

[Create an Asset Manager Role](#)[List of Asset Management Tasks](#)[List of Asset Management Views](#)**Purpose:**

How to create Asset Management security roles, and questions to think about before you create them.

Decisions:

1. Who is going to be editing and creating assets?
2. How many roles do you need: Asset Manager and Asset User?
3. Does the Asset Manager need access to the AM related Library Lists and Import Connector?
4. If access to all Asset Management tasks and views are going to be allowed, except the “Create” task, this can be controlled from the Asset Management settings, and no custom roles are needed.

Tips:

1. Access to the Asset Import connector requires membership into the Administrators Role.
2. Access to the Library required membership to Advanced Operators or Administrators Role.
3. Some of the selection will also be determined based on what tasks or views you have given to other security roles. You might want to control all access to Configuration Items through these roles, and pull access from other roles. This will make the management of access to all Configuration Items easier. The only exceptions would be the ‘Add Affected Hardware Asset’ or ‘Add Affected Software Asset’ tasks that you might want to add to your appropriate Work Item class role.

Creating an Asset Manager Role

If Analysts will be creating / editing items within the Asset Management app, and these analysts are not a part of Security Roles based on the default roles of “Administrators” or “Advance Operators”, you must alter the relevant roles with the Asset Management Set Permissions application following the creation of the new security role.

Create Master Asset Manager Security Role

Normally to start with, I will create an Asset Manager Role that has permissions to every view and task for Asset Management. Place a test user that is not in any other security role to verify it only has access to the Configuration Items you selected. Normally this role is based on the Incident Resolvers role, but does not give access to work items at all.

Scope Down the Master Role

Then, you can go and remove the tasks and views that you know for sure your organization will not be using. This role can now be used as a template for any Asset User or more scoped down role. The following settings will assist you in creating a Master Role for Asset Management and Configuration Items in general.

Master Asset Management Role based on Incident Resolvers Role

Role Base:	Incident Resolver
Enter a Name:	<i>Company</i> – Asset Manager
Management Packs:	All
Queues:	None
Configuration Items:	All configuration items can be accessed
Catalog item Groups:	None

Tasks:	From Cireson Asset Management MP: Select All (or Choose as appropriate) If you are not using all classes, uncheck the appropriate ones
	From Service Manager Console Management Pack: Refresh
	From Service Manager Library Management Pack Edit
Views:	From Cireson Asset Management MP Select All (or Choose as appropriate) If you are not using all classes, uncheck the appropriate ones
	From Service Manager Configuration Management Configuration Library MP All Software Updates All Printers All Windows Computers All Software
	From Service Manager Configuration Management Library MP Users
Form Templates:	None
Users:	Choose appropriate users or group

Grant Permission to Base Security Role

This step will grant the base Security Role you selected for your Asset Manager Role(s) to be able to create and edit asset management related class items. If this step is not completed, you will receive a pop-up error when trying to create or edit any asset management related form.

1. Navigate to download location of the Asset Management App
2. Run the app named "Cireson.AssetManagement.Permissions.exe"
3. Select / populate the following fields within the "Set Asset Management Permissions" settings
 - a. SQL Server
 - Server where the Service Manager DB is located
 - b. Username (only populate if the "SQL Authentication" checkbox is selected)
 - SQL Username for Write access to Service Manager DB
 - c. Password (only populate if the "SQL Authentication" checkbox is selected)
 - SQL Password
 - d. Database
 - Database name for Service Manager (usually 'ServiceManager')
 - e. Test
 - Tests authentication to the Server and DB
 - Select this before moving on to (f.)
 - You will see "Connection Failed" or "Connection Successful" next to the Test button
 - f. Profile

- Select the profile you would like to alter and allow for Analysts that are part of a Security Role based upon this profile to create / edit Assets within the Asset Management app
 - In this example select “Incident Resolver”
- g. Set Permissions
- Sets the permissions on the selected profile
- h. Remove Permissions
- Removes permissions on the selected profile
- i. Remove User and Device set permissions
- Only check this if you have set custom permissions on CIs outside of the Asset Management app and you would like these removed for the selected profile
 - Select the check box to remove permissions on Users and Devices for the selected profile

Example of the **Set Asset Management Permissions**:

Set Asset Management Permissions

SQL Server: SCSM2012 Profile: Incident Resolver

Username: Password: Set Permissions

Database: ServiceManager Remove Permissions

☐ SQL Authentication ☐ Remove User and Device shared permissions

Test Connection Successful Close

Asset Management Tasks (Cireson)

The following is a list of the Tasks that are part of the Cireson Asset Management MP

<input checked="" type="checkbox"/> Create Warranty	Cireson Create Warranty Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create License	Cireson Create License Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Support Contract	Cireson Associate Support Contract (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Custodian	Cireson Associate Custodian (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Organization	Cireson Associate Organization (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Warranty) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Support Contract) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update License	Update License (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Hardware Asset	Add Affected Hardware Asset (Incident, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Hardware Asset	Add Affected Hardware Asset (Change Request, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Change Status	Cireson Software Asset Change Status Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Location	Cireson Associate Location (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Invoice	Cireson Associate Invoice (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Hardware Asset	Cireson Create Hardware Asset Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Organization) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Catalog Item	Cireson Create Catalog Item Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Purchase Order	Cireson Associate Purchase Order (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Cost Center	Cireson Associate Cost Center (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Consumable	Cireson Create Consumable Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Location	Cireson Associate Location (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Software Items) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Set Master Lease/Warranty Starts	Cireson Set Master Lease/Warranty Starts Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Subnet	Cireson Create Subnet Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Purchase	Cireson Create Purchase Task (Asset Management, Software Asset)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Organization	Cireson Create Organization Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Lease	Cireson Create Lease Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Support and Maintenance Contract	Cireson Create New Support Contract Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Invoice	Cireson Associate Invoice (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Lease	Update Lease (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Computers) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Support Contract	Cireson Associate Support Contract (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Invoice	Cireson Create Invoice Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Notice Event	Cireson Create Notice Event Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Change Type	Cireson Hardware Asset Change Type Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Superseded Hardware Asset Leases	Replaces Hardware Asset Leases with selected one (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Invoice) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Purchase Order	Cireson Create Purchase Order Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Hardware Asset	Add Affected Hardware Asset (Problem, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Related Software	Cireson Export Related Software Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Hardware Asset	Add Affected Hardware Asset (Service Request, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Transfer Asset	Transfer Asset Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Vendor	Cireson Associate Vendor (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Purchase) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Lease	Cireson Associate Lease (Hardware Asset) Task (Asset Management)	Cireson Asset Management

<input checked="" type="checkbox"/> Associate Primary User	Cireson Associate Primary User (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Warranty	Cireson Associate Warranty (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create View	Cireson Create View Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Organization	Cireson Associate Organization (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Folder	Cireson Create Folder Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Software Asset	Cireson Update Software Asset Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Purchase Order	Cireson Associate Purchase Order (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Cost Center) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Disable Notice Event	Disable Notice Event (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Change Type	Cireson Software Asset Change Type Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Cost Center	Cireson Create Cost Center Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Edit	Edit Cireson Asset Management Settings	Cireson Asset Management
<input checked="" type="checkbox"/> Delete	Delete Selected Items Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Increase Available Count	Cireson Increase Consumable Available Count (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Location) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Support Contract	Update Support Contract (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Superseded Hardware Asset Warranti	Replaces Hardware Asset Warranties with selected one (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Custodian	Cireson Associate Custodian (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Purchase Order) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Licence) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Superseded Asset Support Contracts	Replaces Asset Support Contracts with selected one (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Software Asset	Add Affected Software Asset (Problem, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Vendor) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Change Status	Cireson Hardware Asset Change Status Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Catalog Item) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Software Asset	Cireson Create Software Asset Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Software Asset	Add Affected Software Asset (Service Request, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Primary User	Cireson Associate Primary User (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Cost Center	Cireson Associate Cost Center (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Vendor	Cireson Create Vendor Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Lease) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Purchase	Cireson Create Purchase Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Related Computers	Cireson Export Related Computers Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Copy License Assignments	Copy License Assignments (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Warranty	Update Warranty (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Enable Notice Event	Enable Notice Event (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Edit	Cireson Edit Notice Event Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Software Asset	Add Affected Software Asset (Incident, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Standard	Cireson Create Standard Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Configuration Item	Cireson Associate Configuration Item (Hardware Asset) Task (Asset Manageme...	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Vendor	Cireson Associate Vendor (Software Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Edit	Cireson Edit Subnet Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Delete	Delete Selected Items Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Show User Assets	Cireson Show User Assets Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Export Selected Items	Cireson Export Selected Items (Hardware Asset) Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Decrease Available Count	Cireson Decrease Consumable Available Count (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Update Consumable	Cireson Update Consumable (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Dispose Hardware Asset	Cireson Dispose Hardware Asset (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Add Affected Software Asset	Add Affected Software Asset (Change Request, Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Create Location	Cireson Create Location Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Set Received Date	Cireson Set Received Date Task (Asset Management)	Cireson Asset Management
<input checked="" type="checkbox"/> Associate Catalog Item	Cireson Associate Catalog Item (Hardware Asset) Task (Asset Management)	Cireson Asset Management

Asset Management Views (Cireson)

The following is a list of the Views that are part of the Cireson Asset Management MP

<input checked="" type="checkbox"/> Software Assets License Status Exceeded	Cireson Asset Management
<input checked="" type="checkbox"/> All Catalog Items	Cireson Asset Management
<input checked="" type="checkbox"/> All Software Assets with Downgrade/Upgrade Counts	Cireson Asset Management
<input checked="" type="checkbox"/> Warranties Contract Status Expired	Cireson Asset Management
<input checked="" type="checkbox"/> My Purchase Orders	Cireson Asset Management
<input checked="" type="checkbox"/> All Subnets	Cireson Asset Management
<input checked="" type="checkbox"/> All Warranties	Cireson Asset Management
<input checked="" type="checkbox"/> Hardware Assets Warning Support Contract	Cireson Asset Management
<input checked="" type="checkbox"/> All Consumables	Cireson Asset Management
<input checked="" type="checkbox"/> Exhausted Consumables	Cireson Asset Management
<input checked="" type="checkbox"/> All Organizations	Cireson Asset Management
<input checked="" type="checkbox"/> My Purchases	Cireson Asset Management
<input checked="" type="checkbox"/> All Standards	Cireson Asset Management
<input checked="" type="checkbox"/> All Purchases	Cireson Asset Management
<input checked="" type="checkbox"/> Hardware Assets Warning Lease or Warranty	Cireson Asset Management
<input checked="" type="checkbox"/> All Notice Events	Cireson Asset Management
<input checked="" type="checkbox"/> Software Assets Contract Status Warning	Cireson Asset Management
<input checked="" type="checkbox"/> All Locations	Cireson Asset Management
<input checked="" type="checkbox"/> All Vendors	Cireson Asset Management
<input checked="" type="checkbox"/> All Seated Licenses	Cireson Asset Management
<input checked="" type="checkbox"/> All Leases	Cireson Asset Management
<input checked="" type="checkbox"/> Contracts Contract Status Warning	Cireson Asset Management
<input checked="" type="checkbox"/> All Contracts	Cireson Asset Management
<input checked="" type="checkbox"/> All Invoices	Cireson Asset Management
<input checked="" type="checkbox"/> Hardware Assets Expired Support Contract	Cireson Asset Management
<input checked="" type="checkbox"/> Warning Consumables	Cireson Asset Management
<input checked="" type="checkbox"/> All Software Assets	Cireson Asset Management
<input checked="" type="checkbox"/> All Licenses	Cireson Asset Management
<input checked="" type="checkbox"/> Warranties Contract Status Warning	Cireson Asset Management
<input checked="" type="checkbox"/> Exceeded Licenses	Cireson Asset Management
<input checked="" type="checkbox"/> Hardware Assets Expired Lease or Warranty	Cireson Asset Management
<input checked="" type="checkbox"/> All Cost Centers	Cireson Asset Management
<input checked="" type="checkbox"/> All Purchase Orders	Cireson Asset Management
<input checked="" type="checkbox"/> All Software Assets with CPU Licensing	Cireson Asset Management
<input checked="" type="checkbox"/> Leases Contract Status Warning	Cireson Asset Management
<input checked="" type="checkbox"/> My Notice Events	Cireson Asset Management
<input checked="" type="checkbox"/> Leases Contract Status Expired	Cireson Asset Management
<input checked="" type="checkbox"/> Contracts Contract Status Expired	Cireson Asset Management
<input checked="" type="checkbox"/> All Hardware Assets	Cireson Asset Management
<input checked="" type="checkbox"/> Software Assets License Status Warning	Cireson Asset Management
<input checked="" type="checkbox"/> Software Assets Contract Status Expired	Cireson Asset Management
<input checked="" type="checkbox"/> All Software Assets with Auth	Cireson Asset Management
<input checked="" type="checkbox"/> All Software Assets with Usage Count	Cireson Asset Management Software Metering