

SYNEXSYS 3.0

Getting started

15 minutes to discover the Synexsys Inventory main features

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IMPORTANT!

IT CAN TAKE SEVERAL MINUTES UNTIL AN ENTIRE INVENTORY CYCLE IS COMPLETED AND UPLOADED IN THE DATABASE ! THE OVERALL TIME IT WILL TAKE WILL DEPEND UPON THE TIME CYCLES OF THE DIFFERENT SXSI COMPONENTS, ON THE NATURE OF THE INVENTORY, ON THE VOLUME OF COLLECTED INFORMATION AS WELL AS MANY OTHER PARAMETERS SUCH THE SPEED AND LOAD OF YOUR PROCESSOR.

SOME ANTI-VIRUS CAN DRASTICALLY SLOW DOWN THE SXSI AGENT AUDIT (UP TO 80% SLOWER THAN WITHOUT ANTI-VIRUS).

USE "TOOLS" / "REFRESH SCREEN" TO UPDATE WHAT YOU SEE IN THE CONSOLE.

PHASE I - INVENTORY

REMARK: You may print or display this reference at any time by selecting the "**Quick start**" option in the "Help" menu.

PC Audit

The easiest thing you can do to start with your tests is to audit your own PC.

- In the "**Tools**" menu of the Synexsys Console, select "**Audit my PC**".
- Select the type of audit you wish to perform. You may chose between:
 1. Hardware
 2. Windows
 3. Files

For the time being, do not touch any other options.

- Execute the audit, **wait a few minutes and then press F5** to refresh what is displayed in the Console.

REMINDER: It may take some time for the system to complete a full inventory cycle and for the data to be available in the database. Also, while the normal audit mode is *differential* and uses less resources, the first audit is always *Full* and therefore requires more processing time.

Remote Audit of Networked PCs

REMARK: For your tests, it may be simpler to execute the agent manually. Afterwards, you'll certainly choose to automate all the following processes by inserting the appropriate commands in the users login script. See "Deployment via Login Script" in the help file for more detailed information.

You may execute a manual remote audit without need of installing any software on the local machine. By doing this, you simulate an audit that would be automatically launched through a network connection script. To execute this audit, follow the instructions below:

- Share the folder `..\Program Files\Synexsys\client`
- From the PC you wish to audit, go to the Windows Start menu, choose "Run" and type the following at the command prompt:

```
"\\server_name\share_name\bin\agent\sxsila.exe"
```

This program is the interactive version of the Synexsys agent `sxiagent.exe`, which is to be used in batch mode in the login script.

- Select the nature of the audit you wish to perform and execute it.
- When the audit is complete, all the data is automatically transferred via FTP to the folder:

```
..\Program Files\Synexsys\server\inbox
```

of your Synexsys server.

- Then, as soon as the Synexsys server begins a new cycle, it will automatically load the audit information in the database.
- Do not forget to **press F5 or use the "Refresh screen"** option from the "Tools" menu to see the new data in the Synexsys Console.

Executing the SXS Agent Manually on Non-Networked PCs

If you wish to audit a PC that is not connected to the network, you can do it manually. There are different methods. The following is the most practical one to use in the tests:

- Locate folder `..\Program Files\Synexsys\Client` on the Synexsys server
- Locate the `..\Synexsys\server\inbox\filter.ini` file on your Synexsys Server and copy it on the `Client\bin\agent` folder
- Copy the folder and its sub-folders to a portable storage device (USB Flash, for instance)
- Open file `client\config.ini` and modify it as follows:

```
; SXS FTP server and Port  
;-----
```

```
SERVER= delete the initial value and leave empty  
PORT= delete the initial value and leave empty
```

```
; Working (temp) directory (%=environment variable)  
;-----
```

```
TEMP= C:\SXS\TEMP is preferable to the original value
```

```
; Directory where to store SID file (%=environment variable)  
-----
```

```
SID=C:\SXS is preferable to the original value
```

- Insert the portable storage device in the PC you wish to audit and execute `client\bin\agent\sxsila.exe`, the agent's interactive version. Chose the nature of the audit and execute it.
- When the audit concludes, the results will be stored in the folder corresponding to `SID=xxxx` of your `config.ini` file. In the example above: `C:\SXS\`.
- Copy **the inventory file (.inv)** to the portable storage device or a different support (as an e-mail attachment, for instance).
- **Leave file SID.TXT as well as *.KEO and SXS.SCK files on the local PC** and delete the `.inv` file.
- Paste all the `.inv` file in folder `..\Program Files\Synexsys\server\inbox` of your Synexsys server.
- As soon as the Synexsys server begins a new cycle, the files found in `..\inbox` will be loaded to the database.

REMINDER: If you are in the Synexsys Console, use the F5 function key or the "Refresh display" option from the "Tools" menu to update the information displayed on the screen.

Distributing the Inventory Agent Remotely and Executing it as a Windows service

- Exclusively for the following operating systems : **Win NT / Win 2000 / Win XP / Win 2003**
- To perform this test you need **DOMAIN ADMINISTRATOR** and **LOCAL ADMINISTRATOR RIGHTS!**

You may automatically push the inventory agent to a PC connected to the network. To do it:

- Go to the Synexsys Console and select the "**Network**" icon from the "**Inventory**" Section (left menu bar)
- Select the PC(s) you wish to audit and chose the "Agent deployment" option from the context menu (right click). The deployment management window opens.
- Make sure the PCs you wish to audit are selected (check-boxes at the left) and click on "Deploy agents". If you are DOMAIN ADMINISTRATOR and have local administrator rights of each workstation, the agents will be remotely installed and will begin auditing the selected PCs. The inventory results are automatically transferred to the Synexsys Server.
- If an error message is shown in the Status column, to the right of the list of PCs, it means you do not have enough rights to perform this action, or that you have tried pushing the agents on operating systems that don't support *services*. **See the help FAQs for additional information.**

REMARK: Synexsys Inventory works in asynchronous mode. The information collected by the agents is not directly written in the database. The waiting time for the collected data to be ready can vary from one to several minutes based on transfer and load cycle frequencies. These frequencies can be defined. **Press F5 to refresh the Console display.**

PHASE II - PROCESSING

REMARK: You may print or display this reference at any time by selecting the **"Quick start"** option in the "Help" menu.

View Collected Data

Select the **"Objects"** option in the **"Inventory"** Section.

- Place the cursor on the "All" node, in the main tree (top window). The audited PCs appear in the list below.
- Select one of the PCs. Its features are shown on the right side of the window.
- If you have installed the demo database, on the **"Summary"** tab you may view how administrative information (Custom Fields) are managed in Synexsys Inventory.

REMARK: This presentation is only an example! You may also start from zero and create your own management fields. Synexsys Inventory allows generating in just a few minutes all the custom fields you may need. See also PHASE III for more information on this subject.

Executing Queries Across the Database

Go to the **"Queries"** Section and select, for instance, the **"Hardware"** option.

- To include all PC type objects in the query, select the root node (All) in the trees window (above).
- To restrict the query only to certain objects, you may select one or several nodes (CTRL+click) and/or objects from the trees in the upper area.
- To include just one PC in the query, select it from one of the trees in the upper part of the screen or type its name in the **"System name"** field (bottom area).
- Enter the search criteria in the lower part of the screen. You may enter exact expressions such as "Dell" or use substitution characters to replace parts of the expression. For instance: if you type **"*he*pa"** in the "System manufacturer" field, you will obtain a list of all the "Hewlett-Packard" PCs (if there are any).
- To avoid mistakes, you can select valid values from a list for practically any field. To view this list, **simply click on the field that interests you and click on [...]**. You can select one or several values (CTRL+click) from the list.
- You can also combine several expressions in the same field. All you need to do is separate such expressions with an "OR" operator. For instance: the expression **"*Acer* OR *Siemens*"** will return a list of all the Acer or Fujitsu-Siemens PCs (if there are any).

 Click on the "Execute" button or press the "Enter" key to execute the query.

Customising Query Results

You can sort the results of a query in any field. You only need to click on the selected field's header so the results become sorted. You may sort the fields in the opposite order by clicking again on the same field header.

- You can **restrict the results displayed** only to the fields that interest you. Use the **"Visible columns"** button to select /deselect the fields that are viewed.
- You can also **search for a specific value** within the results of a query by entering the first letters of the value you wish to search for after clicking on the column (not the header) where the value is to be found. You may also use CTRL+F to make a quick search among the results. Use F3 to find the following hit. Pressing CTRL+F accepts partial criteria such as ***matrox***.
- You can change the size of columns and invert them based on your needs.

- You can also **export query results** ("Export" context menu) to **HTML**, XLS or CSV files. The customisation made to the results grid (visible fields, inverted columns, sorting, etc.) is reproduced in the export files.

REMARK: Do not forget that **query results are filtered** based on the current selection on the trees in the upper part of the window. In other words, if you chose the "Marketing" node from the "Organigram" tree, only the PCs from the "Marketing" Department will be displayed.

Displaying Statistical Views

Go to the "**Views**" Section and select the "**Summary**" icon.

If you have installed the demo database, you should see the "**End of Warranty**" automatic tree in the "**Auto**" tab, in the top window.

- Select the root node of the "End of Warranty" tree. On the right side, you should see the annual distribution of PCs whose warranty is due to end. If you select a lower level of the tree, that is, a node representing the current year, the right side of the screen should display the global representation of PCs whose warranty is due to expire during the current year.
- If you now select the main node of the "**Locations by IP**" tree, you will see PCs distribution based on their site.
- Etc.

REMARK: Automatic trees are powerful filters that are continuously updated. These classification structures are true work tools that can help you gain extra time in your everyday tasks. Practically all the technical and administrative information contained in the SXS*i* database can be used and combined to create automatic trees easily.

PHASE III - ORGANIZING DATA

REMARK: You may print or display this reference at any time by selecting the "**Quick start**" option in the "Help" menu.

Adding Custom Fields

An example always beats an explanation! Imagine you wish to add a PC management field. This field will indicate whether the PC is active or not. To create this field, go to the "**Parameters**" Section and select "**Objects and Fields**".

- Double-click on the "PC" type Object and open its "Organisation" Category.
- Right-click on "Organisation" and select "New field" and then "Character". Name the new field: "Status".
- In the "Choice" field, enter the following 4 options, pressing the ENTER key after each option:
 1. Active
 2. Stock
 3. Obsolete
 4. Repair

You may click the "A/Z" button at any time to sort the options in alphabetical order. You can also select the "Force choice in list" box to force users to choose one of the valid options. You may also select the "Mandatory" box so the field's entry is required.

- Click on "OK" to validate the field and return to the "Inventory" / "Objects" Section.
- Select a PC from the list of Objects. On the right, you should now see the "Status" field you just created (press F5 if this is not the case).
- Enter edit mode, define a value for the field and confirm the selection with "OK".

As we have just seen, creating fields with Synexsys is very simple. From now on, all the collaborators will be able to use this field. The field can also be used in queries ("Queries" / "Objects and Fields" Section. Select "PC" as Object). It can also be used to create an automatic tree that will dynamically provide information on the status of all PCs.

REMARKS:

You can also define **new Object types** in the "Parameters" / "Objects and Fields" Section, based on your needs regarding asset management.

You may, for instance, create a "GSM" Object type to manage all mobile telephones in your company. Once you have given the name "GSM" to the new Object type and assigned it an identifier, it will be displayed in the lists (visual key). Then you may, for instance, create an "Administrative" category and place fields such as "Telephone no.", "End of warranty date", "Price", "Subscription type", etc. **Remember that all this data can be used in automatic trees!**

Creating Classification Trees

In Synexsys Inventory you may create as many manual or automatic trees as you wish. An Object such as a PC can be associated to several tree structures. For instance: "Organigram", "Locations", "Budgets", etc.

Trees are created from the "**Inventory**" Section, under "**Objects**". Use the context menu (right click) to add or modify a tree.

First of all, you may try creating an automatic tree based on the Operating Systems and Service Packs of your PC park. This way, you will realise how simple and powerful this operation is. Proceed the following way:

- Select any PC from the list of Objects.
- Select the "**Hardware**" tab on the right side of the window.
- Select the "Operating System" and "OS Service Pack" lines (CTRL+click).
- Right click to display the context menu and select "**Create an automatic tree**".
- A window will open. Make sure that "Operating System" is displayed below "OS Service Pack" in the list found under "Tree name" (lower left). Use the vertical arrows to modify the order, if required.
- Give the tree a name. For instance: "OS and SP", and validate the name.
- That's it! In just 30 seconds you have created a work tool that displays PC distribution throughout your company, by OS and Service Pack.
- Return to the "Views" Section and select "Summary". Select the root node of the new tree (the one named "OS and SP") and ... ask yourself how long it would have taken to create a dashboard of this type with another inventory tool.

REMARK: Automatic trees can include both technical data and administrative information at the same time. This makes them extremely useful in everyday tasks. For instance, the "**Migration**" tree can be extremely useful if a migration is to take place in the company.

Creating New Objects Manually

In Synexsys Inventory you may create as many manual or automatic Objects as you wish. Whether you create different Objects manually or you import them with the external import module, you can manage all kinds of assets in addition to PCs:

PDAs, GSMs, copiers, and other technical equipment can be managed with Synexsys Inventory. The system can also be used to manage other types of assets, such as tools, furniture, or cars, since Synexsys has no limitations regarding the number and type of Objects that are managed.

You can create new Object occurrences in the "**Objects**" sub-Section of the "**Inventory**" Section. Place the cursor in the list of Objects and select "New" from the context menu (right click) to add, modify, or delete Objects.