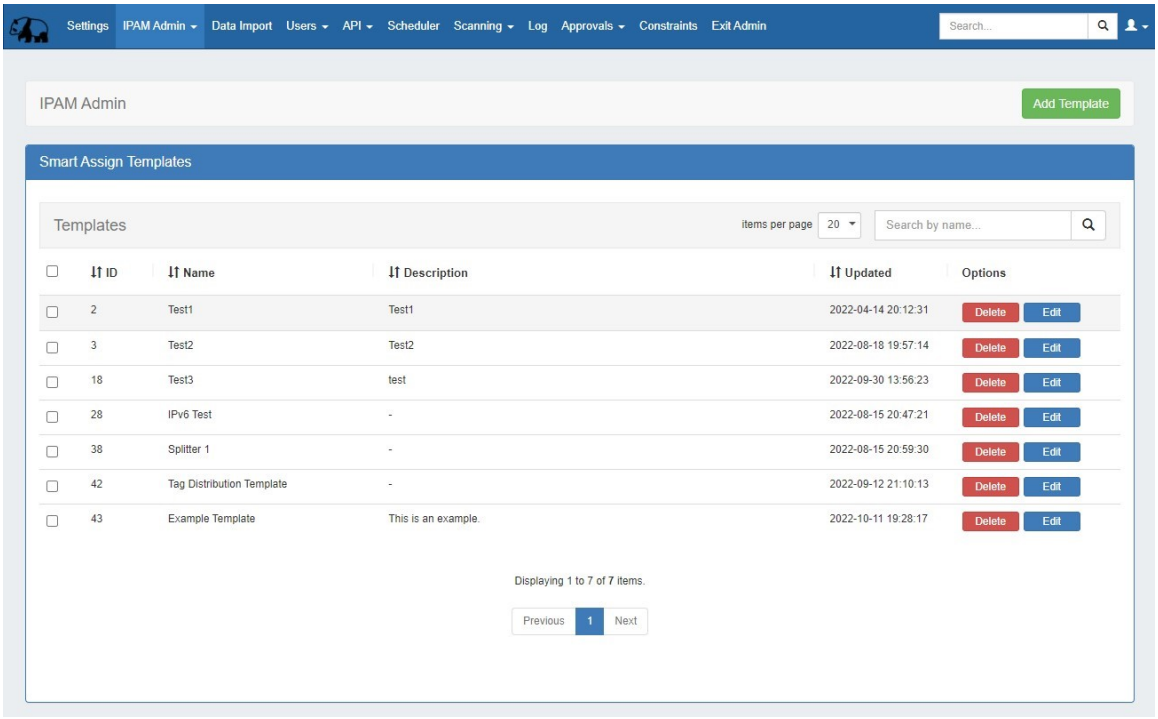
Smart Assign Templates

Smart Assign Templates

Smart Assign Templates provide the ability to define complex assignment scenarios, including those with multiple steps or multiple filter conditions.



Smart Assign Templates are accessed from the Admin -> IPAM Admin dropdown menu.

Like Smart Assign, Smart Assign Templates allow you to enter criteria such as IP type, size, RIR, region, and tag information to automatically assign a block meeting that criteria, if any exist. But Smart Assign Templates allows users to breakdown IP space even further through multiple levels of conditions for more complex assignments. For example, if you need a /24 from Resource A with Tag B, then want to take the first /28 of it and sub-assign that to Resource C, and then take the last /30 of it and assign it to Resource D - you can create a template to do just that.

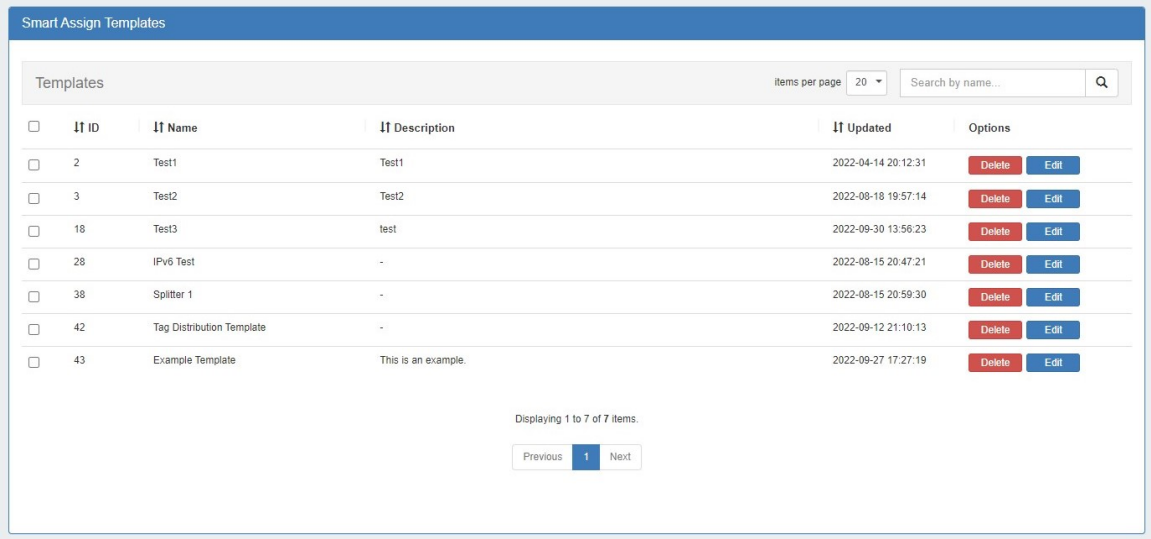
Once created, a Smart Assign Template is available to select and execute from either IPAM Admin Smart Assign Templates or directly from the Smart Assign module in the IPAM Gadget.

- Smart Assign Template List
  - Search
  - Sort
- View or Edit a Template
- Create a Template
  - Add Template Information
  - Add Assignment
  - Breakdown IP Address Space
  - Set an IPAM Alert
- Execute a Template
  - From Smart Assign Template
  - From IPAM Gadget
- Delete a Template
- Additional Information

Smart Assign Template List

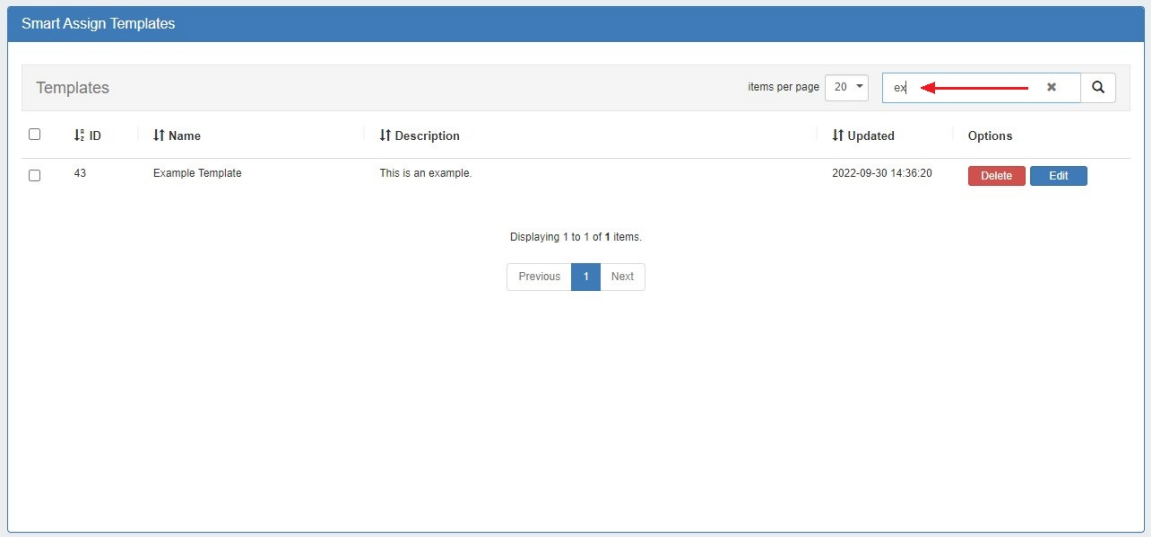
The Smart Assign Template List displays all existing templates, and is where you can view, edit, and delete existing templates.

The template list displays the template ID, Name, user-provided description, and the last updated time.



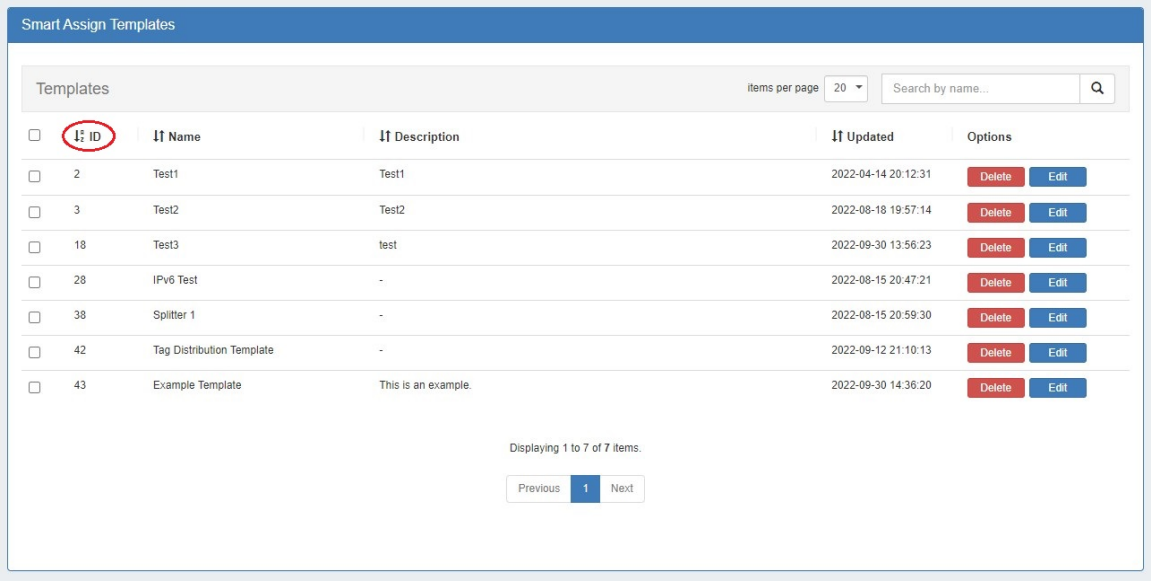
Search

Filter the list for a specific template name by typing all or part of the name in the search box.



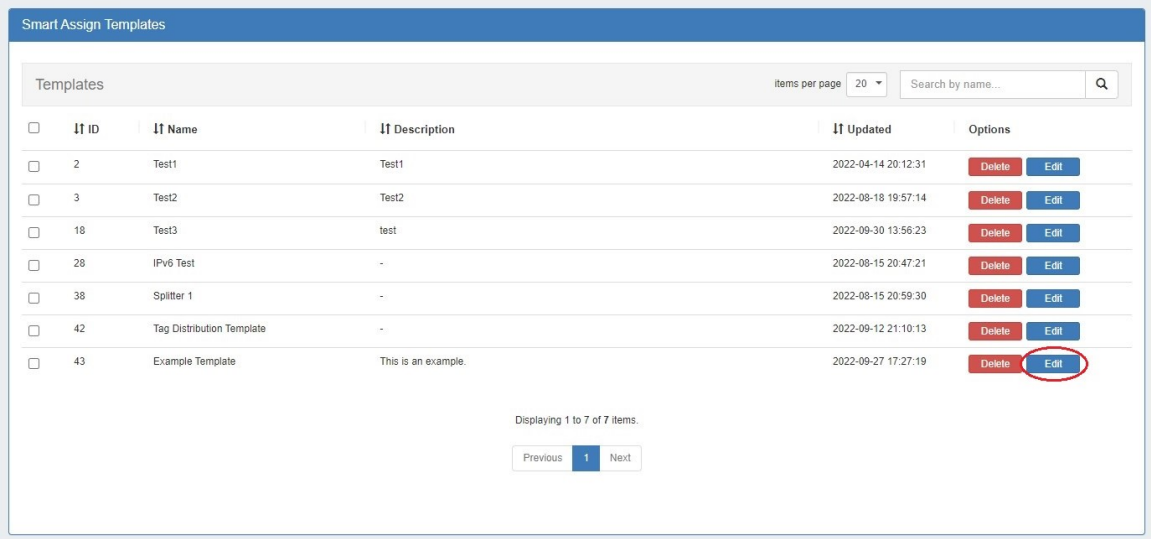
Sort

Sort columns into ascending/descending order by clicking on the column header for any column with an up/down arrow ().

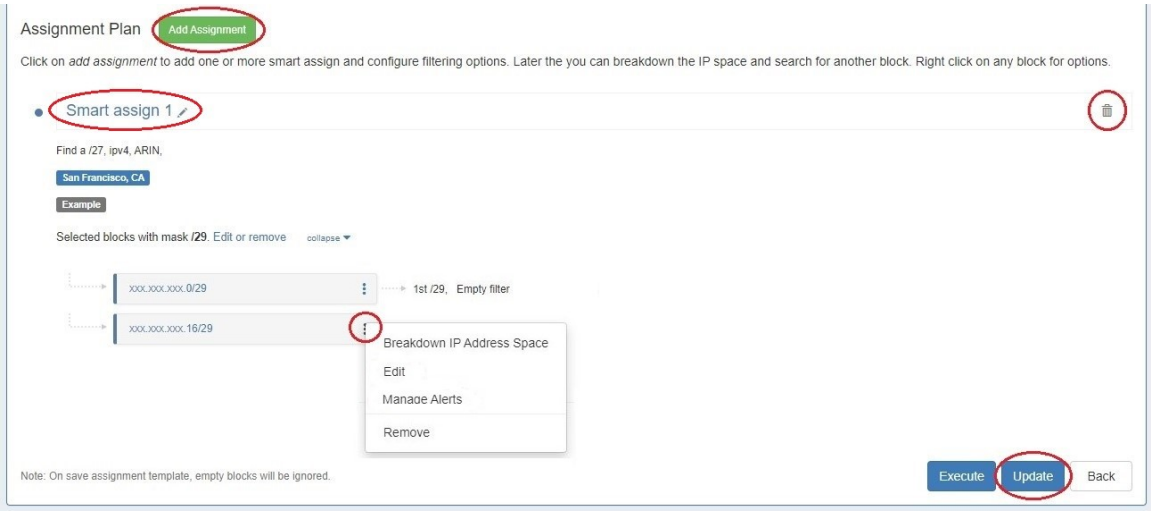


View or Edit a Template

To edit an existing template, go to the Admin Smart Assign Templates list, then click the "Edit" button in the "Options" column.

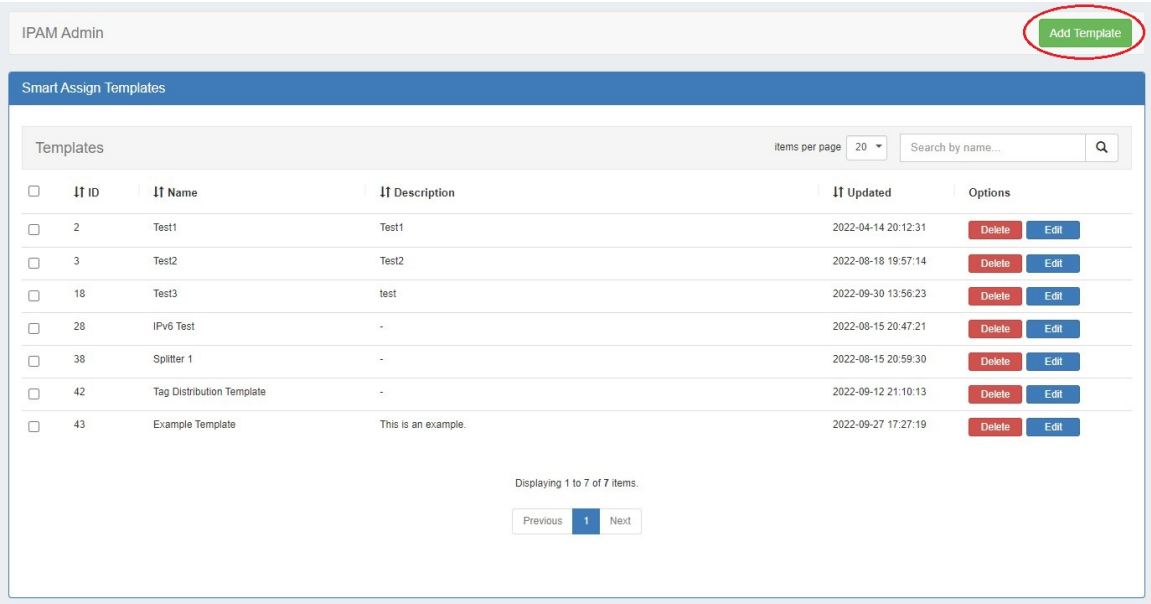


From the edit screen you can add another assignment, edit or delete the current assignment, edit or delete IP address space configuration, and set an IPAM alert. Click "Update" to save your changes.



Create a Template

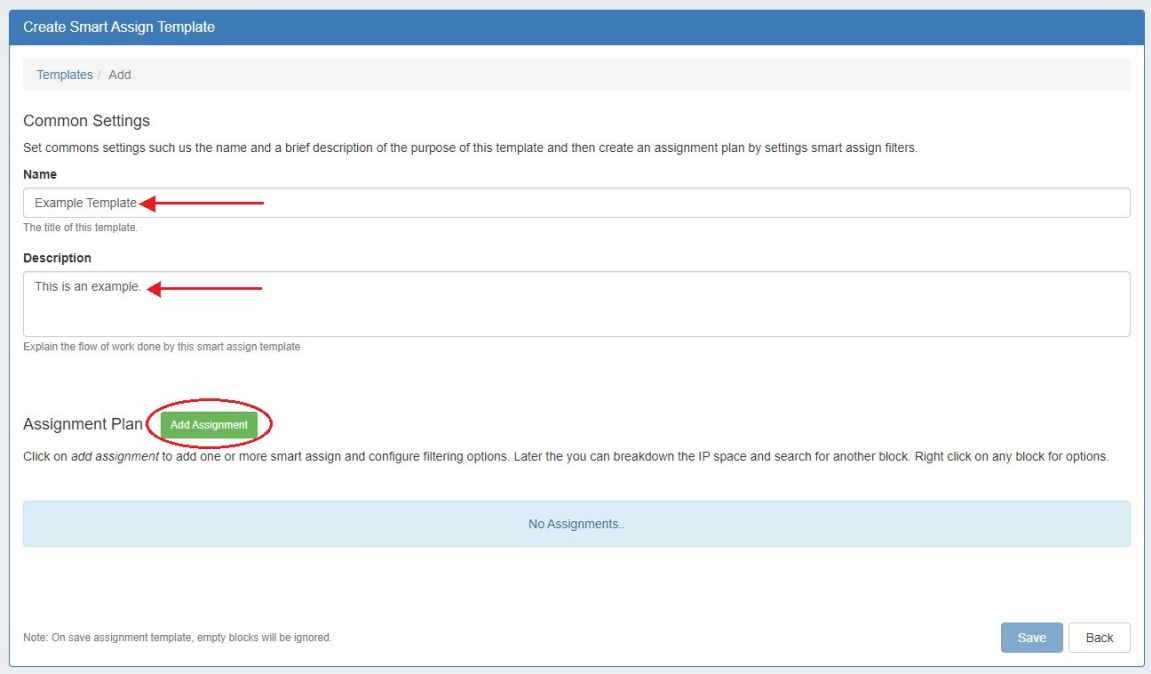
To create a new template, click "Add Template" at the upper right side of the Smart Assign Templates page.



This will open a new page to add information on the template and create the assignment plan.

Add Template Information

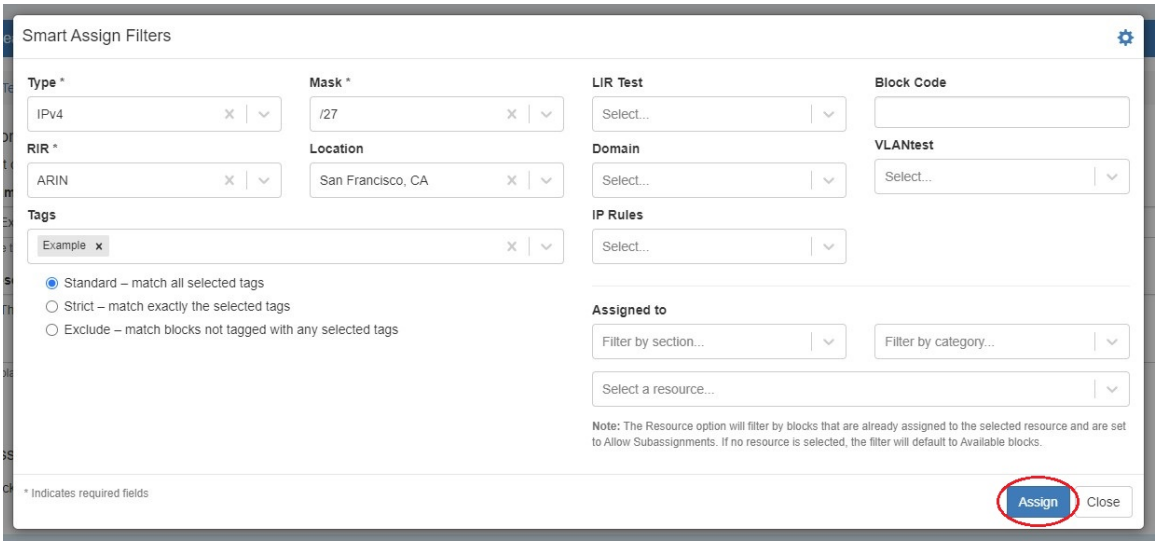
Enter a name and description for the new template, then click "Add Assignment" to proceed to the next step, selecting Smart Assign criteria.



Add Assignment

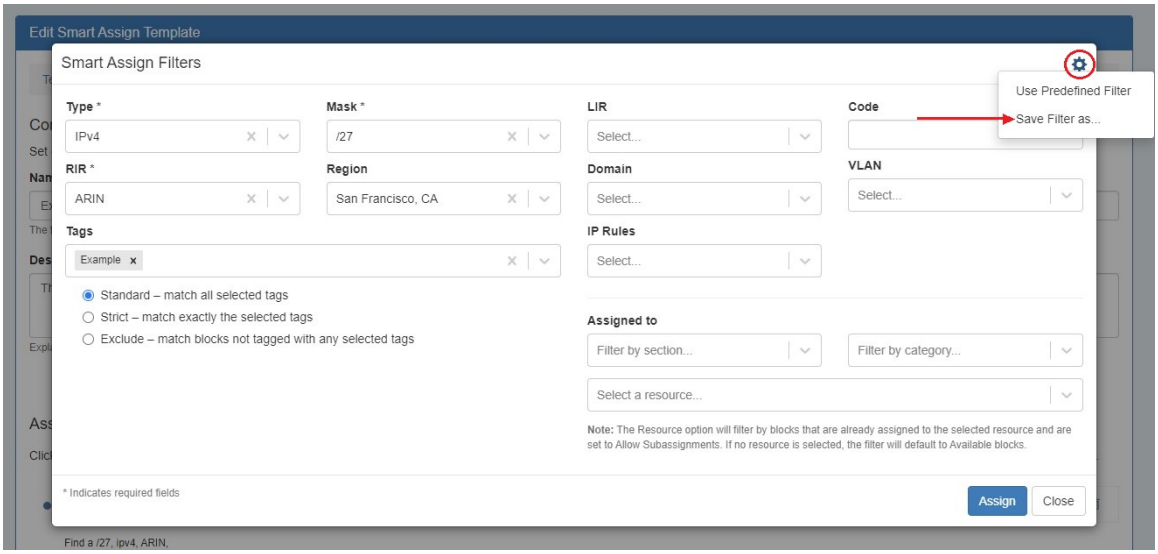
One or more assignments may be added to a template, with each assignment using the provided smart assign filter criteria. You may either manually define filter criteria, or use a predefined filter.

In the Smart Assign Filters modal, select the smart assign filter criteria to use for this assignment, or select a predefined filter from the gear menu at the upper right corner.

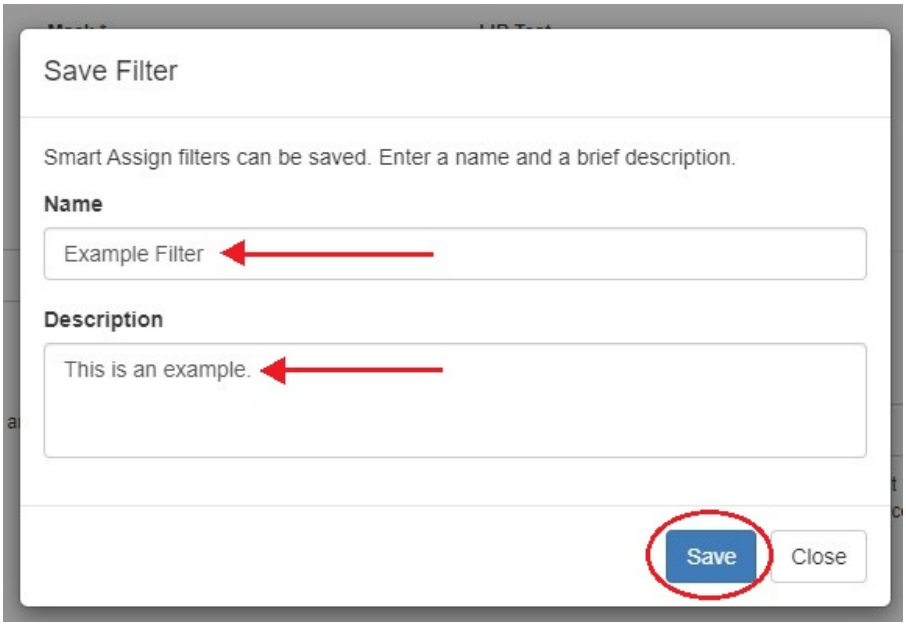


If you would like to save manually entered filter criteria as a new filter before assigning, you may save the filter as a new Predefined Filter. Otherwise, click "Assign".

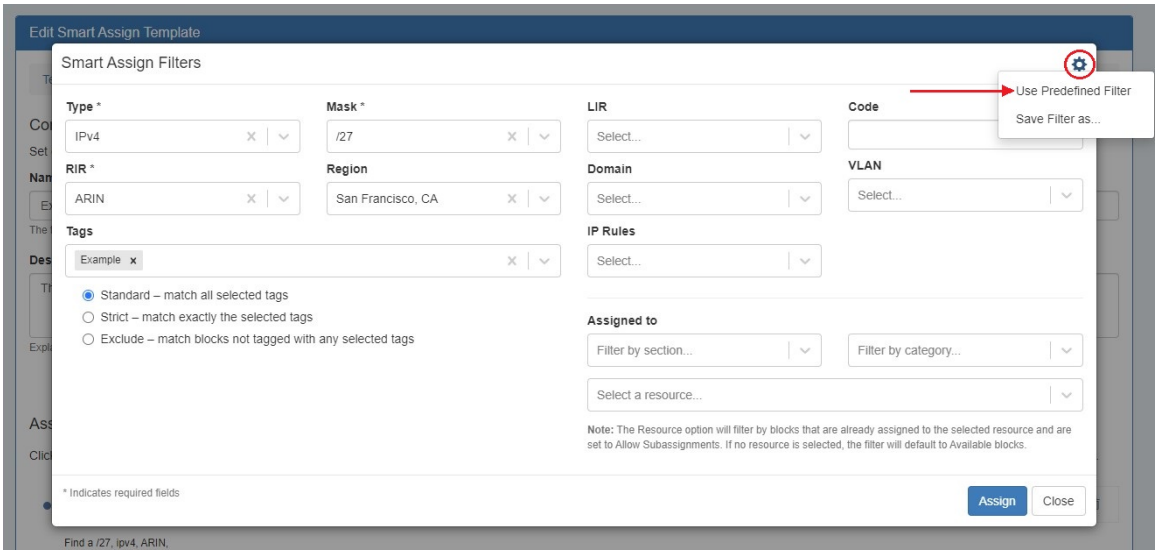
To create a Predefined Filter, select Smart Assign filter criteria. Click on the gear icon at upper right and select "Save filter as..."



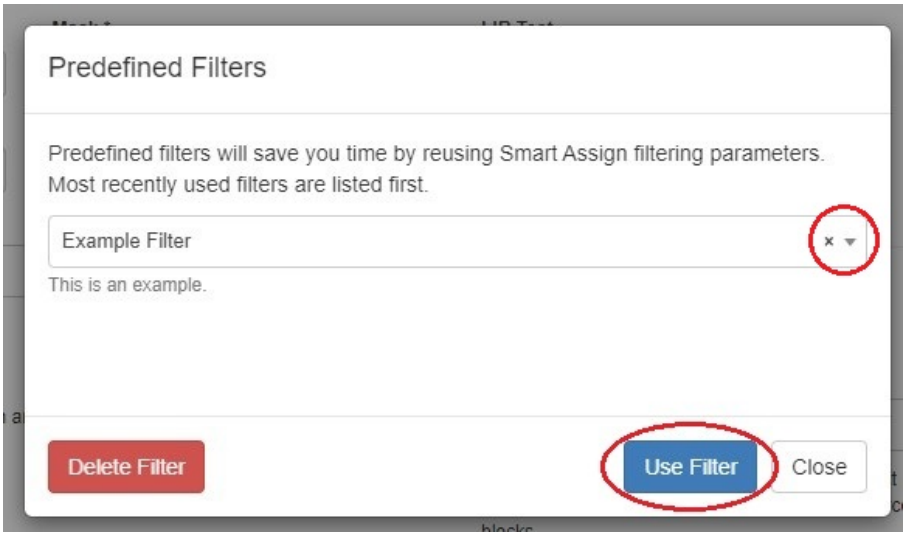
Enter a name and brief description for the filter and click "Save".



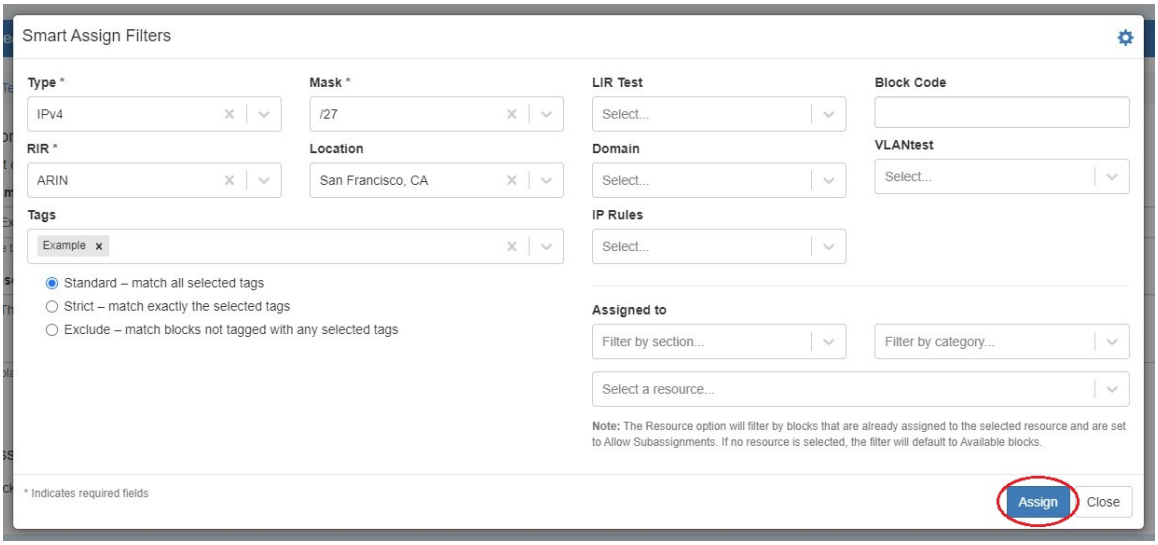
To use a saved filter, click on the gear menu and click "Use Predefined Filter".



Select a filter from the dropdown and click "Use Filter". A saved filter may be deleted by selecting "Delete Filter".

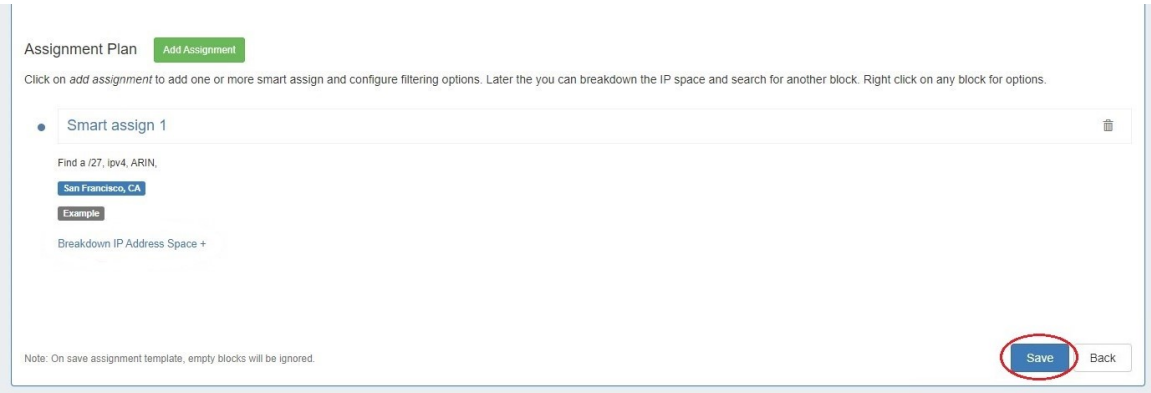


Once the filter is applied, click "Assign".



From here, you may proceed with adding more assignments or breaking down IP space.

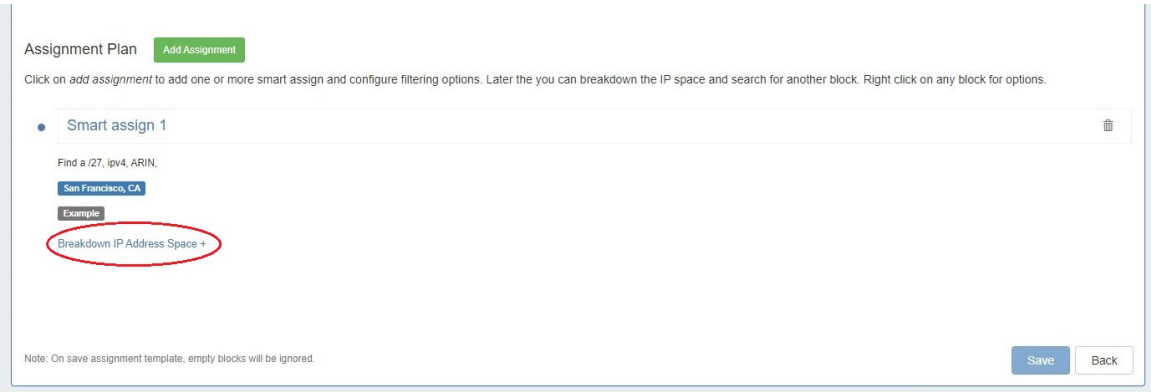
You may also save and resume editing later by clicking "Save" at lower right.



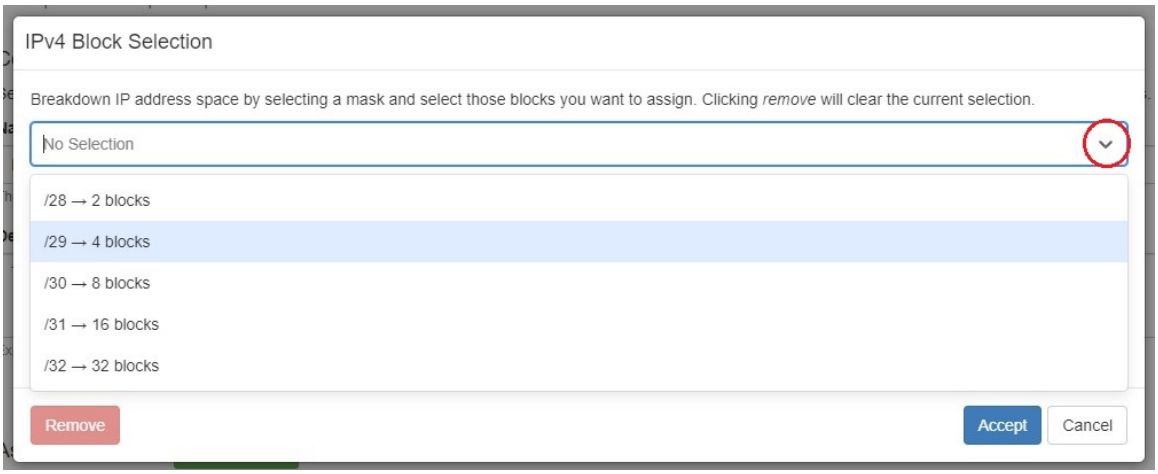
Breakdown IP Address Space

To define more complicated assignments IP address space may be broken down further.

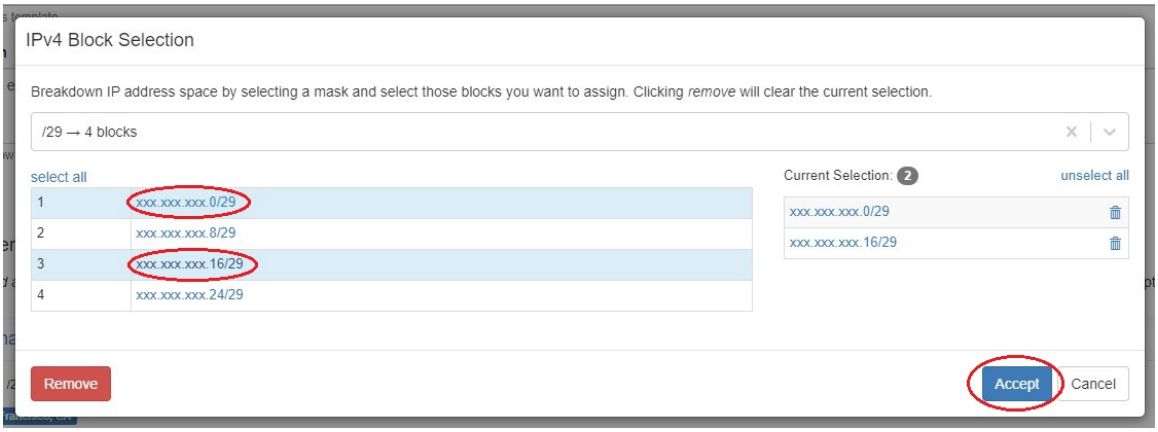
From the template list, click "Edit" for the desired template to view the assignment plan, then click "Breakdown IP Address Space". and select a mask.



The Block selection screen will open. Select a mask to use for the breakdown criteria, then review the available blocks.

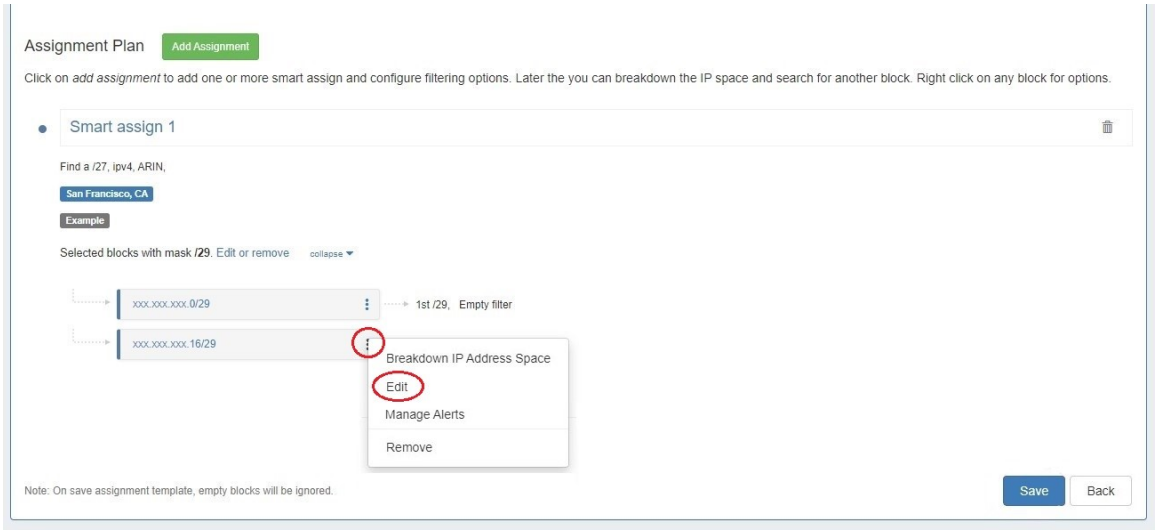


Click on a block CIDR to select that position for assignment, or you may select all. A block may be deselected by clicking the delete icon. Click "Accept" when done.

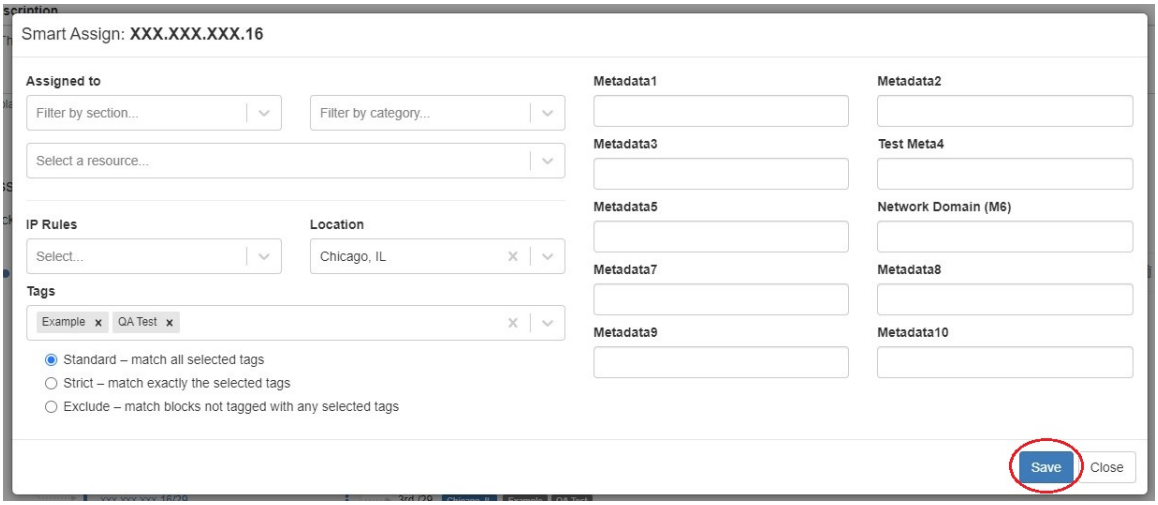


The breakdown summary will display under the template Assignment plan. You may view or hide the block details by clicking the "expand"/" collapse" toggle, or click "Edit or remove" to change or remove your selection(s).

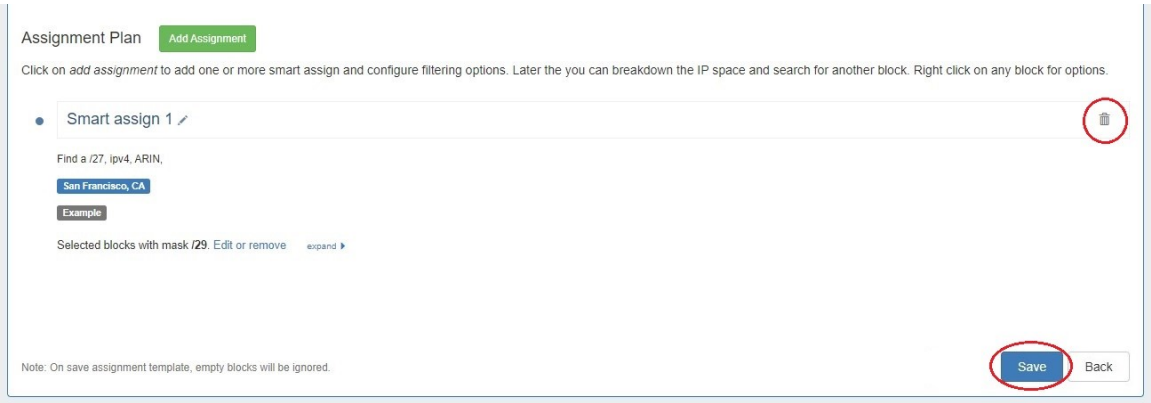
To configure filters for a specific block, click on a block menu (three dots) to open the Action Menu, then select "Edit". The block can be further broken down by selecting "Breakdown IP Address Space" or removed by clicking "Remove".



Select desired filters to apply to that block and click "Save".



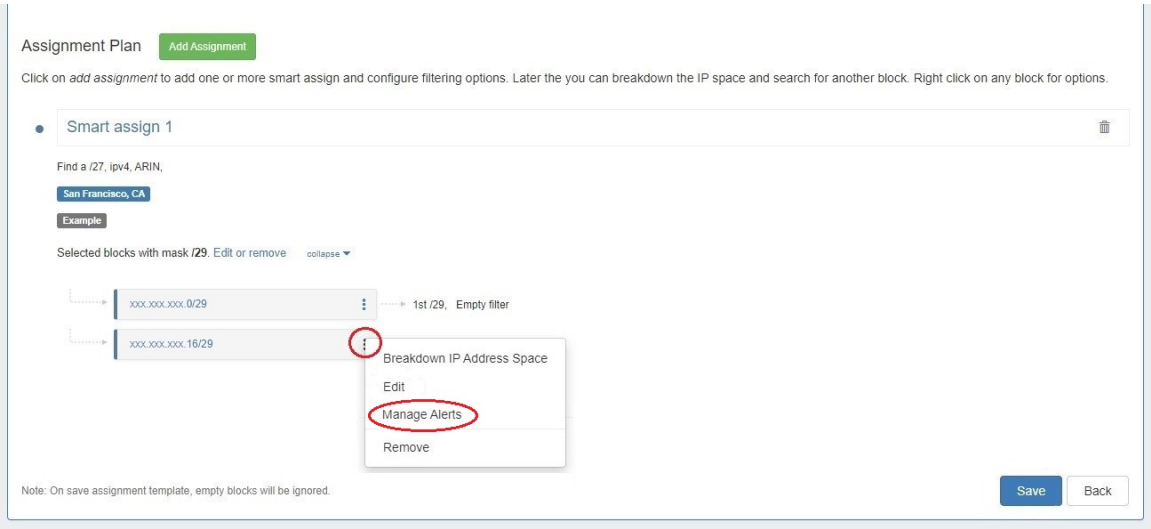
Once block filters are configured, click "Save" or "Update". The assignment may be deleted by clicking the delete icon.



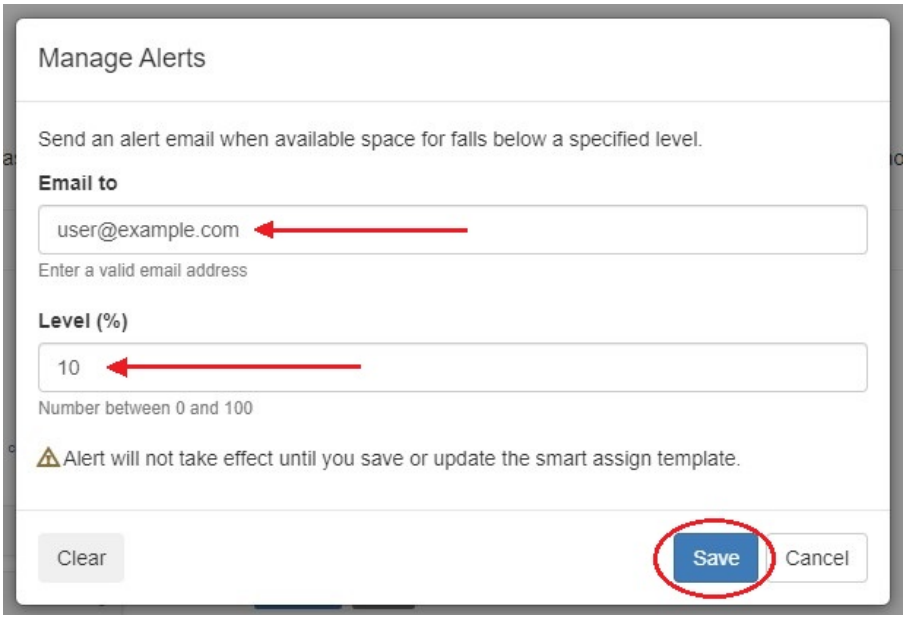
Set an IPAM Alert

Enable or clear alert emails for an IP block by setting an email address and utilization percentage level. When the block is utilized to the set percent, an email alert will be sent to the provided address.

To set an alert, select the "Manage Alerts" option from the Action Menu.



Enter an email address and utilization level for the alert.

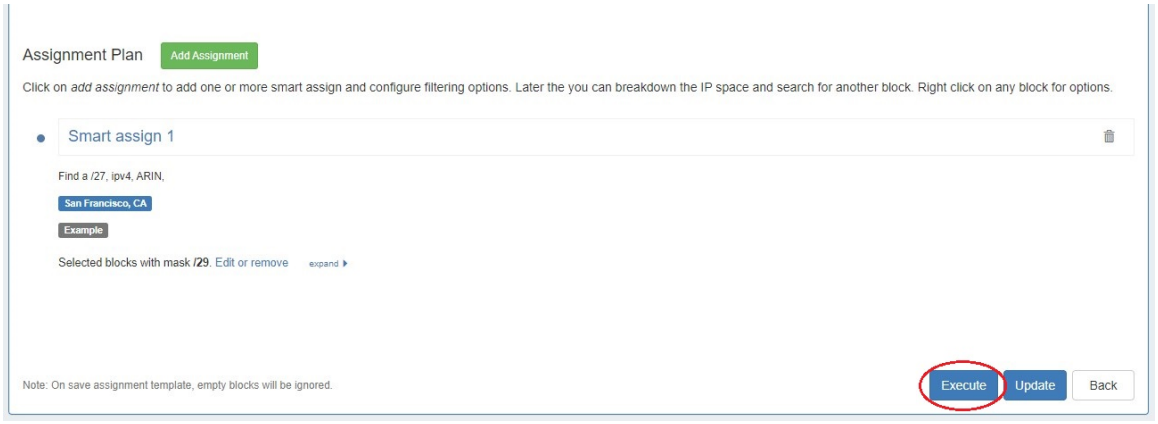


When done, click "Save". To clear an existing alert, hit "Clear", and the alert information will be removed. After adding or clearing an alert you must also save or update the entire template to retain any changes.

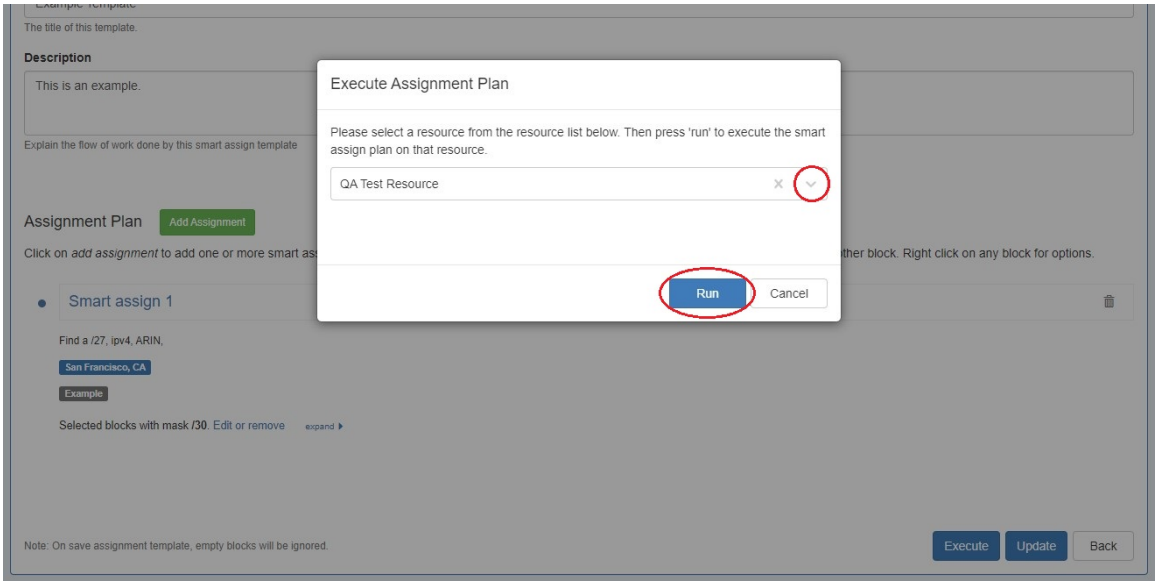
Execute a Template

From Smart Assign Template

To execute the template assignment plan, go to the edit screen for a template and click "Execute".

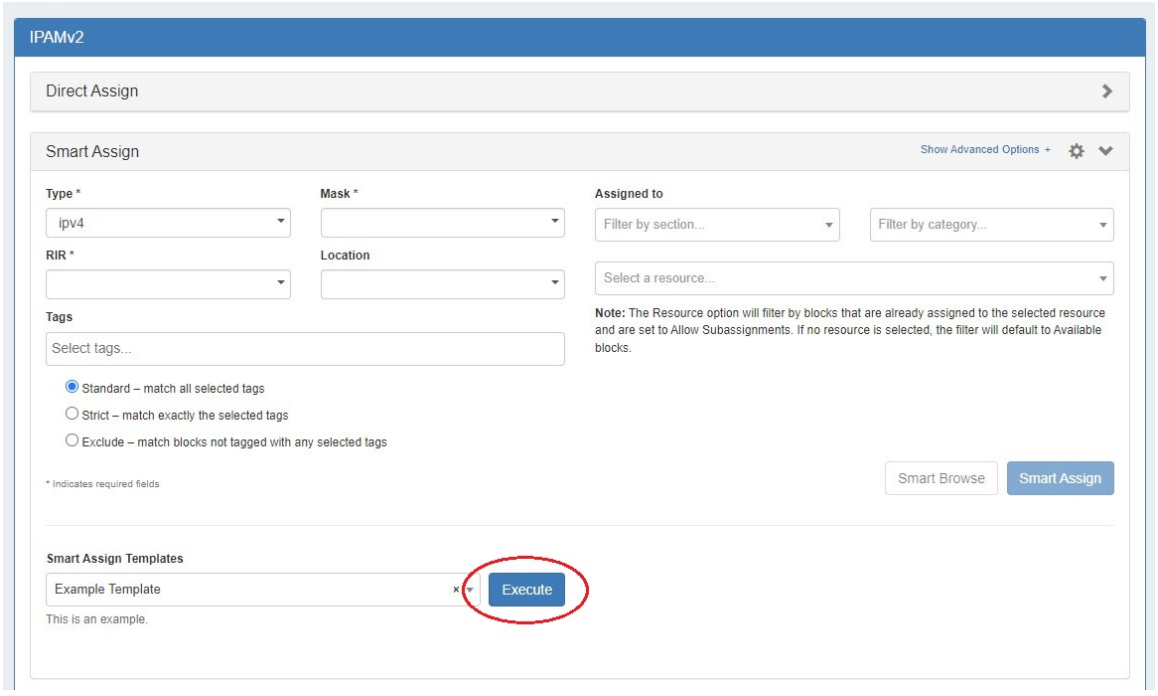


Select a Resource from the dropdown and click "Run".



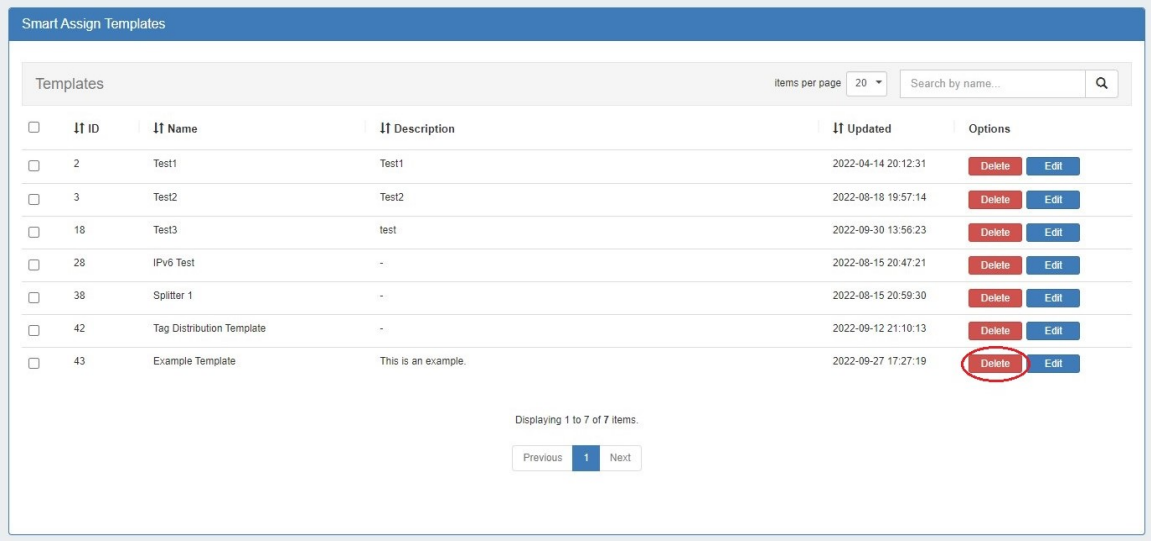
From IPAM Gadget

To run the template from a Resource's IPAM Gadget, open Smart Assign and select the template from the "Smart Assign Templates" dropdown and click "Execute".



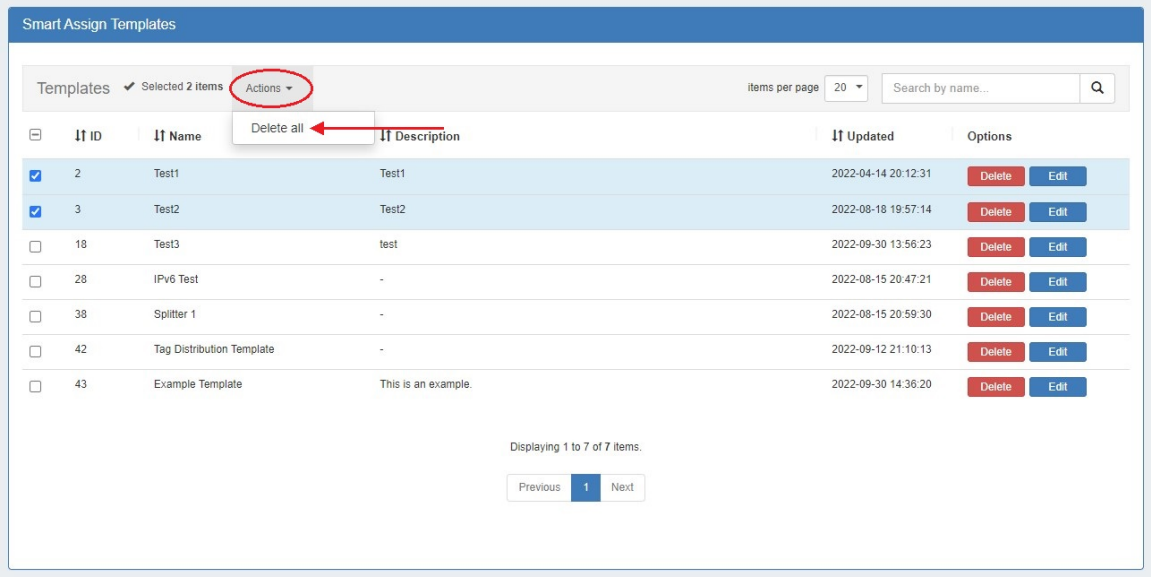
Delete a Template

To delete a template, click the "Delete" button in the "Options" column.



You may also select more than one template to delete.

To do so, select the checkboxes for the desired templates, then under the "Actions" menu at the top of the list, select "Delete all".



Additional Information

See the following pages for additional information:

- IPAM Tab
- Working with IP Blocks - Common Tasks
- IPAM Gadgets