Creating custom annotations

OnCommand Insight

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Table of Contents

Creating custom annotations 1
Steps 1
Manually assigning annotations to assets 2
Modifying annotations 3
Deleting annotations 4

Creating custom annotations

Using annotations, you can add custom business-specific data that matches your business needs to assets. While OnCommand Insight provides a set of default annotations, you might find that you want to view data in other ways. The data in custom annotations supplements device data already collected, such as switch manufacturer, number of ports, and performance statistics. The data you add using annotations is not discovered by Insight.

Steps

1. Log in to the Insight web UI.
2. Click **Manage** and select **Annotations**.

   The Annotations page displays the list of annotations.
3. Click + Add.

   The **Add Annotation** dialog box displays.
4. Enter a name and a description in the **Name** and **Description** fields.

   You can enter up to 255 characters in these fields.

   Annotation names beginning or ending with a dot "." are not supported.
5. Click **Type** and then select one of the following options that represents the type of data allowed in this annotation:

   - Boolean

     This creates a drop-down list with the choices of yes and no. For example, the “Direct Attached” annotation is Boolean.

   - Date

     This creates a field that holds a date. For example, if the annotation will be a date, select this.

   - List

     This can create either of the following:

     - A drop-down fixed list

       When others are assigning this annotation type on a device, they cannot add more values to the list.

     - A drop-down flexible list

       If you select the **Add new values on the fly** option when you create this list, when others are assigning this annotation type on a device, they can add more values to the list.

- Number

  This creates a field where the user assigning the annotation can enter a number. For example, if the annotation type is “Floor”, the user could select the Value Type of “number” and enter the floor number.

- Text

  This creates a field that allows free-form text. For example, you might enter “Language” as the annotation type, select “Text” as the value type, and enter a language as a value.

> After you set the type and save your changes, you cannot change the type of the annotation. If you need to change the type, you have to delete the annotation and create a new one.

6. If you select **List**as the annotation type, do the following:
   a. Select **Add new values on the fly** if you want the ability to add more values to the annotation when on an asset page, which creates a flexible list.

      For example, suppose you are on an asset page and the asset has the City annotation with the values Detroit, Tampa, and Boston. If you selected the **Add new values on the fly** option, you can add additional values to City like San Francisco and Chicago directly on the asset page instead of having to go to the Annotations page to add them. If you do not choose this option, you cannot add new annotation values when applying the annotation; this creates a fixed list.

   b. Enter a value and a name in **Value** and **Description** fields.
   c. Click

to add additional values.
   d. Click to remove a value.
7. Click **Save**.

Your annotations appear in the list on the Annotations page.

Related information

Importing and Exporting user data

Manually assigning annotations to assets

Assigning annotations to assets helps you sort, group, and report on assets in ways that are relevant to your business. Although you can assign annotations to assets of a particular type automatically, using annotation rules, you can assign annotations to an individual asset by using its asset page.

Before you begin

You must have created the annotation you want to assign.

Steps

1. Log in to the OnCommand Insight web UI.

2. Locate the asset to which you want to apply the annotation by doing either of the following:
   - Click the asset in the Assets Dashboard.
   - Click on the toolbar to display the **Search assets** box, type the type of or name of the asset, and then select the asset from the list that displays.

     The asset page displays.
3. In the **User Data** section of the asset page, click Add.

   The Add Annotation dialog box displays.
4. Click **Annotation** and select an annotation from the list.
5. Click **Value** and do either of the following, depending on type of annotation you selected:
   - If the annotation type is list, date, or Boolean, select a value from the list.
   - If the annotation type is text, type a value.
6. Click **Save**.
7. If you want to change the value of the annotation after you assign it, click and select a different value.

   If the annotation is of list type for which the **Add values dynamically upon annotation assignment** option is selected, you can type to add a new value in addition to selecting an existing value.

Modifying annotations

You might want to change the name, description, or values for an annotation, or delete an annotation that you no longer want to use.

Steps

1. Log in to the OnCommand Insightweb UI.
2. Click **Manage** and select **Annotations**.

   The Annotations page displays.
3. Position your cursor over the annotation you want to edit and click .

   The **Edit Annotation** dialog box displays.
4. You can make the following modifications to an annotation:
   a. Change the name, description, or both.

      However, note that you can enter a maximum of 255 characters for both the name and description, and you cannot change the type of any annotation. Additionally, for system-level annotations, you cannot change the name or description; however, you can add or remove values if the annotation is a list type.

      If a custom annotation is published to the Data Warehouse and you rename it, you will lose historical data.

   b. To add another value to an annotation of list type, click Add.

c. To remove a value from an annotation of list type, click .

   You cannot delete an annotation value if that value is associated with an annotation contained in an annotation rule, query, or performance policy.

5. Click **Save** when you finish.

After you finish

If you are going to use annotations in the Data Warehouse, you need to force an update of annotations in the Data Warehouse. Refer to the *OnCommand Insight Data Warehouse Administration Guide*.

Deleting annotations

You might want to delete an annotation that you no longer want to use. You cannot delete a system-level annotation or an annotation that is used in an annotation rule, query, or performance policy.

Steps

1. Log in to the OnCommand Insight web UI.
2. Click **Manage** and select **Annotations**.

   The Annotations page displays.

3. Position your cursor over the annotation you want to delete, and click .

   A confirmation dialog box displays.

4. Click **OK**.

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