

# **Administration Guide for Asset Groups**Asset Management 24.1



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Asset Management 24.1 Administration Guide for Asset Groups 57-241-986042-20240321

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# **Change Log**

Date	Change Description
2024-02-03	Initial release.
2024-02-08	Updated FortiGate on page 74.
2024-03-21	Updated Getting started on page 13.

# Introduction

Asset Management is an easy-to-use portal to register, organize and view all Fortinet products and services in FortiCloud.

This guide is intended for audiences with the asset groups features enabled.

New products, licenses, or contracts can be registered and managed with the Asset Management portal. Registered products are displayed in the *Product List* as well as a customizable folder structure called *My Assets*. The *Account services* menu lists products, contracts, or licenses applicable at the account level.

The *Product List* provides a complete view of all products and services. Assets can be organized into folders and subfolders with the *My Assets* tree structure and assets can be moved into the folders based on the organization needs. Product list and My Assets views provide various filters, sorting, and grouping features to efficiently find and manage assets.

Dedicated views include lists to see assets with expired licenses, assets about to expire (30, 60, 90 days), pending registration, decommissioned units, as well as specialized filtered views to list and search assets based on hardware, license, contract, and location.

For each product, the Asset Management portal provides a drill-down view of all the asset-related information including entitlements, support tickets, license and keys, renewals, statistics, and cloud services.

With Online renewals, licenses or contracts can be renewed directly from the portal for supported products and regions.

# What's new in version 24.1

#### Marketplace FortiClient EMS

The Marketplace now supports FortiClient EMS in the Marketplace > Spending page. See FortiClient EMS on page 105.

#### Marketplace FortiFlex point transfer

FortiPoints can be transferred to FortiFlex points in the Marketplace > Spending page. See FortiFlex on page 107.

## Standard FortiSASE support

Standard FortiSASE support is available for ESA contracts in the ELA Profile page. See ELA profile on page 114.

#### Managed FortiGate Service entitlement registration

When a new Managed FortiGate Service entitlement is registered, a banner is displayed to prompt the user to submit an onboarding request in the Managed FortiGate Service portal. The banner will only display if there is no Managed FortiGate Service entitlement already registered or the registered entitlement is expired. See Registering assets on page 31.

#### **New Terms and Conditions workflow**

All users are prompted to read and accept the Fortinet Inc. terms and conditions when logging into the Asset Management portals. If the terms and conditions are changed or updated, users will be prompted to read them through and accept the changes before they can proceed. See Marketplace on page 71.

# Landing page

The FortiCloud landing page can be found at https://support.fortinet.com.

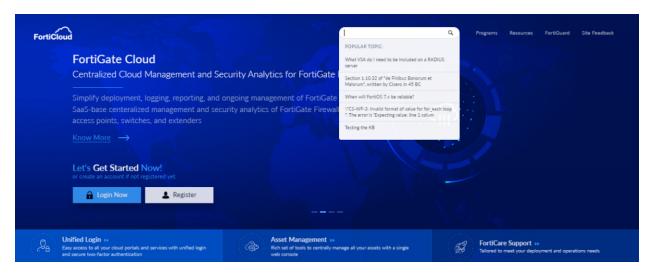


#### From the landing page, users can:

- · Register for a new FortiCare account. See the FortiCloud Account document.
- Log in to FortiCloud using existing credentials. See Logging into an account on page 13.
- Search for information, including quick links, documents, and support.
- Access additional resources from the Resources dropdown menu.

#### To use the Community Search function:

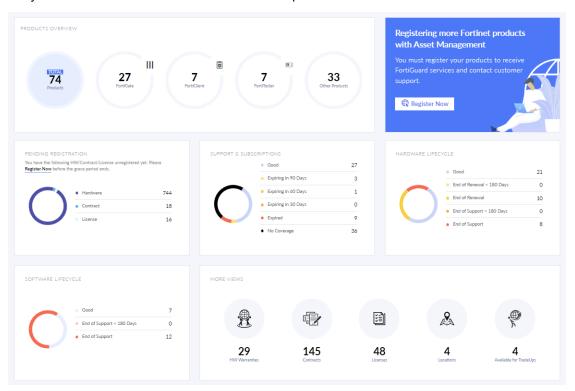
- 1. Go to https://support.fortinet.com.
- 2. Click the search field. Suggested *Popular Topics* are displayed.



- 3. Define the search parameters:
  - **a.** Select a *Popular Topic*. A new page is opened displaying information on the topic.
  - **b.** Enter information in the search field and press Enter. A new page is opened displaying information on the topic.

## **Dashboard**

The *Dashboard* is a visual overview of your products and services. Use the *Dashboard* to view how many products you have registered, pending registartions, expiring subscriptions, and the current status of your hardware and software lifecycle. Click a tile in the *Dashboard* to access the products in the *Product List*.



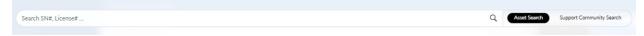


The first time you log in to the AM portal, you will see a welcome page encouraging you to register your products.

You can search in FortiCloud for assets linked to your account or for information from the Community Search feature. The search icon is accessible from any page within the Asset Management portal.

#### To search for assets within FortiCloud:

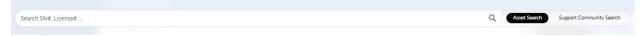
1. Click the search icon. The search field is displayed.



- 2. Select Asset Search.
- 3. Enter asset information into the search field.
- 4. Press Enter. Results related to your search are displayed.

#### To use the Community Search function:

1. Click the search icon. The search field is displayed.



- 2. Select Support Community Search.
- 3. Click the search field. Suggested Popular Topics are displayed.



- 4. Define the search parameters:
  - a. Select a *Popular Topic*. A new page is opened displaying information on the topic.
  - **b.** Enter information in the search field and press Enter. A new page is opened displaying information on the topic.

#### Dashboard tiles

Tile	Description
Products Overview	The <i>Products Overview</i> tile shows the total number of products registered to your account. Click a target in the tile to view the devices in the <i>Product List</i> . The <i>Other Products</i> target is displayed when there are more products than space available in the tile.
Pending Registration	The <i>Pending Registration</i> tile shows the unregistered hardware, contracts, or licenses. Click a bullet in the list to view the asset in the associated <i>Pending Registration</i> page.

Tile	Description
Support Subscriptions	The Support Subscriptions tile shows the current status of your support contracts. Click a bullet in the list to view the expiring products in the About to Expire view of the portal.
Hardware Lifecycle	The <i>Hardware Lifecycle</i> tile shows the current lifecycle status of registered products. Click a bullet in the list to view the devices in the <i>Hardware Lifecycle</i> view of the <i>Product List</i> .
Software Lifecycle	The Software Lifecycle tile shows the current lifecycle status of the major product software versions for your devices. Click a bullet in the list to view the software support end dates in the Software Lifecycle view of the Product List.
More Views	The More Views tile shows the number of devices by HW Warranty, Contracts, Licenses, and Locations. Click a tile to view the products in the Products List.

# Navigation menu

View	Description	
Products	<ul> <li>Use the <i>Products</i> view to register, manage, and organize your products.</li> <li>Product List displays the products registered to your account. See Product list on page 22.</li> <li>Click a product in the list to download a license file, renew a contract, or create a support ticket. See Product details on page 25.</li> <li>More Views organizes the product list by product details, such as the license, warranty, and lifecycle information. See More views on page 43.</li> </ul>	
Pending Registration	Pending Registration displays products that are not registered to your account by Hardware, Contract, and License information. See Pending registration on page 58.  This view is available upon request.	
Marketplace	Marketplace provides access to Fortinet Inc. products and services that will allow you to increase your organization's security, productivity, and profitability. Use FortiPoints to purchase products and packages, such as FortiCare, UTP, and the FortiGate Enterprise Bundle. See Marketplace on page 71.	
Account Services	Account Services displays the services and subscriptions for your account. See Account Services on page 69.	
FortiMeter	FortiMeter displays the volume and consumption of traffic that you use for FortiOS-VMs. See FortiMeter on page 112.	
ELA profile	The <i>ELA Profile</i> view displays information about your Enterprise Level Agreement. See ELA profile on page 114.	

View	Description
	This view is available upon request.

# **Getting started**

The following demonstrates the general process of getting started with the Asset Management portal and FortiCloud Services:

- 1. Create a FortiCloud account. See the FortiCloud Account guide.
- 2. Log into your account. See Logging into an account on page 13.
- 3. Create IAM users and external IdP roles as needed. See User permissions on page 15 and the Identity & Access Management guide.
- 4. Register products, contracts, and licenses to your account. See Registering assets on page 31.

# Logging into an account

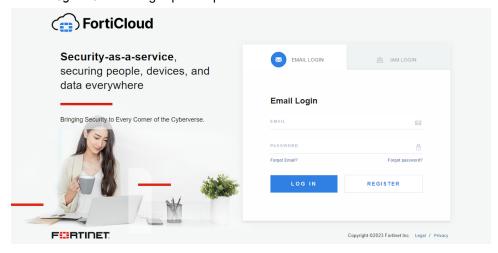
Users can access linked user accounts when logging in using email credentials. Account permissions will vary depending on the account chosen.



Users can log in to FortiCloud using email, IAM, or external IdP credentials in a comprehensive portal. For information on logging into an IAM user account or external IdP role, see the Identity & Access Management (IAM) Administration Guide.

#### To access the user account:

- 1. Go to https://support.fortinet.com.
- 2. Select Login Now. The log in portal opens.



- 3. Select Email Login.
- **4.** Enter your FortiCloud email and password in the *Email* and *Password* fields.
- 5. Click Log In. The Dashboard is displayed.



If multiple accounts are linked to the email credentials, the *Select an Account to Proceed* page is displayed. Hover over the account you want and click *Select* to navigate to the dashboard.

## No access

If the user does not have access to the portal, the following page will direct the user to select a service from the *Services* or *Support* menu.



# User permissions

The Master user is the account administrator that creates the account and has access to all the items in the navigation menu including *Register Products* and *My Assets*. The account administrator can create users, assign permissions based on the user's role, assign user permissions, and assign devices to a user. In Partner accounts with asset groups enabled, a master user can create user and product groups, and assign them to users.

The Master user can create various types of users:

- IAM users on page 15
- External IdP user roles on page 16
- API users on page 16
- Legacy sub-user on page 16

There are three types of user permissions for IAM, External IdP, and API users:

Permissions	Admin	Read/Write	Read Only
View Product List, My Assets, and Asset views (based on Asset permissions)	X	X	Х
Register new products, contracts or licenses	X	X	
Manage asset folders, move, and decommission units	X	X	
View account service entitlements and contracts	Х	Х	
View and renew eligible units for online renewals	X		



Permissions can be assigned to a user using permission profiles. Permissions can be granted on a role-based or resource-based basis. See Permission profiles in the *Identity & Access Administration Guide*.

The Asset Management portal uses resource-based permissions. See Portals with resource-based permissions in the *Identity & Access Administration Guide*.

# IAM users

IAM users are created in the IAM portal and their permissions are assigned by the account administrator. An IAM user will have their own asset and portal permissions until they are assigned to a group. Permissions assigned to a user or user group depend on the permissions profile assigned. See IAM users in the *Identity & Access Administration Guide*.

Account administrators can view an IAM user's permissions in the *Users* and *User Groups* pages of the IAM portal. For information, see Managing IAM users and Managing IAM user groups in the *Identity & Access Administration Guide*.

# **External IdP user roles**

External IdP roles allow external users to log in to a cloud portal using their company's user credentials with a third-party ID provider. External IdP users are authenticated by their company's ID provider. After the user is authenticated, they can access the cloud application based on their role. External IdP roles have the same permissions as IAM users. See External IdP roles in the *Identity & Access Administration Guide*.

# **API users**

API users can access FortiCloud services through the API. API users have the same permissions as IAM users. See API users in the *Identity & Access Administration Guide*.

# Legacy sub-user

The sub user is a legacy model. It is recommended that sub users be migrated into the IAM user model. See Migrating sub users.

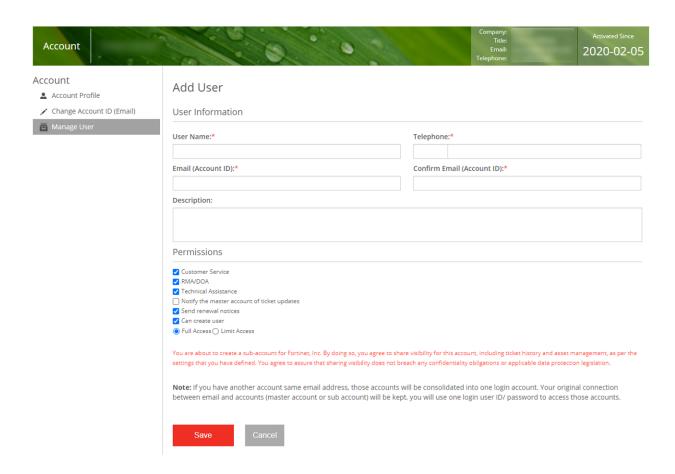
Sub users can have full or limited access:

User type	Description
Sub user (Full Access)	Has access to all the items in the navigation menu including <i>Register Products</i> and <i>My Assets</i> . Sub users with read-only permissions cannot change a folder's structure or move assets. Depending on the permissions set by the master user, a sub user with full access can create new users and send renewal notices.
Sub user (Limited Access)	Has access to <i>Product List</i> and <i>Decommissioned Units</i> in the navigation menu. Sub users with limited permissions only have access to the products assigned to them by the master user.

# Viewing sub user permissions

#### To view a sub user's permissions:

- 1. Go to FortiCloud.
- 2. Log in to your FortiCloud account as a master user.
- 3. In the profile dropdown menu, select My Account.
- 4. Click Manage User. The Current Users list is displayed.
- 5. Click a user in the list.
- 6. (Optional) Click Edit to update the user's permissions.



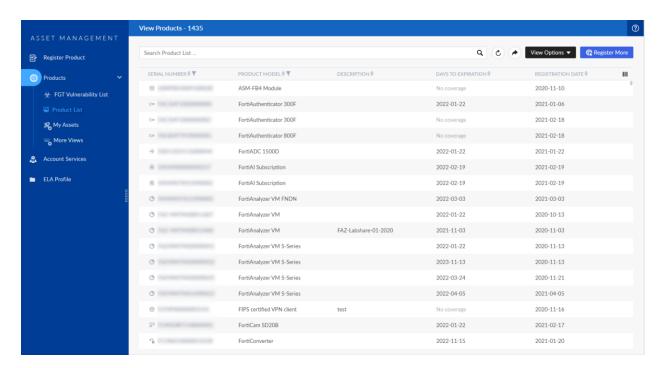
# **Account views**

The views available in the navigation menu are dependent upon your user account permissions. There are various types of user accounts:

- FortiCloud user accounts. See FortiCloud account views on page 17.
- IAM user accounts. See IAM account views on page 18.
- User and asset groups (Partners). See User and asset groups (Partners) on page 19.

## FortiCloud account views

Master users and sub users with full access can see the Register Product and My Assets tabs.



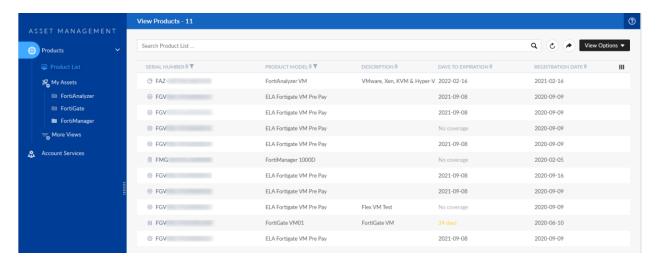
Sub users with limited access will only see Product List, and More Views.



## IAM account views

IAM users will only see the asset folders assigned to their account. The account administrator can grant users permission to view all the folders in *My Assets*, or assign folders to their account using permission profiles and permission scope. For information about IAM asset permissions, see the *Identity & Access Management Administration Guide* in the Fortinet Doc Library.

When the IAM user's permission profile is set to Admin level permissions, the user can see all the sub-folders in the *My Assets* view.



When the IAM user's permission profile is restricted, the user will only see the folders assigned to their account.



# **User and asset groups (Partners)**



The user and asset group dropdowns are available in linked accounts with asset groups enabled.

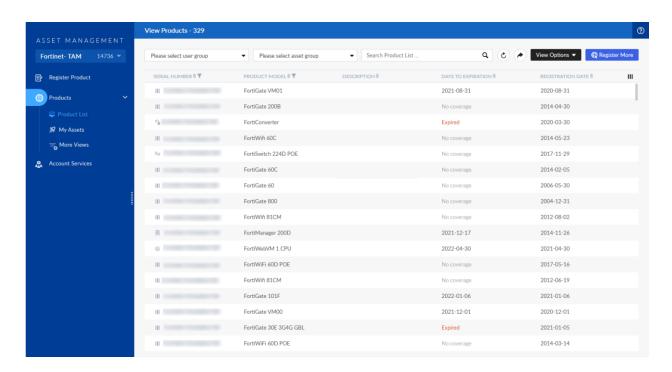
The product list displays all the products in your account until you choose a user and product group.

Click *Please select user group* and select a group from the list. Products are assigned to user groups at the time of registration. Sub users are assigned to user groups by the master user.

Click Please select asset group, and select an asset group to view the products in the group.



User and asset groups have a many to many relationship. This means that one asset group can be associated with multiple user groups, and vice versa. For information, see Asset groups.



# **Switching accounts**

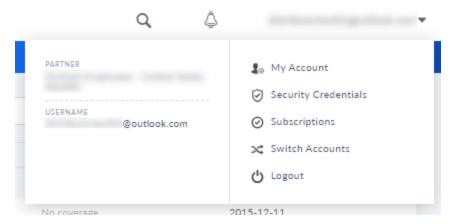
You can switch between available accounts from the profile menu. If you are logged in using your email credentials, you can switch to linked user accounts. Not all options will be available depending on your account permissions and linked accounts. See Logging into an account on page 13 for more information.



The accounts available for switching will depend on your method of logging into FortiCloud. For information on switching between external IdP roles and OU accounts, see the Identity & Access Management (IAM) Administration Guide.

#### To switch to a new user account:

- 1. Click the profile menu in the top right.
- 2. Select Switch Accounts.



3. Select a user account to switch to. A warning message may display.



4. Click Continue. You will be redirected to the Dashboard of the selected account is displayed.



If there is only one user account linked to the email credentials, select *Continue with Current Account*.

# **Products**

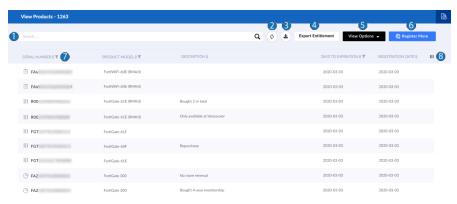
The *Products* view displays products registered to your account. Use this view to register more products, search for assets, and view product details.

*Products* contains three sub-views to quickly locate and manage your products:

- Product list on page 22
- My Assets on page 37
- More views on page 43

# **Product list**

The product list displays the devices registered to your account. Use the column filters to refine the list or create custom views to display only the columns you want to see.

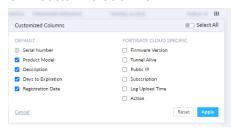


Option		Description
1	Search Product List	You can search for products by serial number, contract, or license number. Partial results are displayed as you type.
2	Refresh	Click to refresh the product list.
3	Export	Click to export the product list (full or filtered) from any view to an Excel or CSV file.
4	Export Entitlement	Click to generate and export an entitlement file. This feature is only available for approved accounts and can only be accessed by the master user or a user with the necessary admin privileges.
5	View Options	Displays the products in the list by category, entitlement, or both.  • Click View Options > Group by Category > Apply.

Option		Description	
		The list is sorted in rows by Click View Options > Show The Support Type, Support and Expiration Date column The view is calculated base service agreements for the product may link to multiple the entitlement.	w Entitlement > Apply.  In Level, Activation Date, Ins are added to the view.  It does not be registration and It does not be current period. One
6	Register More	Click to register products to yo Registering assets on page 31	
7	Filter	<ul> <li>To filter the Serial Number button in the column head serial number, and click A<sub>I</sub></li> <li>To filter the Product Model button in the column head from the dropdown, and clip</li> </ul>	er. Enter the values for the oply.  I columns, click the filter er. Select the model(s)
8 Select columns to display  Click the Select columns to display columns.  You can choose to view columns  FortiGate Cloud Specific columns		nns from the <i>Default</i> view or	
			FortiGate Cloud Specific
		<ul> <li>Serial Number</li> <li>Product Model</li> <li>Description</li> <li>Days to Expiration</li> <li>Registration Date</li> </ul>	<ul> <li>Firmware Version</li> <li>Tunnel Alive</li> <li>Public IP</li> <li>FortiGate Cloud Subscription</li> <li>Log Upload Time</li> <li>Action</li> </ul>
		either Admin or rea permissions to view Specific options. F	•

#### To activate the Cloud Managed toggle:

1. Click Customize Columns.



2. In the FortiGate Cloud Specific column, select the columns to display and click Apply. The selected columns are displayed.



Some columns may take longer to appear than others. A loading notification will appear in the column if it does not appear immediately.

3. Enable Cloud Managed.



## **Expired devices**

Fortinet products include service contracts and guarantees that are known as entitlements. Some products have multiple entitlements with different expiration dates. Entitlement expiration dates are displayed in the *Product List* and *About to Expire* view in the *Days to Expiration* column.

The following table describes the values in the *Days to Expiration* column.

Days to Expiration	Description
<yyyyy-dd-yy></yyyyy-dd-yy>	The end date of the entitlement.
No coverage	The product does not have any entitlements.
Expired	All the entitlements have expired.
Some expired	Some, but not all, of the entitlements have expired.

# Searching for assets in folders

By default, the search bar only searches for products in the folder you are viewing. To include sub-folders in your search, click the button next to the search bar.



The search bar displays the current search parameters. For example, Search My Assets Only.

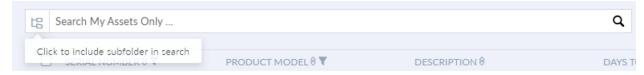
#### To search for assets in a folder:

- 1. In My Assets, select a folder.
- 2. In the search bar, type your text. The product list displays partial results as you type.



#### To search for assets in sub-folders:

- 1. In My Assets, select a folder.
- 2. Click the Click to include sub-folder in search button.



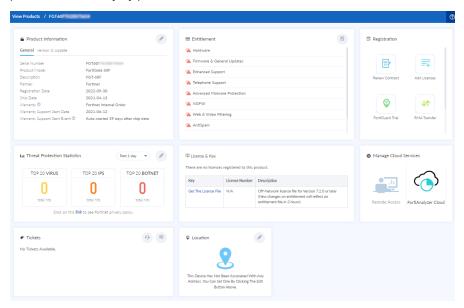
3. In the search bar, type your text. The product list displays partial results as you type.



When exporting a product list in *My Assets*, exported data includes the content of the currently selected folder.

# **Product details**

Click a product serial number to view its details and see additional management options. The widgets displayed in the product details vary by product.



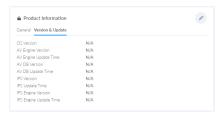
Tile	Description
Product Information	View and edit basic information about the product. See Viewing product information on page 26.
Entitlements	See the status of support, firmware update, and other entitlements. See Viewing entitlements on page 27.
Location	Displays the location of the product if one has been set. See Viewing the product location on page 29.
Threat Protection Statistics	View threat protection statistics for your product. See Viewing threat protection statistics on page 30.
	The <i>Threat Protection Statistics</i> widget is available for FortiGate devices with a valid FortiGuard entitlement.
License & Key	View the product licenses and keys associated with this product. See Viewing licenses and keys on page 28.
Registration	Access quick links for managing product related registration. See Registering contracts and licenses on page 27
Manage Cloud Services	Access quick links to manage related cloud services, such as FortiGate and FortiAnalyzer Cloud. See Managing cloud services on page 28.
Tickets	Displays support tickets (open or resolved) that were submitted for this product. See Creating support tickets on page 29

# **Viewing product information**

The *Product Information* widget displays general information about the product such as the model, serial number, and license number.

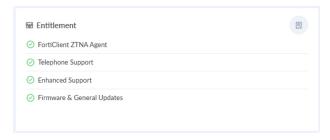


The information in the widget varies by product. For example, FortiAnalyzer VM displays a link to upgrade a license or download a license file. FortiGate models display a *Version & Update* tab.

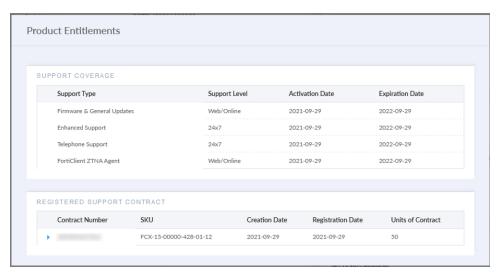


# **Viewing entitlements**

The *Entitlement* widget displays the status of support, firmware update, and other entitlements. A green icon  $_{\circ}$  indicates the entitlement is active, a yellow icon  $_{\circ}$  indicates the entitlement is about to expire, and a red icon  $_{\circ}$  indicates the entitlement has expired.



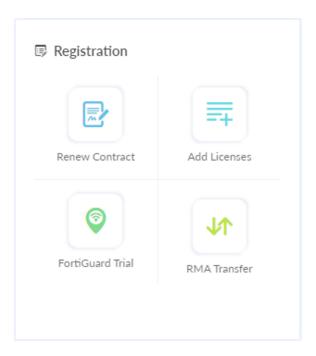
Click the Show Contracts button to view entitlement details such as support level, contract number, and expiration date.



# Registering contracts and licenses

The Registration widgets allows you to renew contracts and add licenses.

Click *Renew Contract*, *Add Licenses*, or *RMA Transfer* to open the registration wizard. Click *FortiGuard Trial* to start a FortiGuard trial license.



# Viewing licenses and keys

The License & Keys widget displays the available licenses and keys.

When a license is available, the License Type, License Number, and Registration Date are displayed.

When a key is available, the *Key*, *License Number*, and *Description* are displayed. Click the *Get the License File* link download a license file.



# Managing cloud services

The *Managed Cloud Services* widget, links you directly to a cloud service from Asset Management. Click a tile in the widget to access a cloud service.



*Remote Access* is only available when FortiGate Cloud, FortiManager Cloud, or FortiVoice is provisioned. Click the tile to open the management console in a new tab.

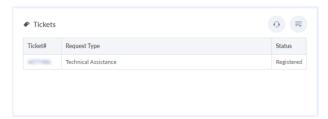
# **Creating support tickets**

The *Tickets* widget allows you to contact support or create a support ticket.

For immediate assistance, click Customer Service Web Chat on, to request to chat with a support agent.

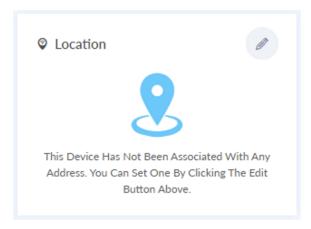
To open a support ticket, click Create a Support Ticket 👨 .

After a ticket is created, the widget displays the Ticket #, Request Type, and Status of support tickets that were opened.

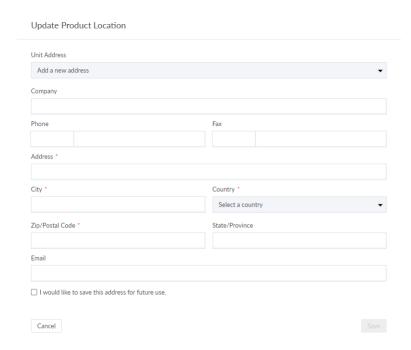


# Viewing the product location

The Location widget displays the current location of the product if one was added.



Click the edit icon to add or update the location. You can also save the address for future use.



# Viewing threat protection statistics

The *Threat Protection Statistics* widget is available on the product page for FortiGate devices with a valid FortiGuard entitlement.

Threat protection reporting includes statistics from FortiGuard on the *Top 20 VIRUS*, *Top 20 IPS*, and *Top 20 BOTNET* threats collected for your device for the selected time range.



Click a tile in the widget to see additional information from FortiGuard, including the *Rank*, *Name*, *Counts*, *Percentage*, and *Distribution* of the malware.

Field	Description
Rank	The malware's rank. Malware with the highest reported counts will appear first in the ranking list.
Name	The name of the malware.
Counts	The number of occurrences reported.
Percentage	The number of counts for this malware as a percentage when compared to the total ranked malware of this type.

Field	Description
Distribution	A visualization of the malware's distribution compared to other ranked malware of this type.

# Sending malware statistics to FortiGuard

FortiGate devices periodically send encrypted antivirus, IPS, botnet IP list, and application control statistics to FortiGuard. The malware statistics are used to improve various aspects of FortiGate malware protection. For example, antivirus data allows FortiGuard to determine what viruses are currently active.

Included with this data is the IP address and serial number of the FortiGate, and the country that it is in. This information is never shared with external parties. For more information, see the Fortinet Privacy Policy.

# Registering assets

Assets can be registered with the Register More button in the Products views.

Assets available for registration include hardware products, contracts, licenses, and account services. The steps in the registration wizard will vary depending on the asset. For more information on account services, see Account Services on page 69.



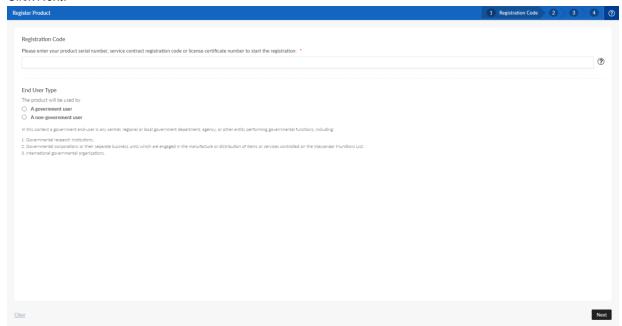
Registering products is only available to master users and sub users with full access permissions.

For information about de-registering units, see Viewing decommissioned units on page 49.

#### To register assets:

- 1. Sign in to your FortiCloud account.
- 2. Go to Products and click the Register More button.
- 3. Provide your registration code:
  - **a.** Enter your asset serial number, service contract registration code, or license certificate number in the *Registration Code* field.
  - **b.** Choose your end user type as either a government or non-government user.

#### c. Click Next.





If a contract number is registered, you will be prompted to enter or select the serial number being registered. The contract auto-start date will be displayed when selecting the product serial number.

#### 4. Specify your registration information:

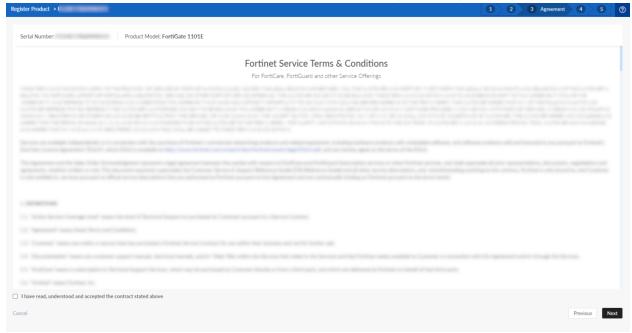
- a. If you have purchased a support contract for your asset, enter the support contract number.
- **b.** Enter a description to help identify the asset.
- **c.** Specify the Fortinet Partner or Reseller that helped you with your asset. If this is a Partner account, specify the Fortinet Partner or Reseller.
- d. Click the My Assets dropdown to assign the asset to a folder.
- **e.** If this is a Partner account, specify the asset group or asset folder. The *Asset Groups* section appears in accounts with asset groups enabled. Master users and sub users with full access will see *My Assets* section in regular accounts.
- f. Click Next.



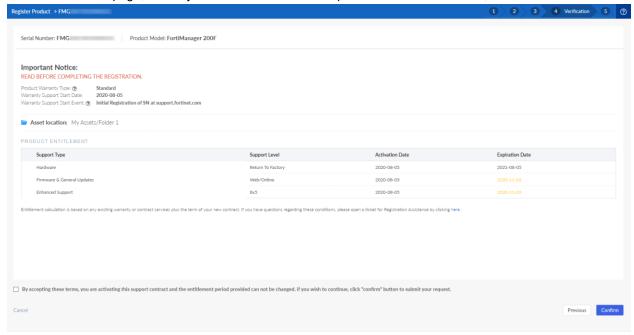


Some assets require a FortiCloud Key when being registered. See the FortiGate Cloud Administration Guide for more information.

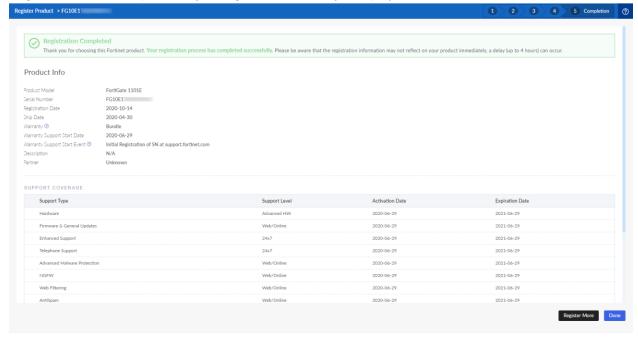
5. Review and accept the terms and conditions of the Fortinet Product Registration Agreement, and click Next.



6. On the Verification page, review your asset details and accept the terms of the contract, then click Confirm.



7. Registration is now complete and your registration summary is displayed.





If you have registered a Managed FortiGate Service entitlement, a different *Registration Completed* banner will display. The new banner will only appear if you do not have a Managed FortiGate Service entitlement already or you have one that has expired.

The specialized Managed FortiGate Service banner will indicate that you have completed the first step of the onboarding process; registering your entitlement. The second step you must complete is submitting an onboarding request in the Managed FortiGate Service portal.

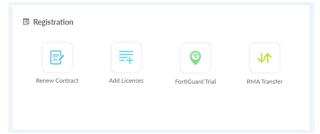
8. Click Done.

# **Product trial subscriptions**

You can activate a 30-day trial subscription from the product information page.

#### To activate a product trial subscriptions:

- 1. In the *Product List*, click a the product serial number.
- 2. In the Registration tile, click < Product\_Name Trial icon.

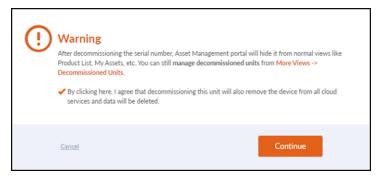


3. Select the service you want to try, and click *Try It*. The FortiGuard Trial confirmation is displayed.



# **Decommissioning assets**

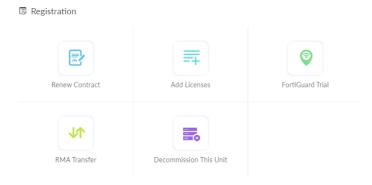
You can decommission an asset by clicking *Add New* from the toolbar in the *Decommissioned Units* view or by selecting *Decommission This Unit* from the *Registration* section of the product information page. A warning message will display that you must acknowledge before the unit is successfully decommissioned and removed from all cloud services.



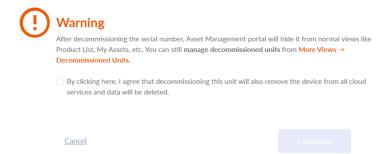
When decommissioning a product, it will be removed from all cloud services and data will be deleted. The asset will no longer be available in the *Products > Product List* page and cannot have a support ticket created for it. Although, ticket and contract information will still be available in the portal. The asset must be removed from the decommissioned units list in order to see contract history. See Viewing decommissioned units on page 49.

#### To decommission an asset:

- 1. Go to *Products > Product List*.
- 2. Select the unit you want to decommission.
- 3. Select Decommission This Unit in the Registration section.



A warning message is displayed.



- 4. Select the checkbox to acknowledge the results of decommissioning a unit.
- 5. Click Continue. A confirmation message is displayed.



## **Decommission Complete!**

FortiGate has been decommissioned from your account.



You can view decommission units and return decommissioned units to the *Product List* from the *More Views > Decommissioned Units* page. See Viewing decommissioned units on page

# My Assets

Use the folders and sub-folders in My Assets to create custom views and navigation within the Products menu.



Sub users with limited access will not see *My Assets* in the navigation menu. See User permissions on page 15.

## Importing assets and folders

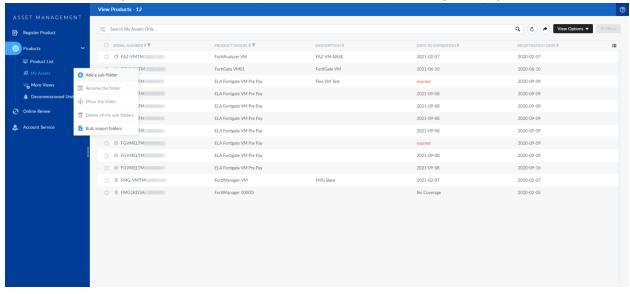
When the My Assets view does not contain any folders, you can use a CSV template to create folders and import assets.



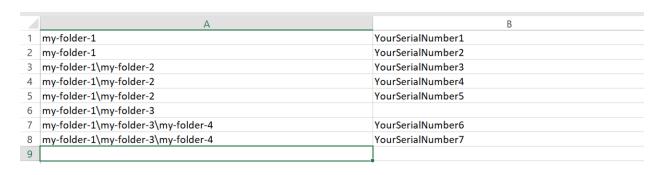
All assets being imported to new folders must be already registered on the FortiCloud account. Assets with new serial numbers cannot be registered and imported with this feature. See Registering assets on page 31 for more information on registering new products.

### To import folders and assets:

- 1. Go to Products > My Assets.
- 2. Hover over the settings icon, and click Bulk import folders. The Bulk Import dialog is displayed.



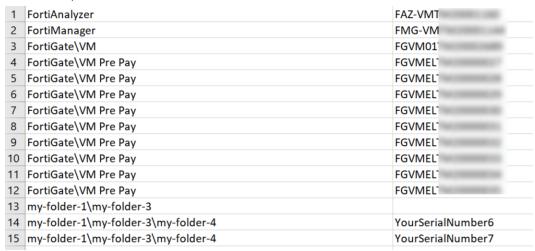
- 3. Click Download Template. The CSV file template opens.
- **4.** Use the template to create your folder structure. The value for *YourSerialNumber* must contain a valid serial number.



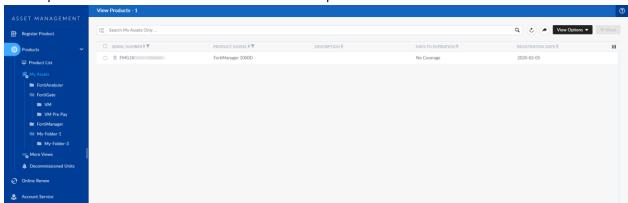


A parent folder can have up to two sub-folders.

In the example below, the import file will create four parent folders (*FortiAnalyzer*, *FortiManager*, *FortiGate*, and *my-folder-1*), and three sub-folders (*VM*, *VM Pre Pay*, and *my-folder-3*). However, *my-folder-1\my-folder-3\my-folder-4*, will fail to import because the serial numbers are not valid.



- 5. Click Choose file, and navigate to the file on your computer.
- **6.** Click *Import*. The folders are created and the assets are imported.

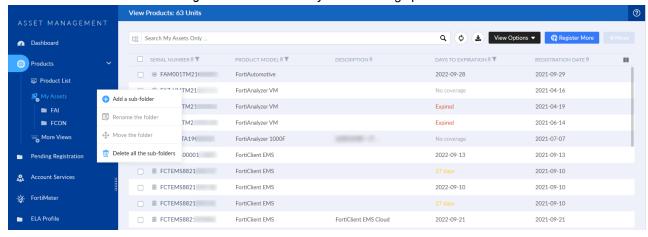


# **Creating custom views**

You can create a new folder from the Settings menu in the My Assets root folder (or one of its sub-folders).

#### To add a folder with the GUI:

- 1. Hover over *My Assets*, and click the settings icon.
- 2. Click Add a sub-folder. The Adding a sub-folder under My Assets dialog opens.





A parent folder can have up to two sub-folders.

- 3. In the Folder name field, enter a name for the folder, and click ADD.
- 4. To create a nested folder, hover over a sub-folder, click Settings and select Add a sub-folder.
- 5. (Optional) To rename a folder, hover over the folder name, click Settings and select Rename the folder.

## Moving assets and folders

You can drag and drop items into a folder, or use the GUI to select a new location.

You can also move products between Organizational Units. See Transferring products on page 137 for more information.



Sub users with full access and read-only permissions cannot change a folder's structure or move assets.

#### To move a folder:

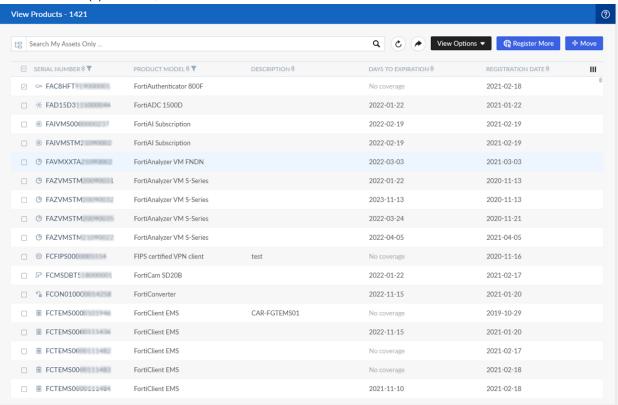
- 1. Hover over a folder, and click the Settings menu.
- 2. Click Move the folder. The Moving <folder\_name > dialog is displayed.

3. Select the a new folder location, and click Move.

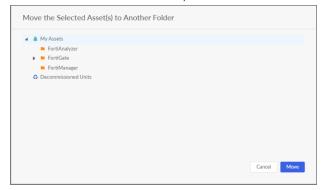


### To move an asset:

- 1. Go to My Assets.
- 2. Select the asset(s) in the list, and click Move.



3. Select the a new folder location, or select Decommissioned Units. See Viewing decommissioned units on page 49.



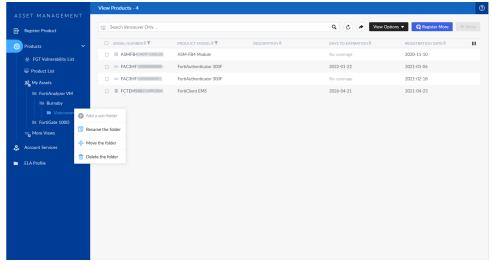
4. Click Move.

## **Deleting folders**

Individual folders can be deleted within the settings menu. Sub-folders included within the deleted folder will also be removed. Once deleted, all assets will be automatically moved back into the *My Assets* root folder.

#### To delete a folder:

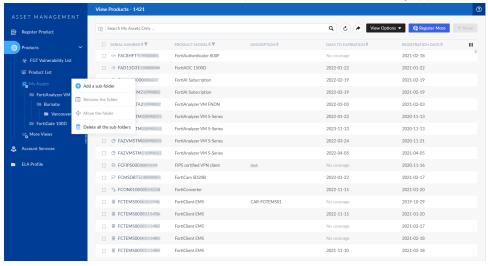
- 1. Hover over the folder name and click the Settings menu.
- 2. Click Delete the folder. The Deleting a Folder Confirmation dialog appears.



3. Click Delete.

### To delete all folders in My Assets:

- 1. Hover over My Assets, and click the Settings menu.
- 2. Click Delete all the sub-folders. The Deleting a Folder Confirmation dialog appears.



3. Click Delete.

## Viewing expired devices by product support

You can view expiring support packages by switching to Entitlement view.

### To filter by support type:

- 1. In the toolbar, click View Options > Show Entitlement, and click Apply.
- 2. In the Support Type column, click the filter icon. The Filter by Product Support list opens.
- 3. Select the support type(s) from the list, and click Apply.

## More views

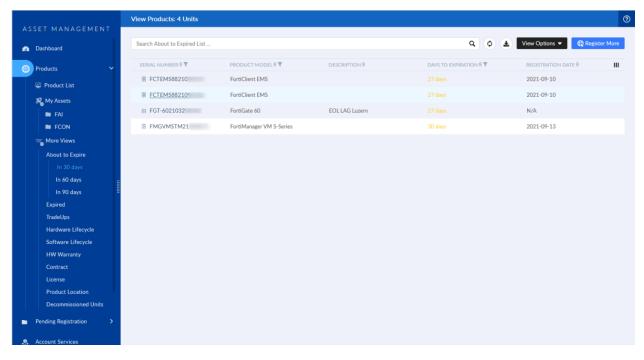
View assets with expired licenses, assets about to expire, and decommissioned units. You can also access specialized filtered views to list and search assets based on hardware, license, contract, and location.



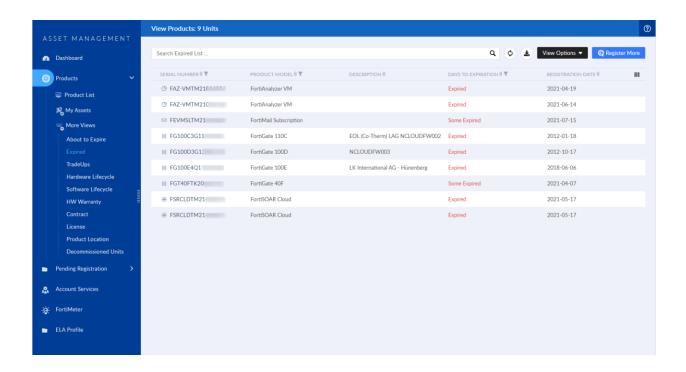
The columns available on *Products > More Views* depends on the current user account permissions and account view. See Account views on page 17.

# Viewing expiring products

The *About to Expire* view includes all products that are expiring soon. Choose between *In 30 days*, *In 60 days*, and *In 90 days*. This view displays the number of days until expiration for each asset in the list.

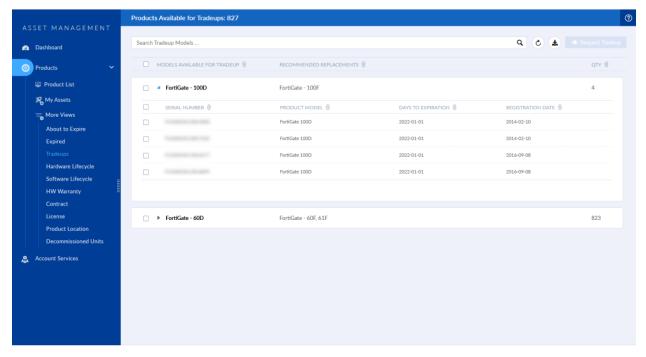


The Expired view displays products that are currently expired.



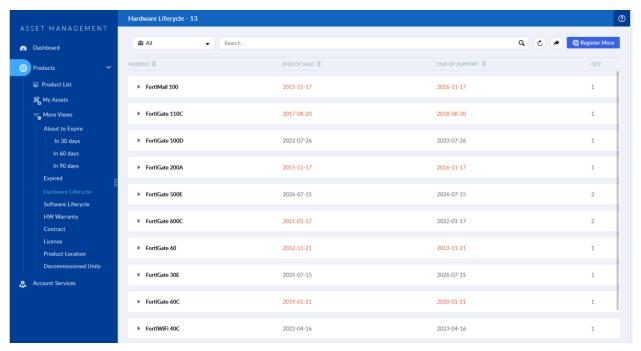
# Viewing models available for TradeUp

The *TradeUp* view shows the devices that are available to TradeUp. Each model displayed in the view represents eligibility. This view is only displayed if assets qualify. See TradeUp on page 50.



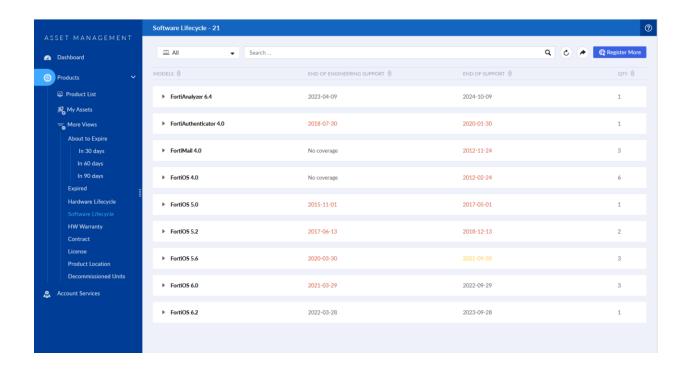
# Viewing products hardware lifecycle

The Hardware Lifecycle view shows the current lifecycle status of your products. You can use the dropdown in the banner to sort the devices by Good, End of Sale < 180 Days, End of Sale, End of Support <180 Days, and End of Support.



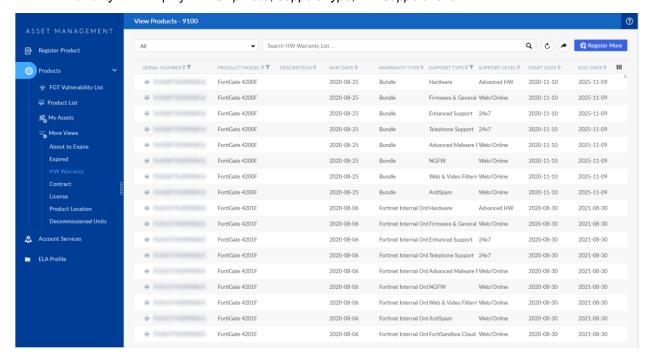
# Viewing products by software lifecycle

The *Software Lifecycle* view shows the current lifecycle status of the major product software versions for your devices. Click the dropdown at the top of the page to sort the list by *Good*, *End of Support* < 180 Days, and *End of Support*.



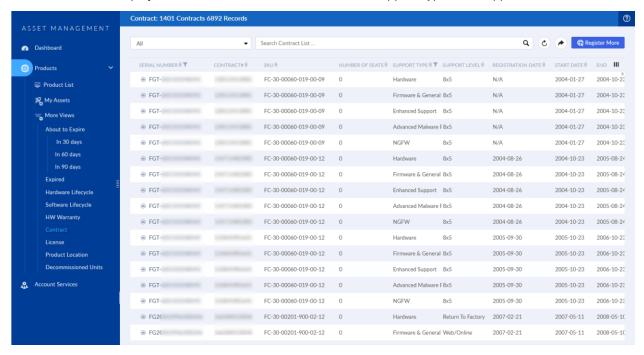
# Viewing products by hardware warranty

The HW Warranty view displays the Ship Date, Support Type, and Support Level columns.



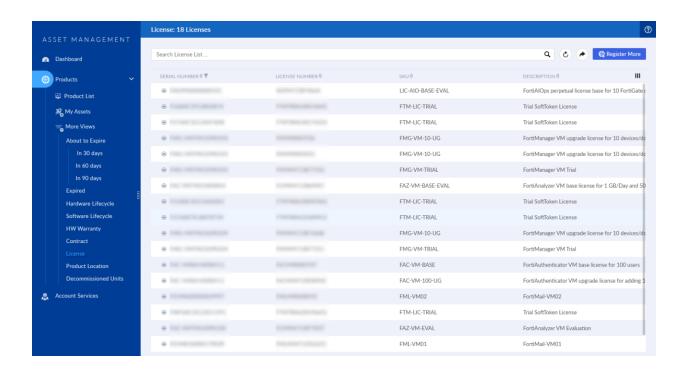
# Viewing products by contract

The Contract view displays the Contract, SKU, Number Of Seats, Support Type, and Support Level columns.



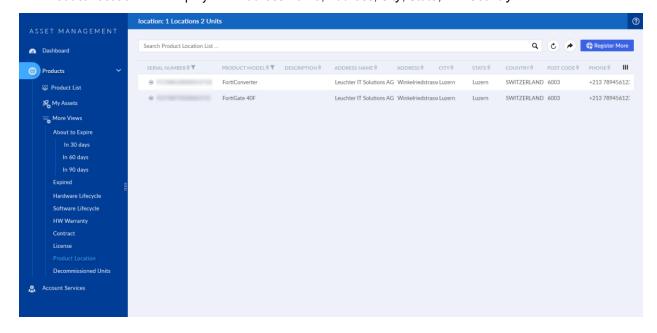
# Viewing products by license

The License view displays the License, SKU, and Description columns.



# Viewing products by location

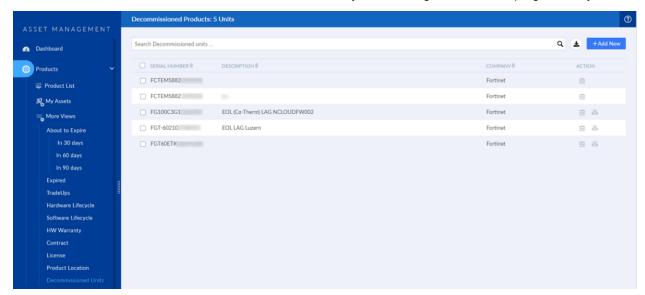
The Product Location view displays the Address Name, Address, City, State, and Country columns.



## Viewing decommissioned units

View decommissioned products and account services in the *Decommissioned Units* view. Once a product or service is decommissioned, it is no longer accessible from the *Product List* and *Account Service* tab. See Decommissioning assets on page 35.

When a hardware device is moved to Decommissioned Units you can deregister the unit to purge it from your account.



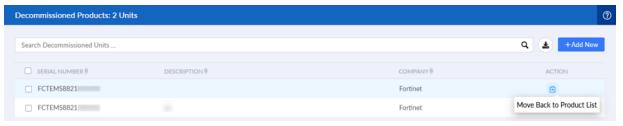
Assets can be excluded from the *Decommissioned Units* view by clicking the *Delete* icon. Multiple assets can be added or deleted at one time. Click the *Export* icon next to the search bar to export the list as a CSV or EXCEL file.



You can use the Decommissioned Units view to return a decommissioned unit back to the Product List.

#### To restore a unit to the product list:

- 1. Go to Products > More Views > Decommissioned Units.
- **2.** Do one of the following:
  - In the Action column, click the Move Back to Product List button.



• Select the units you want to restore and click the Move Back to Product List button.



The Restore Confirmation dialog opens.

3. Click Yes, I want to continue. A confirmation message is displayed.

## **Deregistering units**

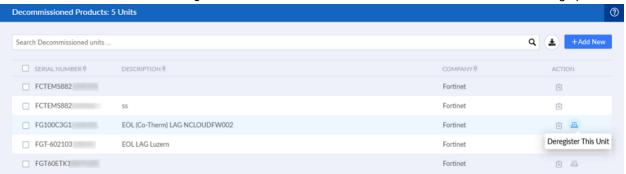
When the system detects a hardware device that is eligible to be deregistered, the *Decommisioned Units* view will display an icon in the *Action* column.

#### Requirements:

- The following user roles can deregister a unit: master user, IAM user with Admin permissions, external IdP role with Admin permissions.
- The device must be registered for at least three years.
- When a device is re-registered, you must wait a year to deregister it again.

### To deregister a device:

- 1. Go to Products > More Views > Decommissioned Units.
- 2. In the Action column, click the Deregister This Unit button for the selected device. A confirmation dialog opens.



3. Accept the terms of deregistration, and click Deregister this Unit. A confirmation message appears.



If you deregister the wrong device, you can re-register it again right away.

# **TradeUp**

Fortinet's TradeUp allows you to access the latest Fortinet solutions, bringing improved performance and updated security with advanced feature sets to help secure your organization's entire attack surface.

The TradeUp allows you to TradeUp devices and transfer existing services to the eligible upgraded units. For those devices where services are not transferred, the remainder of the contract on the old device will be valid until its expiration date.

You are not required to return the old unit that was used for TradeUp. Any products that have been TradeUp will not be eligible for RMA services, renewals or other TradeUps. Once a unit has been traded up, you agree not to reuse, resell, lend, rent or lease, the replaced unit and not use it for the provision of any kind of commercial services to third parties.

For all other questions regarding TradeUp please email us at:

North America	Renewals@fortinet.com		
APAC	Renewals_APAC@fortinet.com		
EMEA	Renewals_EMEA@fortinet.com		
LATAM	Renewals_LATAM@fortinet.com		

## **Eligible products**

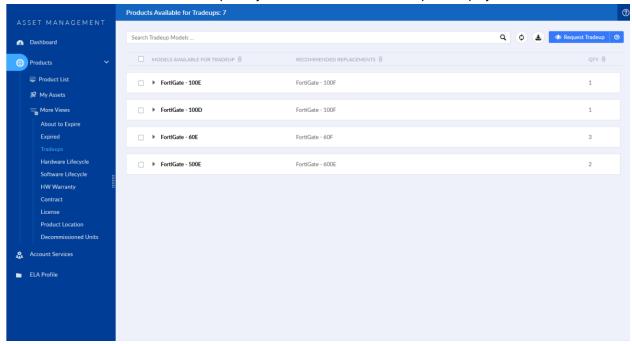
If services are being transferred, the new replacement product must follow the TradeUp recommended replacement path for services transfer. Please contact your Fortinet Account Manager to discuss which of your devices are eligible for TradeUp and what upgrade paths are available for transfer of services.

## Ineligible products

The following products are not eligible for TradeUp: FortiVoice, FortiClient, Coyote Point, FortiToken, FortiRecorder, Virtual Appliances, Fortinet VM Solutions, FortiSMS, FortiCarrier, VDOM, ADOM, Accessories, FortiFone, FortiCamera, Professional Services, FortiSIEM, FortiProxy, FortiCloud, FortiNAC.

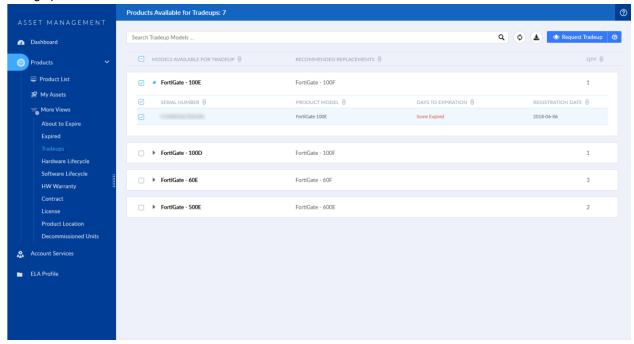
### To request a device TradeUp:

1. Go to *Products > More Views > Tradeups*. Any models available for TradeUp are displayed.



2. To select specific serial number(s) to TradeUp, click the drop down arrow. The serial number list is displayed.

**3.** Select the products you want to TradeUp and click *Request Tradeup*. The *I want to tradeup the following devices* dialog opens.



Click Send My Request. A confirmation message is displayed.



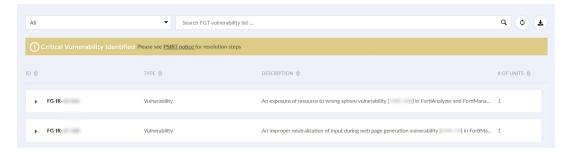


The model of the recommended replacement unit on your TradeUp request is a suggestion and is showing the possible path for Transfer of Services.

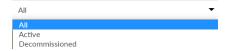
If you do not wish to Transfer Services, please discuss alternative replacement models with your Fortinet Account Manager to better fit your TradeUp needs.

# Vulnerable units

When at least one vulnerable unit is detected on the current user's account, the *Products > FGT Vulnerability List* is displayed in the navigation menu. The vulnerability list includes a list of units with identified critical vulnerabilities and information about the vulnerability from FortiGuard.



Select the dropdown menu to filter All, Active, or Decommissioned units.



# Online renew

Fortinet products can be renewed through Asset Management from the *Online Renew* view. Units that are available for renewal are displayed in the *My Renewable Units List* tab.



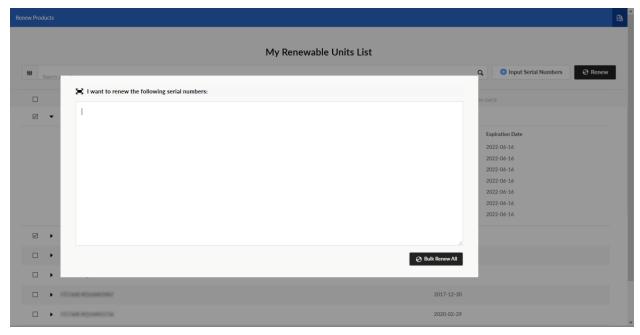
The online renewal feature is only available to North American (US/Canada) customers with accounts that have less than fifty units.

## To renew a product online:

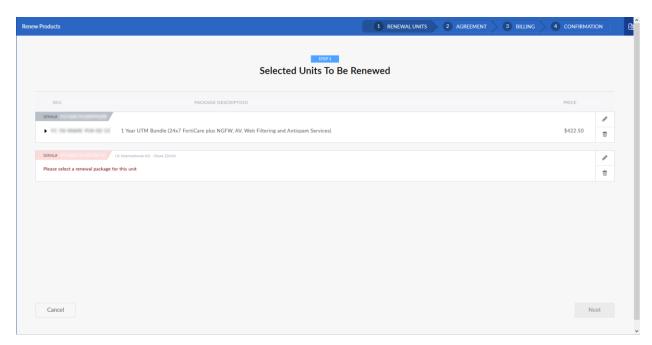
- 1. Go to Online Renew > Renewal.
- 2. Select one or more renewable units from the list, and click *Renew*. You can apply filters or search based on a units serial number to reduce the number of displayed units.



For bulk entry, click *Input Serial Numbers* to manually specify the units that you want to renew by their serial number.

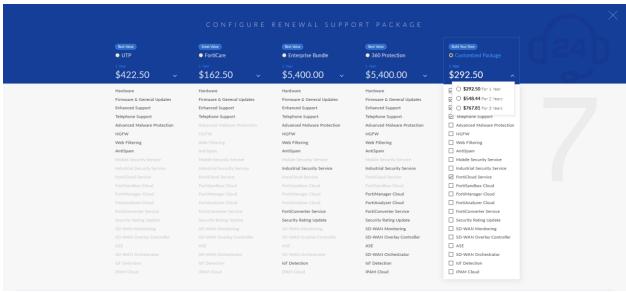


**3.** On the *Selected Units To Be Renewed* page, review your selected units and support package. Click *Next* when finished.

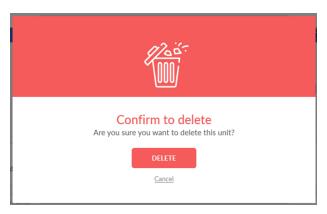


To configure a unit's selected support package, click the edit icon. When configuring a product's renewal support package, you can select one of the pre-configured package options or click *Customized Package* to configure your own. To change the renewal period for the selected package, click the down arrow icon.

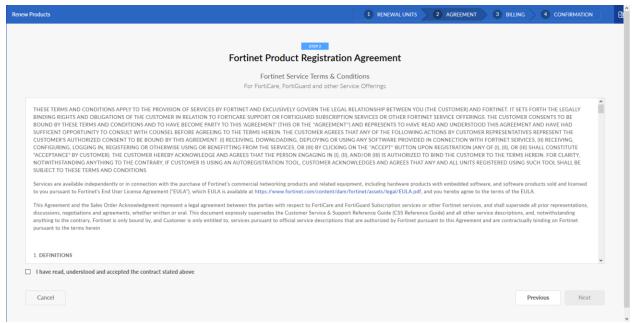
Customized packages include a selectable list of entitlements that can be applied to the product. The price will be displayed when an available combination of options have been selected.



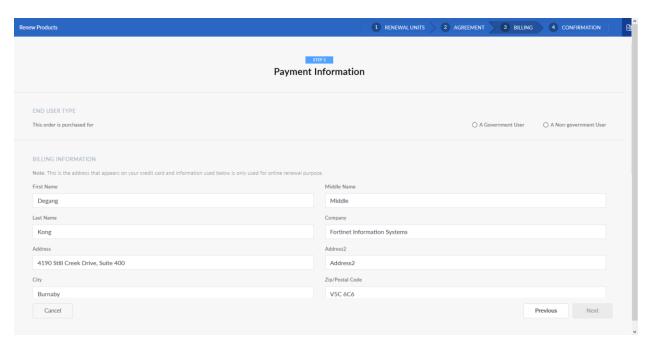
Click the trash icon to remove a product from the list of units to be renewed.



**4.** Review the *Fortinet Product Registration Agreement*, confirm that you have accepted the contract details, and click *Next*.



**5.** On the *Payment Information* screen, enter your billing details including your address and credit card information, and click *Next*.



**6.** Review your order information and click *Confirm* to complete the transaction. You can return to a previous menu at any time by clicking *Previous*, or exit to renewal wizard by clicking *Cancel*.

# **Purchase history**

To view your purchase history, go to Online Renew > Purchase History.

Each entry includes information about the total amount, status, and date of the purchase. Invoices and contract letters can be also be downloaded when available. Click any entry to view additional details including the order ID and a more detailed breakdown of the purchase summary.



# Pending registration

The *Pending Registration* list displays all your unregistered products and devices. You can view the list by *Hardware*, *Contract*, and *License* views.

Each of the views in *Pending Registration* displays order groups containing units to be registered. The *Registered Status* column displays a status bar with the number units to be registered.



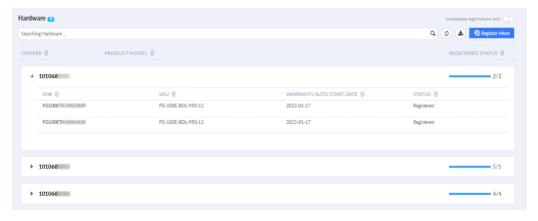
For *Pending Registration* features, your FortiCloud account ID must be linked to an order, such as a quote or purchase order, before PO approval. Contact your local sales representative to have future orders linked to your account.

### To register a unit pending registration:

- 1. Expand an order group.
- 2. In the SN# column, select a serial number.
- 3. Click Register More and complete the steps in the registration wizard. The device is added to the Product List.

## Hardware view

The *Hardware* view displays unregistered devices by *Order#*, *Product Model*, and *Registered Status*. Expand the *Order#* group to view the product's *SN#*, *SKU*, and *Warranty Auto Start Date*.



You can export *Hardware* assets as an Excel or CSV file. Toggle *Incomplete registrations only* to hide completed registrations.

#### To export Hardware assets:

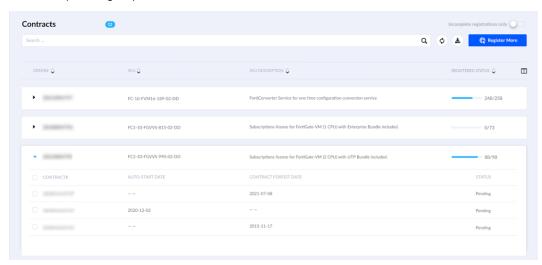
- **1.** Go to Pending Registration > Hardware.
- 2. (Optional) Search for a specific asset or product model in the search field to filter assets.
- 3. Click Export.
- 4. Select the format of the exported file:

- Excel File
- CSV File

The file is exported to your device.

## **Contract view**

The Contract view displays unregistered devices by Order#, SKU, SKU Description, Auto-Start Date, and Registration Status. Expand a group in the view to view the Contract# and Contract Forfeit Date.



You can export Contract assets as an Excel or CSV file.

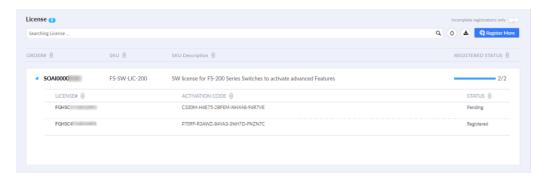
### To export Contract assets:

- 1. Go to Pending Registration > Contract.
- 2. (Optional) Search for a specific asset or SKU in the search field to filter assets.
- 3. Click Export.
- 4. Select the format of the exported file:
  - Excel File
  - CSV File

The file is exported to your device.

## License view

The *License* view displays unregistered devices by *Order#*, *Product Model*, and *Registered Status*. Expand an order group to view the *License#* and *Activation Code*.



You can export License assets as an Excel or CSV file.

### To export License assets:

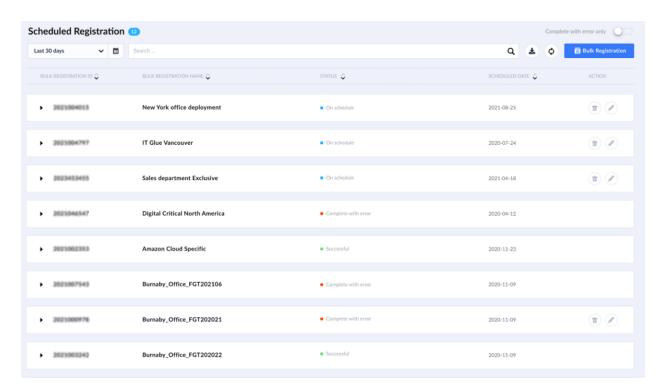
- **1.** Go to Pending Registration > License.
- 2. (Optional) Search for a specific asset or SKU in the search field to filter assets.
- 3. Click Export.
- 4. Select the format of the exported file:
  - Excel File
  - CSV File

The file is exported to your device.

# **Scheduled Registration**

Scheduled Registration view displays unregistered devices by Bulk Registration ID, Bulk Registration Name, Status, Scheduled Date and Action. Expand a bulk registration to view products by SN#, Product Model, Contract#, SKU, and Folder Path.

Use this view to schedule a product registration for a future date or perform a bulk registration.



You can export Scheduled Registration assets as an Excel or CSV file.

### To export Scheduled Registration assets:

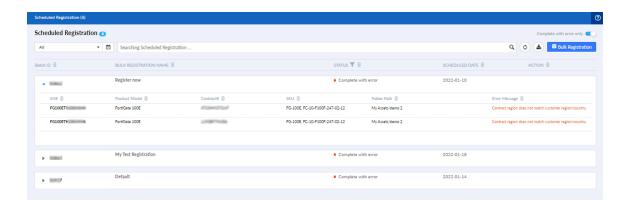
- 1. Go to Pending Registration > Scheduled Registration.
- 2. (Optional) Filter assets. See Filtering registrations on page 67.
- 3. Click Export.
- 4. Select the format of the exported file:
  - Excel File
  - CSV File

The file is exported to your device.

Toggle *Complete with error only* to view completed bulk registrations that include errors.



If there is an error associated with a product, an *Error Message* will provide a suggested action.



## **Bulk Registration**

Use bulk registration to save time registering multiple hardware devices or contracts. Bulk registration can be performed by importing the serial numbers with an Excel template or entering them manually with the GUI. Both methods allow you to assign a serial number to a contract or asset folder.

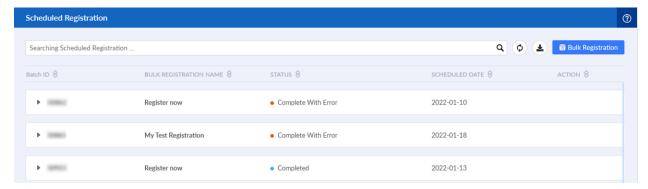
Bulk registration is limited to orders linked to your FortiCare account. Assets not linked to your account cannot be added through bulk registration. See Pending registration on page 58 for more information.



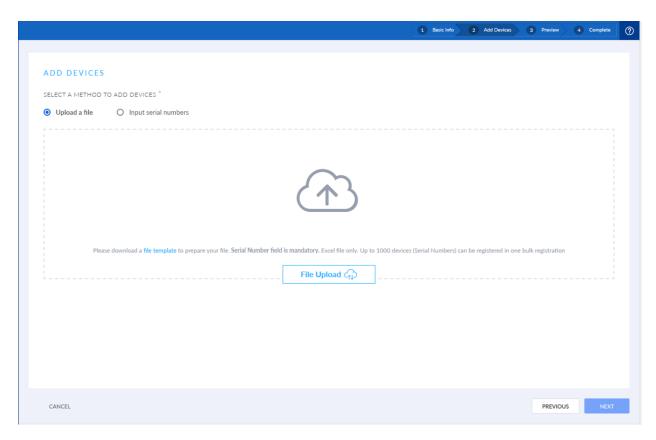
Bulk registration does not support registering licenses at this time.

### To perform a bulk registration:

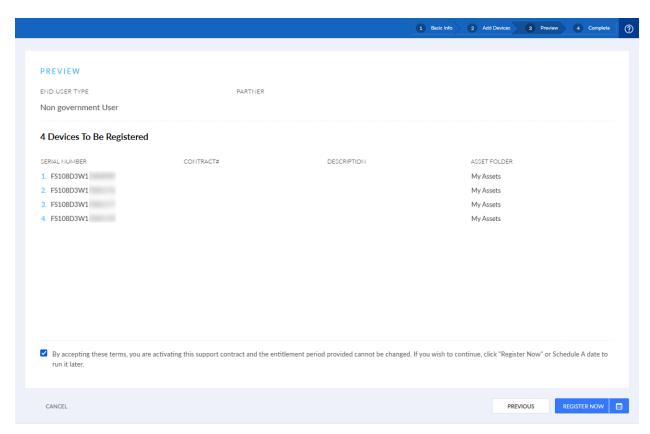
- **1.** Go to Pending Registration > Scheduled Registration.
- 2. Click Bulk Registration. The Basic Info page opens.



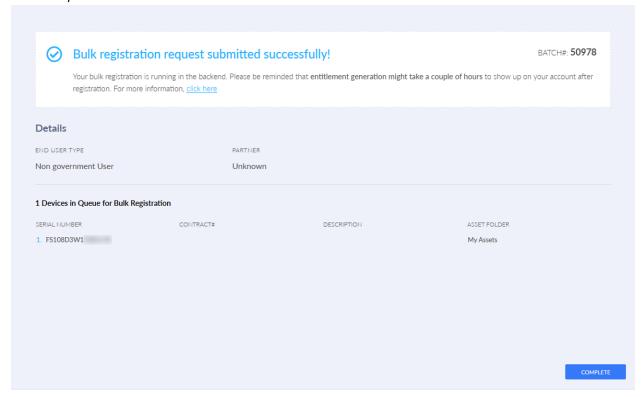
- 3. Complete the Basic Info form and click Next. The Add Devices page opens.
- **4.** Select *Upload a file* or *Input serial numbers*. The *Preview* page opens. See Upload a file on page 65 and Input serial numbers on page 66.



**5.** Accept the terms of the registration agreement, and click *Register Now.* A message is displayed if there are any errors.



### 6. Click Complete.



# Upload a file

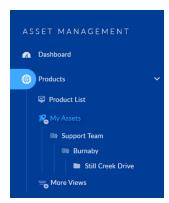
Use Sheet 1 to enter registration information. The application will look for this sheet when the file is uploaded.

You can use the registration template to assign devices to an asset folder in the AM the portal. If you do not specify an ASSET FOLDER LEVEL, the device will be assigned to the My Assets folder.

This column is mandatory. Each serial number must be unique.		
This column is optional. The information you enter here will appear in the device Description field in the AM portal.		
This column is optional. Enter the contract number if you want to assign the serial number to a contract.		
These columns represent the sub-folder structure in the <i>My Assets</i> view of the portal.  To add a device to a folder, enter the folder name in the corresponding Asset Folder Level.		
To add the device to a level 2 or 3 folder, you must enter the names of the parent folders that precede it. See the example below.		
To add the serial number to an asset folder, the folder must already exist in the AM portal. You cannot use the template to create a new folder in the portal.		

### Example

To assign devices to the following folders in the AM portal:



Enter the device information in the template as follows:

	A	В	С	D	E	F
	1 SERIAL NUMBER*	DESCRIPTION	CONTRACT NUMBER	ASSET FOLDER LEVEL 1	ASSET FOLDER LEVEL 2	ASSET FOLDER LEVEL 3
2	2 FG1	First Floor		Support Team		
	FGT.	First Floor		Support Team	Burnaby	
4	FGT FGT	First Floor	THE RESERVE TO SERVE THE PARTY OF THE PARTY	Support Team	Burnaby	Still Creek Drive

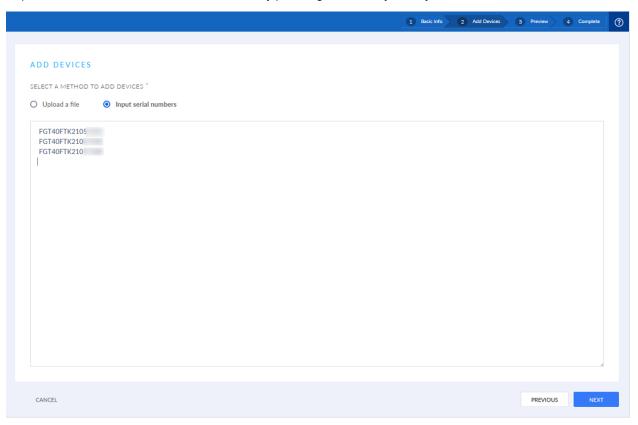


The bulk registration template can also be filled with information from the *Pending Registration* > *Hardware* and *Pending Registration* > *Contract* pages. Both pages allow assets to be exported to a CSV file. See Pending registration on page 58 for more information.

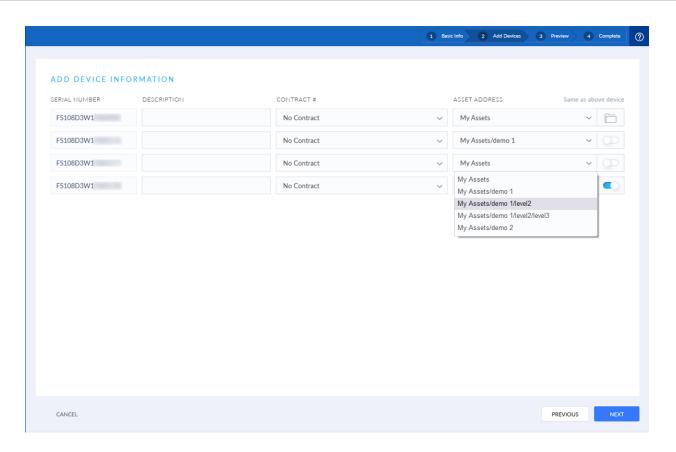
To fill out the template, you can collect the serial numbers and contract numbers for the product model you want to register in bulk. Serial numbers can be extracted from the *Hardware* page CSV file and contract numbers can be extracted from the *Contract* page CSV file. Copy the serial numbers and contract numbers and paste these assets into the template before manually completing the other fields.

## Input serial numbers

Separate the serial numbers with a comma or by pressing Enter on your keyboard.



You can register a serial number to a contract with the *Contract#* dropdown. To assign a serial number to an asset folder, select a folder from the *My Assets* dropdown. The toggle is enabled by default.



# Filtering registrations

You can filter *Pending Registrations* by date and completion status in the *Hardware*, *Contract*, *License*, and *Scheduled Registration* pages.

The following example demonstrates how to filter *Scheduled Registrations* registrations. Go to *Pending Registration > Hardware*, *Pending Registration > Contract*, or *Pending Registration > License* to filter hardware, contract, and license registrations.

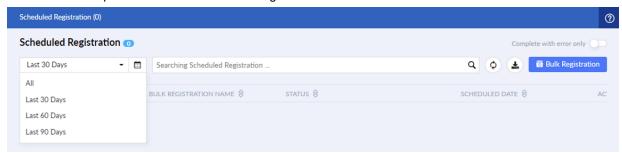


You can filter *Hardware*, *Contract*, and *License* assets by date by entering the date in the search field.

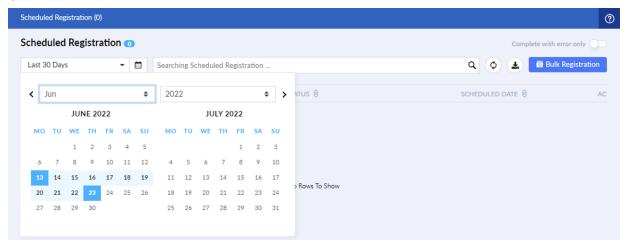
### To filter pending registrations:

- **1.** Go to Pending Registration > Hardware.
- 2. Filter the date of registration:

• Click the date dropdown and select the date range.



• Click the calendar icon and select a start and end date on the calendar.



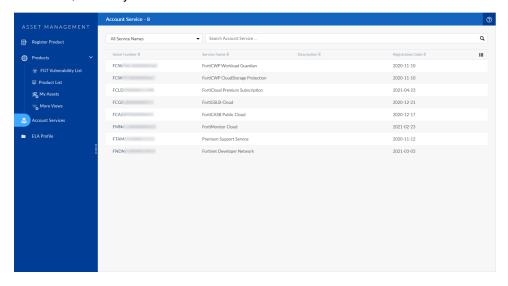
**3.** (Optional) Toggle *Incomplete registrations only* to hide completed registrations.

Incomplete registrations only

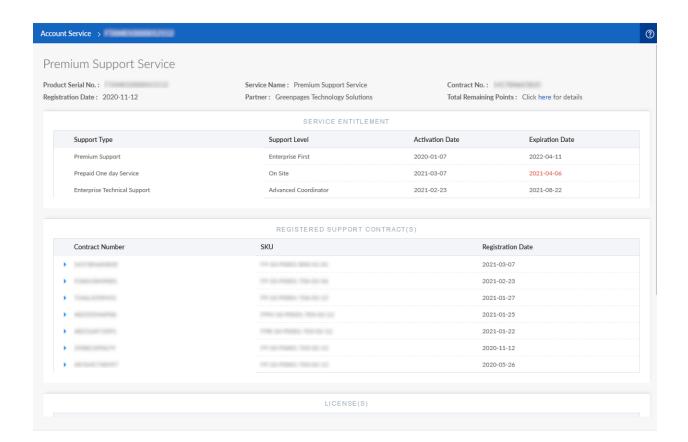
# **Account Services**

Account services can be viewed and managed through the *Account Service* tab. The serial number, service name, description, and registration date are displayed in the *Account Services* table.

You can sort displayed results in ascending or descending order by clicking the header of any displayed column. To filter the results, enter keywords in the search bar.



Clicking on any service listed opens the details page which has additional information based on the service type.





Account services can be registered in the same method as products, contracts, and licenses. Use the *Register More* button in the *Products* page or select *Register Now* from the *Dashboard*. See Registering assets on page 31 for more information.

# Marketplace

Marketplace provides access to Fortinet Inc. products and services that will allow you to increase your organization's security, productivity, and profitability. Use FortiPoints to purchase products and packages, such as FortiCare, UTP, and the FortiGate Enterprise Bundle.

You can add more FortiPoints to your account by selecting *Register Points*. Once you have enough FortiPoints, select an existing Fortinet product to renew or upgrade. You can then use your FortiPoints to customize products and services, or purchase an existing renewal bundle.



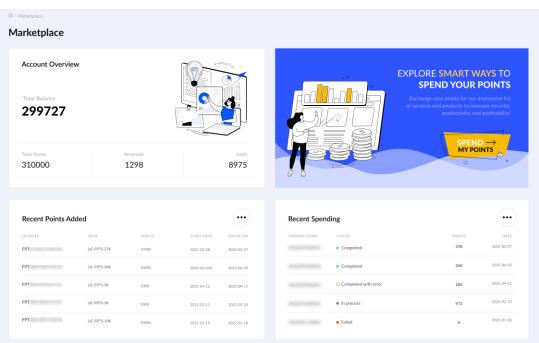
You must accept the Fortinet Inc. Service Terms & Conditions to use Marketplace. If you have not yet accepted the Terms & Conditions or the terms have been upgraded, you will be prompted to read and accept them before you can proceed. See Creating a new account in the FortiCloud Account guide for more information.

Marketplace includes multiple pages:

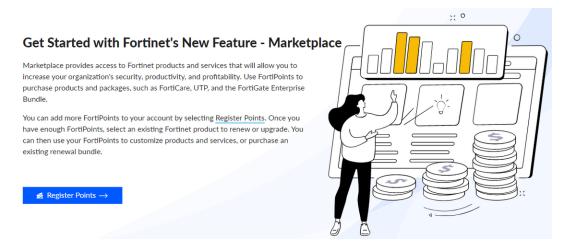
- General on page 71
- Spending on page 73
- History on page 109

## **General**

The *Marketplace* > *General* page displays a high level overview of your Marketplace account, including recently registered FortiPoints and spending.



Select Register Points if you do not have any FortiPoints registered.



### **Account Overview**

The Account Overview section presents information on your:

Total FortiPoints value	The total number of registered FortiPoints.		
Total FortiPoints balance	The current number of available FortiPoints (Total FortiPoints - Used FortiPoints).		
Reserved FortiPoints	FortiPoints currently being processed by Fortinet Inc These points are not yet available to use. If they are approved, they will be allocated to the Total FortiPoints value. If they are not approved, they will be released and the total value will not changed.		
Used FortiPoints	The number of FortiPoints that have already been used in the Marketplace.		

### **Recent Points Added**

The Recent Points Added section displays the five most recently registered FortiPoints licenses, including the license and SKU number, the points value, and the expiration date. Select the icon in the top right corner of the card to see more information or select one of the tabs from the navigation menu.

For more information on registering FortiPoints, see Spending on page 73.

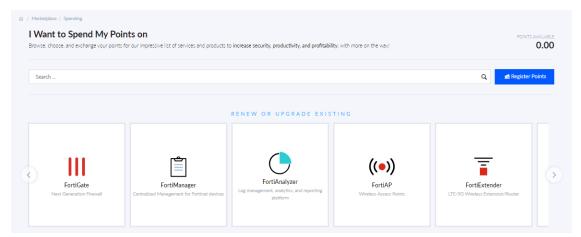
## **Recent Spending**

The *Recent Spending* section displays the five most recent transactions using FortiPoints. Details included with the spending overview transaction number, description of the service, the FortiPoints spent, and expiration date. Select the icon in the top right corner of the card to see more information or select one of the tabs from the navigation menu.

For more information on purchasing services, see Spending on page 73.

# **Spending**

You can register and spend FortiPoints from the *Marketplace > Spending* page.





Currently, only FortiGate, FortiManager, FortiAnalyzer, FortiAP, FortiExtender, FortiSwitch, FortiClient EMS, and FortiFlex related products are supported. FortiCloud will gradually add new product categories for FortiPoints use in the future.

#### This section includes:

- · Registering points on page 73
- Using FortiPoints on page 73

## **Registering points**

You can register points from the *General* and *Spending* pages by selecting *Register Points*. See Registering assets on page 31 for more information on how to complete the registration process.

## **Using FortiPoints**

You can use FortiPoints for renewing and upgrading existing contracts and services from the *Spending* page. FortiPoints can also be transferred to FortiFlex points to be used in the FortiFlex portal.



Service renewal and upgrade options presented in the product examples may not cover all services available. Options vary depending on product model.

Products supported on Fortinet Inc. Marketplace include:

- FortiGate on page 74
- FortiManager on page 80
- FortiAnalyzer on page 85

- FortiAP on page 91
- FortiExtender on page 96
- FortiSwitch on page 100
- FortiClient EMS on page 105
- FortiFlex on page 107

#### **FortiGate**

FortiGate services and contracts can be renewed or upgraded from the Marketplace > Spending page.

PRMA services can be selected from the *Add-On* list. If the location is not set in the product details for the selected serial number, you cannot apply PRMA to the upgrade. See Viewing the product location on page 29.



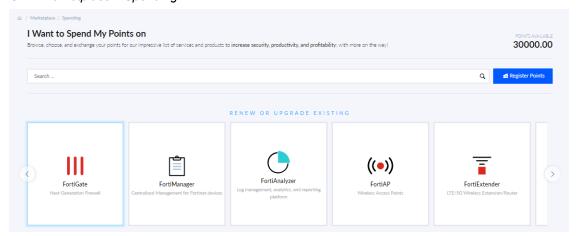
You can buy PRMA contracts for your existing hardware. If Fortinet Inc. has announced an End of Support date for a specific model, the PRMA service contract for that model will be removed from the price list. When the SKU is removed from the price list, the Marketplace will not display the PRMA service in the *Add-On* list. This is by design across all online renewal platforms.

The following documents provide more information on PRMA:

- RMA companion and PRMA service descriptions are available on support.fortinet.com.
   Log into FortiCloud and navigate to Support > Resources > Guidelines, Policies & Documents.
- Premium & Secure RMA in the ELA Portal guide provides descriptions on adding and reviewing PRMA contracts in the FortiCloud ELA portal.

#### To renew a FortiGate service or contract:

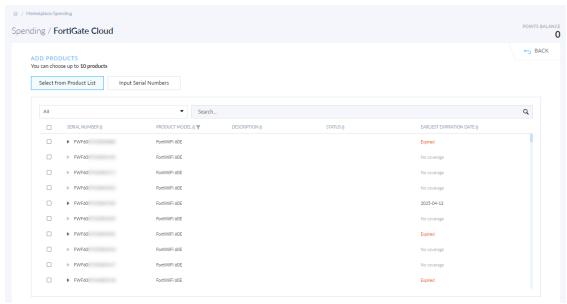
1. Go to Marketplace > Spending.



2. Select FortiGate.



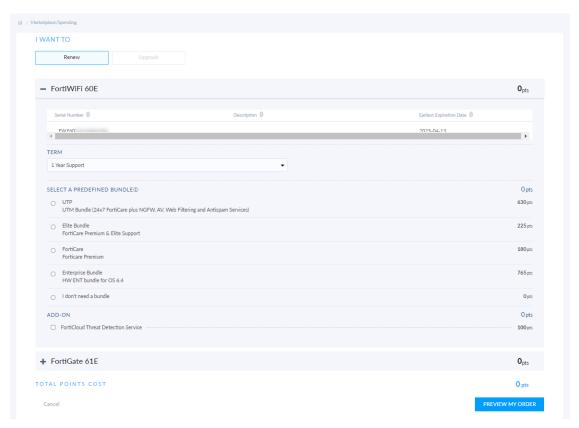
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to renew.



**4.** Select *Renew*. The selected products are displayed in accordion dropdown menus.



- 5. For each product model, select a renewal package:
  - a. Select the Term of the renewal package.
  - **b.** Select number of CPUs from the *Support Range/Seats* dropdown list, if required.
  - **c.** Select the type of renewal package from the predefined bundles.



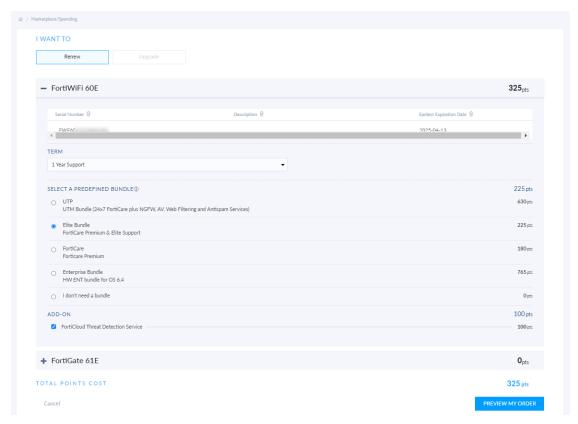
Click the *i* beside *Select a Predefined Bundle* for more information on what is included with each bundle.

d. Select any Add-On services.

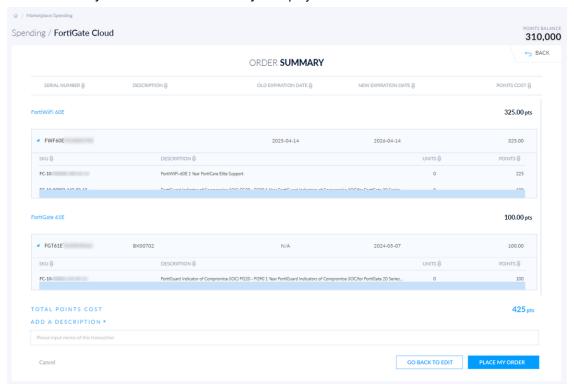


If an Add-On is already included, it will be greyed out and unavailable to select.

The Total Points Cost will update.



6. Click Preview My Order. The Order Summary is displayed.



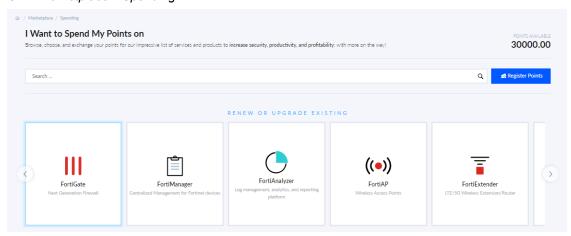


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

- 7. Add a Description to the transaction.
- 8. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

### To upgrade a FortiGate service or contract:

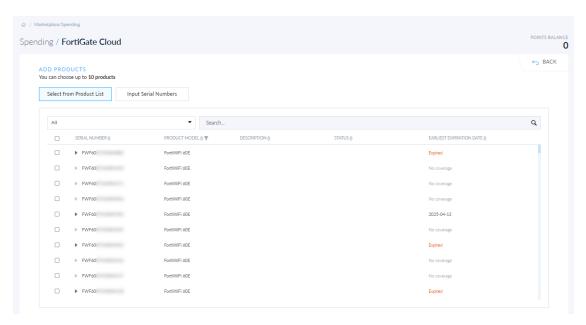
1. Go to Marketplace > Spending.



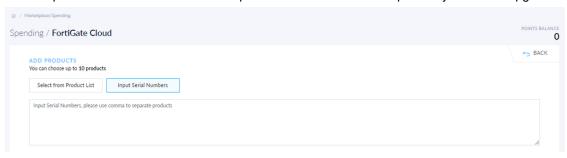
2. Select FortiGate.



- 3. Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.

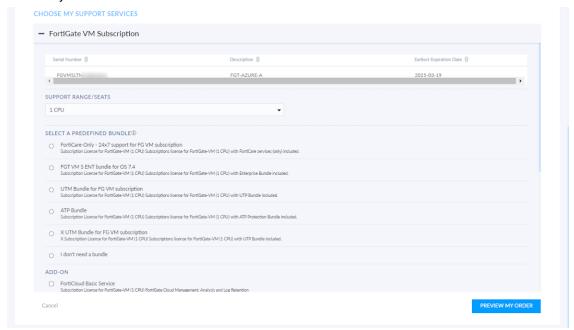


- 4. Select Upgrade.
- 5. Select the End Date calendar to select the end date of the upgrade package.



- 6. Select an upgrade details for each of the selected products:
  - **a.** Select the number of CPUs from the *Support Range/Seats* dropdown list.
  - b. Select a upgrade package from the predefined bundles list.

c. Select any additional add-ons.



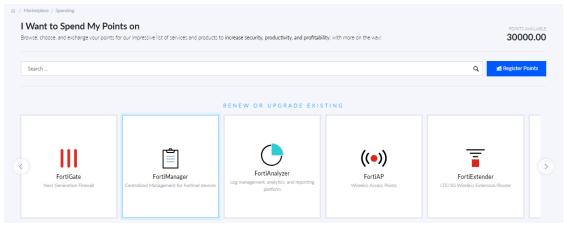
- 7. Click Preview My Order.
- 8. Click Place My Order.

## **FortiManager**

FortiManager services and contracts can be renewed or upgraded from the *Marketplace > Spending* page.

## To renew a FortiManager service or contract:

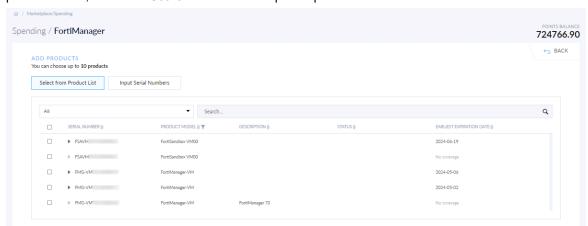
1. Go to Marketplace > Spending.



2. Select FortiManager.



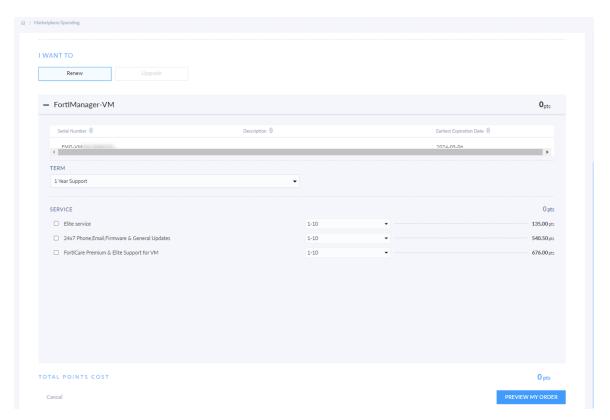
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select *Input Serial Numbers* and enter the product serial number of the product you want to renew.



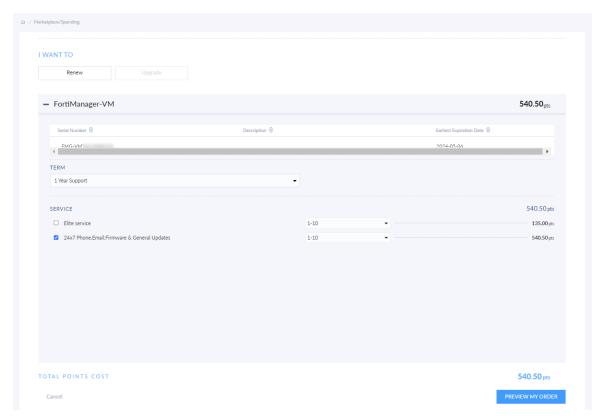
4. Select Renew. The selected products are displayed in accordion dropdown menus.



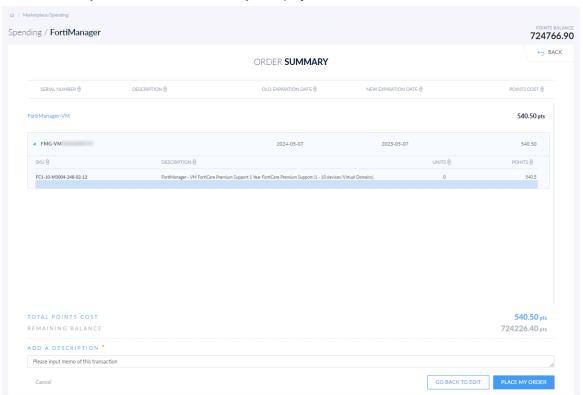
For each product model, select a renewal package:

- **a.** Select the *Term* of the renewal package.
- b. Select the desired Service.

The Total Points Cost will update.



**5.** Click *Preview My Order*. The *Order Summary* is displayed.



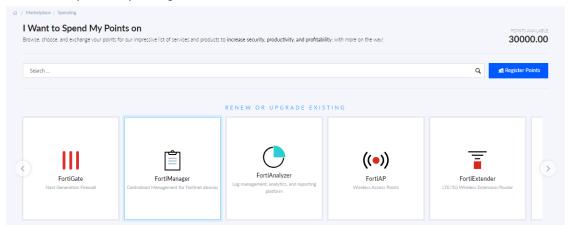


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

- **6.** Add a *Description* to the transaction.
- 7. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

## To upgrade a FortiManager service or contract:

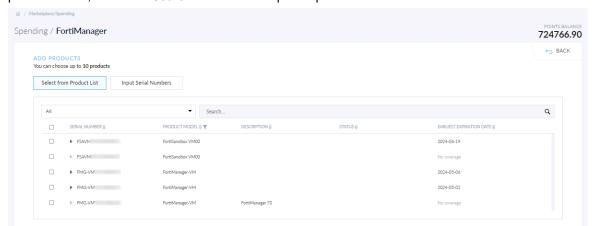
1. Go to Marketplace > Spending.



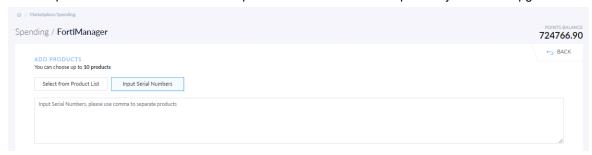
2. Select FortiManager.



- **3.** Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



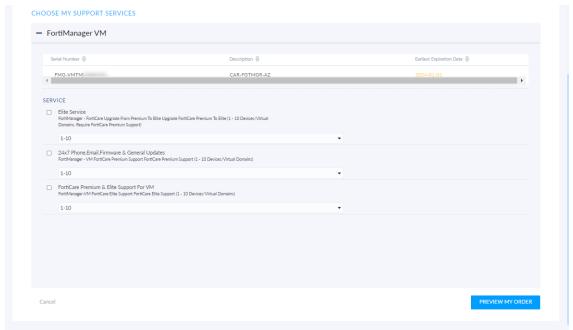
• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.



- 4. Select Upgrade.
- 5. Select the End Date calendar to select the end date of the upgrade package.



6. Select the upgrade Service.



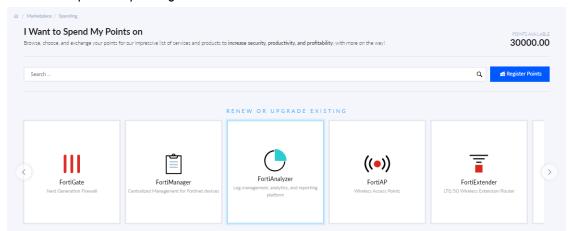
- 7. Click Preview My Order.
- 8. Click Place My Order.

## **FortiAnalyzer**

FortiAnalyzer services and contracts can be renewed or upgraded from the *Marketplace > Spending* page.

## To renew a FortiAnalyzer service or contract:

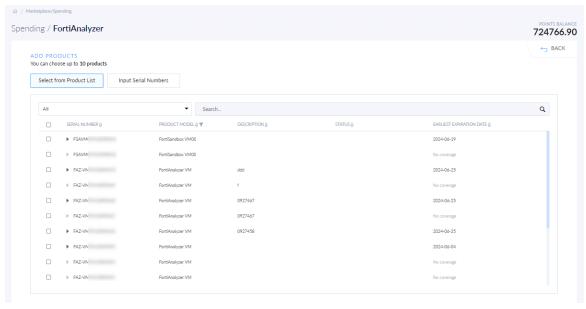
1. Go to Marketplace > Spending.



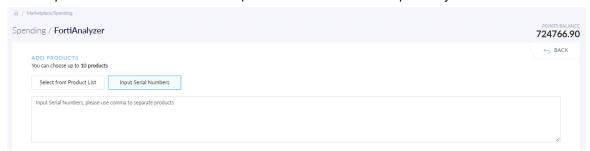
2. Select FortiAnalyzer.



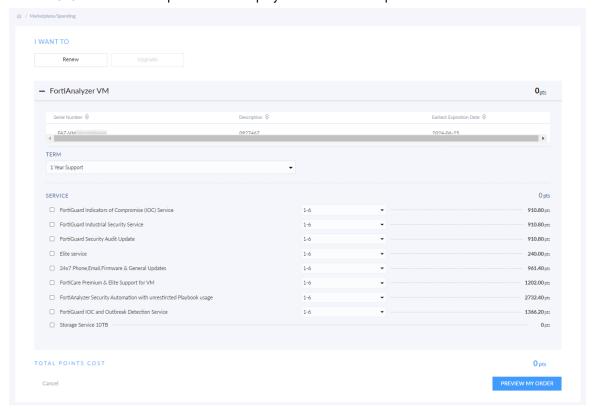
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to renew.

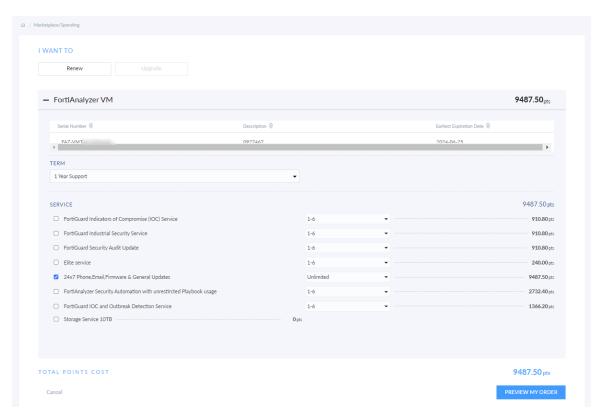


**4.** Select *Renew*. The selected products are displayed in accordion dropdown menus.

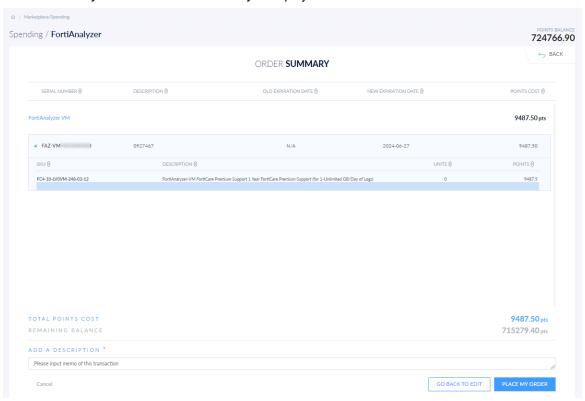


- **5.** For each product model, select a renewal package:
  - a. Select the Term of the renewal package.
  - b. Select the desired Service.

The Total Points Cost will update.



6. Click Preview My Order. The Order Summary is displayed.



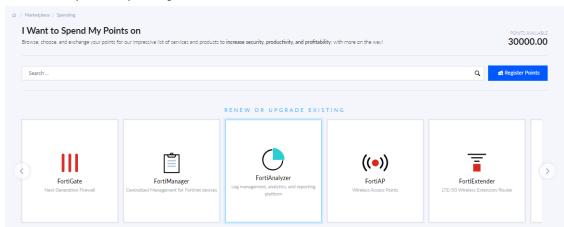


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

- 7. Add a Description to the transaction.
- 8. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

### To upgrade a FortiAnalyzer service or contract:

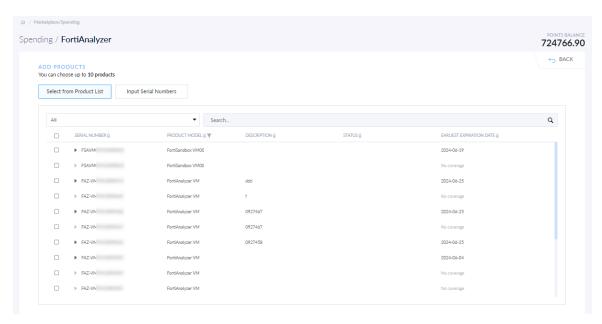
1. Go to Marketplace > Spending.



2. Select FortiAnalyzer.



- 3. Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



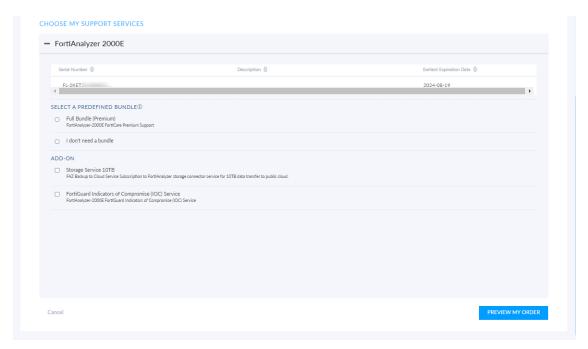
• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.



- 4. Select Upgrade.
- 5. Select the End Date calendar to select the end date of the upgrade package.



- **6.** For each product model, select an upgrade package:
  - a. Select a upgrade package from the predefined bundles list.
  - b. Select any additional add-ons.



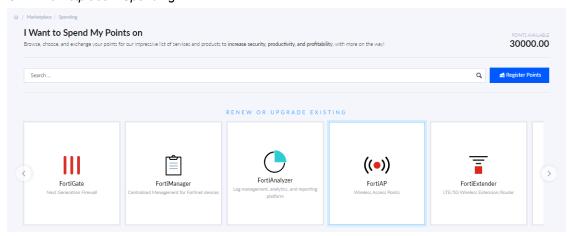
- 7. Click Preview My Order.
- 8. Click Place My Order.

## **FortiAP**

FortiAP services and contracts can be renewed or upgraded from the *Marketplace* > *Spending* page.

## To renew a FortiAP service or contract:

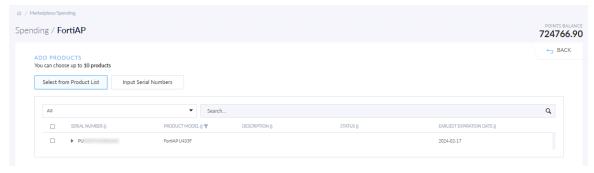
1. Go to Marketplace > Spending.



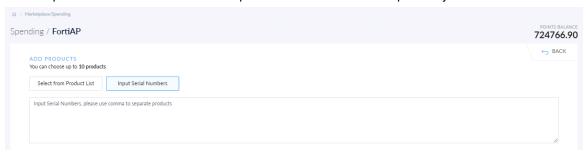
2. Select FortiAP.



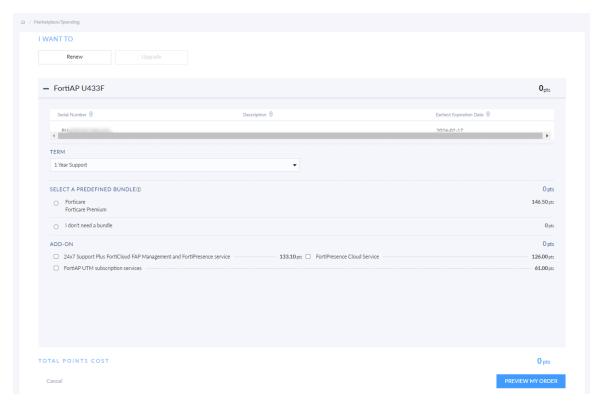
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to renew.



**4.** Select *Renew*. The selected products are displayed in accordion dropdown menus.



- 5. For each product model, select a renewal package:
  - a. Select the Term of the renewal package.
  - **b.** Select the type of renewal package from the predefined bundles.



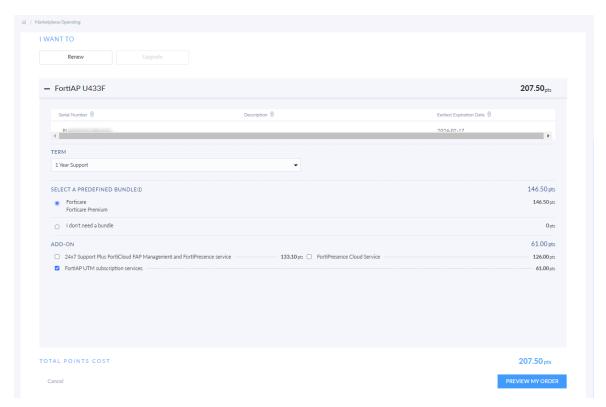
Click the *i* beside *Select a Predefined Bundle* for more information on what is included with each bundle.

c. Select any Add-On services.

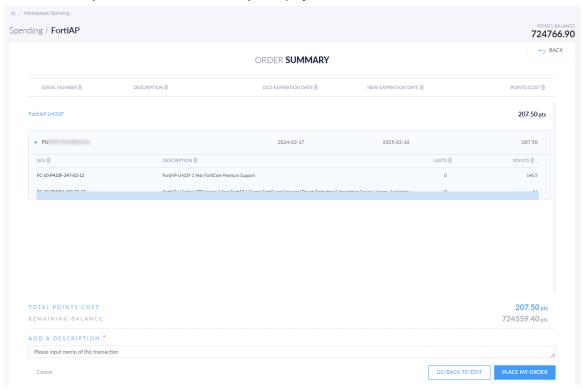


If an Add-On is already included, it will be greyed out and unavailable to select.

The Total Points Cost will update.



6. Click Preview My Order. The Order Summary is displayed.



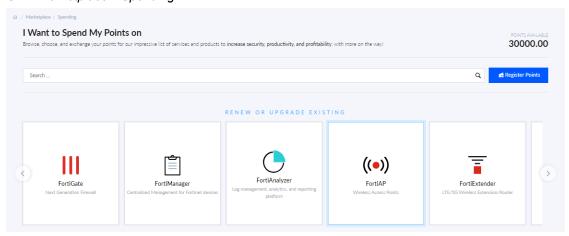


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

- 7. Add a *Description* to the transaction.
- 8. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

### To upgrade a FortiAP service or contract:

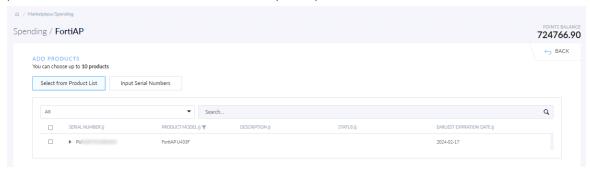
1. Go to Marketplace > Spending.



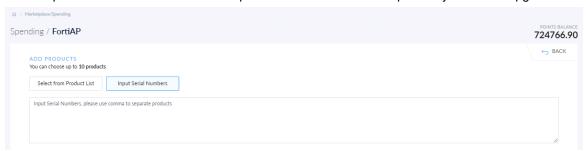
2. Select FortiAP.



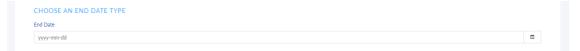
- 3. Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.



- 4. Select Upgrade.
- 5. Select the *End Date* calendar to select the end date of the upgrade package.



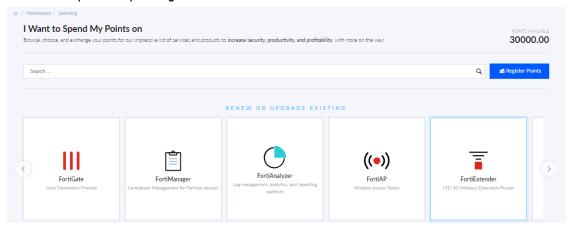
- **6.** For each product model, select an upgrade package:
  - **a.** Select the type of upgrade package from the predefined bundles.
  - **b.** Select any Add-On services.
- 7. Click Preview My Order.
- 8. Click Place My Order.

### **FortiExtender**

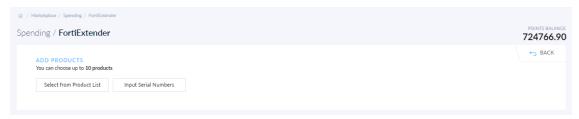
FortiExtender services and contracts can be renewed or upgraded from the *Marketplace > Spending* page.

#### To renew a FortiExtender service or contract:

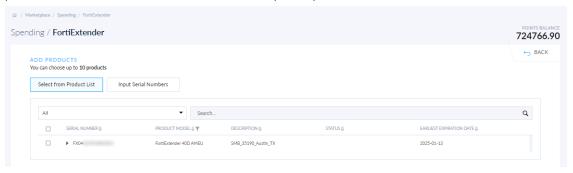
1. Go to Marketplace > Spending.



2. Select FortiExtender.



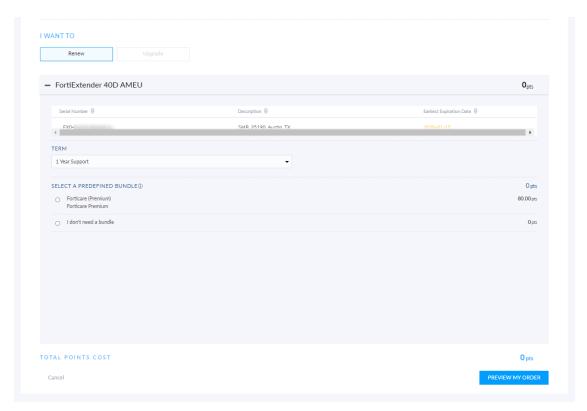
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to renew.



**4.** Select *Renew*. The selected products are displayed in accordion dropdown menus.



- **5.** For each product model, select a renewal package:
  - a. Select the Term of the renewal package.
  - **b.** Select number of CPUs from the *Support Range/Seats* dropdown list, if required.
  - c. Select the type of renewal package from the predefined bundles.



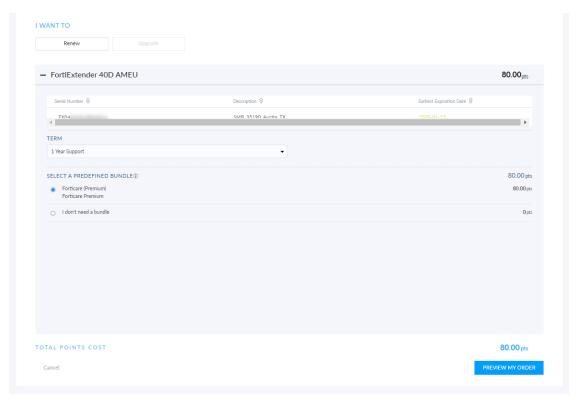
Click the *i* beside *Select a Predefined Bundle* for more information on what is included with each bundle.

d. Select any Add-On services.



If an Add-On is already included, it will be greyed out and unavailable to select.

The Total Points Cost will update.



6. Click Preview My Order. The Order Summary is displayed.

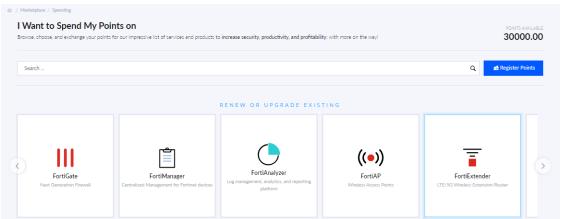


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

- 7. Add a Description to the transaction.
- 8. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

### To upgrade a FortiExtender service or contract:

1. Go to Marketplace > Spending.

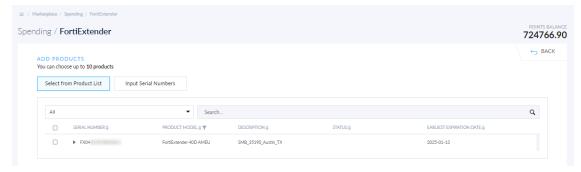


2. Select FortiExtender.

The Add Products page is displayed.



- 3. Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.



- 4. Select Renew.
- 5. Select the End Date calendar to select the end date of the upgrade package.



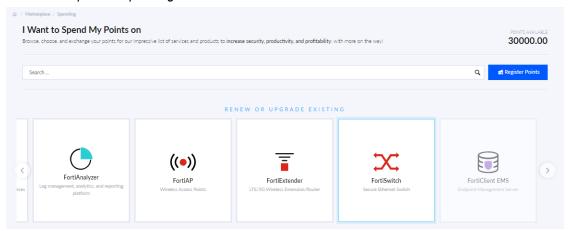
- 6. For each product model, select an upgrade package:
  - **a.** Select the type of upgrade package from the predefined bundles.
  - **b.** Select any *Add-On* services.
- 7. Click Preview My Order.
- 8. Click Place My Order.

#### **FortiSwitch**

FortiSwitch services and contracts can be renewed or upgraded from the Marketplace > Spending page.

#### To renew a FortiSwitch service or contract:

1. Go to Marketplace > Spending.

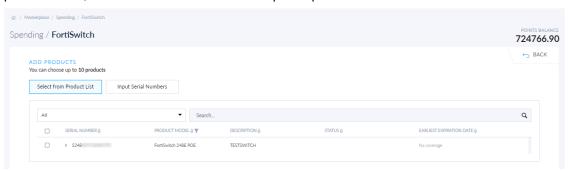


2. Select FortiSwitch.

The Add Products page is displayed.



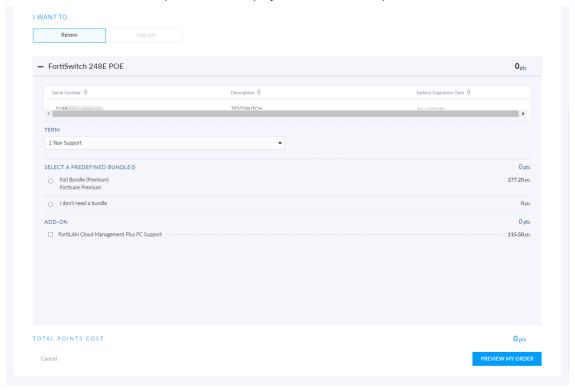
- 3. Select the products you want to renew:
  - Select Select from Product List and choose the products to renew. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to renew.



**4.** Select *Renew*. The selected products are displayed in accordion dropdown menus.



- 5. For each product model, select a renewal package:
  - a. Select the Term of the renewal package.
  - b. Select number of CPUs from the Support Range/Seats dropdown list, if required.
  - c. Select the type of renewal package from the predefined bundles.



Click the *i* beside *Select a Predefined Bundle* for more information on what is included with each bundle.

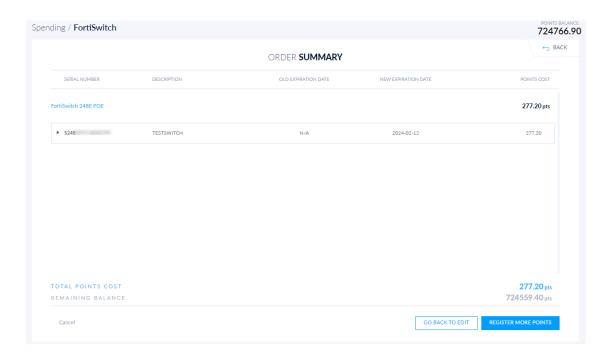
d. Select any Add-On services.



If an Add-On is already included, it will be greyed out and unavailable to select.

The Total Points Cost will update.

**6.** Click *Preview My Order*. The *Order Summary* is displayed.



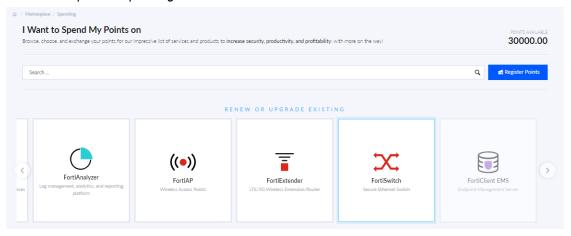


If you do not have enough FortiPoints registered to complete the renewal, a warning message is displayed and you are prompted to register more points.

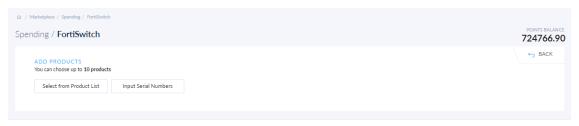
- 7. Add a *Description* to the transaction.
- 8. Click Place My Order. A transaction summary is displayed and the transaction is added to the History page.

## To upgrade a FortiSwitch service or contract:

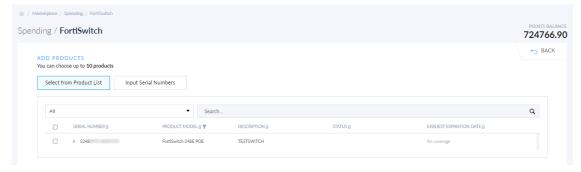
1. Go to Marketplace > Spending.



2. Select FortiSwitch.



- 3. Select the products you want to upgrade:
  - Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



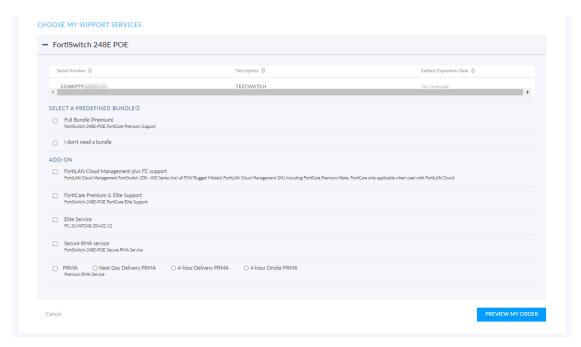
• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.



- 4. Select Upgrade.
- **5.** Select the *End Date* calendar to select the end date of the upgrade package.



- 6. For each product model, select an upgrade package:
  - **a.** Select the type of upgrade package from the predefined bundles.
  - b. Select any Add-On services.



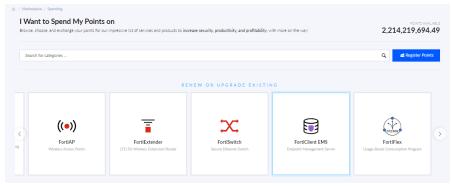
- 7. Click Preview My Order.
- 8. Click Place My Order.

## **FortiClient EMS**

FortiClient EMS services and contracts can be upgraded from the Marketplace > Spending page.

## To upgrade a FortiClient EMS service or contract:

1. Go to Marketplace > Spending.



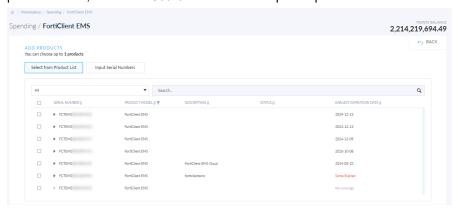
2. Select FortiClient EMS.

The Add Products page is displayed.



**3.** Select the products you want to upgrade:

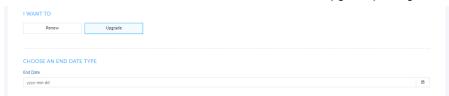
• Select Select from Product List and choose the products to upgrade. You can filter assets by expiry date and product model, or use the Search field to locate specific products.



• Select Input Serial Numbers and enter the product serial number of the product you want to upgrade.

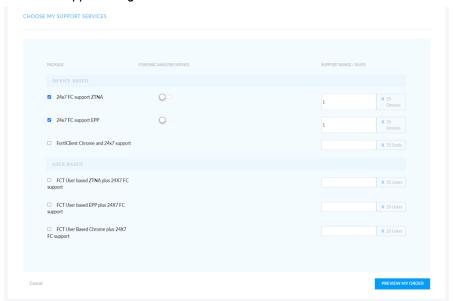


- 4. Select Upgrade.
- 5. Select the End Date calendar to select the end date of the upgrade package.



- **6.** For each product model, select support services:
  - **a.** Select the type of package from the predefined options.
  - b. Select any Forensic Analysis Service options.

c. Enter the Support Range/Seats.



- 7. Click Preview My Order.
- 8. Click Place My Order.

#### **FortiFlex**

FortiPoints can be transferred to FortiFlex points to be used in the FortiFlex portal. See the FortiFlex Administration Guide for more information on using points in the FortiFlex portal.



FortiFlex point transferal is final. Once points have been transferred, they cannot be returned.

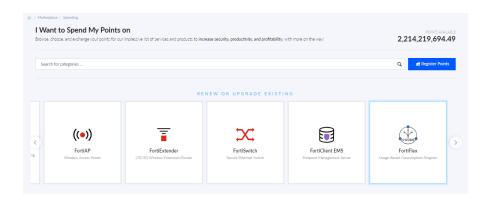
The conversion rate of FortiPoints to FortiFlex points, points rollover, and expiration information depend on the conversion option:

- Lite: Available for less than 50 thousand FortiFlex points.
- Standard: Available for 50 thousand to 1 million FortiFlex points.
- Pro: Available for 1 million to 10 million FortiFlex points.
- Ultimate: Available for over 10 million FortiFlex points.

Details on each option can be viewed in Marketplace > Spending > FortiFlex.

#### To transfer FortiPoints into FortiFlex points:

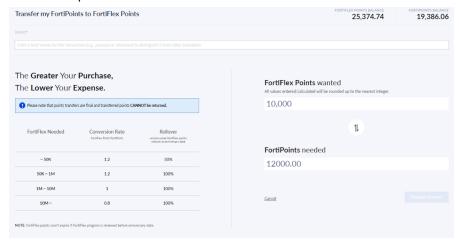
- 1. Go to Marketplace > Spending.
- 2. Select FortiFlex.





If the user does not have access to the FortiFlex portal or the license is expired, the FortiFlex card will be grey and cannot be selected.

3. Add a description of the transfer in the *Memo* field.



**4.** Enter the number of FortiFlex points you want. The *FortiPoints needed* field will update to show how many points must be transferred to receive the desired amount.



Click Swap to enter the amount of FortiPoints you want to transfer. The *FortiFlex Points* wanted field will update with the number of FortiFlex points you would receive.

**5.** Click Request Transfer. The Order Summary is displayed.



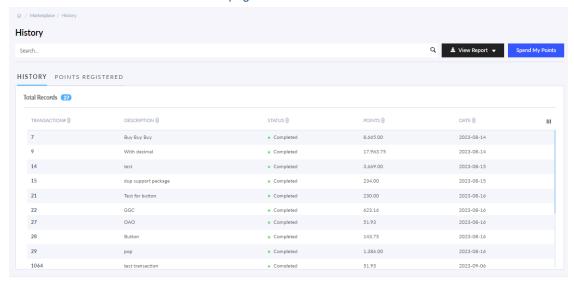
If you do not have enough FortiPoints to complete the transfer, a warning will display the number of outstanding points. Select *Register More Points* to register FortiPoints or select *Go Back To Edit* to reduce the number of FortiFlex points needed.

6. Click Transfer Points. The points will be transferred and the transfer record will display on the History page.

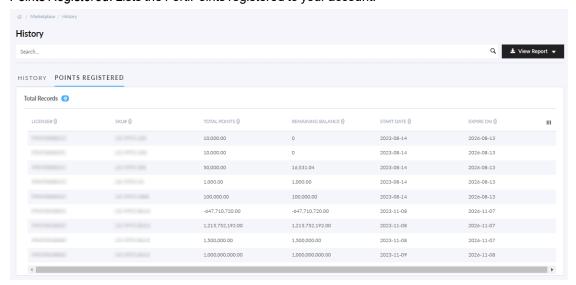
## **History**

The Marketplace > History page displays an overview of:

• *History*: Lists all Marketplace transactions and their current status. Select a *Transaction* number for more information. See Transaction details on page 110.



• Points Registered: Lists the FortiPoints registered to your account.

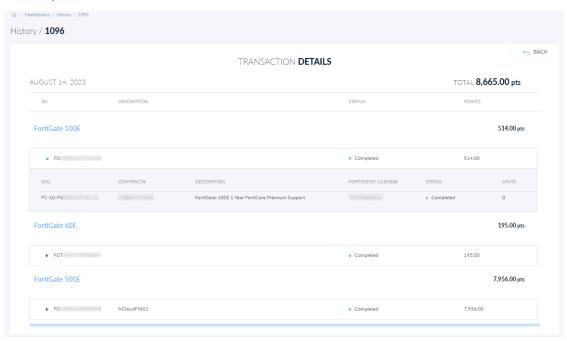




Select a file type from the *View Report* dropdown menu to export a Excel or CSV file containing information from the *History* page.

### **Transaction details**

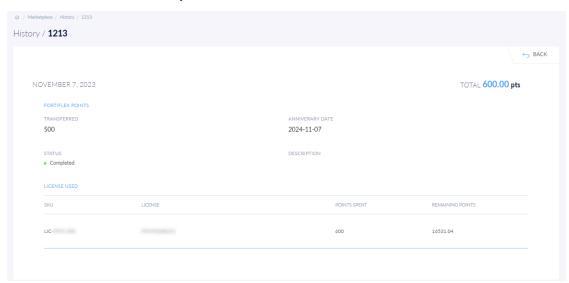
Transaction details can be viewed by selecting a transaction number in the *Marketplace > History* page. Transaction details include the total number of points used and the breakdown of points per product included in the transaction. Select a product serial number to view the SKU, contract and license information, and the status.



## FortiFlex transaction history

FortiPoints can be transferred to FortiFlex points to be used in the FortiFlex portal. See FortiFlex on page 107.

Once the points transfer has been completed, the transaction details will become available in *Marketplace > History*. The transaction details include the total number of FortiPoints spent, the number of FortiFlex points acquired, license information, and the anniversary date.





See the FortiFlex Administration Guide for more information on using points in the FortiFlex portal.

## **FortiMeter**

FortiMeter allows you to view the volume and consumption of traffic that you use for FortiOS-VMs. Metered VMs require that you have a FortiMeter license and have linked that license with a FortiManager unit. For more information on setting up and using FortiMeter, see the FortiManager Administration Guide.



FortiMeter is not available in all accounts.

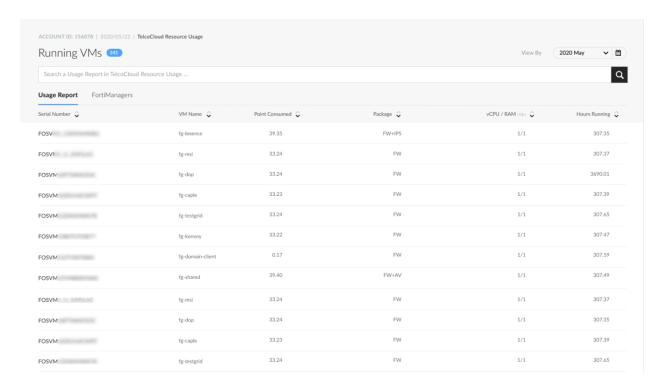
In FortiMeter, you can select Prepay FortiMeter Group or Postpay FortiMeter Group to view each license group.

- *Prepaid FortiMeter Group*: Includes FortiOS-VMs where usage is prepaid by purchasing points. The remaining amount of points available to each FortiMeter group is displayed.
- Postpaid FortiMeter Group: Includes FortiOS-VMs billed monthly based on usage. The points consumed by each FortiMeter group are displayed.

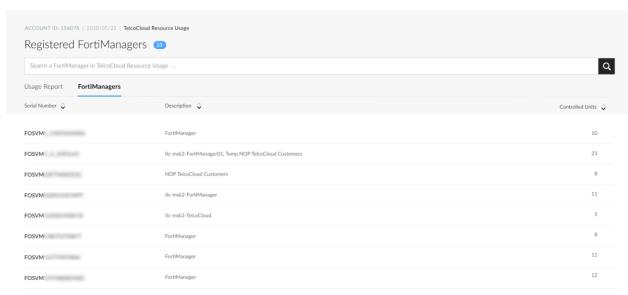
While in any tab, you can use the search bar to search for groups or assets matching your entered search criteria, and click a column title to change the order of displayed information.



Select a prepaid or postpaid group to view the *Usage Report* for members of that group, including the serial numbers, VM names, points available/consumed, packages, VM vCPU/RAM, and hours running for each member in the group.



In the *FortiManagers* tab, you can see the FortiManagers associated with each group, including the number of units controlled by each device.



# **ELA** profile

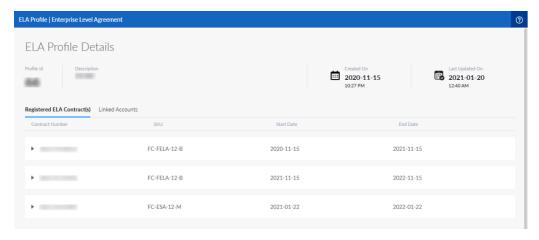
The Enterprise Level Agreement (ELA) profile view is available upon request for customers that have an ELA contract and a registered ELA product. To add the ELA profile view to your product list, contact Customer Support.

The ELA Profiles Details section displays the following information:

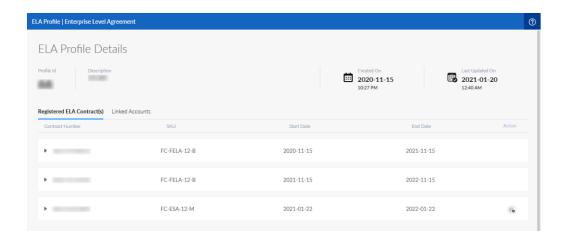
Profile ID	The ID for the ELA profile.
Description	The profile description.
Sold by	The name of the salesperson who sold the ELA contract and product.
Created On	The date the ELA profile was created.
Last Updated On	The date the ELA profile was updated.

# Registered ELA Contract(s)

The Registered ELA Contract(s) view displays the ELA Contract Number, SKU, Start Date and End Date. Expand the contract to view the entitlements associated with the contract.

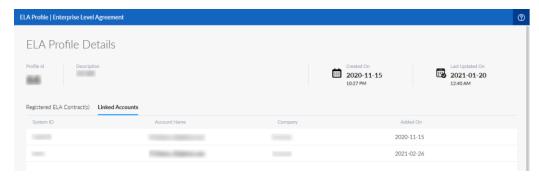


ESA contracts can generate new standard FortiSASE serial numbers in the *Registered ELA Contract(s)* view by selecting the *Generate Standard FortiSASE* action. This action can only be completed once. If a serial number already exists, a new FortiSASE contract will be appended onto the existing serial number.



## **Linked Accounts**

An ELA profile can have more than one account. The *Linked Accounts* tab shows the *System ID*, *Account Number*, *Company*, and *Added On* date for each account connected to the profile.

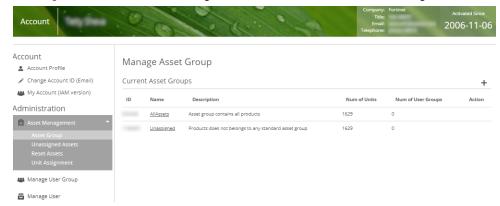


# Asset groups

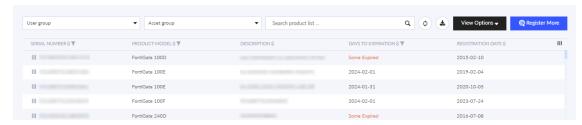
Asset groups allow you to organize and manage assets by grouping them together and assigning user groups to them. You can create new, customized asset groups in *My Account*. You can assign an asset to multiple asset groups, as needed.

Two default asset groups are available:

- · All Assets: Includes all registered assets.
- Unassigned Assets: Includes all registered assets that have not been assigned to an asset group.



Once the asset groups and user groups are configured in *My Account*, they will appear in the Asset Management portal. See Asset groups in the Asset Management portal on page 117.



For more information on My Account, see My Account in the Identity & Access Management guide.

## **User groups**

User groups are groups of sub users. User groups can be assigned to asset groups so that sub users within the user group can access the assets in the associated asset groups.



One sub user can only belong to a single user group. However, a user group can be associated with multiple asset groups, and vice versa. See Asset groups in the Asset Management portal on page 117.

User permissions are configured at the user level. Therefore, permissions within a user group can vary per sub user:

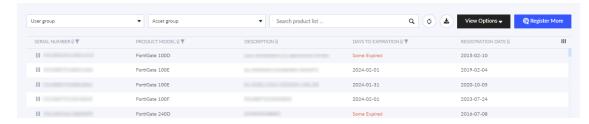
Permissions enabled	Description
Administrator	This default user group gives the same permissions as master account users to any sub users included within the group. Administrators can manage asset groups, such as adding and deleting asset groups, and can manage user groups. This default group cannot be modified or deleted.
User Manager	Users with these permissions are the user group administrator. They can add, delete, and update sub users within the current user group.
Asset Manager	Users with these permissions can manage asset group content, such as adding and removing assets within their view scope. However, these permissions do not allow the user to create asset groups. For information on a user's view scope, see Asset groups in the Asset Management portal on page 117.
Asset Registration	Users with these permissions can register assets to their current asset groups.
Support	Users with these permissions can control ticket requests depending on their role.

#### Topics in this section include:

- Asset groups in the Asset Management portal on page 117
- Creating a new asset group in My Account on page 120
- Managing asset groups in My Account on page 122
- Managing user groups on page 125
- Managing users on page 127

## **Asset groups in the Asset Management portal**

When asset groups and user groups are enabled, you can filter products in the Asset Management portal *Products* > *Product List* by using the dropdown menus.



User groups and asset groups have a many to many relationship. This means that one asset group can be associated with multiple user groups, and vice versa.

A user's view scope defines what assets are visible to the user depending on the asset groups they have access to. If the sub user's user group has access to multiple asset groups, then the sub user's view scope will include the combined assets of all of these asset groups.

If the user filters the *Products > Product List* page by the *User group* and *Asset group* dropdown menus, then only the assets that are assigned to the selected asset group are displayed. Asset groups that are not associated with the selected user group cannot be selected from the *Asset group* dropdown menu.



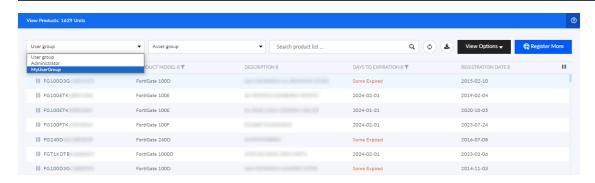
The Search product list field can be used to filter for specific assets before and after filtering with the User group and Asset group dropdown menus.

## Example of the asset group and user group relationship

The following example demonstrates navigating the available assets based on the user's view scope using the many to many relationship style. The example user has administrative access and belongs to the *MyUserGroup* user group.

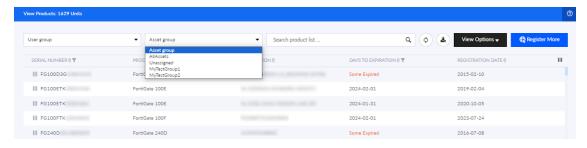


For the purpose of this example, fake asset serial numbers are used.

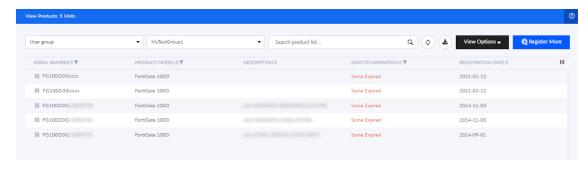


## Filtering assets by asset group

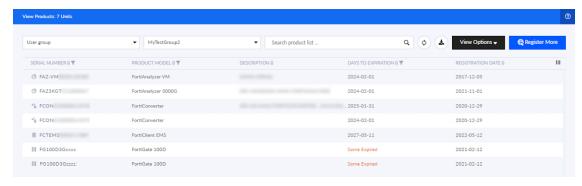
*MyUserGroup* is associated with two asset groups, *MyTestGroup1* and *MyTestGroup2*. When no user group is selected from the *User group* dropdown menu, the user can filter assets by any of the available user groups, including *AllAssets* and *Unassigned*, by selecting from the *Asset group* dropdown menu.



If the user selects one of the asset groups, the assets will filter so that only the assets assigned to that asset group are displayed. For example, if the user selects *MyTestGroup1*, only the five assets assigned to that group will be displayed.

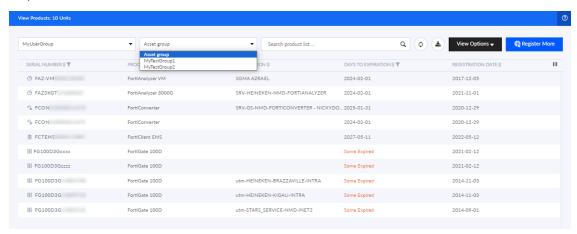


If the user changes the asset group to MyTestGroup2, the seven assets assigned to that group are displayed instead. However, since the FortiGate 100D assets ending in xxxx and zzzz are assigned to both the MyTestGroup1 and MyTestGroup2 asset groups, they are still displayed.

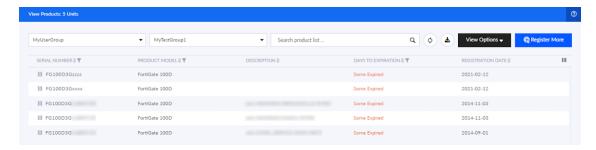


## Filtering assets by user group

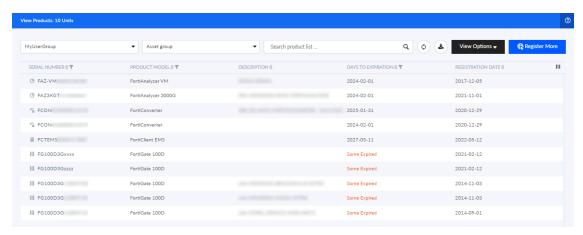
If a user group is selected, then only the asset groups associated with that user group can be selected. For example, if the *MyUserGroup* is selected, then the user can only select *MyTestGroup1* or *MyTestGroup2* from the *Asset group* dropdown menu.



If the user selects one of the asset groups, then the assets will filter to show only the assets assigned to that asset group. This is the same as what was displayed when filtering by asset group alone.



However, if no asset group is selected from the *Asset group* dropdown menu, then all of the assets in the user's view scope are displayed. In this example, that means that all of the assets assigned to *MyTestGroup1* and *MyTestGroup2* are displayed. However, the overlapping assets are not duplicated. Therefore, while the FortiGate 100D assets ending in *xxxx* and *zzzz* are assigned to both the *MyTestGroup1* and *MyTestGroup2* asset groups, they are only displayed once in the list.

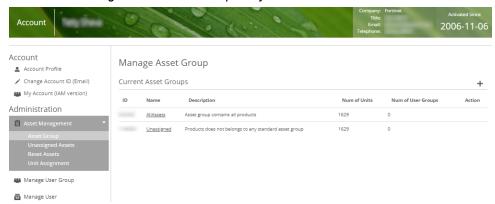


# Creating a new asset group in My Account

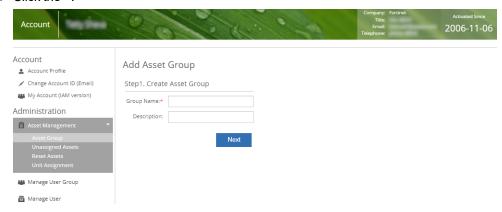
Administrators can create new asset groups in *My Account*. The *Asset Group* page is only available for editing by administrators. Users with other permissions can view the page as read only.

### To create a new asset group:

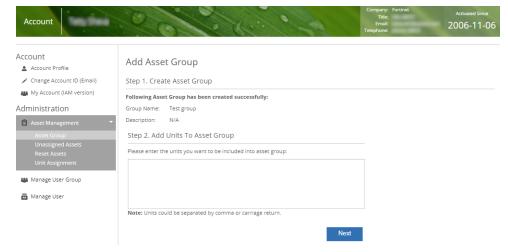
1. Go to Asset Management > Asset Group in My Account.



2. Click the +.



- 3. Enter a Group Name.
- 4. (Optional) Enter a *Description* for the asset group.
- 5. Click Next.



- 6. Enter the serial numbers of the assets you want to assign to the group, separated by a comma or carriage return.
- 7. Click Next.
- 8. Click Complete.

## **Managing asset groups in My Account**

Once an asset group has been created, administrators can:

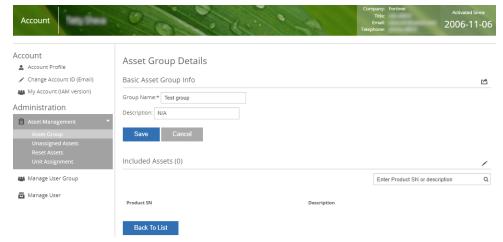
- · Edit asset group details.
- · Export the list of assets within the asset group.
- · Add or delete assets.
- · Delete an asset group.



An asset group can only be deleted from My Account if there is no associated user group.

#### To edit group details:

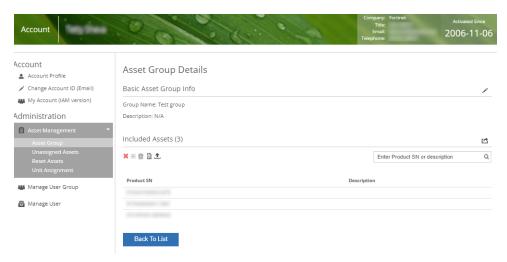
- 1. Go to Asset Management > Asset Group in My Account.
- 2. Select the asset group you want to edit.
- 3. Select the edit icon for Basic Asset Group Info.



- 4. Edit the name or description as needed.
- 5. Click Save.

#### To manage assets within an asset group:

- 1. Go to Asset Management > Asset Group in My Account.
- 2. Select the asset group you want.
- 3. Select the edit icon for Included Assets. The asset management icons are displayed.



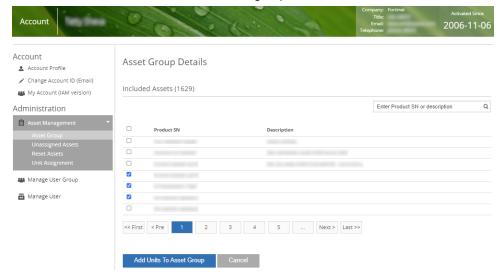
- 4. Select the icon you need:
  - Empty Asset Group:

Warning

i. Select *Empty Asset Group* to remove all assets from the asset group. A confirmation message is displayed.



- ii. Click OK.
- · Batch Add:
  - i. Select Batch Add to add assets to the asset group.

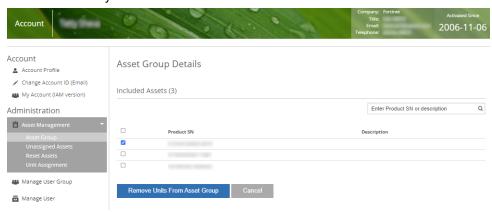


- ii. Select the assets you want to add.
- iii. Click Add Units to Asset Group.

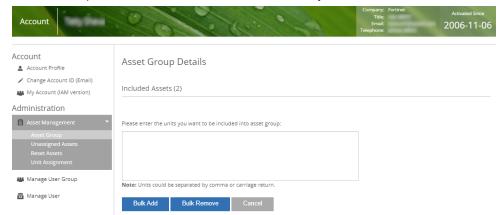


You can also add assets to an asset group in the *Asset Management > Unassigned Assets* page by selecting the asset group from the dropdown menu, selecting the assets, and clicking *Assign*.

- Batch Remove:
  - i. Select Batch Remove to remove assets from the asset group.
  - ii. Select the assets you want to remove.



- iii. Click Remove Units from Asset Group.
- Bulk Operation:
  - i. Select Bulk Operation to add or remove assets in bulk by serial number.



- ii. List the serial numbers of the assets you want to add or remove, separated by a comma or carriage return.
- iii. Click Bulk Add or Bulk Remove, as needed.



Assets can also be removed with the same method in the Asset Management > Reset Assets and Unit Assignment pages of My Account.

- Export Products:
  - i. Select Export Products to export a spreadsheet including all of the assets in the asset group.

### To delete an asset group:

- 1. Go to Asset Management > Asset Group in My Account.
- 2. Find the asset group you want to delete.



3. Select the delete icon in the *Action* column. A confirmation message is displayed.



4. Click OK.

# Managing user groups

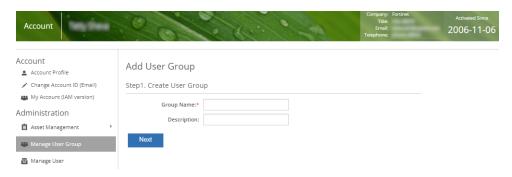
Administrators can create new or delete unneeded user groups in *My Account*. The *Manage User Group* page is only available for editing by administrators. Users with other permissions can view the page as read only. For more information on user groups, see User groups on page 116.



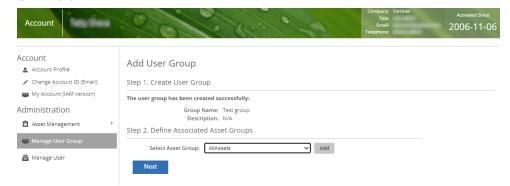
User groups can only be deleted if the user group does not have any users assigned to it.

#### To create a new user group:

- 1. Go to My Account > Manage User Group.
- 2. Click the +.



- 3. Enter the Group Name.
- 4. (Optional) Add a *Description* for the user group.
- 5. Click Next.



- 6. Select the asset group from the Select Asset Group dropdown menu and click Add.
- 7. Repeat the previous step for any other asset groups you want to link the user group to.
- 8. Click Next.
- **9.** Select Assign User. The Assign User to Group dialog is displayed.



- 10. Select the users you want to add to the group.
- 11. Click Save.
- 12. Click Next.
- **13.** Click Complete.

### To edit user group details:

- 1. Go to My Account > Manage User Group.
- 2. Select the user group you want to edit.
- 3. Select the edit icon for Basic User Group Info.
- 4. Edit the details as needed.
- 5. Click Save.

#### To edit the assigned asset groups for a user group:

- 1. Go to My Account > Manage User Group.
- 2. Select the user group you want to edit.
- 3. Select the edit icon for Associated Asset Groups.
- 4. Select a new asset group from the Select Asset Group dropdown menu and click Add to add a new group.
- 5. Click the delete icon beside an asset group you want to remove.
- 6. Click Save.

### To edit the users in a user group:

- 1. Go to My Account > Manage User Group.
- 2. Select the user group you want to edit.
- 3. Select the edit icon for Members.
- 4. Click Batch Add to add new members.
- 5. Select the users you want to add to the group.
- 6. Click Save.

#### To delete a user group:

- 1. Go to My Account > Manage User Group.
- 2. Find the user group you want to delete.
- 3. Click the delete icon in the Action column. A confirmation message is displayed.



4. Click OK.

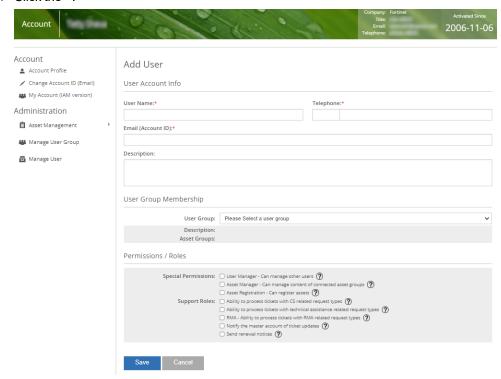
# Managing users

You can manage and add sub users in *My Account > Manage User* page. Only users with *Administrator* and *User Manager* permissions can access this page. Administrators can see all sub users in the account. User managers can

only see sub users within their user groups.

#### To add a new user:

- 1. Go to My Account > Manage User.
- 2. Click the +.



- 3. Enter the user details in the *User Account Info* section.
- 4. Select the Special Permissions and Support Roles. See User groups on page 116.
- **5.** Select the user group from the *Select User Group* dropdown menu.
- 6. Click Save.

#### To edit a user:

- 1. Go to My Account > Manage User.
- 2. Select the user you want to edit.
- 3. Click Edit.
- 4. Make the edits, as needed.
- 5. Click Save.

### To delete a user:

- 1. Go to My Account > Manage User.
- 2. Identify the user you want to delete.
- 3. Click the delete icon in the Action column. A confirmation message is displayed.

## Asset groups



4. Click OK.

# Organizations in the Asset Management portal

The Asset Management portal supports FortiCloud Organizations. FortiCloud Organizations provide a centralized account management, consolidating multiple FortiCloud accounts into structured Organizational Units (OUs). With FortiCloud Organizations, the Asset Management portal provides following features for OU admins:

- Access to consolidated asset view across all the accounts, and the registration and transfer of assets between accounts in the Organization.
- Switch to any customer accounts in the Organization to register and manage assets in accounts belonging the Organization.

The Organization admin account can create IAM users with the user type as *Organization* to access the Organization views and access the customer accounts within the Organization. The IAM user's OU scope determines which accounts the user can access. The IAM user's permission profile should include permissions for the Asset Management portal.

For information on permission profiles and scope, see Permission Profiles in the Identity & Access Management (IAM) Administration Guide. For information on user management within the Organization context, see Organization user management in the Identity & Access Management (IAM) Administration Guide.

For more information on the Organization portal, see the Organization Portal Administration Guide.



The Organization view of the Asset Management portal can only be accessed when logging into the portal as an IAM user with the user type as *Organization* and permissions for the Asset Management portal. The Organization root account cannot perform these tasks. See Creating an IAM user with Organization permissions on page 130 and Overview of creating and managing organizations in the Organization Portal guide.

#### This section includes:

- · Creating an IAM user with Organization permissions on page 130
- Viewing assets in the Organization on page 134
- Registering assets to member accounts on page 131
- Transferring products on page 137

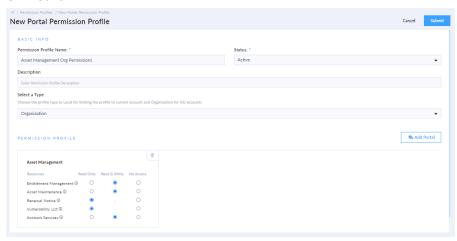
# Creating an IAM user with Organization permissions

An IAM user can be created that can access the Asset Management and Organization portals by defining user type and portal access in the IAM portal. By defining the access type and OU permission scope, the IAM user can have various levels of control over Organization features in the Asset Management portal.

The following demonstrates the general process of creating an Organization type IAM user with access to the Asset Management portal and Organization features:

- 1. Log into the IAM portal with the Organization admin account.
- 2. Create an Organization type permission profile for the Asset Management portal:
  - a. Go to Permission Profiles.
  - b. Click Add New.

- c. Enter a name and set the status to Active.
- d. Select Organization from the Select A Type dropdown menu.
- e. Click Add Portal.
- f. Select Asset Management.
- g. Click Add.
- h. Select the resource permissions.
- i. Click Save.



- 3. Create an Organization type IAM user:
  - a. Go to Users.
  - b. Click Add New and select the type of user you would like.
  - c. Enter the user details and click Next.
  - d. Select Organization from the Select a Type dropdown menu.
  - e. Select the Organizational Unit the user can access from the Permission Scope field.
  - f. Select the permission profile created in the previous step.
  - g. Click Next.
  - h. Click Confirm.
- 4. Log in as the Organization IAM user to view the OU or account selection screen.
  - · Select an OU for the OU view.
  - Select a FortiCloud account to switch the Asset Management portal to the selected account.



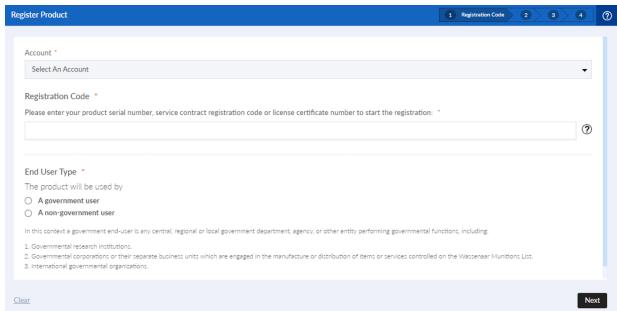
For a more detailed process on creating users within Organizations, see Permission profiles within Organizations and Creating users, user groups, and roles within Organizations in the *Identity & Access Administration Guide*.

# Registering assets to member accounts

When your current selected scope is set to an OU, you can assign an asset to a member account during the registration process.

#### To register assets to a member account:

- 1. Go to *Products* and click the *Register More* button.
- 2. Provide your registration code:
  - a. Select a member account from the Account dropdown list.
  - **b.** Enter your asset serial number, service contract registration code, or license certificate number in the *Registration Code* field.
  - **c.** Choose your end user type as either a government or non-government user.
  - d. Click Next.



#### 3. Specify your registration information:

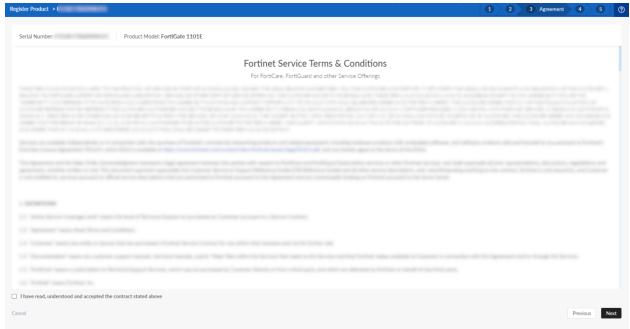
- a. If you have purchased a support contract for your asset, enter the support contract number.
- b. Enter a description to help identify the asset.
- **c.** Specify the Fortinet Partner or Reseller that helped you with your asset. If this is a Partner account, specify the Fortinet Partner or Reseller.
- d. Click the My Assets dropdown to assign the asset to a folder.
- **e.** If this is a Partner account, specify the asset group or asset folder. The *Asset Groups* section appears in accounts with asset groups enabled. Master users and sub users with full access will see *My Assets* section in regular accounts.
- f. Click Next.



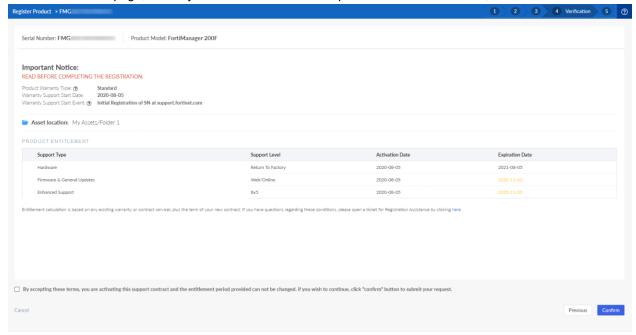


Some assets require a FortiCloud Key when being registered. See the FortiGate Cloud Administration Guide for more information.

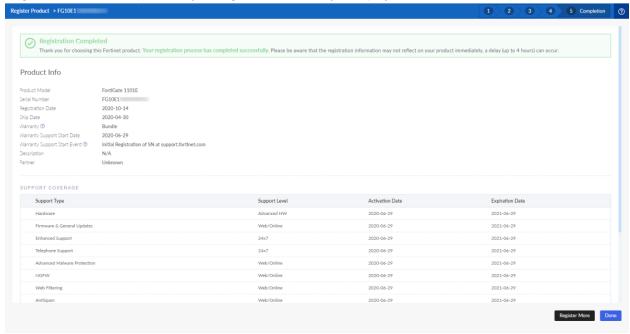
4. Review and accept the terms and conditions of the Fortinet Product Registration Agreement, and click Next.



5. On the Verification page, review your asset details and accept the terms of the contract, then click Confirm.



6. Registration is now complete and your registration summary is displayed.



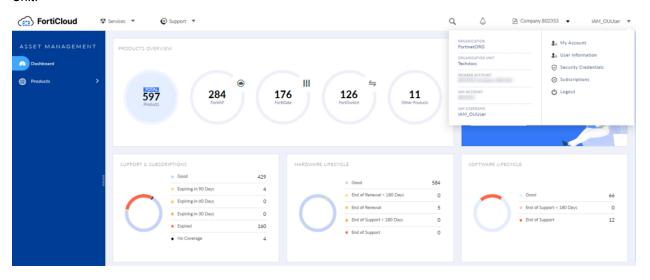
7. Click Done.

## Viewing assets in the Organization

Information displayed in the Asset Management portal can vary depending on the selected OU and account.

### Profile menu

Your profile information available in the profile menu dropdown is dependent on the access and permissions associated with you account. If you are logged in with an IAM or external IdP account that has OU permissions enabled, you will see the *IAM Account* information, your *IAM Username*, and the OU information, including the *Organization* and *Organization Unit*.



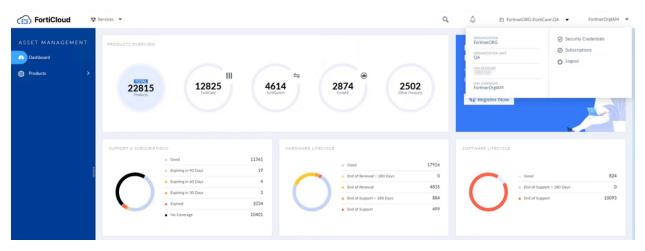


If you are logged in with an IAM or external IdP account that does not have OU permissions enabled, you will only see the *Account* information and your *Username*.

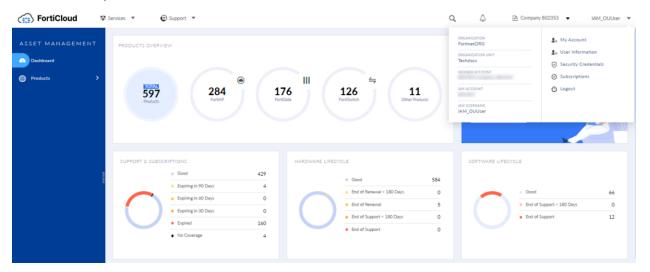
Email credentials cannot access OUs and will therefore also only include the *Account* information and your *Username*.

#### **Dashboard**

The *Dashboard* contents and profile information are also dependent on the type of OU account you are accessing. If you are logged into an OU, the information on the *Dashboard* will be an aggregation of the all of the sub-OUs and OU member accounts within that OU.



If you are logged into an OU member account, the *Dashboard* will only show information related to the current member account and the profile information will include the *Member Account* information.



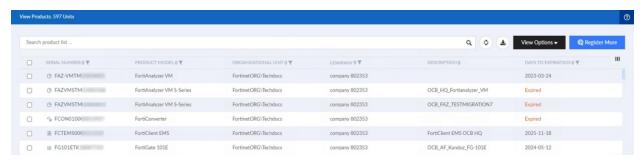
You can switch between OUs and member accounts using the OU context switch menu. See OU context switch in the Identity & Asset Management (IAM) Administration Guide.



If you are logged into an OU, you will not be able to access the legacy *Support* portal. Likewise, if you try to access the IAM portal while logged into an OU, you will be prompted to select a member account instead before you are granted access.

#### **Products**

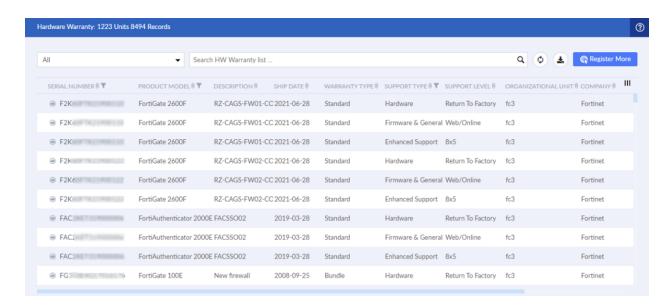
In the OU consolidation mode, the product list will provide additional information, such as *Organizational Unit*, *Company*, and *Asset Folder* columns when viewing *Products* > *Product List* from an OU.





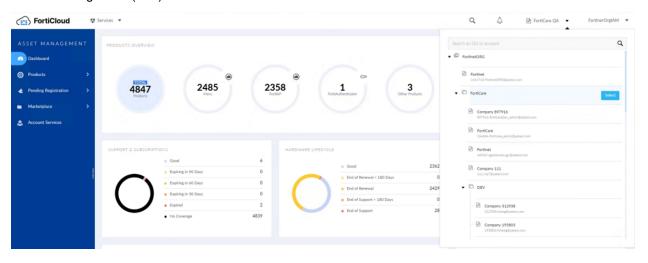
The Asset Folder and Registration Date columns are hidden by default. You can adjust the visible columns in the Select columns to display dropdown.

The *Organizational Unit* and *Company* columns are available when viewing *Products > More Views*. The following image demonstrates the new columns on the *Products > More Views > HW Warranty* page.



## **Context switch dropdown**

You can change your selected scope using the context switch dropdown menu. See OU context switch in the Identity & Access Management (IAM) Administration Guide.



For information on creating and joining Organizational Units, see Enabling Organizations in the Identity & Access Management (IAM) Administration Guide and the Organizational Portal Administration Guide.

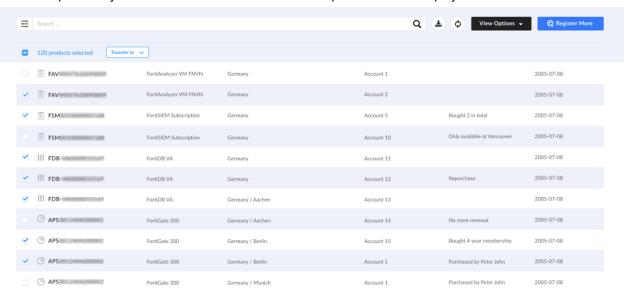
# **Transferring products**

You can transfer products to a different Organizational Unit (OU) in the Products > Products List.

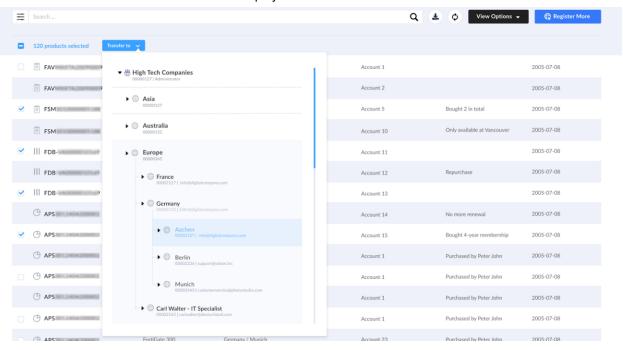
You can also move assets between asset folders. See Creating custom views on page 39 for more information.

### To transfer products to a new organizational unit:

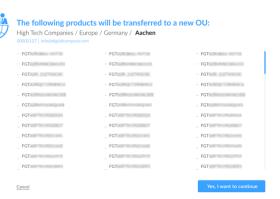
1. Select the products you want to transfer. The *Transfer to* dropdown menu is displayed.



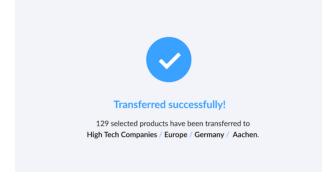
2. Select Transfer to. A list of available OUs is displayed.



3. Select the OU you want to move the products to. A list of products being moved and the new location is displayed.



4. Click Yes, I want to continue. A confirmation message is displayed.





If the transfer is unsuccessful, a warning message will display. If the transfer was partially successful, the products that were not able to transfer to the new location will be listed in the message. Any products not listed in the warning message have successfully transferred to the new location.



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