Click the required item to display it.

Remove items from the watchlist by clicking the **x** icon alongside the item you want to remove.

10. Procurement

Overview

Procurement is the process of acquiring goods and services to support organizational operations. In the system, procurement manages requests, approvals, purchase orders, receiving, and asset assignment while maintaining visibility, cost control, and compliance. It connects vendors, purchase orders, invoices, and assets across the procurement lifecycle.

Work flow

Request → Approval → Purchase Order → Receiving → Asset creation → Assignment

Roles and Permissions

The following roles are involved in procurement operations:

- Procurement Manager
- Storage Manager
- Asset Administrator
- Asset Manager

Mobile Asset Managers can also receive assets using the mobile application, including barcode scanning during delivery.

✓ Procurement Components

Procurement is supported through workspaces that manage purchasing, receiving, and asset tracking. Assets can be procured from the Product Catalog or created through custom purchase orders.

Product Catalog

The Product Catalog contains standardized assets with approved vendors and predefined costs. Using catalog items simplifies purchase order creation and ensures consistency in pricing and sourcing.

If an item is not available in the Product Catalog, it must be manually defined during purchase order creation.

Procurement Levels

The system supports three levels of procurement detail, each providing increasing control over tracking and delivery:

- **Purchase Orders** – The most basic level is to use only purchase orders to manage your procurement. You can record information about the purchase order, including the vendor and the total cost.
 - If your organization is using the Ivanti Service Manager app for Android- and iOS-based smartphones, users with the role of **Mobile Asset Manager** can take delivery of assets that are line items of a purchase order. Use the app to scan asset barcodes into the database from the point of delivery. For details, see the section below.
- **Invoices** – You can associate one or more invoices with a purchase order. This helps you to track the invoices from your vendor and highlights any differences between the total cost from all of the invoices and the expected cost that was recorded on the purchase order.
- **Shipments** – You can associate one or more shipments with an invoice. This helps you to track the shipments associated with an invoice. You can record shipping and tracking details, as well as the destination location and storage, all of which streamline the process for taking delivery of the assets.

The Product Catalog is a list of standard assets that have approved vendors who will supply these assets at an agreed cost—this makes acquiring an asset much simpler when filling out a purchase order. If an asset is not in the Product Catalog, you must complete additional steps below for each request.

✓ Asset Creation in Procurement

The system generates asset records at multiple stages of procurement depending on configuration.

When a purchase order line item is configured with Create Asset or Create Consumable, the system prepares asset tracking before delivery.

✓ Template Asset Records

Template asset records are system-generated placeholders representing items that have been ordered but not yet received. They ensure structured tracking of assets throughout the procurement lifecycle.

Template assets are automatically created when:

- A purchase order is submitted
- Asset creation is enabled on line items

Characteristics:

- Contains minimal procurement data (item type, quantity, PO reference)
- Is assigned an initial status such as **On Order**
- Does not represent a physically available asset

Template assets enable:

- Early asset identification before delivery
- Structured receiving workflows
- Integration with invoices and shipments
- Mobile-based barcode scanning and validation

Receiving and Activation

When assets are received:

- A user opens the purchase order, invoice, or shipment
- Selects the relevant template asset
- Updates asset details (manual entry or barcode scan)

During mobile scanning:

- The system identifies the asset via barcode
- Updates serial number, status, and location
- Converts the template asset into an active asset (e.g., In Stock)

✓ Hardware and Software Procurement

Hardware Procurement

Hardware procurement manages physical goods that require delivery, receiving, and storage.

Key characteristics:

- Purchase orders are used to acquire physical goods
- Assets are generated from purchase order line items
- Receiving is required to confirm delivery
- Barcode scanning supports validation during intake
- Assets are stored and assigned after receipt

Software Procurement

Software procurement manages licenses, subscriptions, and entitlements.

Key characteristics:

- Purchase orders support cost and vendor tracking
- No physical receiving process is required
- No barcode scanning or storage handling
- License or entitlement records are created instead of physical assets

Consumables - Items used over time and not returned after issuance, such as printer ink, toner, paper, cables, or low-cost accessories like a mouse or keyboard. They are not tracked as returnable assets and are replenished as required.

Starting with ITAM Release 2026.3, you can track consumable inventory by storage space, monitor available quantities, view storage space transaction history, and assign consumables to users based on available stock.

Limitation of Consumable Assets

The system creates a new asset for each purchase of a consumable, even if the item already exists in stock. This prevents tracking the total quantity of a single item.

For an example, if "USB two button mouse" is purchased three times with a quantity of 10 each, the system shows three separate assets of 10 instead of a combined total of 30. Stock transfers treat each asset individually, and consumables may not link correctly to storage spaces or appear under the **Consumables** tab.

1. Open the **Purchase Orders** workspace and click **New**.
2. Add a purchase line item for the consumable. For an example enter 15 in quantity text field. Select the **Create Consumable** check box to create the asset.
3. Click **Submit**, and go to **Asset** tab and verify the created asset.
4. Create an **Invoice** for the purchase order. After the invoice is created, create a **Shipment** for the same purchase order.
5. From the Shipment, use the **Take Delivery** quick action enter condition, location and storage space.

From ITAM Release 2026.2, the partial delivery of consumables is supported.

6. Verify the consumable status changes to **In Stock** in status tab.
7. Click **Go To** to view the consumable asset.

The asset is not linked to the storage space.

8. Go to **Stock Management** tab, and select the storage space.

The asset is displayed in the **Assets** tab and not in the **Consumables** tab.

You cannot modify the quantity once a consumable is created. To add more quantity, create a new consumable.

Items used over time and not returned after issuance, such as printer ink, toner, paper, cables, or low-cost accessories like a mouse or keyboard and other inventory items. They are not tracked as returnable assets and are replenished as required. Consumables can be linked to one or more storage spaces but typically don't have an associated asset value.

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10.1. Purchase Order Management

Create and manage purchase order

To create a Purchase Order

1. Open the **Purchase Orders** workspace and click **New**.
2. The **Requisition Number** is automatically generated.
 - Enter the **Purchase Order Number** if known; otherwise, enter it can be added later.
3. Enter data in **Submitted By**, **Date Submitted**, **Name**, and **Vendor** (required to associate contracts with line items) and then
4. Click **Save**.

Add Line Items to the Purchase Order

1. Go to **Line Items** tab, select **New Line Item** from drop down and then select **Consumable**, **Hardware**, or **Software**.
2. Select the **Catalog Item**, if the item exists in the Product Catalog; fields will auto-populate, else enter data manually.
 - Consumables - **Item Name**
 - Hardware - **Item Name**, **Type**, and **Sub Type**
 - Software - **Item Name** (if applicable)
3. Enter **Quantity** and **Cost Per Unit**. The **Total Cost** is calculated automatically.
4. To Create asset or create consumable, select **Create Asset** or **Create Consumable** check boxes, if you want to create template asset records immediately.
 - When adding a hardware or consumable line item but asset or consumable records are not required, deselect the **Create Asset** or **Create Consumable** check box. After purchase, reopen the line item and enable the check box to generate the records in the appropriate workspace.
 - If the asset already exists, deselect the check box and manually link the line item to the existing asset from the **Assets** tab to track it without creating duplicates.
 - Starting with release 2026.2, the system groups consumables based on their asset subtypes. When you add an item that matches an existing asset subtype, the system groups it with items of the same subtype. You can receive partial deliveries and transfer stock in any quantity, and the system automatically updates quantities and locations to maintain accurate inventory. For more information, see [Handling Consumable Deliveries and Storage](#).
 - Prior release to 2026.2, when you buy the same consumables multiple times, the system makes a new record for each purchase instead of adding them together. The inventory shows multiple entries, transfers move one full record at a time, and the item does not show in the correct storage space. For more information, see [Limitation of Consumable Assets](#).
5. For hardware, search for an existing **Contract** or create a new one. Only contracts associated with the selected vendor are available. Similarly, search for or create a **Contract line item**. Only line items linked to the selected contract are available.
6. Click **Save**. The line item is added to the **Line Items** tab, and contract line items appear under **Associated Contracts** tab. The purchase order appears under **Purchase Orders** tab for the related contracts, and any asset records created from the purchase order show the contract line item under the **Contracts** tab.
7. Add more line items to this purchase order as required.

Associated tabs

1. Enter details in the other associated tabs as required:
 - **Vendor Details** – View vendor details here and click **Go to** to open the vendor record.
 - **Vendor Scorecards** – View or create scorecards for vendor performance on this order.

- **Assets** – Link assets fulfilling this order. Linked assets display order details in the **Finance** tab of the **Hardware Assets** workspace.
 - **Invoices** and **Shipments** – Manage related invoices and shipments.
 - **Asset Requests** – Link any customer asset requests. These show order details under **Purchase Order** tab in **Asset Requests** workspace.
 - **Task** – Add and manage order-related tasks. Assign tasks to a team; status defaults to **Logged**, and notifications are sent to the team owner. Update status as progress occurs. Asset Administrators can manage tasks in the **Tasks** workspace.
 - **Journal** – Add emails or notes.
 - **Attachments** – Attach documents or include URLs (must start with https://).
 - **Associated Contracts** – View contracts linked to catalog items and click **Go to** to open.
 - **Audit History** – Tracks changes to key order attributes automatically.
2. If you wish to add more line items later, click **Save**, or click **Submit**, if the order is complete.
- After submission, the status changes to **Approved** and line items can no longer be added. Line items appear in the **Purchase Line Item** workspace.
 - After submission, if a **Purchase Order Number** was added, template asset records are created with status **On Order** and appear in both the purchase order **Assets** tab and the **Hardware Assets** workspace.
 - After submission, If no **Purchase Order Number** was added: template asset records are created only after entering the number and clicking **Save**.

Limitation of Consumable Assets

The system creates a new asset for each purchase of a consumable, even if the item already exists in stock. This prevents tracking the total quantity of a single item.

For an example, if "USB two button mouse" is purchased three times with a quantity of 10 each, the system shows three separate assets of 10 instead of a combined total of 30. Stock transfers treat each asset individually, and consumables may not link correctly to storage spaces or appear under the **Consumables** tab.

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3. Click **Submit**, and go to **Asset** tab and verify the created asset.
4. In **Take Delivery** quick action enter condition, location and storage space.

Partial receipt of a PO line item is not supported; only full delivery can be recorded.

5. Verify the consumable status changes to **In Stock** in status tab.
6. Click **Go To** to view the consumable asset.

The asset is not linked to the storage space.

7. Go to **Stock Management** tab, and select the storage space.

The asset is displayed in the **Assets** tab and not in the **Consumables** tab.

To set up an approval process

By default, when you submit a new purchase order, its status changes to **Approved**. However, the Asset Administrator can configure the use of an approval process, so that the purchase order is approved only after the majority of the **Purchase Order Approvers** contact group has approved the item.

1. Click the  icon in the menu bar at the top of the page. The Configuration Console displays in a new browser tab.
2. In the left navigation, expand **Build** > **Global Constants**. Look for **ivnt_PurchaseOrderThreshold** in the list.
3. Double-click in the **Value** column. Set the number to the number of members you'll assign in step 6 below, then click **Save**.
4. In the left navigation, expand **Configure** > **Users and Permissions** > **Groups**.
5. Double click the group called **Purchase Order Approvers**.
6. Under the **Member** tab, click **Link** and select the users you want on the approvers list. Click **Select**.
7. Click **Save** and close the Configuration console. Refresh the Purchase Orders workspace.

Now, when you click **Submit** when creating a new purchase order, the status changes to **Under Review** and approval requests are automatically sent out to the appropriate people. When over 50% of the group has approved the item, the approval is completed and the status changes to **Approved**.

For more information, see [Employees, departments, teams, and contact groups](#).

10.2. Managing Deliveries and Inventory Lifecycle

✓ To add an invoice to a purchase order

You can associate one or more invoices with a purchase order to help you to track the invoices from your vendor and highlight any differences between the total cost from all of the invoices and the expected cost that was recorded on the purchase order.

1. Open the required purchase order, and click the **Invoices** tab.
2. Click **New Invoice**. The new invoice dialog displays with the Purchase Order field completed.
3. Enter the **Invoice Number** from your vendor.
4. Optionally, enter the **Invoice Date**, **Freight Charge**, and the **Invoice Total**, then click **Save**.

The invoice is added to the purchase order and to the **Invoices** workspace. The **Invoice Total** on the purchase order updates to show the sum of the invoice totals from all of the invoices associated with the purchase order.

If the invoice totals from all of the invoices associated with the purchase order do not add up to the **Total Cost** of the purchase order, the **Invoice Total** label is highlighted in red.

✓ To add a shipment to an invoice

You can associate one or more shipments with an invoice. Shipments enable you to specify a destination location and storage space for the shipment, so that you don't need to specify this individually for each delivered asset.

Shipments that you add to an invoice also display in the **Shipments** workspace, where you can manage them.

1. Open the **Invoices** workspace.
2. Double-click an invoice in the list view to open it.
3. Under the **Shipments** tab, click **New Shipment**.
4. Enter the **Shipper** and **Shipment Number** that was provided by the vendor.
5. If your shipper has provided tracking information, add the **Tracking Number** and the URL for their **Tracking Site**. If the URL to track your shipment is created by appending the tracking number to the URL provided in the **Tracking Site** field, click the **Append Tracking Number to URL** check box. **Click Here** displays under the Tracking Site field. Clicking this link opens the tracking site in a new tab.
6. Enter the **Destination Location** and **Destination Storage Space**.
7. Click **Save**. The shipment is added to the invoice.

✓ To take delivery of an asset

When the ordered assets arrive, you can manage their delivery and storage from the **Assets** tab on the Purchase Order, Invoice, or Shipment workspace as needed.

1. Open the appropriate purchase order, invoice, or shipment, then click the **Assets** tab. The template asset records for the ordered items are displayed if you're using a purchase order.
If you're using an invoice or a shipment, link the required assets by clicking **Link**. You can link all of the assets on a purchase order to an invoice by clicking **Add All PO Assets** at the top of the form, or you can link all of the assets on an invoice to a shipment by clicking **Add All Invoiced Assets** at the top of the form.
2. Select the assets that have been delivered and click **Take Delivery**. You can do this for individual hardware assets and consumables, or on a selection. The enter dialog displays.

The **Take Delivery** button is available only if hardware assets already have their **Serial Number** set. To add the serial number, double-click the asset and open the edit dialog. The Take Delivery button is always available for consumables, even though they don't have serial numbers.

3. Use the **Condition** drop-down to select the condition that the asset was in when you received it.
4. If you're taking delivery from a purchase order or an invoice, set the **Location** and **Storage Space** where you've placed the asset, then click **OK**.
If you're taking delivery from a shipment, these fields are not displayed, as they are populated using the values from the shipment. The **Status** for the asset updates to **In Stock**.

✓ Taking delivery via the smartphone app

You can use the Ivanti Neurons ITSM & ITAM smartphone app to take delivery of hardware assets that are line items of a purchase order. Use the app to scan asset barcodes into the database at the point of delivery.

This feature is available as part of the latest version of the app. For details about downloading and setting up the app for use in your organization, see [Mobile app](#).

Getting started

Before you can take delivery via the app, complete the following steps:

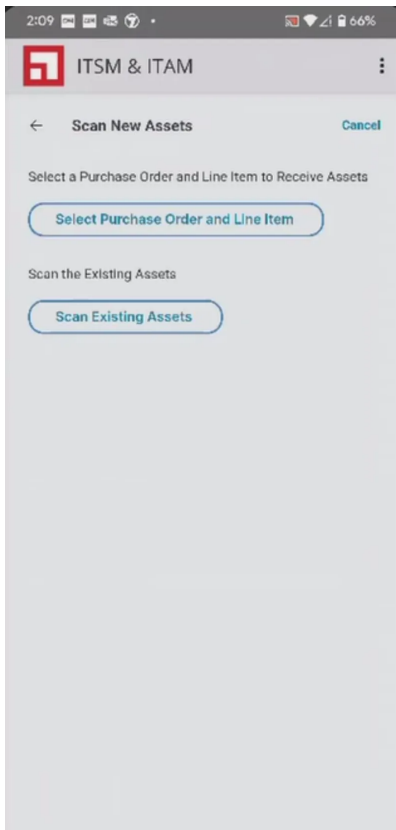
- **Important:** After app setup is complete, contact Ivanti support and ask that they turn on the **EnableReceivingNewAssets** feature on your ITAM Cloud or On-Premises tenant. You can't take delivery via the app if this feature isn't enabled.
- Ask the Asset Administrator to assign you the **Mobile Asset Manager** user role to use the app.
- Create and save a purchase order in ITAM with one or more hardware line items as described in the procedure above. When adding each hardware line item, fill in the fields for **Item Name**, **Type**, **Sub Type**, **Quantity**, and **Cost Per Unit**. The product automatically calculates the **Total Cost**. Leave the **Create Asset** check box selected to create template asset records once the order is submitted.
- Submit the purchase order for approval. This action will update the order to **Approved** status, and the template asset records will display under the **Asset** tab with a status of **On Order**.
- Define a delivery location with a storage space within ITAM. For details on setting up both, see [Locations and storage spaces](#).

Taking delivery

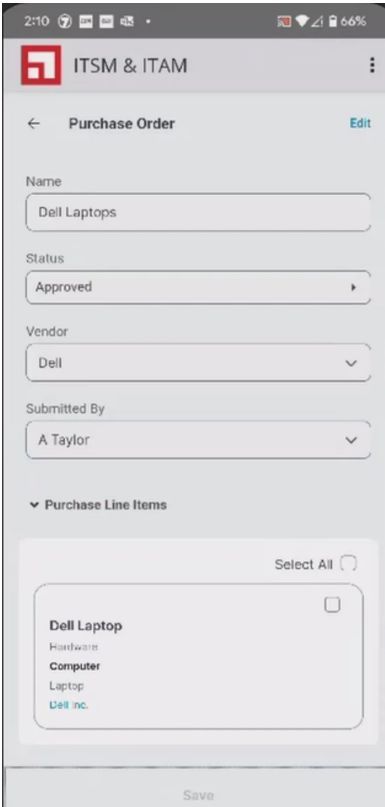
Once the assets are delivered, you can use the app to scan each asset's barcode into the database and take delivery. These actions will update the asset records with a serial number, a new status of **In Stock**, and a storage location.

To take delivery of an asset via the smartphone app

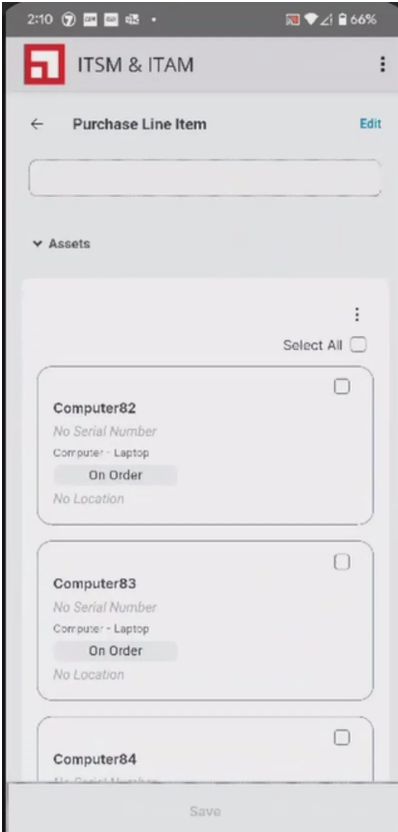
1. Open the app on your phone. Enter your **Tenant URL**, then tap **Continue**.
2. Log in to an account with the **Mobile Asset Manager** user role. The home screen displays. Tap **Scan Assets**.
3. On the resulting page, tap **Select Purchase Order and Line Item**.



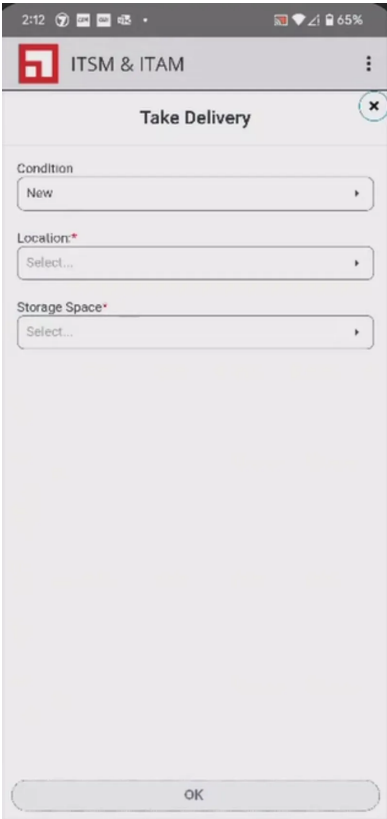
4. On the Currently on Order page, search for the line item of this purchase order by entering key words into the search field. The purchase order information should automatically display. Tap the purchase order you want to view.
5. Scroll down the purchase order and tap **Purchase line items** to expand all line items associated with this order.



6. Tap a line item, then scroll down and tap **Assets** to expand all assets associated with this line item.



2. Tap the check box of individual assets you want to scan (or tap **Select all**), then tap  > **Scan Now** to open the barcode scanner.
3. Use the scanner to scan each barcode, then tap **Done & Scan Next** after each scan. Scanned assets with serial numbers will display in the lower half of the screen.
4. Once you're finished scanning, tap **Finish Scan**. If you get an error message indicating that a record can't be saved because the serial number already exists in the database, it's possible the barcode belongs to a different purchase order. In that case, simply tap **Re-Scan** to scan a different barcode.
5. To finish taking delivery for this purchase order, tap the check box of individual assets (or tap **Select all** to take delivery in bulk), then tap  > **Take Delivery**. Select the asset **Condition**, the delivery **Location**, and the associated **Storage Space**. Click **OK**.



If the records were successfully updated, each asset will now have a serial number, a status of **In Stock**, and a storage location. The updates will display in the app, as well as in the workspaces for **Purchase Orders** and **Hardware Assets**. You may need to refresh the workspaces to see the updates.

✓ Handling Consumable Deliveries and Storage

From release 2026.2, ITAM allows partial delivery of consumables to the same or different storage locations, assignment of quantities to specific storage spaces, and stock transfers between storage locations.

1. Create Consumables

- Open the **Products catalog** window.
- Create required consumables and enter all mandatory details:
 - Name
 - Manufacturer
 - Model
 - SKU/Part number
 - Category

2. Create a Purchase Order (PO)

Purchase O...	Item Name	Item Type	Type	Sub Type	Manufacturer	Model	Cost Per Unit	Currency	Quantity	Quantity Remaining	Tot
PO-	Two Button M...	Consumable				Two Button Mouse	2.00	USD	12	12	

- Open the **Purchase Order** window and enter the following details:
 - Name
 - Vendor
 - Submitted By
 - Date Submitted
 - Cost
- Click **Save**.

3. Under the **Line items** tab:

- Click **New Consumable Purchase Line item**,
- Enter the required quantity and cost per unit
- Add this as a line item and click **Save**.

4. In the **Purchase Order** window, click **Submit**.

The generated asset will appear under the **Asset** tab.

5. Record Delivery via Invoice
 - Open the **Invoice** window, create an invoice for the delivery.
 - Refresh the window to attach the asset to the invoice.
6. Create a Shipment
 - Go to the **Shipments** tab, and click **New shipment**.
 - Enter required shipment details:
 - Shipper
 - Shipment number
 - Destination location
 - Destination storage space
7. Link the invoice to the shipment
 - Click **Add all Invoiced Assets**

The **Consumables** tab has the assets.

- Click **Link** to add the consumables
8. Take Partial or Full Delivery.

←SAVEDELETEADD ALL INVOICED ASSETS

Shipment - SHIP-

SUMMARY

Shipper*ABC Computers

Shipment Number*SHIP-

Signature Required☐

Date Received

Signed By

Comments

StatusAwaiting Dispatch

Tracking Number

Tracking Site

Append Tracking Number to URL☐

Destination LocationDefault

Destination Storage Space*Store-1

ASSETS (0)CONSUMABLE (1)FACILITIES ASSETS (0)JOURNAL (0)ATTACHMENTS (0)AUDIT HISTORY

LinkUnlinkTake Delivery→Go to

Name	Asset Subtype	Quantity Available	Quantity Received	Quantity Remaining	Product Catalog Item
Two Button Mouse	Mouse	12	5	7	Two Button Mouse

- In the **Consumables** tab, select **Take Delivery**

- Enter the required quantity to deliver and click **Ok**.

When the quantity received is the total quantity available, take delivery button is grayed out.

The **Consumables** tab is updated with the quantity received and quantity remaining for the destination storage space.

The **Storage Space Transaction** tab in **Hardware Assets** window reflects the partial delivery details.

9. To assign consumables for different storage location:

- In the **Hardware Assets** window, and click **link** in **Storage space** tab.
- Select required storage space and quantity then click **Save**.

The **Storage Space Transaction** tab in **Hardware Assets** window reflects all the delivery details.

2. To transfer or change storage location for assigned consumables:

- In the **Hardware Assets** window, select the storage location to remove and click **unlink** in **Storage space** tab.
- Click **link** and select new storage space and quantity then click **Save**.

The **Consumables** tab in Invoice window and **Storage Space Transaction** tab in **Hardware Assets** window reflects the updated storage space. The unlinked storage location is removed from the details window.

10.3. Integrating with CDW

Starting with ITAM v2023.3, you can streamline the process of hardware asset procurement by integrating with the value-added reseller CDW. This means that if an asset request from ITAM's online Product Catalog requires a CDW purchase order, you can raise that order directly to CDW with several clicks from the ITAM user console.

With ITAM v2023.4, there are two new CDW integration features:

- CDW shipment and invoice data now display in the console and dynamically update with the purchase order's status.
- The ITAM Product Catalog's Asset Request form includes a Deliver to Office check box, which employees can select to automatically use the default delivery address configured for CDW integration. This means they no longer have to fill in the address fields manually.

Product requirements

Both Ivanti Neurons for ITAM and ITSM v2023.3 must be operational in your work environment for CDW integration to work. To raise CDW purchase orders that also include shipment and invoice data, ITAM and ITSM v2023.4 or above are required.

This topic assumes you have the correct version of ITAM and ITSM installed for the type of integration you want. To download the minimum version of the consolidated package required for CDW integration, see this page of the [Ivanti Marketplace](#).

Getting started

Before configuring CDW integration in ITAM, you must register ITAM as an application on the CDW website. Contact your CDW representative for guidance.

During the registration process, obtain the following credentials, which are required to configure the CDW integration:

- Client ID
- Client Secret
- Token API URL
- Order API URL

For CDW integrations in production or staging environments, these credentials and URLs must be provided by your CDW representative.

It's recommended that you test the app registration and API in a pre-production environment before going live. For a pre-production environment, the source server IP needs to be whitelisted with CDW so that they can control the requests coming in; otherwise, the CDW API will produce a 403 unauthorized error. This step is not necessary in a production environment.

Next, access the ITAM user console to configure it for CDW integration.

To raise CDW purchase orders from the console *without* shipment and invoice data you need to:

- Turn on the EnableVendorIntegration global constant for vendor integration.
- Configure CDW integration, which includes address fields so that CDW knows where to ship your company's purchase orders.
- Add address fields to the ITAM Product Catalog's Asset Request form that match the ones you entered for CDW integration above. This procedure is required for upgrade customers only. For new customers of ITAM v2023.3 and above, these fields exist by default.

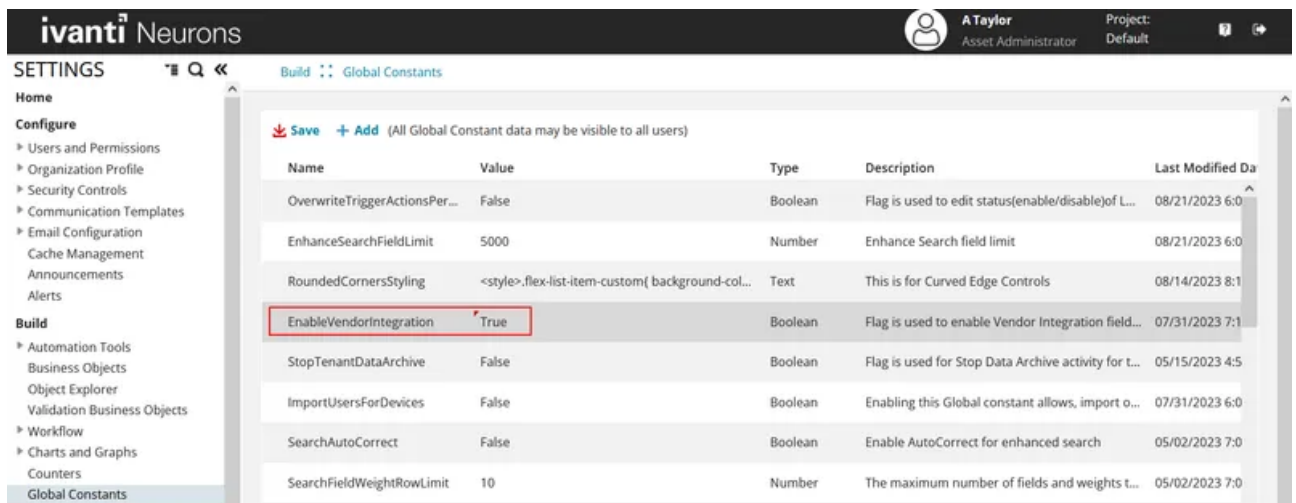
- Add CDW hardware items to the ITAM Product Catalog. Items must be of asset type Computer and/or Consumable.

To raise CDW purchase orders that include shipment and invoice data, you also need to:

- Enable the Webhook for PO invoice and shipment data from a third party.

✓ To turn on the global constant for vendor integration

1. Log in as Asset Administrator.
2. Click the  icon at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand to **Build > Global Constants**.
4. Find **EnableVendorIntegration** in the list and set it to **True**.



The screenshot shows the Ivanti Neurons Configuration Console. The left sidebar has a 'Build' section expanded, showing 'Global Constants'. The main area displays a table of global constants. The 'EnableVendorIntegration' row is highlighted with a red box, indicating it is the current focus. The table has columns for Name, Value, Type, Description, and Last Modified Date.

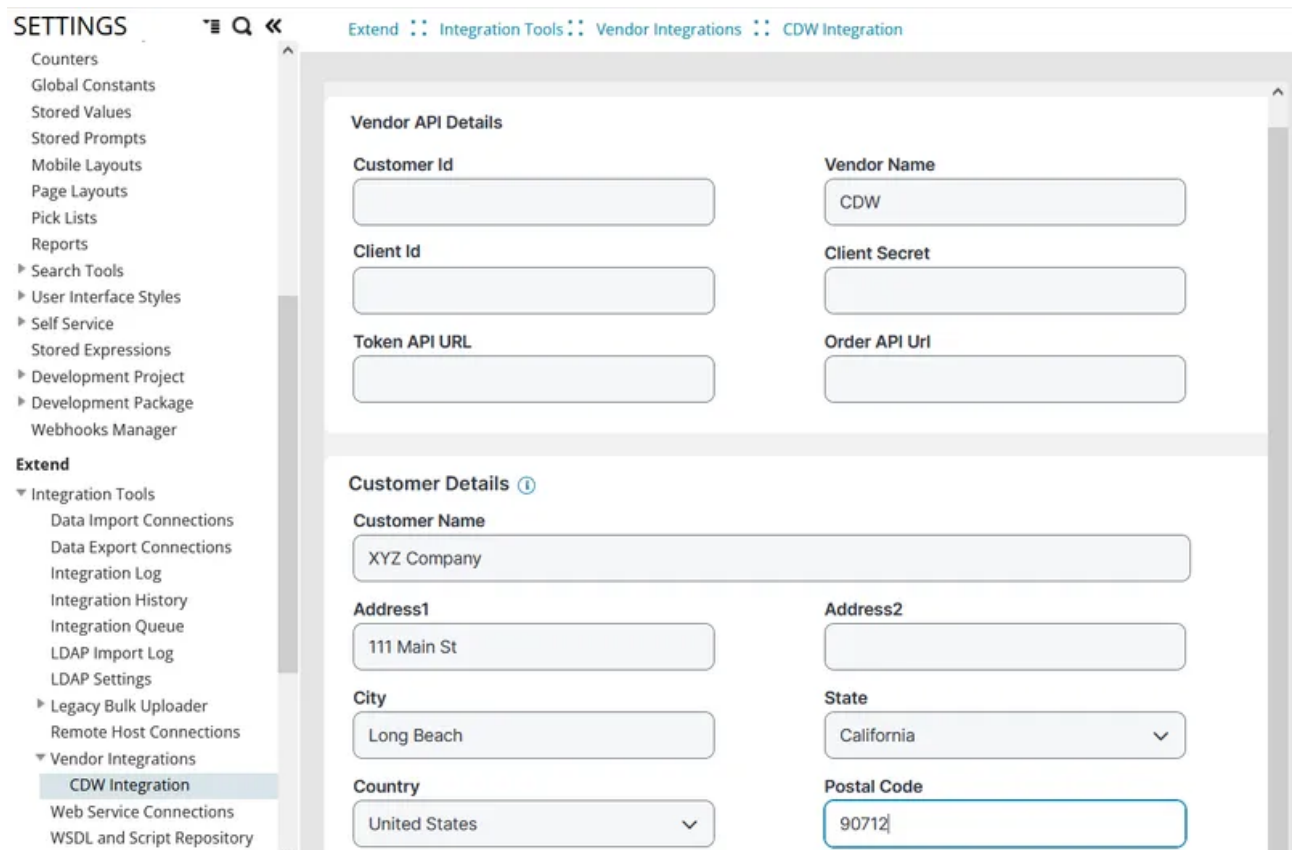
Name	Value	Type	Description	Last Modified Date
OverwriteTriggerActionsPer...	False	Boolean	Flag is used to edit status(enable/disable)of L...	08/21/2023 6:0
EnhanceSearchFieldLimit	5000	Number	Enhance Search field limit	08/21/2023 6:0
RoundedCornersStyling	<style>.flex-list-item-custom{ background-col...	Text	This is for Curved Edge Controls	08/14/2023 8:1
EnableVendorIntegration	True	Boolean	Flag is used to enable Vendor Integration field...	07/31/2023 7:1
StopTenantDataArchive	False	Boolean	Flag is used for Stop Data Archive activity for t...	05/15/2023 4:5
ImportUsersForDevices	False	Boolean	Enabling this Global constant allows, import o...	07/31/2023 6:0
SearchAutoCorrect	False	Boolean	Enable AutoCorrect for enhanced search	05/02/2023 7:0
SearchFieldWeightRowLimit	10	Number	The maximum number of fields and weights t...	05/02/2023 7:0

5. Click **Save**.

To turn off integration with CDW at any point, set this same global constant back to False. This will hide the address fields on the Asset Request form that are necessary for integration.

▼ To configure CDW integration

1. Log in as Asset Administrator.
2. Click the  icon at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Extend > Integration Tools > Vendor Integrations > CDW Integration**. This option only displays if the EnableVendorIntegration global constant has been set to True.
4. Fill in the fields—all are necessary. The vendor API details enable ITAM to connect to the CDW website. The customer details ensure CDW knows where to ship your company's purchase orders.



- **Customer ID:** The unique identifier associated with your CDW account.
 - **Vendor Name:** CDW is the vendor in this case.
 - **Client ID:** The ID used to authenticate your CDW account, generated during the registration process.
 - **Client Secret:** The secret associated with your client ID, generated during the registration process.
 - **Token API URL:** The API token associated with your CDW account and provided by CDW.
 - **Order API URL:** An order API associated with your CDW account and provided by CDW.
 - **Customer Name:** Your company's name.
 - **Address/City/State/Country/Postal Code:** The default company location you want CDW to ship all purchase orders to.
5. Click **Submit**. If the configuration was successful, you'll see a pop-up indicating success.

✓ To add address fields to the Asset Request form

This procedure is required for upgrade customers only. For new customers of ITAM v2023.3 and above, these fields exist by default.

Address fields are necessary for CDW integration to work. As part of an asset request, employees will be required to fill in these fields to indicate where the items should be delivered. The address they enter will need to match the address entered as part of the CDW integration procedure above.

The ITAM user roles of Asset Administrator, Asset Manager, and Procurement Manager can complete this procedure.

For details not provided here about editing request forms, see the ITSM help topics under [About Request Offerings](#).

1. Open the **Request Offerings** workspace.
2. Click **General Services** in the left pane, then click **Computer Request from Product Catalog** in the list. To edit the form for consumables, click **Consumable Request from Product Catalog** and follow the same instructions below.
3. Click **Design request form** at the top of the page. Add the following fields and options to the form, starting with step 4 below. Enter the expressions and property IDs exactly as shown:
 - **Field:** Deliver to Office (for v2023.3 this field is hidden from the form, but it's used for internal validation and will be visible in future releases); **Control:** Check Box; **Visible:** No; **Properties Unique ID:** IsDelivertoOffice
 - **Field:** Address Line 1; **Control:** Text, Number or Mask Field; **Visible:** Expression GetGlobal("EnableVendorIntegration"); **Required:** Expression GetGlobal("EnableVendorIntegration") && IsDelivertoOffice == false; **Properties Unique ID:** AddressLine1
 - **Field:** Street; **Control:** Text, Number or Mask Field; **Properties Unique ID:** AddressLine2
 - **Field:** City; **Control:** Text, Number or Mask Field; **Properties Unique ID:** AddressCity
 - **Field:** Postal Code; **Control:** Text, Number or Mask Field; **Properties Unique ID:** AddressPostalCode

The **State** and **Country** fields require drop-down pick lists that will enable employees to select from available options stored in the ITAM database.

- **Field:** State (if this field existed previously on the form as a text field, delete it and create from new as a drop-down field); **Control:** Drop-down selection; **Pick List:** Validation list; **Validation list to use:** State Address US and Canada State (the **Title Field** will default to State Long—leave as-is); **Properties Unique ID:** State
 - **Field:** Country; **Control:** Drop-down selection; **Pick List:** Validation list; **Validation list to use:** Countries Full Name (the **Title Field** will default to Country Full Name—leave as-is); **Properties Unique ID:** AddressCountry
4. In the Form Designer Tools pane, double-click the control type you want to use for the new field.

FORM DESIGNER TOOLS

Controls Templates Attachments

☒ Check Box

Ask a simple yes-or-no question.

 Text, Number or Mask Field

Field allows user to enter text or number or any other supported type of data like email or URL

ab| Text Area

Ask an open-ended question with a multi-line response.

H1 Category Heading

Seperate and group a set of form items.

The control type you selected will display as a text box next to the control itself, similar to this:

Checkbox 1

☐

[Enter description here]

2. Place your cursor in this text box and type the name of the field. A description is optional.

Deliver to Office

2. Click the icon to the left of the new field name to open the Item Configuration Editor dialog. Edit the options to match the ones listed above for each new field, then click **OK**. Leave as-is any options not listed above.

Item Configuration Editor for Address Line 1 (Text Field)

Configure options for field: **Address Line 1**

DEFAULT VALUE: NONE

FIELD OPTIONS: INDENT FIELD: NO; DATA TYPE: ALPHANUMERIC; WIDTH: 500

FIELD HELP:

VISIBLE: [EXPRESSION]

REQUIRED: [EXPRESSION]

☐ Yes ☐ No ☒ Expression

GetGlobal("EnableVendorIntegration") && IsDelivertoOffice == false

Requested For

Login Id

Manager

Email

Location

Financial Owner

Requested By

Login Id

Financial Owner

READONLY: NO

PROPERTIES: UNIQUE ID: ADDRESSLINE1

OK

Cancel

2. Repeat steps 4-6 for each field you're adding.

3. If needed, you can reorder any of the fields in the Request Form list by dragging and dropping them to a new position.

4. Preview the updates, then click **Save & Exit**.

The new fields will display in the Preview page and online Product Catalog only if you've set the **EnableVendorIntegration** global constant to **True**.

✓ To add CDW hardware items to the Product Catalog

The ITAM user roles of Asset Administrator and Asset Manager can complete this procedure.

1. Open the **Product Catalog** workspace.

2. Add hardware items (of asset type **Computer** or **Consumable**) that you want to make available for purchase from CDW. For details about adding hardware items to the Product Catalog, see [Product Catalog](#).

Beyond the usual required fields, the **Part Number** field is also mandatory for each added item. Fill it in with the CDW-supplied part number. If the part number is missing, you will not be able to raise the purchase order to CDW via the ITAM user console.

3. Save each item, then click **Submit for Approval** (at the top of the page), so that the status changes to **Approved**.

▼ To enable the Webhook for PO invoice and shipment data from a third party

1. Log in as Asset Administrator.
2. Click the  icon at the top of any workspace. The Configuration Console displays in a new browser tab.
3. In the left navigation pane, expand **Build > Webhooks Manager**.
4. Find **lvnt_PurchaseOrder Invoice and Shipment** in the list and toggle its status to **Enabled**. The enabled status automatically saves.

Procuring assets from CDW using the ITAM user console

Once the procedures above are completed, you should be able to raise a CDW purchase order directly from the ITAM user console when needed. You can do so after an employee has submitted a CDW asset request that meets the following conditions:

- The request requires a purchase order.
- The request is for a standard CDW item listed in the ITAM Product Catalog. Non-standard items are not allowed.
- The address added in the request form matches the same address entered for CDW integration above. Someone other than the submitter, such as a Procurement Manager or Service Desk Analyst, must verify that the fields match before the purchase order can be raised to CDW.

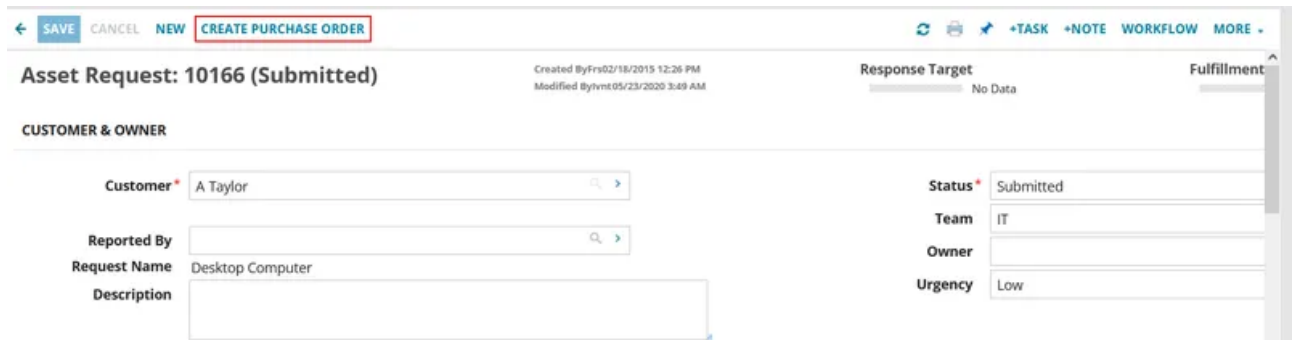
For v2023.4 users: If the employee selected the request form's **Deliver to Office** check box, the addresses will automatically match.

For details about submitting an asset request, see [Asset requests](#).

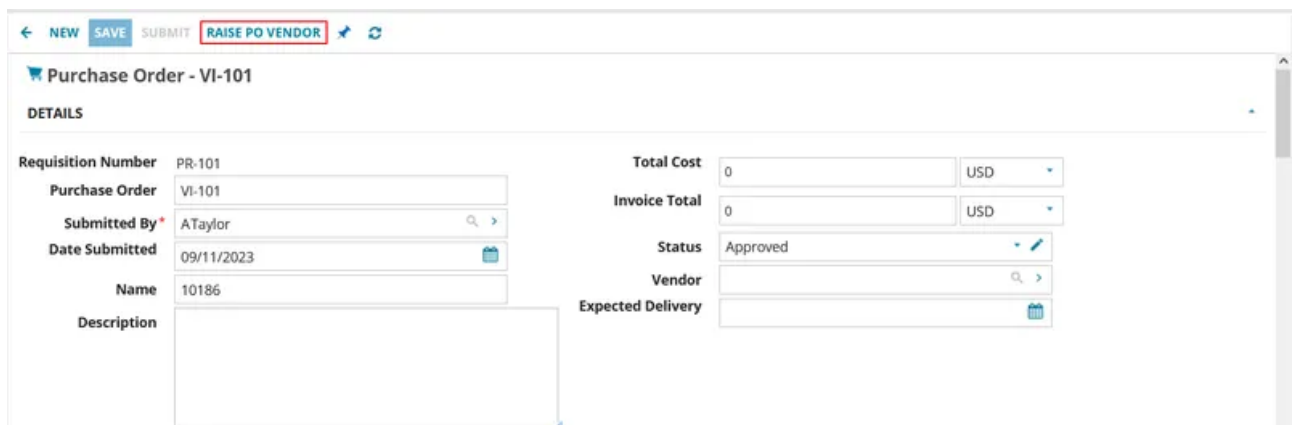
✓ To raise a CDW purchase order from ITAM

The ITAM user roles that can manage this workflow are Asset Administrator, Asset Manager, Procurement Manager, and Storage Manager.

1. Open the **Asset Requests** workspace, then open the submitted request.
2. Review the request details to ensure the address fields for **city**, **state**, and **country** match the same fields entered during CDW integration configuration above. Edit the fields if necessary.
3. Click **Create Purchase Order** (at the top of the page). This action does three things in the Purchase Orders workspace:



- It creates the CDW purchase order and associated line item within ITAM.
 - It generates a purchase request number as the PO name.
 - It sets the purchase order status to **Created**.
4. Open the **Purchase Orders** workspace, then open the newly created CDW purchase order.
 5. Click **Submit** (at the top of the page) to change the status to **Approved**.
 6. Click **Raise PO Vendor** to initiate the order within the CDW system and generate an asset request number. If successful, the status will change to **On Order** and the Vendor Order Status tab will update with the purchase order.



7. Click **Save**.

If the ability to view shipment and invoice data is enabled, those details will display under the purchase order's **Shipment** and **Invoice** tabs and will dynamically update with the order's status. You can click those tabs to view more details in the Shipment and Invoice workspaces respectively.

From the **Vendor Order Status** workspace, you can track the progress of all CDW purchase orders. If an error occurs upon raising the purchase order to CDW, this workspace provides an error description that can help you troubleshoot the issue. Open

the purchase order to view details about the error.

11. Contract and Warranty Management

Contract

Use the **Contracts** workspace to create and manage contracts associated with your asset purchase orders. The **Contract Manager**, **Asset Administrator**, and **Asset Manager** roles can access to this workspace, as do the Asset Administrator and Asset Manager roles.

The users with the role Contract Manager, the workspace is labeled as **Contract Management**.

If you are using Neurons for ITAM Cloud and are licensed to use Ivanti Neurons for Spend Intelligence, you can integrate the two products so that software asset contract data is automatically synchronized between the databases. For details, see [Integrating with Ivanti Neurons for Spend Intelligence](#).

Device Warranty

In Neurons for ITAM, Configuration Item (CI) device warranty information is captured in the **Device Details** section, where the relevant warranty fields are defined and maintained. The following key fields are used to capture and maintain warranty details:

- **Warranty Term** – Text field to record the warranty term as provided by Neurons.
- **Warranty Start Date** – Date and time field to track the warranty start date.
- **Warranty Expiry** – Date and time field to track the warranty end or expiry date.

Warranty Workspace

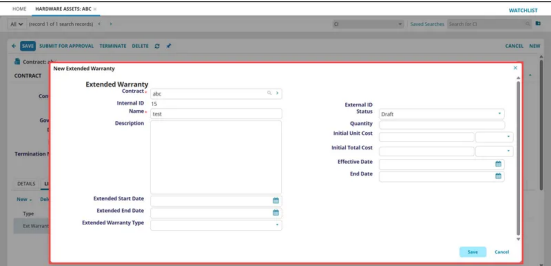
The Warranty Workspace is a centralized area in Neurons for ITAM where all device warranty-related data, activities, and views are grouped together to quickly see and manage warranty and contract information for Configuration Items (CIs). The following fields are displayed in the workspace:

Field	Description
Title	Provide a clear, descriptive name for the warranty or contract (for example, "Dell Latitude 5440 – 3 Year ProSupport Warranty").
Description	Provide a brief summary of what the warranty or contract covers, including any important inclusions, exclusions, or special conditions
Start Date	The date on which the warranty or contract coverage becomes effective.
End Date	The date on which the warranty or contract coverage ends. After this date, the asset is no longer covered under the agreement.
Service Level	The agreed level of service provided under the warranty or contract (for example, response time, resolution time, on-site versus remote support).
Provider	The vendor or service provider responsible for delivering the warranty or contract services (for example, Dell, HP, Lenovo, or a third-party service partner).
Number	The unique reference or identifier for the warranty or contract (for example, contract number, agreement ID, or warranty registration number).

Warranty for Contracts

When a contract is logged by the Asset Admin, any associated warranty information for covered assets must be recorded and kept in sync with the contract details.

Under the **Line Items** tab, when you select **New**, the **New Extended Warranty** functionality is available. By using the New Extended Warranty functionality, you can create a warranty for a **Contract** and for a **Contract Line Item**.



✓ To Create a Contract record

1. Open the **Contracts** workspace and click **New**.
2. Enter the following required information:
 - **Contract Name, Vendor**
 - **Expiry Date** - The contract expires automatically on this date.
 - **Internal ID** - Your organization's contract tracking identifier.
3. Complete the other fields as required:
 - **Governing Law**
 - **Date Signed**
 - **Termination Notice Days** -The number of days notice you give before terminating the contract
4. Click **Save**. The contract is saved with an initial **Status** of **Draft**.
5. Complete the associated tabs as required:
 - **Details** – Enter text description of the contract.
 - **Line Items** – Create line items for the contract. Line items created here also appear in the **Contract Line Items** workspace. Select a line item and choose **Go To** to open it in that workspace.
 - **Line Item Scorecards** – Select **Go To** to view vendor scorecards associated with line items in this contract.
 - **Purchase Orders** – Select **Go To** to open purchase order line items associated with this contract. For details about linking purchase-order line items, see [Procurement](#) > To create a purchase order.
 - **Termination Details** – Record contract termination information.

The **Termination Notice Days** and **Date Signed** fields are the same as those at the top of the page.

You can specify:

- **Termination Type**
- **Termination Date,**
- **Termination Reason.**
- **Language** – Enter terms and conditions associated with this contract.

Click **New** to add a new entry. You can specify:

- **Contract Language Type,**
- **Addendum** number
- Associated **Contract** and **Contract Line Item**
- **Details**
-

Participants – Details of all participants involved with the negotiation of the contract. Click **New** to add details about a new person involved with the contract. Add the **Participant Role**, the **Participant Type** (either **Internal** or **External**), and a description of their **Responsibility**.

Typically, a participant will be an internal employee or external contact that currently exists in your database. If you need to add a new contact here, that person is also added to the **Employee** or **External Contact** workspace respectively.

- **Attachments** – Attach documents or add a URL to a relevant website. URLs must include the https:// prefix.
- **Journal** – Add emails or notes to this contract record.
- **Audit History** – Tracks changes to key contract attributes automatically.

6. Select:

- **Save** -If you plan to continue editing later.
- **Submit for Approval** only when the contract is ready for approval.

When submitted, the contract **Status** changes to **Submitted**.

After you create a contract, you can use the toolbar to: **Cancel** or **Terminate** the contract, or change the **Status** manually.

If you cancel or terminate a contract, you can capture the **Reason**.

If you terminate a contract, you can also select the **Type** of termination from **Company Breach**, **End Term**, **Mutual Agreement**, or **Vendor Breach**.

Contract line items

A single contract can comprise many line items of different types, such as entitlements, maintenance, support, and so on. Use the **Contracts** workspace or the **Contract Line Items** workspace to add and modify line items for a contract.

Line items created in the Contract Line Items workspace will automatically display under the **Line Items** tab for the associated contract.

✓ To create a contract line item

1. In the **Contracts** workspace, open the required contract and click the **Line Items** tab.
2. Click the **New** dropdown, then select the type of line item to add.
3. Enter a **Name** for the line item and choose an appropriate **Status**.
4. Enter the **Quantity** and **Initial Unit Cost**.

The system calculates the **Initial Total Cost** automatically. Also enter the **Effective Date** and **End Date**.

5. Complete any other additional fields specific fields, then click **Save**. The line item is added to the list.
6. To add more detailed information. Under the **Line Items** tab, select the required line item, then click **Go to** to open the full record in the Contract Line Items workspace.

To return to the parent contract at any point, you can click ➤ alongside the **Contract** field, then click **Go to**.

7. Complete the associated tabs to add more details:

For line items that are entitlements, leases, or volume purchases, an extra details tab displays:

- **Entitlement Details** – Add information about license entitlements. The available fields match those in Ivanti Neurons for Spend Intelligence if it's integrated with your ITAM Cloud system. For details about setting up integration, see [Spend Intelligence](#) in the Ivanti Neurons for Spend Intelligence help.
- **Lease Details** – Add information that is specific to a lease, such as the lease schedule, early termination calculations, and shipping costs.
- **Vol Purchase Details** – Add information that is specific to a volume purchase, such as minimum purchase quantities, periods, discounts, and prices.

The following tabs display for all types of contract line items:

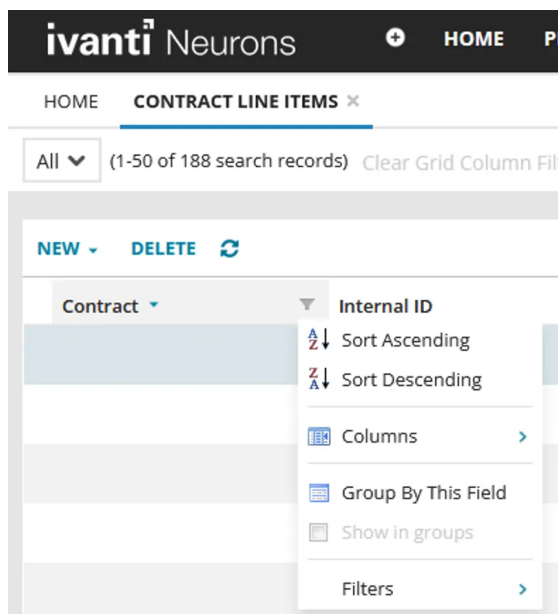
- **Renewal Details** – If a line item is renewable, select the **Renewable** check box on this tab. Enter the following values:
 - **Renewal Amount** – The cost of the renewal.
 - **Renewal Notice (days)** – The number of days notice you need to give to the vendor if you DO NOT want to renew the agreement or want to make changes to it.
 - **Renewal Reminder (days)** – The number of days before the renewal notice period starts when you want to be reminded about the renewal.
 - **Frequency** – How frequently the renewal occurs.
 - The other fields are automatically calculated by the product.
 - If a contract line item has the **Renewable** check box selected and a status of **Active** when the **End Date** is reached, the **Renewal Amount** for the line item is applied to each of the assets linked to it. You can see this on the **Financial Transactions** tab for the asset.
 - The **Uplift Amount** shows the cost increase from the previous renewal, and the **Uplift Percent** shows this as a percentage difference. The **Last Renewal Unit Cost** shows the cost for each unit when this line item was last renewed, and this value is multiplied by the quantity to give the **Last Renewal Total**.
- **Termination Details** – Record the **Termination Notice Days**. To terminate a contract line item by setting its **Status** field to **Terminated**, and use the remaining fields on this tab to record details about the termination.
- **Language** – View or add the terms and conditions associated with this contract line item. To add a new entry, select **New Contract Language**. Select the **Contract Language Type**, then enter the **Addendum** number, associated

Contract and Contract Line Item, and required Details.

- **Assets** – Link asset records from the Hardware Assets workspace that are associated with this contract line item.
- **Purchase Orders** – View the purchase orders associated with this contract line item.
- **Journal** – Add notes to this record.
- **Employee** – This tab displays only for contract line items of type **Entitlement**. It enables you to link employees whose license entitlement is associated with this record.
- **Attachments** – Attach a document to this record, or add a URL link to a relevant website. URLs must include the https:// prefix.
- **Audit History** – Automatically tracks any changes made to key attributes of this record.

2. Click **Save**.

Tip: To change the view within this workspace so that contract line items are grouped under their contracts, click the down arrow in the **Contract** column header, then select **Group By This Field**.



12. Vendors

Use the **Vendors** workspace to maintain details about the asset vendors you use, as well as monitor their performance. You can also look up assets, purchase orders, and contracts by associated vendor. **Procurement Manager** and **Contract Manager** user roles have access to this workspace, as do the Asset Administrator and Asset Manager roles.

✓ To create a vendor record

1. Open the **Vendors** workspace and click **New**.
2. In the **Type** drop-down, select whether the vendor is **Internal** or **External**.
3. Type a **Name** for the vendor, then complete the remaining fields as required with the appropriate information about the vendor. The **Category** field automatically fills to show that this is an asset-specific vendor.
4. Enter the **Fiscal Year End** for the vendor. This field automatically updates at the end of the vendor's fiscal year for the following year. Knowing when a vendor's fiscal year ends can help with your negotiations as a vendor looks to meet their sales margins for the year end. Saved searches are available from the **Favorite Searches** drop-down to identify which vendors are approaching the end of their fiscal year.
5. If the vendor supplies items or services that are critical to your business, select the **Strategic Vendor** check box so that a ★ displays alongside its name in the vendors list. You can also filter for strategic vendors.
6. Complete the associated tabs as needed:

- **Contact Details** – Record details for how to contact the vendor, including the **Primary Contact** if required. Existing primary contacts are pulled from the External Contracts workspace. If you create a new one here, it will then display in the External Contracts workspace as well.
- **Contacts** – Add another *external* contact for this vendor or *internal* contact in your organization that may be relevant for this record. In either case, the selected person displays in the **Contact** column, along with their phone and email details.

Typically, a contact is either an external person or an employee who currently exists in your database. If you add a new contact here, that individual will now be added to the **External Contact** or **Employee** workspace respectively.

- **Catalog Items** – Lists items in the Product Catalog currently associated with this vendor. Select an item and click **Go To** to open that record in the Product Catalog workspace, where this vendor will display under the Approved Vendors tab.
- **Assets** – Link asset records from the Hardware Assets workspace that are associated with this vendor.
- **Purchase Orders** – Lists any purchase orders currently associated with this vendor. Select an order and click **Go To** to open that record in the Purchase Orders workspace.
- **Contracts** – Lists any contracts currently associated with this vendor. Select a contract and click **Go To** to open that record in the Contracts workspace.
- **Performance** – Shows this vendor's overall performance, based on a calculated average of all purchase-order scorecards created for this vendor.
- **Scorecards** – Lists all of the purchase-order scorecards associated with this vendor that have been created in the Purchase Orders workspace. For details, see the section below.
- **Journal** – Add any relevant notes to this record.
- **Attachments** – Attach a document to this record, or add a URL link to a relevant website. URLs must include the https:// prefix.
- **Audit History** – Automatically tracks any changes made to key attributes of this record.

7. Click **Save**.

Vendor performance and scorecards

Purchase orders give you the opportunity to add a vendor scorecard, where you can record the vendor's performance each time you have an interaction.

For each of the provided categories, you can specify how the vendor has performed. ITAM then automatically converts these ratings to a number (Very Good = 5, Good = 4, Acceptable = 3, Poor = 2, and Very Poor = 1) and calculates the average to give the vendor an **Overall Performance** score. If a category is not relevant, select **N/A** to exclude the score.

These scorecards are averaged to give the values that display on the **Performance** tab of the vendor's record.

▼ To add a vendor scorecard

1. In the **Purchase Orders** workspace, open the appropriate purchase order and click the **Vendor Scorecards** tab.
2. Click **New** and use the drop-downs to rate the vendor on their **Communication, Reliability, Quality, Customer Service,** and **Pricing**.
3. Type any **Comments**, then click **Save**. The scorecard is added to this record and also to the **Vendors** workspace > **Scorecards** tab for the vendor.

13. Stock management

The **Stock Management** workspace enables you to manage all aspects of the tracking process for in-stock assets. The **Storage Manager** user role has access to this workspace, as do the Asset Administrator and Asset Manager roles.

Defining storage spaces

The first step in managing your in-stock assets is to have a user with the Asset Administrator or Asset Manager role set up your organization's locations and storage spaces in the **Locations** workspace. For details, see [Locations and storage spaces](#). Once they're defined, these locations and storage spaces will be available in the Stock Management workspace for organizing and tracking inventory.

Stock Managers can also add locations and storage spaces directly from the Stock Management workspace, but they don't have the ability to manage those locales from the Locations workspace.

Checking in stock

The second step to enabling stock management is checking assets into your storage spaces—do this from the Hardware Assets workspace. If an asset is being returned from loan, or if a user leaves the organization, you'll want to check in that asset to keep track of it. You can move assets between your defined storage spaces, assign assets to a user or a location, or transfer stock between storage spaces from this workspace.

✓ To check an asset into a storage space

1. Open the **Hardware Assets** workspace.
2. Expand the required asset type in the list and double-click the asset that you want to check in. The asset record page displays.
3. Click **Check In**.
4. Select the **Location** and **Storage Space** that you're checking the asset in to, then click **OK**.

The asset is checked in to the selected storage space and its status changes to **In Stock**. This asset will now display as part of this storage space's record in the **Stock Management** and **Locations** workspaces.

The **Inventory Transactions** tab for both the storage space and the asset will include a record of this check-in.

Managing in-stock assets

The **Stock Management** workspace enables you to manage where your assets are stored. The list view shows all of the defined storage spaces grouped by location. Double-click an entry in the list to see details about the storage space, such as the types of assets stored there and where its fulfillment locations are. Note that you must first transfer an asset into a storage space via the Hardware Assets workspace before it displays here.

The Stock Management workspace has the following set of tabs for each defined storage space:

- **Storage Space Summary** – Displays Product Catalog items and the quantity of each stored at this storage space and location. Items can be hardware or consumables, not software. Quantities are updated during asset fulfillment:
 - **For customer asset requests** – The quantity automatically decreases when an item is assigned to the customer.

- **For procurement requests** – The quantity automatically increases once the items arrive at this location and are checked in.
- Note that if an approval process is in place for either type of asset request, the item quantity won't update until all managers have granted approval.
- **Storage Space Transactions** – For consumables only: Indicates the quantity of a particular consumable stored at a storage space. The same consumable may also be in storage elsewhere—to see all possible storage spaces and quantities, open the consumable record in the Hardware Assets workspace and view the **Storage Space Transactions** tab.
- **Assets** – These are standard assets that you track individually because of their high value, though consumables are included here as well. You can add an asset to a storage space by clicking **Link**. Doing so updates the asset's **assigned** values in the **Hardware Assets** workspace.

You can also transfer an asset to a different storage space by selecting the asset, clicking **Transfer Stock**, and following the prompts. The asset will now display under the new storage space's **Assets** tab. The **Inventory Transactions** tab for both the storage space (in the Stock Management workspace) and the asset (in the Hardware Assets workspace) will include a record of this transfer.
- **Consumables** – These are assets that you can link to a storage space, but that generally don't have a value (such as cables, mice, and so on).
- **Inventory Transactions** – Keeps an automatic record of all movements of inventory into and out of a storage space.
- **Fulfillment Locations** – Link to a location that has been designated as an asset-request fulfillment center for this storage space. Available locations are defined in the **Locations** workspace.
- **Audit History** – Automatically tracks any changes made to key attributes of a record.

13.1. Locations and storage spaces

The **Locations** workspace enables you to create and manage locations that correspond to the different sites that your organization has, as well as the storage spaces where your assets are in stock. You can set up parent and child locations to create a hierarchy that groups locations geographically.

You need to create your locations and storage spaces here *before* using the Stock Management workspace to manage in-stock assets. For details about managing stock, see [Stock management](#).

Asset Administrators and Asset Manager roles have access to the Locations workspace. Note that **Storage Managers** can add locations and storage spaces directly from the Stock Management workspace, but they don't have the ability to manage those locales from the Locations workspace.

To create a new location with a storage space

1. Open the **Locations** workspace and click **New**.
2. Enter a **Name** for the location. ITAM will automatically fill in the **Full Name** field for you at the end of the creation process.
3. In the **Parent Location** field, create a new parent location, or click the  icon and select an existing one from the list.
4. Complete the other fields as needed. If necessary, Asset Administrators can add new countries to the **Country** drop-down via the **Address Country** workspace.
5. Complete the other associated tabs for this location:
 - **Child Location** – Click **New** to create a new child location for this location, or link to an existing one to create a hierarchy. A child location is not to be confused with a storage space.
 - **Subnets** – Associate a subnet with this location. ITAM uses this information to produce a report that identifies when discovered or imported assets aren't in the location you may have manually assigned them to via the Hardware Assets workspace. For details, see [Missing assets](#).
 - **Discovered Assets** – Assets that data discovery has discovered at this location. Click **Go to** to open the asset record.
 - **Storage Spaces** – Create a new storage space for this location. Any storage spaces added here are also listed in the **Stock Management** workspace.
 - **Storage Space Assets** – Assets that are currently checked in to a storage space at this location. You can check in assets via the **Stock Management** workspace.
 - **Asset Request Fulfillment Centers** – Link to a storage space that has been designated as an asset-request fulfillment center for this location.
 - **Fulfillment Assets** – Assets that are currently available from the asset-request fulfillment centers.
 - **Audit History** – Automatically tracks changes made to key attributes of this record.
6. Click **Save**.

13.2. Asset disposals

The **Disposals** workspace is used to manage the disposal of assets at the end of their lifecycle. This workspace displays a list of all disposals in the database and includes saved searches to narrow the list. A single disposal record can include one or more assets for disposal.

You can start the disposal process either from the **Disposals** workspace or from the **Hardware Assets** workspace by selecting one or more assets and clicking **Create Disposal**.

The following roles can access the Disposals workspace and perform disposal actions:

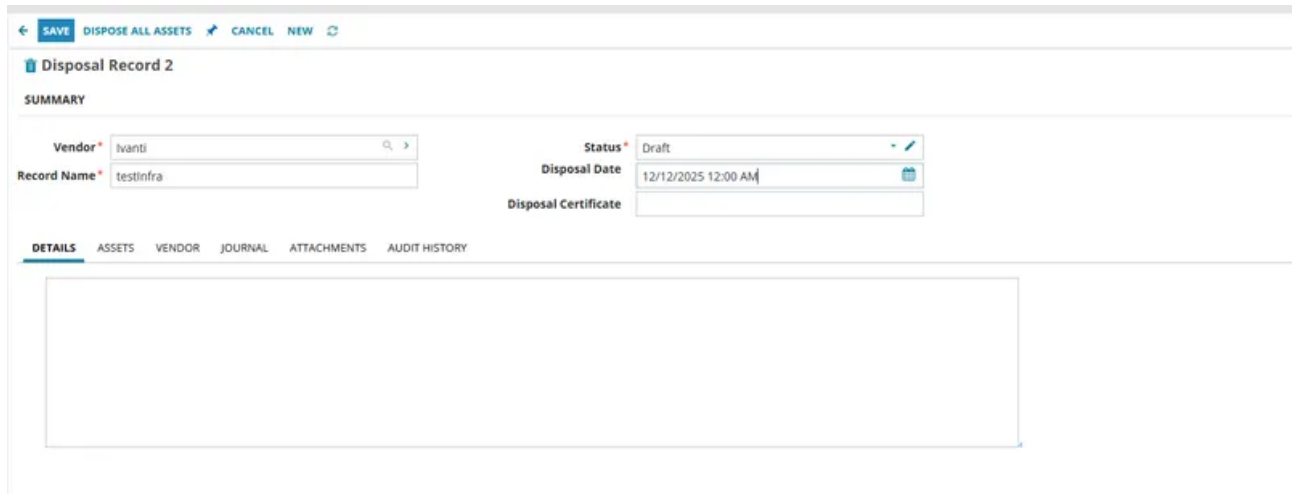
- **Storage Manager**
- **Asset Manager**
- **Asset Administrator**

These roles can create, link, and finalize disposals.

For details about deleting asset records from the ITAM database and tracking them in the Deleted Assets Audit workspace, see [Hardware assets](#).

To create an asset disposal record

- You can create an asset disposal either way:
 - In home page, select **Hardware Assets**, and click **Create Disposal**.
 - In home page, search **Disposal** and click **New**.



- Select the **Vendor** handling the disposal, and enter the **Record Name**, this can be a summary description or a reference number.
- Choose the **Status** from the dropdown. Set it to **Draft** when creating a new record.
- If available, enter the **Disposal Date**, and **Disposal Certificate** then click **Save**.
- Click the **Assets** tab and click **Link**.

The dialog lists available assets for disposal. Assets already in process do not appear.

- Select the assets for disposal, and click **Select**. A **Disposal** tab is also added to the associated asset records, enabling you to track the disposal in the Hardware Assets workspace.
- Click **Save**.

You can set the **Status** to **Cancelled** to cancel the disposal.

✓ To finalize the asset disposal

Once you have created the asset disposal record, you can return to the **Assets** tab and link and unlink further assets as required. The next stage is to finalize the disposal.

Before disposal, assets must be transferred to **Temporary Storage** for processing. Once moved, the status updates to **Awaiting Disposal**, preventing further assignment or movement.

1. From the **Assets** tab of the disposal, click **link** icon to link the assets. When linked, a corresponding Disposal tab appears on each asset record.

You can add multiple assets in a single disposal record.

2. Select the asset in the list, and click **unlink** icon to remove asset from disposal asset record.
3. Select the required assets and click **Assign Temporary Storage**.
4. Choose the **Location** and **Storage Space** and then click **Ok**.

The status of the linked assets changes to **Awaiting Disposal**, and they can no longer be assigned to users or transferred around your organization. Now you can prepare each asset for disposal if required.

5. From the **Assets** tab, select the assets and click **Set Disposal State**. Choose appropriate status and click **Ok**.
You can change the **Disposal State** on the **Disposal** tab on the asset record page. Use this status to monitor your internal disposal processes before the asset is removed for final disposal.
6. When disposal is complete, update the **Disposal Date** enter the **Disposal Certificate**, click **Dispose**, and set the **status** to **Complete**.

Assets are now marked as **Disposed**.

7. Complete the associated tabs as required:
 - **Details** – Add important information to this record.
 - **Vendor** – View or edit vendor information who are handling the disposal.
 - **Journal** – Record additional notes.
 - **Attachments** – Add certificates such as WEEE certificates, or URLs (include https://).
 - **Audit History** – Automatically tracks changes to key attributes.
8. Click **Save**.

✓ Limitations of Assets Disposal

- Retired assets cannot be disposed without manual intervention.
- Changing storage assignments after an asset is assigned requires custom configuration.
- Vendor pickup scheduling has no built-in workflow.
- Transfer verification lacks a sign-off or approval process to confirm successful handover to vendors.

14. Optional content packages

Existing Ivanti Neurons for ITAM customers can apply optional, free content packages that enhance the product functionality. These packages are highly recommended but not required.

Currently available packages:

- **Mobile Asset Manager content package:** This package downloads the tenant software used by the Ivanti Neurons for ITSM & ITAM mobile app to support ITAM functionality. Use the app to scan hardware asset barcodes, edit asset record details, and apply a range of quick actions remotely from Android- or iOS-based smartphones. The latest version also supports the ability to take delivery of hardware assets that are part of a purchase order.

Download this package from the [Ivanti Marketplace](#). For details about setting up and using, see [Mobile app](#).

- **Ivanti Facilities Management content package:** Though primarily for use with Ivanti Neurons for ITSM, this package also includes new workspaces that enable you to manage the non-device assets common to many facilities (such as office furniture and building equipment) and to create work orders for maintenance jobs in and around a facility.

To obtain this package, contact Ivanti's [Professional Services Organization \(PSO\)](#). For details about using, see [Facility assets](#).

14.1. Facility assets

The Facilities Management content package adds workspaces for managing the non-device assets common to many facilities, such as office furniture, equipment, and building mechanics. Basically, **facility assets** is a catch-all term relating to any facility-based item that you want to manage or maintain. You can also create work orders for maintenance jobs in and around a facility.

Use this package in an environment where both Ivanti Neurons for ITSM and ITAM are installed or in an Ivanti Neurons for ITAM-only environment. For details about downloading, see [Optional content packages](#).

This topic covers how you can use this package for ITAM. For details about using it with Ivanti Neurons for ITSM, see that product's online help.

✓ Facility asset workspaces defined

Asset Administrators have access to the following new workspaces:

- **Facilities Assets** – A manually-created list of facility assets located at any of the locations listed in the database. Assets can include office furniture, equipment, building mechanics (elevators, escalators, electrical), and so on. Manage assets from this workspace in a way similar to the Hardware Assets workspace. The **Storage Manager** user role also has access to this workspace.
- **Facilities Buildings / Floors / Rooms / Cubicles** – Separate workspaces that list of all facility buildings in the database, as well as the specific floors, rooms, and cubicles where you want to track facility assets. The most logical way to add this data is via the **Locations** workspace, as part of a location record.
- **Schedule Entry** – A list of facility maintenance jobs that should occur on an hourly, daily, weekly, monthly, or yearly schedule that you can link to a work order as a reminder.
- **Work Orders** – Work orders for custodial, operational, or maintenance jobs at a facility. Use one of the available templates to speed up the creation process. Work orders must be responded to and resolved within a certain period of time or they breach their response and resolution targets.

Facility asset data will also display in these other workspaces:

- **Home** – Displays a number of dashboards relevant to facility assets in stock, the locations they're at, active purchase and work orders, and so on.
- **Locations** – Add a facility to a location record. Doing so enables you to manage facility assets in the building via the Facility Assets workspace. Use the tabs for **Buildings**, **Floor**, **Room**, and **Cubicles** to define areas in the building where you want to track the facility assets.
- **Stock Management** – A list of storage spaces and their locations, as well as the facility assets stored in each.
- **Product Catalog** – Create a facility asset item that users can request from the online Product Catalog.
- **Asset Request** – Submit a request for a facility asset item in the Product Catalog using a Facility Services request template (located under the **Parameters** tab > **Facility Services** category).
- **Tasks** – A list of all tasks in the database, including ones associated with facility-asset work orders.
- **Reports** – A list of all available reports relating to facility assets.

Facility buildings and assets

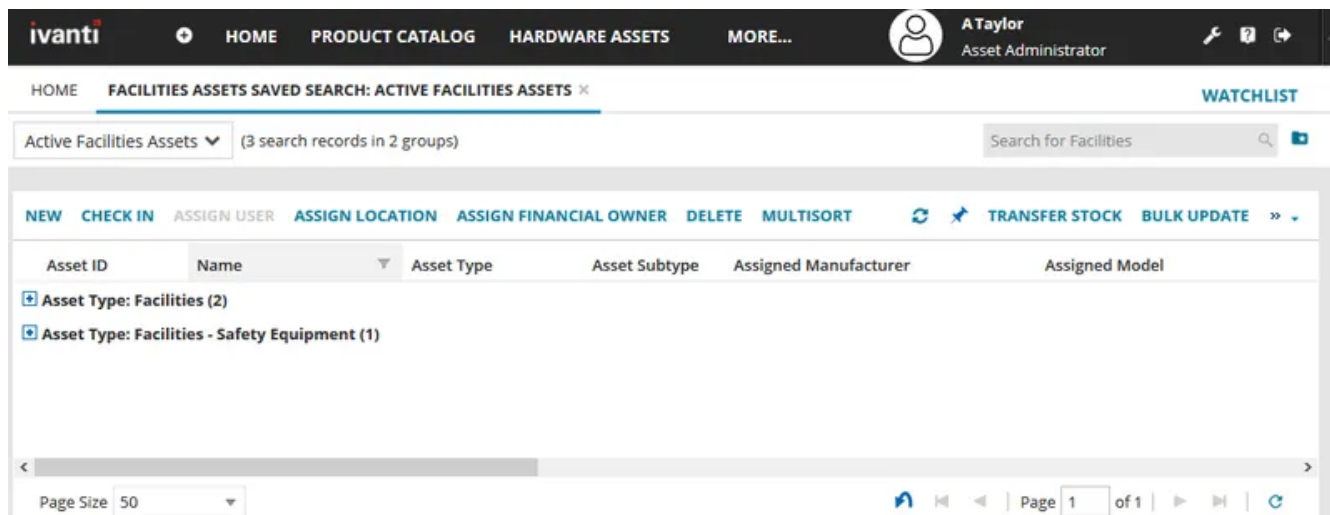
It's recommended that you set up the facility buildings (as well as the floors, rooms, and cubicles in those buildings) as part of a location record before adding the facility assets that you want to manage.

✓ To add a facility building to the database

1. Open the **Locations** workspace.
2. Open an existing location record, or create a new one that will contain the facility building data.
3. With a location record open, click the **Buildings** tab.
4. Click **New**. The **Location** and **Building ID** auto-fill. Building ID incrementally updates with each facility you add to this location record. Provide a meaningful **Building Name** and select a **Status** from the drop-down. All other fields are optional. Click **Save**. The building data is also saved in the Facilities Building workspace. Repeat for each building at this location that you want to manage.
5. Add a floor, room, and cubicle to each facility building as needed:
 - Click the **Floor** tab and click **New**. The **Location** and **Floor ID** auto-fill. Floor ID incrementally updates with each floor you add to this Facility Building record, but you can change as needed. Provide a meaningful **Floor Name** and select a **Status** from the drop-down. All other fields are optional. Click **Save**. The floor data is also saved in the Facilities Floor workspace. Repeat for each floor that contains assets you want to manage.
 - Click the **Room** tab and click **New**. The **Location** auto-fills. Select the **Building**, **Floor**, and **Room Number**. Room Number incrementally updates, but you can change as needed. All other fields are optional. Click **Save**. The room data is also saved in the Facilities Room workspace. Repeat for each room that contains assets you want to manage.
 - Click the **Cubicles** tab and click **New**. The **Location** auto-fills. Select the **Building** and **Floor**. **Cubicle ID** incrementally updates, but you can change as needed. Select a **Status** from the drop-down. All other fields are optional. Click **Save**. The cubicle data is also saved in the Facilities Cubicle workspace. Repeat for each cubicle that contains assets you want to manage.
6. Click **Save** in the toolbar to update this location record, and click the  icon to return to the list view.

▼ To add a facility asset to the database

Once an asset is added, you can use the top toolbar to check it into a location; assign to a user, location, or financial owner; or transfer to a different location and storage space.

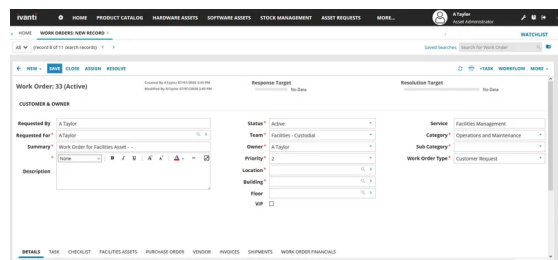


1. Open the **Facilities Assets** workspace.
2. From the toolbar, click **New**.
3. Enter a required **Name** for this asset and **Serial Number**. The serial number is especially important as the unique identifier that the product uses to track an asset.
4. Under the **Details** tab, select a **Status** from the drop-down. All other Detail tab fields are optional and generally match those found in the Hardware Assets workspace. For details about a specific field, see [Hardware assets](#).
5. Other tabs: Use **Sub Asset** to link another facility asset to this record. Use **Preventative Maintenance Spares** to link a consumable asset. Use **Work Orders** to link to an existing work order or to create a new one for a maintenance job at a facility that is relevant to this record. For details, see the next section. All other tabs are optional and generally match those found in the Hardware Assets workspace. For details about a specific tab, see [Hardware assets](#).
6. Click **Save** in the toolbar to log the asset, and click the  icon to return to the list view.

After saving, you can go back in and update this record with more details as needed.

Work orders

Create work orders for custodial, operational, or maintenance jobs at a facility. Work orders must be responded to and resolved within a certain period of time, or they'll breach their response and resolution targets.



▼ To submit a work order

Follow this procedure to log a basic work order into the database. The additional tabs defined below are optional or provide informational details about this record.

1. Open the **Work Orders** workspace.
2. From the toolbar, click the **New** drop-down and select one of the available templates. A unique reference number and date time stamp are automatically assigned to the order.
3. Many of the fields will auto-fill, though you can change them if necessary. Select who the order is **Requested for** by clicking  to open the employee list. Add a **Summary** title and detailed **Description**.
The Status field is notable, because it automatically updates as the order advances through the workflow process. Users associated with this record receive a notification after each change of status until the record is **resolved** and then permanently **closed**. The incident Audit History tab records each change in status.
Select values for the **Category**, **Sub Category**, and **Work Order Type** fields. These fields further categorize the work order, which a Facilities Administrator (a user role in Ivanti Neurons for ITSM) can use to identify trends for reporting purposes.
Priority can be 1-5, with 1 being the highest. Search the list to select the **Location** where the work order will be performed.
4. In the toolbar, click **Save** to submit the work order, and click the  icon to return to the list view. The system automatically notifies the requestee, as well as your team, that this order is **active** and assigned to you.
After saving, you—or anyone associated with this record—can go back in and update it with more details as needed, using the tabs defined below. To see how far the record has progressed through the workflow, click  to view updates to the Resolution Target progress bar.

Work order tabs defined

If some of these tabs don't display by default within the record, click the  icon (at the far right of the tab list) to view all available tabs.

- **Details** tab – In the **Journal** area, click **Add** to add an email or note that's relevant to the order. All journal entries made here will display under the Activity History tab for this record. See that tab description below for how to add a journal entry.

Under **Attachments**, click **Attach** to add a file or **Paste** to add clipboard text that may be useful when submitting the order. Add additional **Comments** if necessary. Any attachments added here will also display under the Attachment tab for this record.

- **Task** tab – Assign a task to a relevant team and owner that can help fulfill this order. Once the task is added to this record, the assigned owner will be notified of the task and can accept it, reject it, reassign it, and so on.
Click **New Task** and fill in the fields. **Summary** is a brief title for the task. **Priority** can be 1-5, with 1 being the highest. **Service** further defines which area of the business this task belongs to. Assign this task to the selected service's **Team** and **Owner**. Enter the task **Details**, which will help the owner understand what this task entails. Leave **Actual Effort** blank—the owner is responsible for entering the amount of time this task took to complete. After the record is closed, the system will calculate the total cost and time associated with each completed task.
- **Checklist** tab – Create a checklist item for this work order or link to an existing one. Use checklists as reminders for units of work that should be completed before the work order is closed. Unlike tasks, checklists do not need to be completed to close a work order.
- **Purchase Order** tab – If a PO is part of this work order, it displays under this tab. POs can be part of work orders of type Break/Fix, Customer Request, or Scheduled Maintenance.
- **Facilities Assets / Vendor / Invoices / Shipment** tabs – Link to items that may be relevant to this work order.
- **Work Order Financials** tab – A cost item is a specific line item within an order. New cost items added here will also display in the ITFM Cost Item workspace; they're used to compile data on all associated costs. The ITFM Cost Item workspace is viewable only by user roles in Ivanti Neurons for ITSM.
Click **New from price list item** to add an item directly from the established price list, or you can click **New ITFM Cost Item** to create a new cost item to associate with this record.
- **External Task** tab – An external task is a task that is acted upon by an outside organization, usually with whom you have a contract for services. Link to an existing task or create a new one for this record. Any external task created here will also display in the External Task workspace, which is only viewable by user roles in Ivanti Neurons for ITSM.
- **Activity History** tab – A history of the email and notes associated with this record. You can also link to relevant emails associated with other work orders. To add a new email or note, click the **New** drop-down, and select **New Email** or **New Notes**:
 - **For email** – Some of the fields auto-fill. Fill in others as needed; most are self-explanatory. For **Category**, you'll most likely select Outgoing Email. **Processed** is enabled by default—leave as is. If enabled, click **Publish to Web** to make this email a visible part of the record in the Self Service Portal. Add **Attachments** if needed, and include a **Message**. Click **Save** to send the email and store it under the tab.
 - **For notes** – The **Category** is the note type, such as customer follow-up, general memo, and so on. **Source** is the source that initiated this activity, such as a call, email, and so on. **Duration (Min)** is the amount of time you spent on the activity. Click **Publish to Self Service** to make this note a visible part of the record in the Self Service Portal. Also include a title **Summary** and detailed **Notes**. Click **Save** to store the note under the tab.
- **Audit History** tab – Automatically tracks any changes made to key attributes of this record.
- **Workflow Instance** tab – Lists any workflows associated with this record, such as status progression.

- **Escalation Watch** tab – An escalation occurs when a request's response time exceeds a defined period of time. At that point, the escalation clock starts, which updates the Resolution Target progress bar and activates this tab. The application sends notifications to the task owner and team. It's up to the owner and team manager to take appropriate action based on such notifications.

This tab shows the results of each phase of an escalation, including the amount of time spent in a certain state, date, and time of escalation, and total running time.

For work orders of type Scheduled Maintenance:

If you go back into the record once it's saved, you'll notice two other tabs that display:

Scheduled Maintenance tab – Link to facility maintenance jobs that should occur on an hourly, daily, weekly, monthly, or yearly schedule. Create these jobs in the Schedule Entry workspace and use them as reminders for necessary ongoing maintenance that's part of a work order.

Child Work Orders tab – Create or link to a child work order that's part of a parent order. Create child orders based on the duration of the parent order schedule. For example, if the parent order is for monthly maintenance for 2 months, create two child orders, one for each month of the schedule. All linked child orders must be closed before you can close the parent order.

15. Upgrading

Customers with ITAM versions earlier than 2021.3 must manually apply the one time ITAM upgrade packages, available on the [Ivanti Marketplace](#). You will find instructions there for how to download the packages. It's highly recommended that you stay current on these updates. There's also a category of optional content packages that you may want to apply. For details, see [Optional content packages](#).

Auto-upgrade from version 2025.2

From Enterprise Service Management version 2025.2, customers using ITAM version 2021.3 or later are automatically upgraded to the latest ITAM version.

Post-upgrade Validation

Existing Layout Updates

The latest ITAM package includes changes to following OOTB layouts. During the upgrade, new child tabs may be added to existing layouts. This can:

- Reorganize the order of child tabs
- Replace existing child tabs

To ensure that customizations remain retained, you must validate the impacted layouts after the upgrade. Verify the following:

- All child panels appear in the correct order
- Each child tab is associated with the correct object

Below are the business object names and their corresponding layout names used in the ITAM system.

Business Object Name	Layout Name
CI	AM.Asset.Administrator
CI	AM.Asset.Default
CI	CI
CI.CloudServiceAsset	AM.CloudServiceAsset
CI.Contract	AM.Contract.Administrator.New
CI.Contract	AM.Contract.DefaultLayout
CI.IoTAssets	CI.IoTAssets
CI.ivnt_MedicalDevices	CI.MedicalDevices
CI.ivnt_SoftwareProduct	AM.SoftwareProduct.AssetManager.Default
CI.ivnt_SoftwareProduct	AM.SoftwareProduct.Default
Department	Department
Employee	AM.Employee.Administrator
Employee	AM.Employee.Default
FRS_Priceltem	AM.FRS_Priceltem.Administrator
FRS_Priceltem	AM.FRS_Priceltem.DefaultLayout
ivnt_AuditDeleted_CI	Audit_CI_Default_Layout
ivnt_ContractLineItem	AM.ContractLineItem.Administrator
ivnt_ContractLineItem	AM.ContractLineItem.DefaultLayout
ivnt_Disposal	AM.Disposal.Administrator
ivnt_Disposal	AM.Disposal.Default
ivnt_Invoice	AM.Invoice.Administrator
ivnt_Invoice	AM.Invoice.Default
ivnt_Ivanti_Spend_Intelligence_Configuration	ivnt_Ivanti_Spend_Intelligence_Configuration_Layout.Default
ivnt_PurchaseLineItem	AM.ivnt_PurchaseLineItem.DefaultLayout
ivnt_PurchaseLineItem	AM.ivnt_PurchaseLineItem.Layout.Manager
ivnt_PurchaseOrder	AM.PurchaseOrder.Administrator
ivnt_PurchaseOrder	AM.PurchaseOrder.Layout
ivnt_ScannedAsset	ScannedAsset
ivnt_ScannedAsset	ScannedAsset.Admin
ivnt_Shipment	AM.Shipment.Administrator
ivnt_Shipment	AM.Shipment.Default
ivnt_StorageSpace	AM.StorageSpace.Default

Business Object Name	Layout Name
ivnt_Subnet	AM.Subnet.Default
ivnt_VendorOrderRequests	Vendor Order Request Status Layout
Location	AM.Location.AssetAdministrator
Manufacturer	AM.Asset.Manufacturer.Layout
Manufacturer	AM.Manufacturer.Layout
OrganizationalUnit	AM.OrganizationalUnit.Default
ServiceReq	AM.AssetRequest.Default
Task.Assignment	Internal Task SDA
Task.Assignment	Task.Assignment
Vendor	AM.Vendor.Administrator
Vendor	AM.Vendor.Default
Vendor	Profile.Vendor