Ex 3 - Tachyon v5.2 - Using - Using Inventory as an Administrator

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Exercise Overview:

Using Inventory

In this lab we will learn how to use the Inventory Application as a user with Administrator rights.

AI Powered Auto-curation seen as an Administrator

We will now look at the effect of the AI Powered Auto-curation has on software records

Basic Summary Screen

1ETRNW72

1. Log onto **1ETRNW72** as **1ETRN\Manager1**
2. Open the Tachyon Portal in Chrome (if not already open)
3. Click **Switch App** and choose **Inventory**
4. Click on **SLA Inventory**
5. Once the initial curation completes, click on **Basic Summary** in the left menu

The **Summary** table now includes software records curated by AI. The first column in the table shows the total **Records Collected**. The next three columns represent direct catalog matches, AI assisted matches and records that remain non-normalized. You can explore these by clicking on the links in the brackets.

- **Normalized Records-Direct Catalog Matches (Distinct Products)** - corresponds to software records identified using existing rules in the 1E Catalog. Exploring these will show you the normalized entries with enriched data regarding licensability, end-of-support date etc.
- **Normalized Records-AI Assisted Matches (Distinct Products)** - the software records the AI automatically extracted and normalized. The AI recognises the vendor, title, version and edition and normalizes them. Every record identified by the AI is looked at by the 1E Catalog team and enriched with data regarding licensability, end-of-support date etc.
- **Non-Normalized Records (With AI Suggestions)** - displays a screen to assist in manually normalizing important software.

AI Suggestions for Non-Normalized Records (With AI Suggestions)

The AI makes predictions for all source data. Predictions with a confidence score below the set threshold. These predictions might still be accurate or quite close to accurate, so the task of manually adding rules to the Catalog becomes much easier.

The predictions are displayed on the AI Suggestions screen.

6. Click on the **(x)** link in the **Basic Summary** screen (in the Non-Normalized Records (With AI Suggestions) column).

7. This displays the **Unidentified Software Records** screen: This screen has the following elements:

Overview

Shows a count of distinct software records to be identified, so you can keep track of progress.

- **AI predicted** - records the AI was unable to identify, but was able to provide suggestions
- **AI predicted and partially matched** - where the vendor or title was identified through previous knowledge from the 1E Catalog, these records have a default high confidence score
- **Cannot be identified** - these records have insufficient information to recognize the software or make a prediction.
- **Clear All Filters** - show all records

Filter

Filters by application type.

- **Show only Secondary Applications -** filters to only secondary applications
- **Newly discovered (Last 30 days)** - filters to applications discovered within the last 30 days
- **New to Catalog** - filters to applications that are either new vendors or titles previously unknown to the 1E Catalog
- **Exclude Secondary Apps** - removes any applications considered secondary, like updates, hot fixes or language packs.

AI Prediction Confidence
Confidence scores for predictions are divided into three equal parts below the threshold. **High**, **Medium** and **Low** confidence relate to the ease at which the AI engine suggestions can be manually reviewed and added as rules.

FILTER BY
Use this to add conditional filters for various fields on the **Suggestions Table**,

8. **Click** on the **Plus sign** next to filter by and enter: "Vendor Contains Micro" to return results based on Microsoft as a software vendor.

Suggestions Table
Each row on this table corresponds to a distinct set of software records. There are four values and a number of actions to perform for each distinct record. The values are:

- **Install Count** - the total number of records found with the same source data across the estate
- **Source Data** - ARP data extracted into **Title**, **Version**, **Vendor**, **Edition**, **Colloquial Version** and **Licensable** fields
- **AI Prediction** - the AI suggestion after attempting to extract **Title**, **Version**, **Vendor**, **Edition**, **Colloquial Version** and **Licensable** fields from source data, Licensability is set to a default of **No** on the suggestions table, this can be edited before adding
- **Confidence**- abstracted to high, medium or low based on the exact numeric value for prediction confidence, these confidences values will always be lower than the threshold required to automatically normalize records.

Take Action on Unidentified Software Records

The **Actions** you can take on each record are:

- **Add** - adds the suggestion directly to the catalog, once the rule is added, the software record in context will appear normalized from the next sync onwards
- **Edit** - allows you to edit the software record before adding to the catalog
- **Exclude** - you can exclude a software record, to remove it from a normalization requirement, this also reduces the count of software left to identify - these excluded records will still appear on the same screen, tagged as excluded.

You can explore these records to see what the AI has curated by clicking on the related links in the **Basic Summary Report**.

We have also introduced a new screen for AI suggestions for any software records that remain non-normalized. This is a replacement for the **Best Match Screen** which allowed you to add rules.

Edit/Add a Suggestion to the Catalog

9. **Filter** the Unidentified Software Records to show software where the vendor is Microsoft
10. Scroll to find the software with the title: **Administrative Templates (ADMX) for Windows 10 and Windows Server** Click **Edit**

11. In the displayed screen (shown right), accept the suggestions and click **Add to Catalog**

Edit Suggested Match   ✕

Source Vendor: Microsoft Corporation

SUGGESTED VENDOR
Microsoft Corporation

Source Title: Administrative Templates (ADMX) for Windows 10 and Windows Server 2016

SUGGESTED TITLE
Administrative Templates for Windows and Windows Server

Source Colloquial Version:

SUGGESTED COLLOQUIAL VERSION
10

Source Edition:

SUGGESTED EDITION

Source Version: 1.0

SUGGESTED VERSION
1.0

Is Licensable

Cancel   Add to catalog

Note the Options have now changed from Add, Edit to Added, Edit

	Vendor: Microsoft Corporation	Microsoft Corporation		
1	Title: Administrative Templates (ADMX) for Windows 10 and Windows Server...	Administrative Templates for Windows and Windows Server	Added	Low
	Version: 1.0	1.0		
	Edition:		Edit	
	Colloquial Version:	10		
	Licensable:	No		

Exclude a Suggestion from the Catalog

12. Remove the previous filter on Unidentified Software Records and add a filter to find software where the **Title** contains **Mail**
13. Scroll to find the software with the title: **hMailServer 5.4.2-B1964** Click **Exclude**
    Note the Options have now changed from Add, Edit and Exclude to Add, Edit and Include

The Inventory screens seen as an Inventory Administrator

Now that we have seen what a Viewer can see we will see how it differs for an Administrator.

Software Inventory - Dashboard screen as an Administrator

1ETRNW72

14. Log onto **1ETRNW72** as **1ETRN\Manager1**
15. Open the Tachyon Portal in Chrome (if not already open)
16. Click **Switch App** and choose **Inventory**
17. The page should open on **Software Inventory - Dashboard** if it has not navigate there
18. The screen has the same fields as the viewer saw, and the drop lists have the same effect, select the options to confirm if you desire

Software Inventory - Aggregate screen as an Administrator

19. Navigate to **Software Inventory - Aggregate**
20. The screen has the same fields as the viewer saw, and the drop lists have the same effect, select the options to confirm if you desire
21. The difference is the Export button is now enabled, click on this.

22. The **Export** popup opens. You can choose which columns to export in the same way you can choose columns to display in the main report panel. **Choose** all columns

23. The report is exported in a .TSV format, for example **AggregatedSoftwareInventory_20200813095415.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
24. Review the data exported, choose a title and confirm that the data matches that displayed on screen (the downloaded file exports in Vendor order descending)
25. Once reviewed, close the file

Software Inventory - Product Usage screen as an Administrator

26. Navigate to **Software Inventory - Product Usage**
27. The screen has the same fields as the viewer saw, and the drop lists have the same effect, select the options to confirm if you desire
28. The difference is the Export button is now enabled, click on this.
29. The **Export** popup opens. You can choose which columns to export in the same way you can choose columns to display in the main report panel. **Choose** all columns

30. The report is exported in a .TSV format, for example **InventoryProductUsage_20200813102621.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
31. Review the data exported, choose a title and confirm that the data matches that displayed on screen (the downloaded file exports in Vendor order descending)
32. Once reviewed, close the file

Hardware - Hardware Inventory screen as an Administrator

33. Click on *Hardware - Hardware Inventory*
34. The screen has the same fields as the viewer saw, and the drop lists have the same effect, select the options to confirm if you desire
35. The difference is the Export button is now enabled, click on this.
36. The report is exported in a .TSV format, for example **HardwareInventory_20200813111828.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
37. Review the data exported, choose a title and confirm that the data matches that displayed on screen (the downloaded file exports in Vendor order descending)
38. Once reviewed, close the file

Hardware - Virtual Summary Screen as an Administrator

39. Navigate to *Hardware - Virtual Summary* the screen on the right is displayed
40. The screen has the same fields as the viewer saw, and the drop lists have the same effect, select the options to confirm if you desire, there is no difference between a user and an administrator

Hardware - Device Screen as an Administrator

41. Navigate to *Hardware - Device* the screen will be blank
42. Enter **1ETRNW101** in the Search device box at the top of the screen and when the machine name resolves select this, the Devices screen then populates, all the fields are as the viewer saw
43. Observe the Installed Software - Matched tab the Export button is now enabled, click on this.
44. The report is exported in a .TSV format, for example **MatchedSoftware_20200813111828.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
45. Review the data exported, choose a title and confirm that the data matches that displayed on screen (the downloaded file exports in Vendor order descending)
46. Once reviewed, close the file
47. Navigate to the Installed Software - Unmatched tab
48. Note the Export button is enabled click on this,
49. The report is exported in a .TSV format, for example **UnmatchedSoftware_20200813111828.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
50. There is no data at this time we have not linked any apps
51. Once reviewed, close the file
52. The Link apps button is enabled we will look at that functionality later

Manage Associations Screen as an Administrator

CM to Product Screen

53. Navigate to *Manage Associations - CM to Product* the screen will be blank on the left under the Page title, CM to Product is underlined and on the right there are three options Associations, All records and No Associations, All records is selected, Note the number of records Note Add/Edit Association is disabled
54. Select No Associations, and confirm the number of records is equal to that seen on the All records option

55. Select Microsoft Project 2010 via the check box to the left and then note that the Add/Edit Association button is enabled, **Click** this, and observe the screen to the right opens
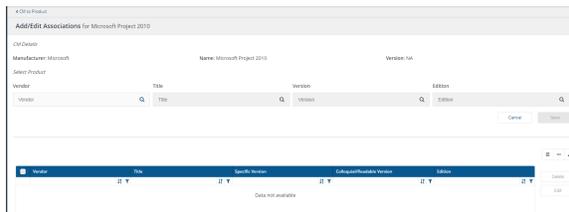

56. In the Vendor field type **Microsoft**, when the search resolves select **Microsoft Corporation**
57. In the Title field type **Project** and **select** this when the search resolves
58. **Choose 2010** in the version field
59. Search for and **select** Standard in the Edition field
60. Click **Save,** Click **< CM to Product**
61. Now choose the Associations tab, and confirm that Microsoft Project 2010 is now listed
62. Confirm that the value for All records is one more than that for No Associations
63. Associate another product of your choice, once you have saved, do not return to the CM to Product screen.
64. Select the record you just added, and click **Edit**
65. The record will now appear in the upper section of the page, amend the version number and click **Save**
66. Confirm the amendment is shown. And navigate back to **< CM to Product** and **Associations**
67. Confirm the new product is listed, and **select** it. Click **Add/Edit Associations**
68. In the bottom half of the screen, select the title and click **Delete** click **delete** on the popup window, confirm no data is now displayed
69. And navigate back to **< CM to Product** and **Associations**
70. Confirm the title is no longer listed

Product to CM Screen

71. Navigate to *Manage Associations - Product to CM*, Product to CM is underlined and on the right there are three options Associations, All records and No Associations, All records is selected, Note the number of records
Note there are three buttons all are disabled:
Add Association
Edit Association
Remove Association
72. Select **No Associations**, and confirm the number of records is equal to that seen on the All records option
73. Sort the vendor field Ascending, and select Adobe Systems Incorporated, and click on **Add Association**

74. The screen will display as shown on the right
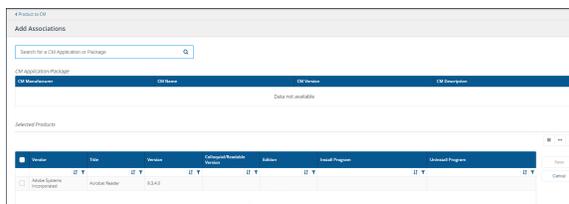
75. In the *Search for a CM Application or Package* field type **Adobe**, and when it resolves to Adobe Reader 9 **select** it
76. In the lower half of the screen, select **Adobe Systems Incorporated** and click **Save**

77. The message on the right will be displayed briefly

78. Navigate back to **< Product to CM**
79. Then click on **Associations**, and confirm the newly created Association is listed
80. Repeat the above for another Application of your choice
81. Two applications now have Associations to CM Applications

Review the Associations as a Viewer

Now that there are some Associations between Product and CM and CM and Product, we will review what the Viewer user can see

1ETRNW101

82. Log onto **1ETRNW101** as **1ETRN\User**
83. Open the Tachyon Portal in Chrome (if not already open)
84. Navigate to **Manage Associations - CM to Product,** and open the **Associations** tab
85. Confirm that the 3 Applications we have created associations for are listed
86. Select one of the three using the check box to the left and confirm that the Add/Edit Association button remains disabled

87. Notice that each of the names is a link, click on one and observe the information displayed, which is the detailed

information from the Application an example is shown on the
right. Once reviewed close the pop up

88. Navigate to **Manage Associations - Product to CM,** and open the **Associations** tab
89. Confirm that the 2 Applications we have created associations for are listed
90. Select one of them using the check box to the left and confirm that the Add/Edit Association button remains disabled

Amend and Delete Associations

Having created Associations, and viewed them we will now amend and delete them

1ETRNW72

91. Return to **1ETRNW72** as **1ETRN\Manager1**
92. Navigate back to **Product to CM** and the **Associations** tab
93. Select an entry and note the options that become enabled on the right hand side, Edit Association and Remove Association are now enabled
94. Click **Edit Association**
95. **Amend** the search to be Adobe Acrobat Reader DC
96. **Check** the radio button next to Acrobat Reader in the Selected Products area and **click** Save
97. Navigate back to **< Product to CM**
98. Then click on **Associations**, and confirm the amendment made is shown
99. Select an entry and note the options that become enabled on the right hand side, Edit Association and Remove Association are now enabled
100. Click **Remove Association**
101. Click **delete** on the pop up window after reading the message
102. Confirm the Association has been removed

User Summary Screen as an Administrator

103. Navigate to *User Summary,* this page shows the same data we looked at as a User

104. Note the Export button is enabled click on this,
105. The report is exported in a .TSV format, for example **InventoryProductUsage_20200813120506.tsv**, on the downloaded file **click** view in folder, and right click to **open** with **notepad++**
106. Once reviewed, close the file
107. You can also customize which of these fields are displayed on the page by using the **Choose Columns** control.

Lab Summary

In this lab we looked at the Inventory Application looking at the actions an Administrator can carry out. And associated CM Applications to Products and vice versa.

Next Page