

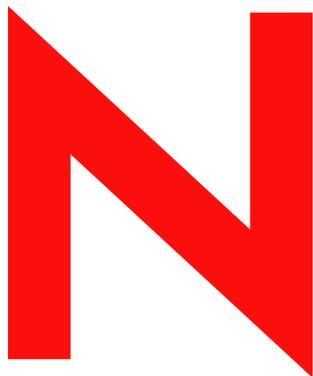
Novell ZENworks® 10 Asset Management Services

10.0.3

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REFERENCE

May 16, 2008



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About This Guide

This *Novell ZENworks 10 Configuration Management Asset Management Services Reference* includes information to help you maintain software compliance. The information in this guide is organized as follows:

- ◆ Chapter 1, “Overview,” on page 11
- ◆ Chapter 2, “Creating Purchase Records,” on page 13
- ◆ Chapter 3, “Working with Catalog Products,” on page 27
- ◆ Chapter 4, “Working with Discovered Products,” on page 31
- ◆ Chapter 5, “Creating Licensed Products,” on page 37
- ◆ Chapter 6, “Using License Management Reports,” on page 51
- ◆ Chapter 7, “Establishing Proof of Ownership,” on page 71
- ◆ Chapter 8, “Using Software Collections,” on page 97
- ◆ Chapter 9, “Monitoring Software Usage,” on page 101

Audience

This guide is intended for Novell® ZENworks® administrators.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or go to the [Novell Documentation Feedback site \(http://www.novell.com/documentation/feedback.html\)](http://www.novell.com/documentation/feedback.html) and enter your comments there.

Additional Documentation

ZENworks 10 Configuration Management Asset Management Services is supported by other documentation (in both PDF and HTML formats) that you can use to learn about and implement the product. For additional documentation, see the [ZENworks 10 Configuration Management documentation \(http://www.novell.com/documentation/zcm10/index.html\)](http://www.novell.com/documentation/zcm10/index.html).

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In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as Linux*, should use forward slashes as required by your software.

Overview

1

Novell® ZENworks® 10 Configuration Management Asset Management Services allows you to monitor software license compliance, track software usage, manage contracts, and manage licenses.

NOTE: If you have an evaluation copy of Asset Management Services, when the evaluation period expires, the following message appears on the main Asset Management Services page: *This installation is not currently licensed for ZENworks Asset Management.* However, you can still run standard reports, create and run custom reports, and view Asset Management Services pages.

The following sections contain additional information:

- ♦ [Section 1.1, “Monitor License Compliance,” on page 11](#)
- ♦ [Section 1.2, “Track Software Usage,” on page 11](#)
- ♦ [Section 1.3, “Manage Contracts,” on page 12](#)
- ♦ [Section 1.4, “Manage Product Licenses,” on page 12](#)

1.1 Monitor License Compliance

Asset Management Services automatically compares the number of purchased licenses with the number of consumed licenses to give you a clear picture of license compliance in your Management Zone. It works like this:

- 1** Enter the number of software product licenses by using purchase records, catalog records, or purchase summary records.

You can import this data or enter the data manually. For more information, see [Chapter 3, “Working with Catalog Products,” on page 27](#) *ZENworks 10 Configuration Management Administration Quick Start*.
- 2** Run an inventory scan to discover the number of installed products in your Management Zone.

This information is compared with the number of purchased licenses to determine license compliance. For more information, see [ZENworks 10 Configuration Management Asset Inventory Reference](#).
- 3** Create licensed products and entitlements for the discovered software products in your Management Zone.

For more information, see [Chapter 5, “Creating Licensed Products,” on page 37](#).
- 4** Add proof of ownership data.

For more information, see [Chapter 7, “Establishing Proof of Ownership,” on page 71](#).

After you’ve completed the steps above, the compliance engine calculates your license compliance. You can then run a variety of reports to view the data.

1.2 Track Software Usage

Asset Management Services allows you to track usage of software applications (including run time, active time, logged in user, machine, and application used) in your existing inventory. You can also

track and report on software run via Terminal Server and Citrix*, as well as Web applications run through the browser. To make this data more useful, you can run a full range of predefined software usage reports, as well as create, save, and run custom reports. This information is useful in helping you make purchase decisions based on your license compliance. For more information, see [Chapter 9, “Monitoring Software Usage,” on page 101](#).

1.3 Manage Contracts

Asset Management Services allows you to define and track IT contract details, including key dates and vendor, financial, SLA, lease, and renewal information; attach related documents; associate contracts with assets, licenses, and demographic data; and create automated e-mail notifications for specified dates. You can also run a full range of predefined contract management reports, as well as create, save, and run custom reports. For more information, see [Chapter 7, “Establishing Proof of Ownership,” on page 71](#).

1.4 Manage Product Licenses

Asset Management Services allows you to create software purchase records, define license entitlements, attach supporting documentation, reconcile discovered software products to entitlements, and track ongoing compliance status. Asset Management Services also allows you to run a full range of predefined license management reports, as well as create, save, and run custom reports. For more information, see [Chapter 5, “Creating Licensed Products,” on page 37](#).

Creating Purchase Records

2

Purchase records and purchase summary records provide the number of product licenses that are used in compliance calculations. The number of purchased licenses is compared to the number of consumed licenses to determine compliance. The following sections contain additional information:

- ♦ [Section 2.1, “Importing Purchase Records,” on page 13](#)
- ♦ [Section 2.2, “Manually Creating Purchase Records,” on page 22](#)
- ♦ [Section 2.3, “Creating Purchase Summary Records,” on page 24](#)

2.1 Importing Purchase Records

The easiest way to create purchase records is to import them. Asset Management Services supports several purchase record formats (for more information, see [Section 2.1.1, “ZENworks Asset Management Import File Formats,” on page 14](#)).

To import purchase records:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Purchase Records*.

The screenshot shows the 'Purchase Records' interface in the License Management panel. The breadcrumb path is 'License Management > Purchase Records'. The interface includes a menu bar with 'New', 'Move...', 'Delete', and 'Action', along with a refresh icon. Below the menu bar is a table with columns for 'PO #', 'Order Date', and 'Reseller'. The table contains 10 rows of purchase records, all from 'Software Spectrum' with order dates in 2007.

| PO # | Order Date | Reseller |
|-----------------------|------------|-------------------|
| 10077 | 8/9/07 | Software Spectrum |
| 101 | 8/4/07 | Software Spectrum |
| 10100 | 8/9/07 | Software Spectrum |
| 10101 | 8/9/07 | Software Spectrum |
| 10102 | 8/9/07 | Software Spectrum |
| 10127 | 8/9/07 | Software Spectrum |
| 10135 | 8/9/07 | Software Spectrum |
| 10159 | 8/9/07 | Software Spectrum |
| 10191 | 8/9/07 | Software Spectrum |
| 10216 | 8/9/07 | Software Spectrum |

- 3 Click *Action > Start Import*.
- 4 In the Import dialog box, specify a filename or click *Browse* to search, then click *OK*.
- 5 Click the refresh icon  on the right side of the menu bar.

The Purchase Records panel shows a list of purchase records from the import file.

After you've imported the purchase records, Asset Management Services creates catalog products with license information that will be used for compliance calculations. The next step is to create licensed products and reconcile them with the newly created catalog products. For information on creating licensed products from imported records, see [Chapter 5, “Creating Licensed Products,” on page 37](#).

2.1.1 ZENworks Asset Management Import File Formats

The standard format is the ZENworks® Asset Management Standard Import File (for more information, see “ZENworks Asset Management Standard Import File Format” on page 14). Asset Management Services also supports the following reseller connectors:

- ◆  CompuCom* Software Compliance Report
- ◆  Softchoice Product History Report (for more information, see “Softchoice Import File Format” on page 17)
- ◆  ZENworks Asset Management Reseller Connector Report
- ◆  SHI License Compliance Report

ZENworks Asset Management Standard Import File Format

The ZENworks Asset Management Standard Import File is an ASCII, tab-delimited text file with one row per line item. The first line of the file must contain column headers and must match the field names defined in [Table 2-1 on page 14](#).

Each row of the import file contains a line item in a purchase record. There are two parts to each row in the import file:

- ◆ **Purchase Record Header Fields:** These fields contain information specific to a particular invoice, purchase order, or other purchase transaction. They appear in columns 1–13 of [Table 2-1 on page 14](#). For each line item in a purchase record, you must repeat all of the purchase record information.
- ◆ **Purchase Record Product Fields:** These fields contain information about a particular line item in the purchase record. They appear in columns 14–30 of [Table 2-1 on page 14](#). A purchase record can contain multiple invoices. An invoice or purchase record can contain multiple line items, each representing a single product, as long as the information in the purchase record header fields (columns 1–13) remains the same for each line item.

Table 2-1 *Asset Management Standard Import File Fields*

| Column | Field Name | Field Definition | Comments |
|--------|------------|----------------------------------|---|
| 1 | PO# | The purchase order number | This reference helps link to supporting documentation and establish proof-of-ownership. Either this field or the <i>OrderDate</i> field must be included in the record; one or more of these fields are used to define a unique purchase record in the ZENworks Asset Management database. |
| 2 | OrderDate | The date the product was ordered | Either this field or the <i>PO#</i> field must be included in the record; one or more of these fields are used to define a unique purchase record in the ZENworks Asset Management database. |

| Column | Field Name | Field Definition | Comments |
|--------|------------------|--|---|
| 3 | Reseller | The reseller from whom the products in this order were purchased | |
| 4 | Recipient | The individual to whom the products in this order were shipped | |
| 5 | CompanyName | The name of the company or entity that executed the order | |
| 6 | ShippingAddress1 | The first line of the shipping address | |
| 7 | ShippingAddress2 | The second line of the shipping address | |
| 8 | ShippingAddress3 | The third line of the shipping address | |
| 9 | City | The city where the order was shipped | |
| 10 | State | The state where the order was shipped | |
| 11 | Zip | The zip code or mail code of the shipping destination | |
| 12 | Country | The country where the order was shipped | |
| 13 | Notes | A text field for general notes about the purchase record | |
| 14 | Manufacturer | The manufacturer of the ordered product | The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |
| 15 | ProductName | The name or description of the ordered product | This is a required field. The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |
| 16 | Version | The version of the ordered product | The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |

| Column | Field Name | Field Definition | Comments |
|--------|--------------------|--|--|
| 17 | ProductType | The type of product ordered | <p>The <i>ProductType</i> field helps establish what the product represents, for example, full license, upgrade, media, and so on.</p> <p>The <i>Manufacturer</i>, <i>ProductName</i>, <i>Version</i>, <i>ProductType</i>, and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product.</p> |
| 18 | LicensesPerPackage | The number of licenses represented by this form of the product | <p>For example, if the product is a 5-pack, then this value is 5. The default is 1.</p> <p>The <i>Manufacturer</i>, <i>ProductName</i>, <i>Version</i>, <i>ProductType</i>, and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product.</p> |
| 19 | ResellerSKU | The SKU number assigned by the reseller | This value may be important when communicating with a particular reseller. |
| 20 | MfrPart# | The part number assigned by the manufacturer | If available, this value can often be used to distinguish one product from another. |
| 21 | PurchaseQty | The number of units purchased in the order | |
| 22 | Serial# | The software serial number associated with the ordered product | |
| 23 | Site | The site where the software licenses are assigned | The <i>Site</i> , <i>Department</i> , and <i>CostCenter</i> fields are used by Asset Management Services for tracking demographics. |
| 24 | Department | The department where the licenses are assigned | You can associate a line item with a value in any or all of these columns so that license quantities can be summarized within a particular demographic. For these values to be meaningful, corresponding demographics must be associated with workstations in the Asset Management Services inventory. |
| 25 | CostCenter | The cost center where the licenses are assigned | |
| 26 | Comment | A text field for general comments about the purchased product | |
| 27 | Invoice | The invoice number of the ordered product | <p>This value helps link to supporting documentation and establish proof-of-ownership.</p> <p>Multiple invoices can be associated with the same purchase order number.</p> |

| Column | Field Name | Field Definition | Comments |
|--------|---------------|--|--|
| 28 | UnitMSRP | A numeric field representing the product's Manufacturer's Suggested Retail Price | If currency symbols and thousands separators appear in the fields, they are stripped out when the data is imported. |
| 29 | UnitPrice | A numeric field representing the product's unit price | The importer uses the locale of the server to determine what characters are used for thousands and monetary decimal separators. If your values contain a mix of currencies, the imported cost values may be incorrect. |
| 30 | ExtendedPrice | A numeric field representing the product's extended price | If no value exists in the <i>ExtendedPrice</i> field, a value is calculated based on the values of the <i>PurchaseQty</i> and <i>UnitPrice</i> fields. If a value exists, it is imported and is not checked to see if it matches a calculated value. |

Softchoice Import File Format

The Softchoice import file is an ASCII, tab-delimited text file with one row per line item. The first line of the file must contain column headers and must match the field names defined in [Table 2-2 on page 18](#). This format is generated from the Softchoice Corporation's Product History Report.

Each row of the import file contains a line item in a purchase record. There are two parts to each row in the import file:

- ◆ **Purchase Record Header Fields:** These fields contain information specific to a particular invoice, purchase order, or other purchase transaction. They appear in columns 1–13 of [Table 2-2 on page 18](#). For each line item in a purchase record, you must repeat all of the purchase record information.
- ◆ **Purchase Record Product Fields:** These fields contain information about a particular line item in the purchase record. They appear in columns 14–30 of [Table 2-2 on page 18](#). A purchase record can contain multiple invoices, and an invoice or purchase record can contain multiple items, each representing a single product as long as the information in columns 1–13 remains the same for each line item.

NOTE: You may omit any columns that are not required.

Table 2-2 *Asset Management Standard Import File Fields*

| Column | Field Name | Softchoice Field Name | Field Definition | Comments |
|--------|------------------|-----------------------|--|--|
| 1 | PO# | PURCHASEORDER | The purchase order number | This reference helps link to supporting documentation and establish proof-of-ownership. The <i>PO#</i> or <i>OrderDate</i> field must be included in the record; one or more of these fields are used to define a unique purchase record in the ZENworks Asset Management database. |
| 2 | OrderDate | ORDERDATE | The date the product was ordered | The <i>PO#</i> or <i>OrderDate</i> field must be included in the record; one or more of these fields are used to define a unique purchase record in the ZENworks Asset Management database. |
| 3 | Reseller | | The reseller from whom the products in this order were purchased | |
| 4 | Recipient | SHIPCONTACTNAME | The individual to whom the products in this order were shipped | |
| 5 | CompanyName | COMPANYNAME | The name of the company or entity that executed the order | |
| 6 | ShippingAddress1 | SHIPADDR | The first line of the shipping address | |
| 7 | ShippingAddress2 | SHIPCITYSTZIP | The second line of the shipping address | |
| 8 | ShippingAddress3 | | The third line of the shipping address | |
| 9 | City | | The city where the order was shipped | |
| 10 | State | | The state where the order was shipped | |

| Column | Field Name | Softchoice Field Name | Field Definition | Comments |
|--------|--------------|-----------------------|--|---|
| 11 | Zip | | The zip code or mail code of the shipping destination | |
| 12 | Country | | The country where the order was shipped | |
| 13 | Notes | | A text field for general notes about the purchase record | |
| 14 | Manufacturer | PUBLISHER | The manufacturer of the ordered product | The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |
| 15 | ProductName | ITEMDESC | The name or description of the ordered product | This is a required field. The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |
| 16 | Version | | The version of the ordered product | The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |
| 17 | ProductType | | The type of product ordered | The <i>ProductType</i> field helps establish what the product represents, for example, full license, upgrade, media, and so on. The <i>Manufacturer</i> , <i>ProductName</i> , <i>Version</i> , <i>ProductType</i> , and <i>LicensesPerPackage</i> fields are used to determine the existence of a unique product. |

| Column | Field Name | Softchoice Field Name | Field Definition | Comments |
|--------|--------------------|-----------------------|--|--|
| 18 | LicensesPerPackage | | The number of licenses represented by this form of the product | For example, if the product is a 5-pack, then this value is 5. The default is 1. <i>The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.</i> |
| 19 | ResellerSKU | SKU | The SKU number assigned by the reseller | This value may be important when communicating with a particular reseller. |
| 20 | MfrPart# | MFGSKU | The part number assigned by the manufacturer | If available, this value can often be used to distinguish one product from another. |
| 21 | PurchaseQty | QTYORD | The number of units purchased in the order | |
| 22 | Serial# | | The software serial number associated with the ordered product | |
| 23 | Site | | The site where the software licenses are assigned | The <i>Site, Department, and CostCenter</i> fields are used by Asset Management Services for tracking demographics. |
| 24 | Department | | The department where the licenses are assigned | You can associate a line item with a value in any or all of these columns so that license quantities can be summarized within a particular demographic. For these values to be meaningful, corresponding demographics must be associated with workstations in the Asset Management Services inventory. |
| 25 | CostCenter | | The cost center where the licenses are assigned | |
| 26 | Comment | COMMENTS | A text field for general comments about the purchased product | |

| Column | Field Name | Softchoice Field Name | Field Definition | Comments |
|--------|---------------|-----------------------|--|---|
| 27 | Invoice | INVOICE | The invoice number of the ordered product | This value helps link to supporting documentation and establish proof-of-ownership. Multiple invoices can be associated with the same purchase order number. |
| 28 | UnitMSRP | | A numeric field representing the product's Manufacturer's Suggested Retail Price | If currency symbols and thousands separators appear in the fields, they are stripped out when the data is imported. The importer uses the locale of the server to determine what characters are used for thousands and monetary decimal separators. If your values contain a mix of currencies, the imported cost values may be incorrect. |
| 29 | UnitPrice | SELLPRICE | A numeric field representing the product's unit price | |
| 30 | ExtendedPrice | INVTOTAL | A numeric field representing the product's extended price | If no value exists in the ExtendedPrice field, a value is calculated based on the values of the PurchaseQty and UnitPrice fields. If a value exists, it is imported and is not checked to see if it matches a calculated value. |

The following Softchoice import file fields are ignored during the import process:

- ◆ ORDERNO
- ◆ INVDATE
- ◆ PURCHASEREF
- ◆ ORDERSTATUS
- ◆ LINENO
- ◆ QTYSHIP
- ◆ COMPANYNAMESHIP
- ◆ COMPANYNAMEBILL
- ◆ BILLCONTACTNAME
- ◆ BUYERNAME
- ◆ BILLCITYSTZIP
- ◆ ATTN
- ◆ REQ
- ◆ ITEM

2.2 Manually Creating Purchase Records

Before you can calculate compliance, you need to create purchase records for all the purchased software in your Management Zone.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Purchase Records*.

License Management > Purchase Records

| Purchase Records | | | |
|-------------------------------|--|------------|-------------------|
| New ▾ Move... Delete Action ▾ | | | |
| <input type="checkbox"/> | PO # ▲ | Order Date | Reseller |
| <input type="checkbox"/> |  10077 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  101 | 8/4/07 | |
| <input type="checkbox"/> |  10100 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10101 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10102 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10127 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10135 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10159 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10191 | 8/9/07 | Software Spectrum |
| <input type="checkbox"/> |  10216 | 8/9/07 | Software Spectrum |

- 3 In the Purchase Record Panel, click *New > Purchase Record* to launch the Create New Purchase Record Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|--------------------------|---|
| General Information page | <p>Fill in the following fields:</p> <p>PO Number: The purchase order number. This entry is required.</p> <p>Recipient: The recipient shown on the purchase order.</p> <p>Company: The company selling the product.</p> <p>Shipping Address: The address of the company, including city, state/province, postal code, and country.</p> <p>Order Date: The date the product was ordered.</p> <ol style="list-style-type: none"> 1. Click the calendar icon. 2. Select a date from the pop up calendar. 3. Click <i>Close</i>. <p>Reseller: The name of the reseller.</p> <p>Notes: Add any notes as necessary.</p> |

| Wizard Page | Details |
|----------------------------------|--|
| New Purchase Summary Record page | Review the summary data. Click <i>Back</i> to make changes. Click <i>Finish</i> to create the purchase record. |

- 4 (Optional) Select *Define Additional Properties* to further define the purchase record after you click *Finish*.
- 5 Click *Finish* to create the purchase record. If you selected *Define Additional Properties* in [Step 4](#), go on to [Step 6](#) in this procedure.
- 6 In the Purchase Details panel, click *Add*.

- 7 Fill in the fields in the Add Purchase Detail dialog box.

Product: Click the browse icon to search for a product. These products are created either by importing a purchase record or creating a catalog product. For information on importing a purchase record, see [Section 2.1, “Importing Purchase Records,” on page 13](#). For information on creating a catalog product, see [Chapter 3, “Working with Catalog Products,” on page 27](#).

Qty: Specify the quantity.

Invoice#: Specify the invoice number.

Serial Number: The product’s serial number.

Cost Center: The cost center responsible for the purchase.

Department: The department associated with the purchase.

Site: The department location.

Comments: Specify any comments.

Unit MSRP (\$): The Manufacturer Suggested Retail Price (MSRP) of the product. This value is required.

Unit Price (\$): The unit price of the product. This value is required.

Extended Price (\$): The extended price of the product. This value is required.

8 Click *OK*.

2.3 Creating Purchase Summary Records

Purchase summary records allow you to manually enter the number of licenses that will be used for calculation purposes.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Licensed Products*.

| Name | Discovered Products | Catalog Products | License Quantity |
|---|-------------------------------------|-------------------------------------|------------------|
| ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 |
| ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 |
| Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 |
| Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 |
| Microsoft Office Professional 2003 4 | | | 0 |
| Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 |
| Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 |
| Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 |
| Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 |
| Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 |
| Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 |
| VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 |
| Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 |

- 3 In the Licensed Products panel, click the product you want to create a purchase summary record for.
- 4 Click the *License Entitlements* tab.

| General | | License Entitlements | | | | Compliance Status | | |
|---|--------------|----------------------|---------------------|---------------|------------------|--------------------|--------------|--|
| Entitlements (Consumption Data Source: Inventory) | | | | | | | | |
| No items available. | | | | | | | | |
| Entitlements (Consumption Data Source: Manual) | | | | | | | | |
| Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Upgrade From | |
| ACME Use | Full License | Perpetual | Active | Unrestricted | 2 | 2 | | |
| Total: | | | | | 2 | 2 | | |

- 5 Click the entitlement you want to associate with the purchase summary record.
- 6 Click the *Proof of Ownership* tab.

| General | | Proof of Ownership | | |
|---------------------------------|----------------------------------|--------------------|------------------|------------------|
| Catalog Products | | | | |
| Add Remove | | | | |
| <input type="checkbox"/> | Product | Purchase Quantity | License Quantity | |
| <input type="checkbox"/> | ACME Jumble 2 (Full License) (1) | 2 | 2 | |
| Totals: | | 2 | 2 | |
| Purchase Summary Records | | | | |
| New Delete | | | | |
| <input type="checkbox"/> | Description | Date Entered | Entered By | License Quantity |
| <input type="checkbox"/> | ACME Purchase | 8/9/07 | administrator | 2 |
| Totals: | | | | 0.00 |
| Contracts | | | | |
| Add Remove | | | | |
| <input type="checkbox"/> | Contract ID | Name | Type | Status |
| No items available. | | | | |
| Documents | | | | |
| Add Remove | | | | |
| <input type="checkbox"/> | Document ID | File Name | Date Attached | File Type |
| No items available. | | | | |

- 7 In the Purchase Summary Records panel, click *New* to open the Create New Purchase Summary Record Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|----------------------------------|---|
| General Information page | Fill in the following fields: Description: Specify a description for the purchase summary record. License Quantity: Specify the number of licenses to be used in the compliance calculations. Total Cost: Specify the total cost associated with the entitlement. Notes: Specify any notes, if any. |
| New Purchase Summary Record page | Review the summary data. Click <i>Back</i> to make changes. Click <i>Finish</i> to create the purchase summary record. |

- 8 (Optional) Select *Define Additional Properties* to further define the purchase record after you click *Finish*.
- 9 Click *Finish* to create the purchase record. If you selected *Define Additional Properties* in **Step 8**, go on to **Step 10**.
- 10 In the General panel, make any edits as desired.

General

Description: ACME Purchase

Date Entered: 8/9/07

Entered By: administrator

License Quantity: 2

Total Cost:

Notes:

Change History

| Date of Change | Changed By | License Quantity Before | License Quantity After | Description Before | Description After |
|---------------------|------------|-------------------------|------------------------|--------------------|-------------------|
| No items available. | | | | | |

Documents

Add Remove

| <input type="checkbox"/> | Document ID | File Name | Date Attached | File Type | File Size(KB) | Description | Attached By |
|--------------------------|-------------|-----------|---------------|-----------|---------------|-------------|-------------|
| No items available. | | | | | | | |

Apply Reset

- 11** Associate any documents with the purchase summary record.
 - 11a** In the Documents panel, click *Add*.
 - 11b** Select a file in the Select Document(s) for Entitlement dialog box.
 - 11c** Click *OK*.
- 12** Click *Apply*.

Working with Catalog Products

3

Catalog products are created either by importing a purchase record or creating it manually. The following sections provide more information on creating catalog products:

- ◆ Section 3.1, “Creating Catalog Products from Purchase Records,” on page 27
- ◆ Section 3.2, “Creating Catalog Products Manually,” on page 27
- ◆ Section 3.3, “Including and Excluding Catalog Products,” on page 28
- ◆ Section 3.4, “Adding Catalog Products to a Licensed Product,” on page 29

3.1 Creating Catalog Products from Purchase Records

Asset Management Services allows you to import purchase records and automatically create catalog products from these purchase records. For more information on importing purchase records and creating catalog products, see Section 2.1, “Importing Purchase Records,” on page 13.

3.2 Creating Catalog Products Manually

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Catalog Products*.

| Catalog Products | | | | | | |
|--|------------------|-------------|--------------|----------|-------------------|------------------|
| New Move... Delete Action | | | | | | |
| Name | Licenses Per Pkg | Mfr. Part # | Reseller SKU | Excluded | Purchase Quantity | Licensed Product |
| <input type="checkbox"/> 4D TECHNOLOGIES INC CD DUPE MS OFFICE 2000 STANDARD 32 BIT WIN (CD)(HR) 2000 (FF_Media Duplication) (1) | 1 | C49567 | C49567 | | 1 | |
| <input type="checkbox"/> ACME Jumble 2 (Full License) (1) | 1 | | | | 2 | Jumble |
| <input type="checkbox"/> ACME Turbo (Version Upgrade) (1) | 1 | | | | | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT CAPTURE V3.0 PERSONAL ED WNT (CD) 3 (Shrinkwrap Product) (1) | 1 | 22101156 | A59587 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001438 | A68210 | | 2 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP UPG (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001440 | A68250 | | 3 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE DESIGN COLLECTION V4.0 MP (CD) 4 (Shrinkwrap Product) (1) | 1 | 27590080 | A69412 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE GOLIVE V6.0 MP (CD) 6 (Shrinkwrap Product) (1) | 1 | 23200324 | A84261 | | 2 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0 MP (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530341 | A69856 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0.2 MP UPG (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530402 | A104342 | | 1 | |

- 3 Click *New > Catalog Product* to open the Create New Catalog Product Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|----------------------------------|--|
| General Information page | <p>Fill in the following fields:</p> <p>Manufacturer: Specify the manufacturer of the product.</p> <p>Product: Specify the name of the product.</p> <p>Product Type: Select a product type.</p> <p>Version: Specify the product version.</p> <p>Mfr. Part #: Specify the product's part number.</p> <p>Reseller SKU: Specify the reseller's SKU.</p> <p>Licenses Per Pkg: Specify the number of licenses that come in the package.</p> <p>Notes: Add notes, if any.</p> <p>Excluded: Select <i>Excluded</i> to remove the product from compliance calculations.</p> |
| New Catalog Product Summary page | Review the data. |

4 Click *Finish* to create the catalog product.

3.3 Including and Excluding Catalog Products

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Catalog Products*.

| Catalog Products | | | | | | |
|--|------------------|-------------|--------------|----------|-------------------|------------------|
| New Move... Delete Action | | | | | | |
| Name | Licenses Per Pkg | Mfr. Part # | Reseller SKU | Excluded | Purchase Quantity | Licensed Product |
| <input type="checkbox"/> 4D TECHNOLOGIES INC CD DUPE MS OFFICE 2000 STANDARD 32 BIT WIN (CD)(HR) 2000 (FF_Media Duplication) (1) | 1 | C49567 | C49567 | | 1 | |
| <input type="checkbox"/> ACME Jumble 2 (Full License) (1) | 1 | | | | 2 | Jumble |
| <input type="checkbox"/> ACME Turbo (Version Upgrade) (1) | 1 | | | | | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT CAPTURE V3.0 PERSONAL ED WNT (CD) 3 (Shrinkwrap Product) (1) | 1 | 22101156 | A59587 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001438 | A68210 | | 2 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP UPG (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001440 | A68250 | | 3 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE DESIGN COLLECTION V4.0 MP (CD) 4 (Shrinkwrap Product) (1) | 1 | 27590080 | A69412 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE GOLIVE V6.0 MP (CD) 6 (Shrinkwrap Product) (1) | 1 | 23200324 | A84261 | | 2 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0 MP (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530341 | A69856 | | 1 | |
| <input type="checkbox"/> ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0.2 MP UPG (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530402 | A104342 | | 1 | |

- 3 Select the catalog product that you want to include or exclude.
- 4 Click one of the following:
 - ◆ *Action > Exclude*
 - ◆ *Action > Include*

3.4 Adding Catalog Products to a Licensed Product

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Catalog Products*.

| Catalog Products | | | | | | |
|---|------------------|-------------|--------------|-------------------|----------|------------------|
| New Move... Delete Action | | | | | | |
| Name | Licenses Per Pkg | Mfr. Part # | Reseller SKU | Purchase Excluded | Quantity | Licensed Product |
| 4D TECHNOLOGIES INC CD DUPE MS OFFICE 2000 STANDARD 32 BIT WIN (CD)(NR) 2000 (FF_Media Duplication) (1) | 1 | C49567 | C49567 | | 1 | |
| ACME Jumble 2 (Full License) (1) | 1 | | | | 2 | Jumble |
| ACME Turbo (Version Upgrade) (1) | 1 | | | | | |
| ADOBE SYSTEMS INC ADOBE ACROBAT CAPTURE V3.0 PERSONAL ED WNT (CD) 3 (Shrinkwrap Product) (1) | 1 | 22101156 | A59587 | | 1 | |
| ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001438 | A68210 | | 2 | |
| ADOBE SYSTEMS INC ADOBE ACROBAT V5.0 MP UPG (CD) 5 (Shrinkwrap Product) (1) | 1 | 22001440 | A68250 | | 3 | |
| ADOBE SYSTEMS INC ADOBE DESIGN COLLECTION V4.0 MP (CD) 4 (Shrinkwrap Product) (1) | 1 | 27590080 | A69412 | | 1 | |
| ADOBE SYSTEMS INC ADOBE GOLIVE V6.0 MP (CD) 6 (Shrinkwrap Product) (1) | 1 | 23200324 | A84261 | | 2 | |
| ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0 MP (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530341 | A69856 | | 1 | |
| ADOBE SYSTEMS INC ADOBE PAGEMAKER V7.0.2 MP UPG (CD)(EU) 7 (Shrinkwrap Product) (1) | 1 | 27530402 | A104342 | | 1 | |

- 3 Select the catalog product that you want to add to a licensed product.
- 4 Click *Action > Add to Licensed Product* to open the Add Catalog Products to Licensed Product Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|--------------------------|---|
| Licensed Product page | Select a licensed product for the listed catalog products. Catalog Products: Shows the catalog product(s) you selected. Licensed Products: Click the search icon to find the licensed product that you want to associate with the catalog product(s). |
| License Entitlement page | Select the license entitlement for the catalog products. |
| Summary page | Review the data. |

- 5 Click *Finish* to complete the wizard.

Working with Discovered Products

4

Discovered products are those products identified by an inventory scan of the Management Zone. For more information on inventory scans, see *ZENworks 10 Configuration Management Asset Inventory Reference*. This section includes the following topics:

- ◆ Section 4.1, “Viewing Discovered Product Details,” on page 31
- ◆ Section 4.2, “Including and Excluding Discovered Products,” on page 34
- ◆ Section 4.3, “Associating Discovered Products with Licensed Products,” on page 34
- ◆ Section 4.4, “Adding Discovered Products to Software Collections,” on page 35
- ◆ Section 4.5, “Setting Standards Categories,” on page 36

4.1 Viewing Discovered Product Details

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Discovered Products*.



| <input type="checkbox"/> | Name | Excluded | Licensed Product | Installed Quantity | Standards Category |
|--------------------------|--|----------|--|--------------------|--------------------|
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 (Windows) | | Office Professional 2003 | 2 | |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 (Windows) | | Windows Server 2003 | 1 | |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 (Windows) | | Windows XP Professional | 2 | |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5.0_10 (Windows) | | Java2 Runtime Environment | 1 | |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 (Windows) | | OpenOffice.org | 1 | |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 (Windows) | | SQL Anywhere Developer Edition | 1 | |
| <input type="checkbox"/> | VMware VMWare Tools - (Windows) | | VMware Tools | 3 | |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - (Windows) | | Yahoo! Companion Toolbar | 2 | |

The Discovered Products panel appears, showing the following details:

Name: The name of the discovered product.

Excluded: Indicates that the discovered product is excluded from compliance calculations.

Licensed Product: The licensed product associated with the discovered product.

Installed Quantity: The number of installations in the Management Zone.

Standards Category: The category for the product.

- 3 Click the discovered product you want to view the details for.

| Details | | Installations/Consumption | | | |
|--------------------------------------|-----------------------------------|--------------------------------------|----------|-----------|-------------|
| General | | | | | |
| Manufacturer: | Microsoft | | | | |
| Product: | Windows Server 2003 | | | | |
| Version: | 5.2 | | | | |
| Platform: | Windows | | | | |
| Distribution: | | | | | |
| License Type: | | | | | |
| Current Manufacturer: | Microsoft | | | | |
| Serial Numbers: | 69712-347-8481644-42264 | | | | |
| Standards Category: | <input type="text"/> | | | | |
| Licensed Product: | Microsoft Windows Server 2003 5.2 | | | | |
| License Entitlement(s): | Entitlement 1 | | | | |
| Installed Quantity: | 1 | | | | |
| Notes: | <input type="text"/> | | | | |
| <input type="checkbox"/> Excluded | | | | | |
| Inventory Products | | | | | |
| Manufacturer | Product | Version | Platform | Category | Subcategory |
| Microsoft | Windows Server 2003 | 5.2 | Windows | Op System | Windows NT |
| <input type="button" value="Apply"/> | | <input type="button" value="Reset"/> | | | |

The Details page appears, consisting of two panels: General and Inventory Products.

General Panel: Contains general information about the product, including:

- ◆ **Manufacturer:** The manufacturer of the product.
- ◆ **Product:** The product name.
- ◆ **Version:** The product version.
- ◆ **Platform:** The product platform: Windows or Mac.
- ◆ **Distribution:** The type of license distribution.
- ◆ **License Type:** The type of license.
- ◆ **Current Manufacturer:** The current manufacturer of the product.
- ◆ **Serial Numbers:** The product serial numbers.
- ◆ **Standards Category:** The product category. Select a category, then click *Apply*.
- ◆ **Installed Quantity:** The number of installations in the Management Zone.
- ◆ **Notes:** Add notes, if any, then click *Apply*.
- ◆ **Excluded:** Select *Excluded* if you want the product to be excluded from compliance calculations.

Inventory Products Panel: Displays information about the inventory products that make up the discovered product. Typically, a discovered product is associated with more than one inventory product.

- ◆ **Manufacturer:** The manufacturer of the product.
- ◆ **Product:** The product name.
- ◆ **Version:** The product version.
- ◆ **Platform:** The product platform: Windows or Mac.
- ◆ **Category:** The product's category.
- ◆ **Subcategory:** The product's subcategory.

4 Click the *Installations/Consumption* tab.

| Action | Machine Name | Login Name | IP Address | Site | Department | Cost Center | Ignored | Serial Number |
|--------------------------|--------------|---------------|---------------|------|------------|-------------|---------|-------------------------|
| <input type="checkbox"/> | ZENDOCWKS1 | Administrator | 137.65.164.72 | | | | | 55274-338-4988024-22542 |
| <input type="checkbox"/> | ZENDOCWKS2 | Administrator | 137.65.165.53 | | | | | 55274-338-4988024-22732 |

Ignored Installations: 0

Consumption

Recognized Installations: 2

Additional Consumption: 0

Net Consumption: 2

Apply Reset

The Installations/Consumption page appears, consisting of two panels: Installations and Consumption.

Installations Panel: A list of devices in the Management Zone that have the product installed, along with the following information:

- ♦ **Machine Name:** The machine name. Click the machine name to see details about the device.
- ♦ **Login Name:** The login name for the device.
- ♦ **IP Address:** The IP address of the device.
- ♦ **Site:** The location of the device.
- ♦ **Department:** The department associated with the device.
- ♦ **Cost Center:** The cost center associated with the device.
- ♦ **Ignored:** Shows if the installation is ignored. Select a device, then click *Action > Ignore Installation* to ignore this installation. Click *Action > Recognize Installation* to recognize the installation.
- ♦ **Serial Number:** The product serial number.

Consumption Panel: Details about consumption, including the following:

- ♦ **Recognized Installations:** The number of recognized installations.
- ♦ **Additional Consumption:** Specify any additional consumption, then click *Apply*.
- ♦ **Net Consumption:** The total consumption.

4.2 Including and Excluding Discovered Products

Asset Management Services allows you to include or exclude a discovered product from compliance calculations.

To include or exclude a discovered product:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Discovered Products*.

| <input type="checkbox"/> | Name | Excluded | Licensed Product | Installed Quantity | Standards Category |
|--------------------------|--|----------|--|--------------------|--------------------|
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 (Windows) | | Office Professional 2003 | 2 | |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 (Windows) | | Windows Server 2003 | 1 | |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 (Windows) | | Windows XP Professional | 2 | |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5.0_10 (Windows) | | Java2 Runtime Environment | 1 | |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 (Windows) | | OpenOffice.org | 1 | |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 (Windows) | | SQL Anywhere Developer Edition | 1 | |
| <input type="checkbox"/> | VMware VMware Tools - (Windows) | | VMware Tools | 3 | |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - (Windows) | | Yahoo! Companion Toolbar | 2 | |

- 3 Select the product you want to include or exclude.
- 4 Click either of the following:
 - ♦ *Action > Include*
 - ♦ *Action > Exclude*

4.3 Associating Discovered Products with Licensed Products

Associating discovered products with licensed products is how Asset Management Services determines compliance.

To associate a discovered product with a licensed product:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Discovered Products*.

| Discovered Products | | | | | |
|--------------------------|--|----------|--|--------------------|--------------------|
| Action ▾ | | | | | |
| <input type="checkbox"/> | Name ▲ | Excluded | Licensed Product | Installed Quantity | Standards Category |
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 (Windows) | | Office Professional 2003 | 2 | |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 (Windows) | | Windows Server 2003 | 1 | |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 (Windows) | | Windows XP Professional | 2 | |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5.0_10 (Windows) | | Java2 Runtime Environment | 1 | |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 (Windows) | | OpenOffice.org | 1 | |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 (Windows) | | SQL Anywhere Developer Edition | 1 | |
| <input type="checkbox"/> | VMware VMware Tools - (Windows) | | VMware Tools | 3 | |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - (Windows) | | Yahoo! Companion Toolbar | 2 | |

1 - 8 of 8 show 25 ▾ items

- 3 Select the discovered product you want to associate with a licensed product.
- 4 Click *Action > Add to Licensed Product* to open the Add Discovered Products to Licensed Products Wizard. Complete the wizard by using information in the table below to fill in the fields.

| Wizard Page | Details |
|--------------------------|---|
| Licensed Product page | Select a licensed product to associate with the discovered product. |
| License Entitlement page | Select a license entitlement for the licensed product. |
| Summary page | Review the data. Click <i>Finish</i> to complete the wizard. |

4.4 Adding Discovered Products to Software Collections

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Discovered Products*.

| Discovered Products | | | | | |
|--------------------------|--|----------|--|--------------------|--------------------|
| Action ▾ | | | | | |
| <input type="checkbox"/> | Name ▲ | Excluded | Licensed Product | Installed Quantity | Standards Category |
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 (Windows) | | Office Professional 2003 | 2 | |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 (Windows) | | Windows Server 2003 | 1 | |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 (Windows) | | Windows XP Professional | 2 | |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5.0_10 (Windows) | | Java2 Runtime Environment | 1 | |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 (Windows) | | OpenOffice.org | 1 | |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 (Windows) | | SQL Anywhere Developer Edition | 1 | |
| <input type="checkbox"/> | VMware VMware Tools - (Windows) | | VMware Tools | 3 | |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - (Windows) | | Yahoo! Companion Toolbar | 2 | |

1 - 8 of 8 show 25 ▾ items

- 3 Select the discovered products that you want to add to a software collection.
- 4 Click *Action > Add to Software Collection*.

For information on creating a software collection, see [Section 8.1, “Creating a Software Collection,”](#) on page 97.

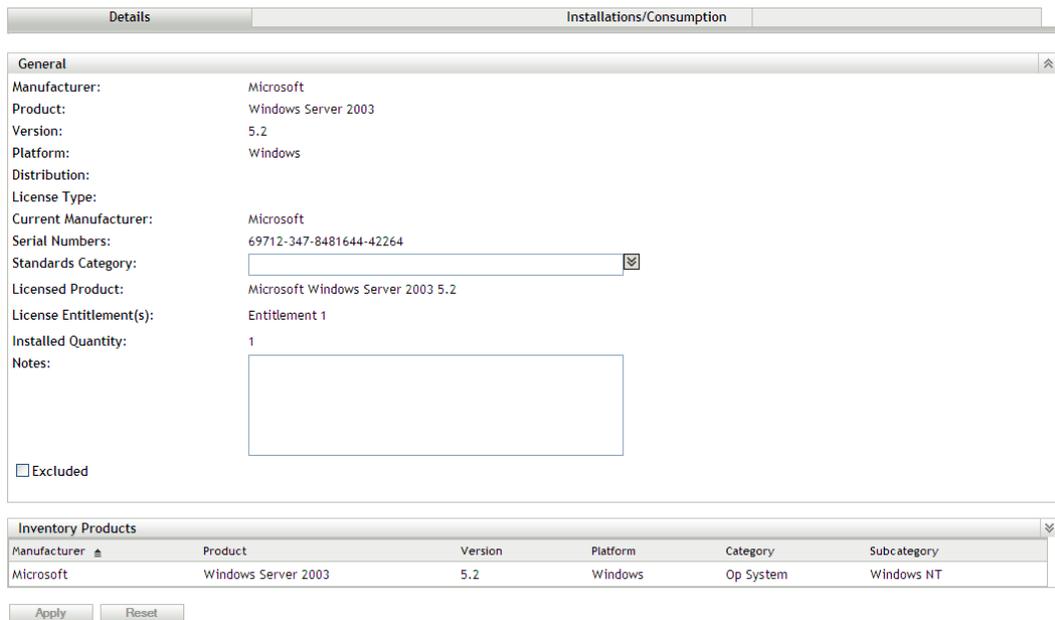
4.5 Setting Standards Categories

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Discovered Products*.



| <input type="checkbox"/> | Name | Excluded | Licensed Product | Installed Quantity | Standards Category |
|--------------------------|--|----------|--------------------------------|--------------------|--------------------|
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 (Windows) | | Office Professional 2003 | 2 | |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 (Windows) | | Windows Server 2003 | 1 | |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 (Windows) | | Windows XP Professional | 2 | |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5.0_10 (Windows) | | Java2 Runtime Environment | 1 | |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 (Windows) | | OpenOffice.org | 1 | |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 (Windows) | | SQL Anywhere Developer Edition | 1 | |
| <input type="checkbox"/> | VMware VMWare Tools - (Windows) | | VMware Tools | 3 | |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - (Windows) | | Yahoo! Companion Toolbar | 2 | |

- 3 Click the discovered product that you want to set the standard category for.



Details | **Installations/Consumption**

General

Manufacturer: Microsoft
Product: Windows Server 2003
Version: 5.2
Platform: Windows
Distribution:
License Type:
Current Manufacturer: Microsoft
Serial Numbers: 69712-347-8481644-42264
Standards Category:
Licensed Product: Microsoft Windows Server 2003 5.2
License Entitlement(s): Entitlement 1
Installed Quantity: 1
Notes:

Excluded

Inventory Products

| Manufacturer | Product | Version | Platform | Category | Subcategory |
|--------------|---------------------|---------|----------|-----------|-------------|
| Microsoft | Windows Server 2003 | 5.2 | Windows | Op System | Windows NT |

- 4 In the *Standards Category* field, specify a category.
- 5 Click *Apply*.

Creating Licensed Products

5

Licensed products are used to determine compliance. This section includes the following topics:

- ♦ Section 5.1, “Viewing Licensed Product Detail,” on page 37
- ♦ Section 5.2, “Reconciling Licensed Products with Purchase Records,” on page 41
- ♦ Section 5.3, “Creating Licensed Products Manually,” on page 42
- ♦ Section 5.4, “Defining License Entitlements,” on page 45

5.1 Viewing Licensed Product Detail

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management tab, click *Licensed Products*.

| <input type="checkbox"/> | Name | Discovered Products | Catalog Products | License Quantity |
|--------------------------|---|-------------------------------------|-------------------------------------|------------------|
| <input type="checkbox"/> | ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 |
| <input type="checkbox"/> | ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 |
| <input type="checkbox"/> | Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 |
| <input type="checkbox"/> | Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> | Microsoft Office Professional 2003 4 | | | 0 |
| <input type="checkbox"/> | Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> | Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 |
| <input type="checkbox"/> | Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> | Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 |
| <input type="checkbox"/> | Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> | Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> | VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 |
| <input type="checkbox"/> | Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 |

A list of licensed products appears, along with the following details:

Name: The name of the licensed product.

Discovered Products: Indicates that the licensed product is associated with a discovered product.

Catalog Products: Indicates that the licensed product is associated with a catalog product.

License Quantity: Shows the number of licenses for the product.

- 3 Click a licensed product.

| General | License Entitlements | Compliance Status |
|--|----------------------|-------------------|
| <div style="border: 1px solid gray; padding: 5px;"> <p>General</p> <p>Manufacturer: <input type="text" value="ACME"/> <input type="checkbox"/></p> <p>Licensed Product: <input type="text" value="Urbane"/> <input type="checkbox"/></p> <p>Version: <input type="text" value="2"/></p> <p>Notes: <input style="width: 100%; height: 40px;" type="text"/></p> <p>Cost Center: <input type="text"/></p> <p style="text-align: right;"> <input type="button" value="Apply"/> <input type="button" value="Reset"/> </p> </div> | | |

The General panel appears with the following data:

Manufacturer: The manufacturer of the product. To change the manufacturer, specify a new value, then click *Apply*.

Licensed Product: The name of the product. To change the name, specify a new value, then click *Apply*.

Version: The version number of the product. To change the version, specify a new value, then click *Apply*.

Notes: Notes, if any. Add any notes, then click *Apply*.

Administrator-defined Field: Any administrator-defined field for a license appears here. To edit the field, specify a new value, then click *Apply*. For more information, see [Chapter 10, “Using Administrator-Defined Fields,”](#) on page 117.

4 Click the *License Entitlements* tab.

| General | License Entitlements | Compliance Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------------------|-------------------|--------------------------|---------------------|------------------|------------------|---------------------|-------------------|------------------|--------------------|------------------|--------------|--------------------------|---------------|--------------|-----------|--------|------------------|---|---|-------------------|--|--------|--|--|--|--|--|---|---|--|--|
| <div style="border: 1px solid gray; padding: 5px;"> <p>Entitlements (Consumption Data Source: Inventory)</p> <p style="text-align: right;">New Delete <input type="button" value="Refresh"/></p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Description</th> <th>Type</th> <th>License Period</th> <th>Term License Status</th> <th>License Model</th> <th>License Quantity</th> <th>Quantity Available</th> <th>Versions Covered</th> <th>Upgrade From</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>ACME Standard</td> <td>Full License</td> <td>Perpetual</td> <td>Active</td> <td>Per-Installation</td> <td>4</td> <td>4</td> <td>Unknown (Windows)</td> <td></td> </tr> <tr> <td colspan="6">Total:</td> <td>4</td> <td>4</td> <td></td> <td></td> </tr> </tbody> </table> </div> | | | <input type="checkbox"/> | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | <input type="checkbox"/> | ACME Standard | Full License | Perpetual | Active | Per-Installation | 4 | 4 | Unknown (Windows) | | Total: | | | | | | 4 | 4 | | |
| <input type="checkbox"/> | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | ACME Standard | Full License | Perpetual | Active | Per-Installation | 4 | 4 | Unknown (Windows) | | | | | | | | | | | | | | | | | | | | | | | | |
| Total: | | | | | | 4 | 4 | | | | | | | | | | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid gray; padding: 5px;"> <p>Entitlements (Consumption Data Source: Manual)</p> <p style="text-align: right;">New Delete <input type="button" value="Refresh"/></p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Description</th> <th>Type</th> <th>License Period</th> <th>Term License Status</th> <th>License Model</th> <th>License Quantity</th> <th>Quantity Available</th> <th>Versions Covered</th> <th>Upgrade From</th> </tr> </thead> <tbody> <tr> <td colspan="10">No items available.</td> </tr> </tbody> </table> </div> | | | <input type="checkbox"/> | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | No items available. | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | | | | | | | | | | | | | | | | | | | | | | | |
| No items available. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

The License Entitlements page appears, which consists of two panels: Entitlements (Consumption Data Source: Inventory) and Entitlements (Consumption Data Source: Manual)

These panels display the following details:

Description: The description of the entitlement.

Type: The license type.

License Period: The license period: perpetual or term.

Term License Status: Indicates if the license period has expired.

License Model: The type of license model. License models are grouped according to how license consumption is determined, either by an inventory scan or by manually specifying the license quantity.

License Quantity: The number of licenses

Quantity Available: The number of available licenses. This is calculated by subtracting licenses consumed from the total number of licenses.

Versions Covered: The versions covered by this license entitlement.

Upgrade From: If the entitlement type is *Version Upgrade*, this column displays the version it is upgraded from.

- 5 Click the *Compliance Status* tab.

| General | | License Entitlements | | | Compliance Status | | |
|---|-------------------|----------------------|-------------------|--------------------|-----------------------|------------------------|-----------------|
| License Consumption (Consumption Data Source: Inventory) | | | | | | | |
| Discovered Product | Distribution | License Type | Serial Numbers | Installed Quantity | Ignored Installations | Additional Consumption | Net Consumption |
|  .com Solutions FmPro Migrator Unknown (Windows) | | | | 0 | 0 | 0 | 0 |
| Total: | | | | 0 | 0 | 0 | 0 |
| Compliance Status (Consumption Data Source: Inventory) | | | | | | | |
| As Of: August 12, 2007 12:00:02 AM | | | | | | | |
| Type | Versions Covered | License Quantity | Licenses Consumed | Over/Under | | | |
| Version-Specific | Unknown (Windows) | 4 | 0 | 4 | | | |
| Total: | | 4 | 0 | | | | |
| Compliance Status (Consumption Data Source: Manual) | | | | | | | |
| As Of: August 12, 2007 12:00:02 AM | | | | | | | |
| <input type="checkbox"/> License Entitlement | License Quantity | Licenses Consumed | Over/Under | | | | |
| No items available. | | | | | | | |

The Compliance Status page appears, which consists of three panels:

License Consumption (Consumption Data Source: Inventory): This panel shows license consumption that has been determined by an inventory scan.

Compliance Status (Consumption Data Source: Inventory): This panel shows the compliance status of the license from information gathered by an inventory scan.

Compliance Status (Consumption Data Source: Manual): This panel shows license compliance status calculated from license quantities entered manually.

- 6 Click an entitlement to display information about that entitlement.

General Proof of Ownership

General

Description: ACME Use

Entitlement Type: Full License

Platform: Windows

License Period:
 Perpetual Term

 Start Date: 8/12/07

 End Date: 8/12/07

License Model: Unrestricted

License Quantity: 2

Quantity Available: 2

Quantity Consumed: 2

Virtual Machine Use Rights:

Notes:

Change History

| Date of Change | Changed By | Quantity Consumed Before | Quantity Consumed After | Description Before | Description After |
|---------------------|------------|--------------------------|-------------------------|--------------------|-------------------|
| No items available. | | | | | |

Apply Reset

The General page appears with details about the entitlement.

7 Click the *Proof of Ownership* tab.

General Proof of Ownership

Catalog Products

Add Remove

| Product | Purchase Quantity | License Quantity |
|----------------------------------|-------------------|------------------|
| ACME Jumble 2 (Full License) (1) | 2 | 2 |
| Total: | 2 | 2 |

Purchase Summary Records

New Delete

| Description | Date Entered | Entered By | License Quantity | Total Cost |
|---------------|--------------|---------------|------------------|------------|
| ACME Purchase | 8/9/07 | administrator | 2 | |
| Total: | | | 2 | 0.00 |

Contracts

Add Remove

| Contract ID | Name | Type | Status | Start Date | End Date |
|---------------------|------|------|--------|------------|----------|
| No items available. | | | | | |

Documents

Add Remove

| Document ID | File Name | Date Attached | File Type | File Size(KB) | Description | Attached By |
|---------------------|-----------|---------------|-----------|---------------|-------------|-------------|
| No items available. | | | | | | |

The Proof of Ownership page displays the following panels:

Catalog Products: The Catalog Products panel lists the catalog products associated with this license and entitlement.

Purchase Summary Records: The Purchase Summary Records panel lists the summary records associated with this license and entitlement.

Contracts: The Contracts panel lists the contracts associated with this license and entitlement.

Documents: The Documents panel lists the documents associated with this license and entitlement.

Coverage: The Coverage panel lists the discovered product versions that are covered by this entitlement. (Available only for entitlements whose consumption data source is inventory.)

5.2 Reconciling Licensed Products with Purchase Records

Before you can run compliance reports, you need to create licensed products to monitor and report on license compliance. After the licensed products are created, they can be reconciled with discovered products in your Management Zone and used to calculate compliance.

To create licensed products and reconcile them with discovered products:

- 1 Run an inventory scan of the Management Zone using default settings.

For information on running an inventory scan, see the [Asset Inventory Reference \(http://www.novell.com/documentation/zcm10/\)](http://www.novell.com/documentation/zcm10/).

- 2 In ZENworks Control Center, click the *Asset Management* tab.
- 3 In the License Management panel, click *Licensed Products*.



| Name | Discovered Products | Catalog Products | License Quantity |
|--|-------------------------------------|-------------------------------------|------------------|
| <input type="checkbox"/> ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 |
| <input type="checkbox"/> ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 |
| <input type="checkbox"/> Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 |
| <input type="checkbox"/> Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Microsoft Office Professional 2003 4 | | | 0 |
| <input type="checkbox"/> Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 |
| <input type="checkbox"/> Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 |
| <input type="checkbox"/> Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 |
| <input type="checkbox"/> Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 |

- 4 In the Licensed Products panel, click *Action > Auto-Reconcile: Create Licensed Products* to launch the Auto-reconcile Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|---|--|
| License Entitlements page | <p>Add a description for the license entitlement.</p> <p>Select one of the following license models:</p> <p>Per-Installation: Software is licensed per installation.</p> <p>OEM: Software is licensed as part of the OEM package.</p> <p>Machine: Software is licensed per machine.</p> |
| Discovered Product Filter page | <p>Select the discovered products to reconcile. Select <i>Any</i> to reconcile with all discovered products, or select <i>Products Specified Below</i> and provide a manufacturer and product name to reconcile a specific product.</p> |
| Select Licensed Products to Create page | <p>Select the licensed products to create and the discovered products to be included. If catalog products are listed, select the catalog products to be included.</p> |
| Auto-reconcile Create Summary page | <p>Review your data.</p> |

- 5 Click *Finish* to create the licensed product and reconcile it with the associated discovered products and catalog products.

You can now check license compliance. For more information, see [Chapter 6, “Using License Management Reports,” on page 51](#).

5.3 Creating Licensed Products Manually

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Licensed Products*.

| Name | Discovered Products | Catalog Products | License Quantity |
|---|-------------------------------------|-------------------------------------|------------------|
| ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 |
| ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 |
| Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 |
| Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 |
| Microsoft Office Professional 2003 4 | | | 0 |
| Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 |
| Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 |
| Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 |
| Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 |
| Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 |
| Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 |
| VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 |
| Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 |

3 Click *New > Licensed Product* to open the Create New Licensed Product Wizard. Complete the wizard by using information in the following table to fill in the fields.

| Wizard Page | Details |
|----------------------------------|--|
| General Information page | Fill in the fields: Manufacturer: The manufacturer of the licensed product. Licensed Product: The name of the product. Version: The product version. Notes: Specify any notes. Administrator-Defined Field: Specify a value for the administrator-defined field, if any. |
| New License Product Summary page | Review the data. |

4 (Optional) Select *Define Additional Properties* to further define the license after you click *Finish*.

5 Click *Finish*.

If you selected *Define Additional Properties*, continue with [Section 5.3.1, “Creating License Entitlements,”](#) on page 43.

5.3.1 Creating License Entitlements

1 If you are continuing from [Step 5 on page 43](#), and selected *Define Additional Properties*, skip to [Step 6](#) in this procedure.

2 In ZENworks Control Center, click the *Asset Management* tab.

3 In the License Management panel, click *Licensed Products*.

| Licensed Products | | | | |
|--|-------------------------------------|-------------------------------------|------------------|--|
| New Move... Delete Action | | | | |
| Name | Discovered Products | Catalog Products | License Quantity | |
| <input type="checkbox"/> ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 | |
| <input type="checkbox"/> ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 | |
| <input type="checkbox"/> Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 | |
| <input type="checkbox"/> Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 | |
| <input type="checkbox"/> Microsoft Office Professional 2003 4 | | | 0 | |
| <input type="checkbox"/> Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 | |
| <input type="checkbox"/> Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 | |
| <input type="checkbox"/> Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 | |
| <input type="checkbox"/> Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 | |
| <input type="checkbox"/> Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 | |
| <input type="checkbox"/> Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 | |
| <input type="checkbox"/> VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 | |
| <input type="checkbox"/> Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 | |

4 Click the product you want to create an entitlement for.

5 Click the *License Entitlements* tab.

| General | License Entitlements | Compliance Status |
|---|----------------------|---|
| Entitlements (Consumption Data Source: Inventory) | | |
| New Delete | | |
| <input type="checkbox"/> | Description | Type License Period Term License Status License Model License Quantity Quantity Available Versions Covered Upgrade From |
| No items available. | | |
| Entitlements (Consumption Data Source: Manual) | | |
| New Delete | | |
| <input type="checkbox"/> | ACME Use | Full License Perpetual Active Unrestricted 2 2 Upgrade From |
| Total: | | 2 2 |

6 Click *New* in the appropriate panel, depending on whether the consumption will be calculated by an inventory scan or manually, to open the Create New Entitlement Wizard. Complete the wizard by using the information in the following table to fill in the fields.

| Wizard Page | Details |
|-----------------------|---|
| License Model page | Select a license model. |
| Entitlement Type page | Select an entitlement type: <ul style="list-style-type: none"> ◆ Full License ◆ Version Upgrade (If you select Version Upgrade, you will need to identify the entitlement that it is upgraded from.) ◆ License/Maintenance |

| Wizard Page | Details |
|------------------------------|--|
| General Information Page | <p>Fill in the following fields:</p> <p>Description: A description of the entitlement.</p> <p>Platform: Select a platform from the list.</p> <p>License Period: Select a license period: <i>Perpetual</i> or <i>Term</i>. If you select <i>Term</i>, use the calendar icons to select start and end dates.</p> <p>Quantity Consumed: Specify the number of licenses consumed. (Available only for entitlements whose consumption data source is manual.)</p> <p>Virtual Machine Use Rights: Specify any virtual machine use rights.</p> <p>Notes: Specify any notes.</p> |
| New Entitlement Summary page | Review the data. |

7 (Optional) Select *Define Additional Properties* to further define the entitlement after you click *Finish*.

8 Click *Finish*.

If you selected *Define Additional Properties*, continue with [Section 5.4, “Defining License Entitlements,”](#) on page 45.

5.4 Defining License Entitlements

- 1** If you are continuing from [Step 8 on page 45](#), and selected *Define Additional Properties*, skip to [Step 7](#) in this procedure.
- 2** In ZENworks Control Center, click the *Asset Management* tab.
- 3** In the License Management panel, click *Licensed Products*.

Licensed Products

New Move... Delete Action

| Name | Discovered Products | Catalog Products | License Quantity |
|--|-------------------------------------|-------------------------------------|------------------|
| <input type="checkbox"/> ACME Jumble 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 2 |
| <input type="checkbox"/> ACME Urbane 2 | <input checked="" type="checkbox"/> | | 4 |
| <input type="checkbox"/> Macromedia Macromedia Flash Player 8.0 | <input checked="" type="checkbox"/> | | 2 |
| <input type="checkbox"/> Microsoft Office Professional 2003 2003 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Microsoft Office Professional 2003 4 | | | 0 |
| <input type="checkbox"/> Microsoft Windows Server 2003 5.2 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Microsoft Windows XP Professional 5.1 | <input checked="" type="checkbox"/> | | 5 |
| <input type="checkbox"/> Sun Java2 Runtime Environment 1.5 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Sun Microsystems OpenOffice.org 2.2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4 |
| <input type="checkbox"/> Sybase SQL Anywhere Developer Edition 10.0 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> Symantec Symantec AntiVirus Corporate Edition 8.1 | <input checked="" type="checkbox"/> | | 0 |
| <input type="checkbox"/> VMware VMware Tools - | <input checked="" type="checkbox"/> | | 10 |
| <input type="checkbox"/> Yahoo! Yahoo! Companion Toolbar - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0 |

1 - 13 of 13 show 25 items

4 Click the product whose entitlement you want to modify.

| General | License Entitlements | Compliance Status |
|--|----------------------|-------------------|
| <p>General</p> <p>Manufacturer: ACME</p> <p>Licensed Product: Jumble</p> <p>Version: 2</p> <p>Notes:</p> <p>Cost Center:</p> <p>Apply Reset</p> | | |

5 Click the *License Entitlements* tab.

| General | License Entitlements | Compliance Status | | | | | | | | | | | | | | | | | | | | | | | | |
|--|----------------------|-------------------|---------------------|---------------|------------------|---------------------|------------------|------------------|--------------------|------------------|--------------|---------------------|-----------|--------|--------------|---|---|--|--------|--|--|--|--|---|---|--|
| <p>Entitlements (Consumption Data Source: Inventory)</p> <p>New Delete</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Type</th> <th>License Period</th> <th>Term License Status</th> <th>License Model</th> <th>License Quantity</th> <th>Quantity Available</th> <th>Versions Covered</th> <th>Upgrade From</th> </tr> </thead> <tbody> <tr> <td colspan="9">No items available.</td> </tr> </tbody> </table> | | | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | No items available. | | | | | | | | | | | | | | |
| Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Versions Covered | Upgrade From | | | | | | | | | | | | | | | | | | |
| No items available. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Entitlements (Consumption Data Source: Manual)</p> <p>New Delete</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Type</th> <th>License Period</th> <th>Term License Status</th> <th>License Model</th> <th>License Quantity</th> <th>Quantity Available</th> <th>Upgrade From</th> </tr> </thead> <tbody> <tr> <td>ACME Use</td> <td>Full License</td> <td>Perpetual</td> <td>Active</td> <td>Unrestricted</td> <td>2</td> <td>2</td> <td></td> </tr> <tr> <td colspan="5">Total:</td> <td>2</td> <td>2</td> <td></td> </tr> </tbody> </table> | | | Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Upgrade From | ACME Use | Full License | Perpetual | Active | Unrestricted | 2 | 2 | | Total: | | | | | 2 | 2 | |
| Description | Type | License Period | Term License Status | License Model | License Quantity | Quantity Available | Upgrade From | | | | | | | | | | | | | | | | | | | |
| ACME Use | Full License | Perpetual | Active | Unrestricted | 2 | 2 | | | | | | | | | | | | | | | | | | | | |
| Total: | | | | | 2 | 2 | | | | | | | | | | | | | | | | | | | | |

6 Click the entitlement you want to define.

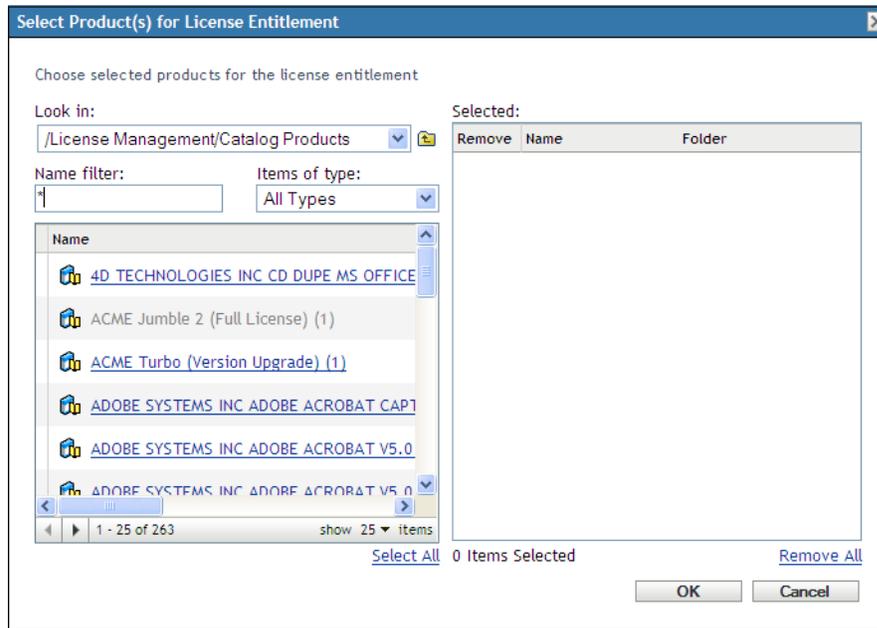
| General | Proof of Ownership | Coverage |
|---|---|----------|
| General | | |
| Description: | Entitlement 1 | |
| Entitlement Type: | Full License | |
| Platform: | Windows | |
| License Period: | <input checked="" type="radio"/> Perpetual <input type="radio"/> Term Start Date: 8/12/07 End Date: 8/12/07 | |
| License Model: | Per-Installation | |
| License Quantity: | 2 | |
| Quantity Available: | 2 | |
| Virtual Machine Use Rights: | | |
| Notes: | Created by Auto-reconcile: August 4, 2007 8:45:16 PM | |
| <input type="button" value="Apply"/> <input type="button" value="Reset"/> | | |

7 Click the *Proof of Ownership* tab.

| General | Proof of Ownership | Coverage | | | | |
|---|--------------------|------------------|------------------|---------------|-------------|-------------|
| Catalog Products | | | | | | |
| Add Remove | | | | | | |
| <input type="checkbox"/> Product | Purchase Quantity | License Quantity | | | | |
| <input type="checkbox"/> ACME Jumble 2 (Full License) (1) | 2 | 2 | | | | |
| Total: | 2 | 2 | | | | |
| Purchase Summary Records | | | | | | |
| New Delete | | | | | | |
| <input type="checkbox"/> Description | Date Entered | Entered By | License Quantity | Total Cost | | |
| <input type="checkbox"/> ACME Purchase | 8/9/07 | administrator | 2 | | | |
| Total: | | | 2 | 0.00 | | |
| Contracts | | | | | | |
| Add Remove | | | | | | |
| <input type="checkbox"/> Contract ID | Name | Type | Status | Start Date | End Date | |
| No items available. | | | | | | |
| Documents | | | | | | |
| Add Remove | | | | | | |
| <input type="checkbox"/> Document ID | File Name | Date Attached | File Type | File Size(KB) | Description | Attached By |
| No items available. | | | | | | |

8 Add any catalog products:

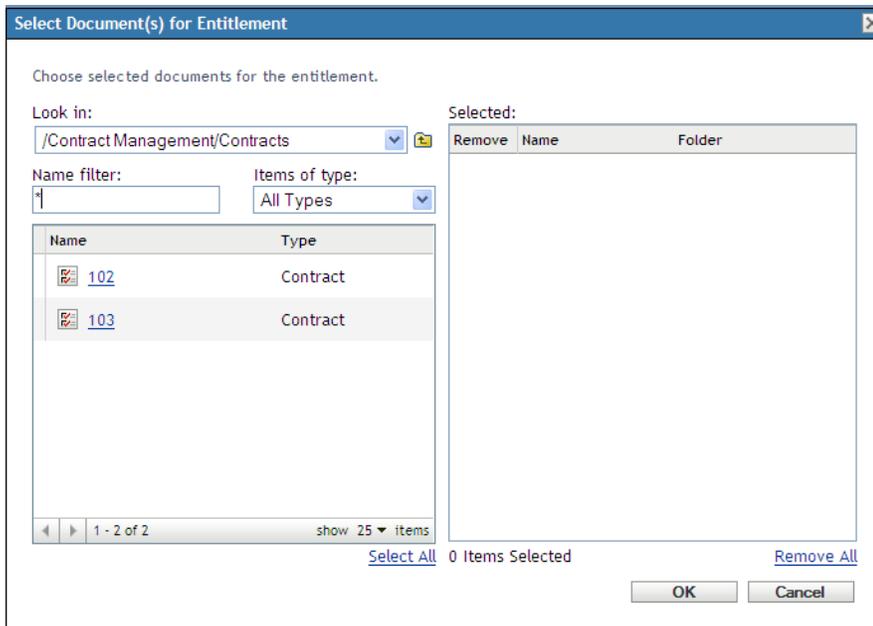
8a In the Catalog Products panel, click *Add*.



- 8b** In the Select Product(s) for License Entitlement dialog box, select a catalog product.
- 8c** Click *OK*.
- 9** Add any purchase summary records:
 - 9a** Click *New* to open the Create Purchase Summary Record Wizard. Complete the wizard by using the information in the following table to fill in the fields.

| Wizard Page | Details |
|----------------------------------|---|
| General Information page | Fill in the following fields: Description: A description of the summary record. License Quantity: The number of licenses. Total Cost: The cost of the product licenses. Notes: Specify any notes. |
| New Purchase Summary Record page | Review the data. Select <i>Define additional Properties</i> to edit the summary record, see a change history, or add documents to the purchase summary record after you click <i>Finish</i> . |

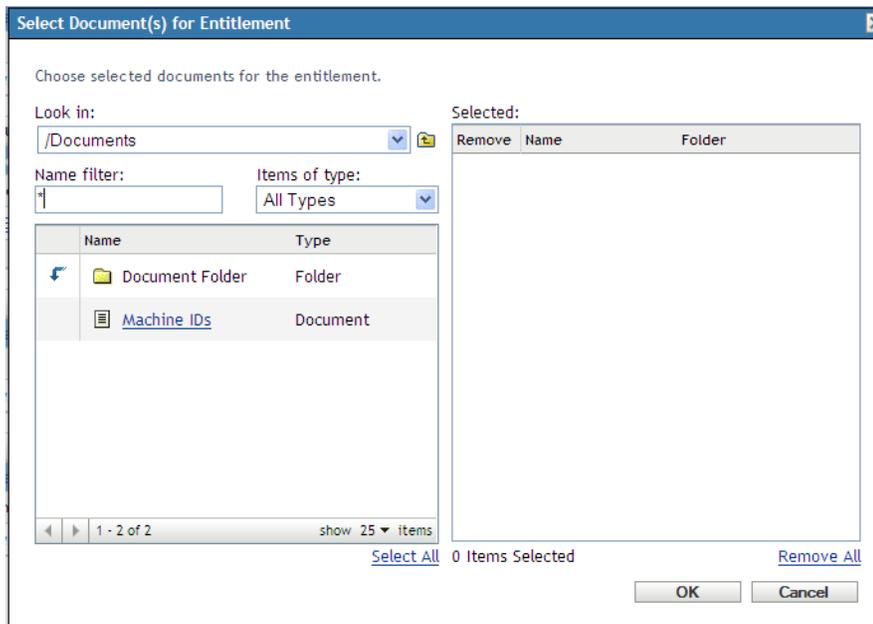
- 9b** Add any documents to the summary record by clicking *Add*, selecting the document, then clicking *OK*.
- 10** Navigate back to the Proof of Ownership page, following **Step 2** through **Step 7** on page 47.
- 11** Add any contracts:
 - 11a** In the Contracts panel, click *Add*.



11b In the Select Document(s) for Entitlement dialog box, specify a contract, then click *OK*.

12 Add any documents:

12a In the Documents panel, click *Add*.



12b In the Select Document(s) for Entitlement dialog box, specify a document, then click *OK*.

13 Click the *Coverage* tab.

| General | | Proof of Ownership | | | Coverage | | |
|-------------------------------------|--------------|-------------------------|---------|----------|--------------|--------------|----------------|
| Discovered Product Versions Covered | | | | | | | |
| Add - Remove | | | | | | | |
| <input type="checkbox"/> | Manufacturer | Product | Version | Platform | Distribution | License Type | Serial Numbers |
| <input type="checkbox"/> | Macromedia | Macromedia Flash Player | 8.0 | Windows | Commercial | Full | |
| | | | | | | | show 5 Items |
| Covered Machines | | | | | | | |

14 Add any discovered product versions covered by this entitlement:

14a Click one of the following:

- ◆ *Add > Installed Discovered Product.*
- ◆ *Add > Any Discovered Product.*

14b Choose the products covered by the license entitlement.

14c Click *OK*.

Using License Management Reports

6

ZENworks® Control Center includes a variety of reports to help you manage the assets in your Management Zone. The License Management Reports page allows you to monitor compliance and compliance-related data through a variety of standard and custom reports. This section includes the following topics:

- ◆ [Section 6.1, “Using License Management Standard Reports,” on page 51](#)
- ◆ [Section 6.2, “Using License Management Custom Reports,” on page 56](#)
- ◆ [Section 6.3, “Setting Asset Management Services Report Rights,” on page 68](#)

6.1 Using License Management Standard Reports

Standard (predefined) reports scan your software usage data and arrange the data according to the report configuration.

- ◆ [Section 6.1.1, “Available Standard Reports,” on page 51](#)
- ◆ [Section 6.1.2, “Running a Standard Report,” on page 52](#)

6.1.1 Available Standard Reports

ZENworks Control Center includes several predefined reports you can use to analyze software compliance in your Management Zone. These reports are grouped into folders according to their function. The available folders and reports are as follows:

- ◆ **Software Compliance (folder):** Reports focusing on software compliance.
 - ◆ **Compliance Report:** Shows the Management Zone’s compliance status grouped by license.
 - ◆ **Status Summary:** Shows a summary of the compliance status of the Management Zone.
- ◆ **Unreconciled Products (folder):** Reports focusing on unreconciled products.
 - ◆ **Catalog Products:** Shows the unreconciled catalog products in the Management Zone.
 - ◆ **Discovered Products:** Shows the unreconciled discovered products in the Management Zone.
- ◆ **Purchases (folder):** Reports focusing on software purchases.
 - ◆ **Purchase Summary:** Shows a summary list of purchase records.
 - ◆ **Purchase Detail:** Lists purchase records and details.
- ◆ **Suites (folder):** Reports focusing on suites and components.
 - ◆ **Suites/Components:** Shows discovered suites and their components.
 - ◆ **Standalone Components:** Shows a list of discovered standalone (suite) components.

- ◆ **Other Reports (folder):** Reports focusing on inventory comparison and software standards.
 - ◆ **Inventory Comparison:** Shows a comparison of inventoried products to discovered products.
 - ◆ **Software Standards:** Shows discovered products along with their standards category.

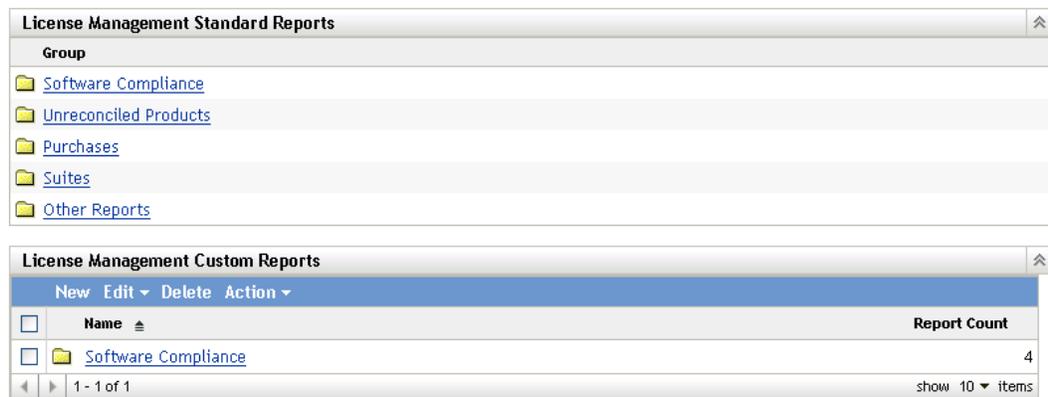
6.1.2 Running a Standard Report

You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management Services allows you to export data to another format, view the data as a graph, change the time period of the report, and change the filter criteria. The following sections provide more information:

- ◆ [“Running a Report” on page 52](#)
- ◆ [“Exporting a Report to a Different Format” on page 53](#)
- ◆ [“Viewing the Report as a Graph” on page 53](#)
- ◆ [“Changing the Time Period” on page 54](#)
- ◆ [“Changing the Filter Criteria” on page 55](#)

Running a Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 Click the folder containing the report you want to run.

| Name | Description |
|-----------------------------------|--------------------------------------|
| Compliance Report | Compliance Status by License |
| Status Summary | Summary of License Compliance Status |

Reports are listed by name and description. For a list of reports and descriptions, see [Section 6.1.1, “Available Standard Reports,” on page 51](#).

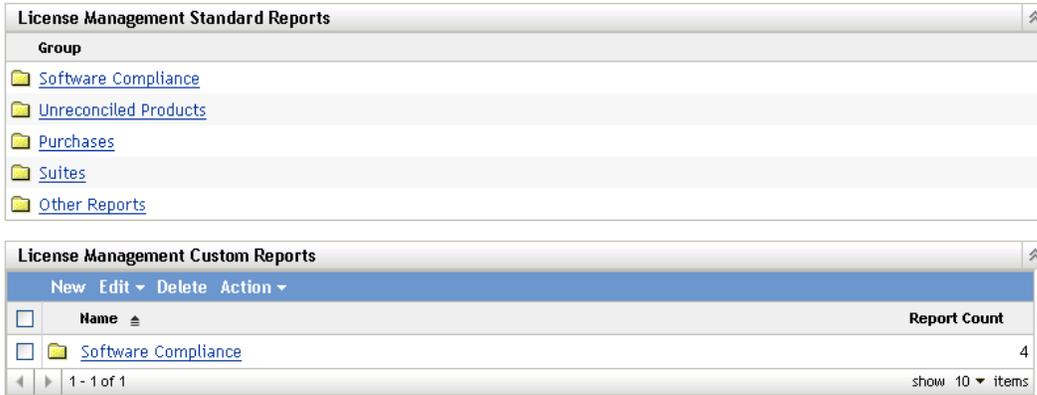
- 4 Click the report to run it.
- 5 (Optional) Filter the data by selecting filtering criteria from the left panel and clicking *Search*.

6 Click the links for more detailed information.

Exporting a Report to a Different Format

Asset Management Services allows you to export report data to three formats: Excel*, CSV, and PDF.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



3 Click the folder containing the report you want to run.

| Reports | |
|-----------------------------------|--------------------------------------|
| Name | Description |
| Compliance Report | Compliance Status by License |
| Status Summary | Summary of License Compliance Status |

4 Click the report to run it.

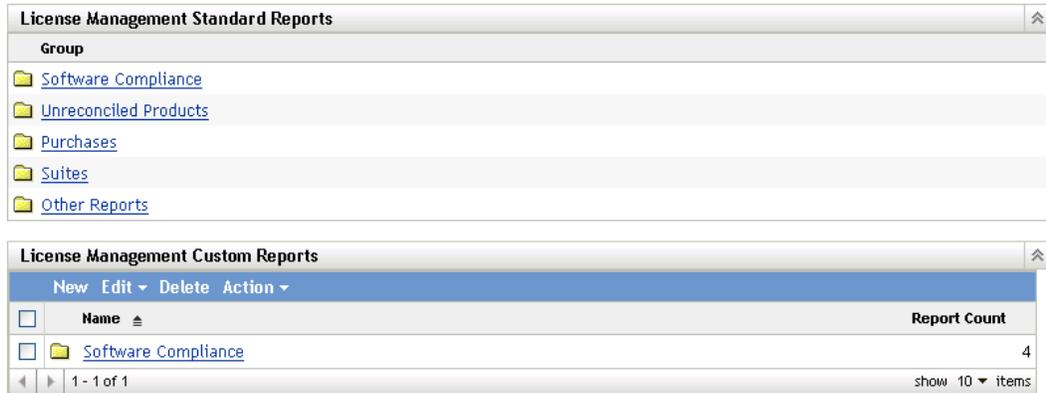
5 Select the format to export the report to by clicking one of the three formats on the bottom of the report.



Viewing the Report as a Graph

Many reports can be viewed as a graph. Three graphical formats are available: bar graph, pie chart, and line graph. (If this feature is available, *Graph* appears at the bottom of the report.)

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 Click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Click *Graph* on the bottom of the report.

| | | | | |
|----------|--|-----|--|-----------|
| Symantec | Symantec AntiVirus Corporate Edition | 8.1 | | Inventory |
| VMware | VMware Tools | - | | Inventory |
| Yahoo! | Yahoo! Companion Toolbar | - | | Inventory |

[Excel](#) [CSV](#) [PDF](#) [Graph](#) [Change Time Period](#)

A new window appears with the available graphs.

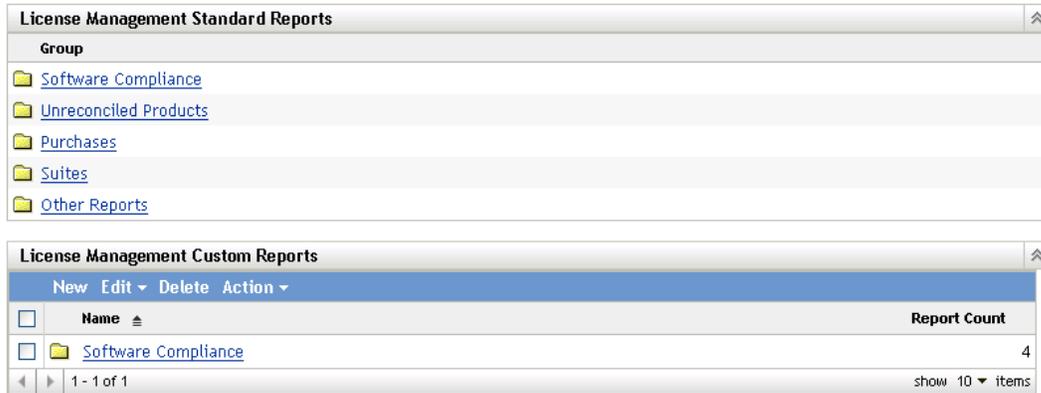
Changing the Time Period

For greater flexibility, you can change the time period of some reports. (If this feature is available, *Change Time Period* appears at the bottom of the report.) You can select from the following time periods:

- ◆ Previous Month
- ◆ Previous 3 Months
- ◆ Previous 6 Months
- ◆ Previous 12 Months
- ◆ All History in Database

To change the time period:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 Click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Click *Change Time Period*.

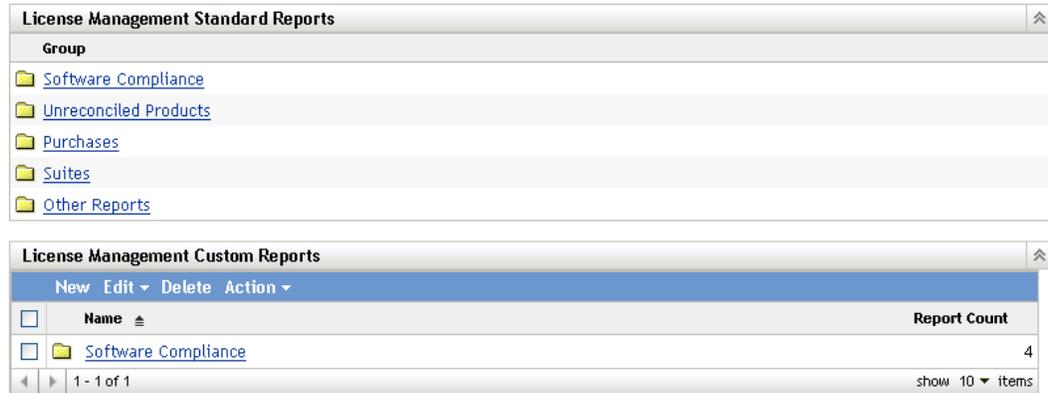


- 6 Select an interval in the *Time Period* field.
 - 7 Click *Apply*.
- The new time period is shown on the top left of the report.

Changing the Filter Criteria

Many reports allow you to change the report filter criteria. (If this feature is available, *Change Filter* appears at the bottom of the report.)

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 Click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Click *Change Filter* on the bottom of the report.
- 6 Select one of the following filters:
 - ♦ Used applications only
 - ♦ Unused applications only
 - ♦ All applications
- 7 Click *Apply*.

6.2 Using License Management Custom Reports

ZENworks Control Center allows you to create and run custom reports that you can use to analyze software compliance in your Management Zone. These sections provide more information:

- ♦ [Section 6.2.1, “Available Custom Reports,” on page 57](#)
- ♦ [Section 6.2.2, “Running a Custom Report,” on page 57](#)
- ♦ [Section 6.2.3, “Creating a Custom Report,” on page 58](#)
- ♦ [Section 6.2.4, “Scheduling a Custom Report and Sending Notifications,” on page 60](#)
- ♦ [Section 6.2.5, “Configuring E-Mail Addresses for Sending Notifications,” on page 62](#)
- ♦ [Section 6.2.6, “Editing a Custom Report,” on page 63](#)
- ♦ [Section 6.2.7, “Moving a Custom Report,” on page 65](#)
- ♦ [Section 6.2.8, “Deleting a Custom Report or Folder,” on page 66](#)
- ♦ [Section 6.2.9, “Viewing Scheduled Reports by Date and Title,” on page 67](#)
- ♦ [Section 6.2.10, “Importing New Report Definitions,” on page 67](#)

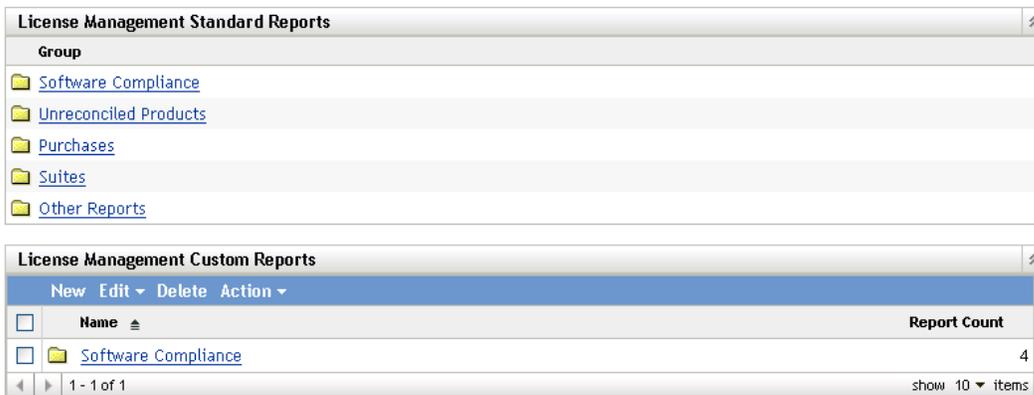
6.2.1 Available Custom Reports

ZENworks Control Center includes four report templates you can use to analyze the degree of license compliance in your Management Zone:

- ♦ **Software Compliance (folder):** Reports focusing on software compliance.
 - ♦ **Excluded catalog products:** Shows the catalog products that are excluded from compliance calculations.
 - ♦ **Excluded discovered products:** Shows the discovered products that are excluded from compliance calculations.
 - ♦ **Non-Compliant license records:** Shows license records that are non-compliant.
 - ♦ **Unreconciled discovered products:** Shows the discovered products that are not reconciled with a licensed product.

6.2.2 Running a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 In the License Management Custom Reports panel, click the folder containing the report you want to run.

The number of reports in each folder is shown in the *Report Count* column.

- 4 Click a report.

Custom Report Definition Summary: Excluded catalog products

| | |
|----------------------|---|
| Description | Lists catalog products that have been excluded from compliance calculations |
| Type | ProductCatalog |
| Columns | Catalog Manufacturer Catalog Product Catalog Version Catalog Type Catalog Mfg Part Number Catalog License Quantity |
| Criteria | Catalog Excluded = Yes |
| Creator | |
| Creation Date | 8/4/07 |
| Last Run Date | 8/12/07 |

[Run](#) [Schedule/Notification](#) [Edit](#) [Copy](#) [Export](#)

The report definition appears. For information on editing the report definition, see [Section 6.2.6, “Editing a Custom Report,” on page 63](#).

- 5 Click *Run* in the lower left corner.

On the report page, click the various links on the report for additional information. You can also export the report to an Excel, CSV, or PDF format by clicking the corresponding link.

6.2.3 Creating a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.

The screenshot shows two panels from the ZENworks interface. The top panel, titled "License Management Standard Reports", contains a list of report groups: Software Compliance, Unreconciled Products, Purchases, Suites, and Other Reports. The bottom panel, titled "License Management Custom Reports", features a table with columns for "Name" and "Report Count". The "Software Compliance" folder is listed with a report count of 4. The table also includes a "New" button, "Edit", "Delete", and "Action" options, along with a "show 10 items" footer.

- 3 In the License Management Custom Reports panel, click the folder where you want to save the report, or create a new folder by clicking *New*, specifying a folder name, then clicking *OK*.

| Custom Reports | | | | | |
|--------------------------|--|--------------------|---------------------|-------------|--------------|
| New Edit Delete | | | | | |
| <input type="checkbox"/> | Title ▲ | Type | Focus | Create Date | Last Run |
| <input type="checkbox"/> | Excluded catalog products | License Management | Catalog Products | Aug 4, 2007 | Aug 12, 2007 |
| <input type="checkbox"/> | Excluded discovered products | License Management | Discovered Products | Aug 4, 2007 | Aug 12, 2007 |
| <input type="checkbox"/> | Non-Compliant license records | License Management | Compliance Status | Aug 4, 2007 | Aug 12, 2007 |
| <input type="checkbox"/> | Unreconciled discovered products | License Management | Discovered Products | Aug 4, 2007 | Aug 12, 2007 |

1 - 4 of 4 show 10 items

4 In the Custom Reports panel, click *New*.

Custom Report Definition - Step 1 of 2: Choose Focus

Name

Type License Management

Focus

- Purchase Records
- Catalog Products
- License Records
- Discovered Products
- Compliance Status
- Software Standards
- Licenses - Associated Contracts

5 Specify a name in the *Name* field.

6 Select the focus of the report. The options are:

- ◆ Purchase Records
- ◆ Catalog Products
- ◆ License Records
- ◆ Discovered Products
- ◆ Compliance Status
- ◆ Software Standards
- ◆ Licenses - Associated Contracts

7 Click *Continue*.

Custom Report Definition - Step 2 of 2: Choose columns, column order, and criteria

Name **Description**

Folder

Type

Columns

| Available | Available | Column Order |
|--------------------------|-------------------------|--------------|
| Catalog Associated | Purchase PO Number | |
| Catalog Description | Purchase Invoice Number | |
| Catalog Excluded | Purchase Reseller | |
| Catalog License Quantity | Purchase Order Date | |
| Catalog Matched | Catalog Manufacturer | |
| Catalog Mfg Part Number | Catalog Product | |
| Catalog Reseller SKU | Catalog Version | |
| Catalog Upgrade | Catalog Type | |
| Purchase Comments | Purchase Quantity | |
| Purchase Company | Purchase Unit MSRP (\$) | |

Criteria

| Criteria | Field | Operator | Value |
|-------------------------|---------------|----------|-------|
| Summary Criteria | Summary Field | Operator | Value |

8 Fill in the following fields:

Name: Specify the name of the report.

Folder: Select a folder where you want to save the report.

Description: Specify a description for your report.

Type: Displays the report type you selected.

Columns: From the list on the left, select the data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators

9 Click *Save*.

The next time you open the Custom Reports page, the report appears in the Custom Reports panel.

6.2.4 Scheduling a Custom Report and Sending Notifications

You can schedule a report to run automatically and send out notifications to specified people when the report is ready.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.

License Management Standard Reports

- Software Compliance
- Unreconciled Products
- Purchases
- Suites
- Other Reports

License Management Custom Reports

New Edit Delete Action

| <input type="checkbox"/> | Name | Report Count |
|--------------------------|---------------------|--------------|
| <input type="checkbox"/> | Software Compliance | 4 |

1 - 1 of 1 show 10 items

3 In the License Management Custom Reports panel, click the folder containing the report you want to schedule.

4 Click the report you want to schedule.

Custom Report Definition Summary: Excluded catalog products

| | |
|----------------------|---|
| Description | Lists catalog products that have been excluded from compliance calculations |
| Type | ProductCatalog |
| Columns | Catalog Manufacturer Catalog Product Catalog Version Catalog Type Catalog Mfg Part Number Catalog License Quantity |
| Criteria | Catalog Excluded = Yes |
| Creator | |
| Creation Date | 8/4/07 |
| Last Run Date | 8/12/07 |

[Run](#) [Schedule/Notification](#) [Edit](#) [Copy](#) [Export](#)

5 Click *Schedule/Notification*.

Schedule Report/Notification: Unreconciled discovered products

Start Date

Frequency

Output

Stored Report Results

Send a Notification (E-mail)

Both

Send notification / Store results, only when matching records are found

Maximum Records

6 Fill in the following fields:

Start Date: Click the calendar icon to specify a date.

Frequency: Select how often you want to send the notification: yearly, monthly, weekly, daily, once, or never.

Output: Select whether you want to store the report, send an e-mail notification that the report is ready, or both. You can also choose to store the results or send a notification only when matching records are found. For information on configuring e-mail addresses, see [Section 6.2.5, “Configuring E-Mail Addresses for Sending Notifications,” on page 62.](#)

Maximum Records: Specify the maximum number of records to store.

7 Click *Submit*.

6.2.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see [Section 6.2.4, “Scheduling a Custom Report and Sending Notifications,” on page 60.](#)

The E-mail Addresses panel on the Asset Inventory page allows you to import e-mail addresses that can be used to send notifications when a custom report is ready, as configured in the report definition. Previously imported e-mail addresses are listed in the panel, along with the user’s first, last, and middle name.

To import e-mail addresses:

- 1 In ZENworks Control Center, click the *Configuration* tab.
- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.



- 4 In the *Import From* field, select either *Inventory Data* or *Comma Separated File*.
If you select *Inventory Data*, the e-mail addresses found in an inventory scan are imported.
If you select *Comma Separated File*, specify the file location in the *E-mail Address File* field.
- 5 Click *Import*.
- 6 Click *Close*.

To delete all e-mail information:

- 1 In ZENworks Control Center, click *Configuration*.
- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.



4 Click *Delete*.

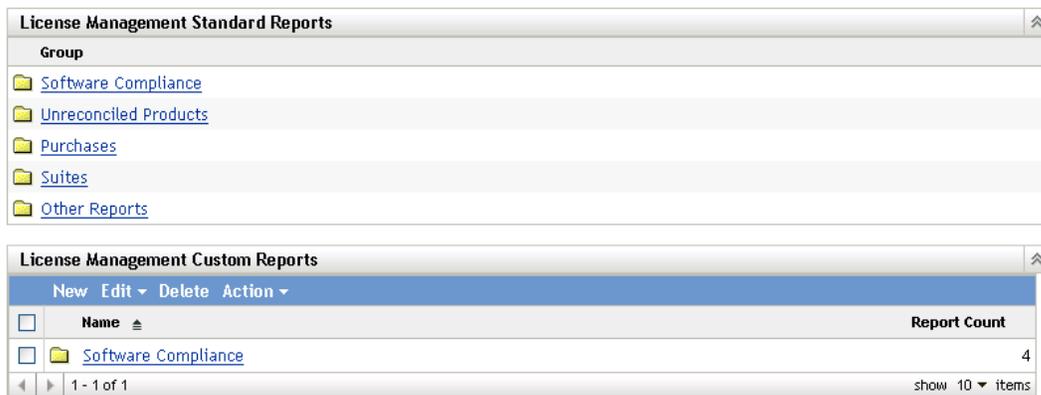
5 Click *OK*.

All e-mail information is deleted.

6.2.6 Editing a Custom Report

1 In ZENworks Control Center, click the *Asset Management* tab.

2 In the License Management panel, click *License Management Reports*.



3 In the License Management Custom Reports panel, click the folder containing the report you want to edit.

4 Click the report.

Custom Report Definition Summary: Excluded catalog products

| | |
|----------------------|---|
| Description | Lists catalog products that have been excluded from compliance calculations |
| Type | ProductCatalog |
| Columns | Catalog Manufacturer Catalog Product Catalog Version Catalog Type Catalog Mfg Part Number Catalog License Quantity |
| Criteria | Catalog Excluded = Yes |
| Creator | |
| Creation Date | 8/4/07 |
| Last Run Date | 8/12/07 |

[Run](#) [Schedule/Notification](#) [Edit](#) [Copy](#) [Export](#)

5 Click *Edit* in the lower left corner.

Custom Report Definition

| Name | Unreconciled discovered products | Description | Discovered products that have not been reconciled to a license and have not been excluded | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------------|--|--------------------|---|--------------|------------------------|--------------------------------|---|--------------------|--------------------|----------------------------|---------------------|--------------------|--|------------------|------------------|--|--------------------------|---------------------|--|----------------------|--------------------------|--|-----------------|------------------------------|--|-------------------------|--------------------------------|--|-----------------|--|--|----------------------|--|--|--|--|
| Folder | Software Compliance | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Type | Discovered Products | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Columns | <table border="1"> <thead> <tr> <th>Available</th> <th>Available</th> <th>Column Order</th> </tr> </thead> <tbody> <tr> <td>Active Hours (Summary)</td> <td>Discovered Manufacturer</td> <td></td> </tr> <tr> <td>Catalog Associated</td> <td>Discovered Product</td> <td></td> </tr> <tr> <td>Catalog Description</td> <td>Discovered Version</td> <td></td> </tr> <tr> <td>Catalog Excluded</td> <td>Product Category</td> <td></td> </tr> <tr> <td>Catalog License Quantity</td> <td>Product SubCategory</td> <td></td> </tr> <tr> <td>Catalog Manufacturer</td> <td>Discovered User Excluded</td> <td></td> </tr> <tr> <td>Catalog Matched</td> <td>Discovered Mapped to License</td> <td></td> </tr> <tr> <td>Catalog Mfg Part Number</td> <td>Device Installations (Summary)</td> <td></td> </tr> <tr> <td>Catalog Product</td> <td></td> <td></td> </tr> <tr> <td>Catalog Reseller SKU</td> <td></td> <td></td> </tr> </tbody> </table> | Available | Available | Column Order | Active Hours (Summary) | Discovered Manufacturer | | Catalog Associated | Discovered Product | | Catalog Description | Discovered Version | | Catalog Excluded | Product Category | | Catalog License Quantity | Product SubCategory | | Catalog Manufacturer | Discovered User Excluded | | Catalog Matched | Discovered Mapped to License | | Catalog Mfg Part Number | Device Installations (Summary) | | Catalog Product | | | Catalog Reseller SKU | | | | |
| Available | Available | Column Order | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Active Hours (Summary) | Discovered Manufacturer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Associated | Discovered Product | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Description | Discovered Version | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Excluded | Product Category | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog License Quantity | Product SubCategory | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Manufacturer | Discovered User Excluded | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Matched | Discovered Mapped to License | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Mfg Part Number | Device Installations (Summary) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Product | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Catalog Reseller SKU | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Criteria | <table border="1"> <thead> <tr> <th>Field</th> <th>Operator</th> <th>Value</th> <th></th> </tr> </thead> <tbody> <tr> <td>(Discovered Mapped to License</td> <td>=</td> <td>No</td> <td rowspan="2">AND</td> </tr> <tr> <td>(Discovered User Excluded</td> <td>=</td> <td>No</td> </tr> </tbody> </table> | Field | Operator | Value | | (Discovered Mapped to License | = | No | AND | (Discovered User Excluded | = | No | | | | | | | | | | | | | | | | | | | | | | | | |
| Field | Operator | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (Discovered Mapped to License | = | No | AND | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (Discovered User Excluded | = | No | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Summary Criteria | Summary Field | Operator | Value | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

6 Edit the following fields:

Name: The name of the report.

Folder: The folder where you want to save the report.

Description: The description for your report.

Columns: From the list on the left, select the data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

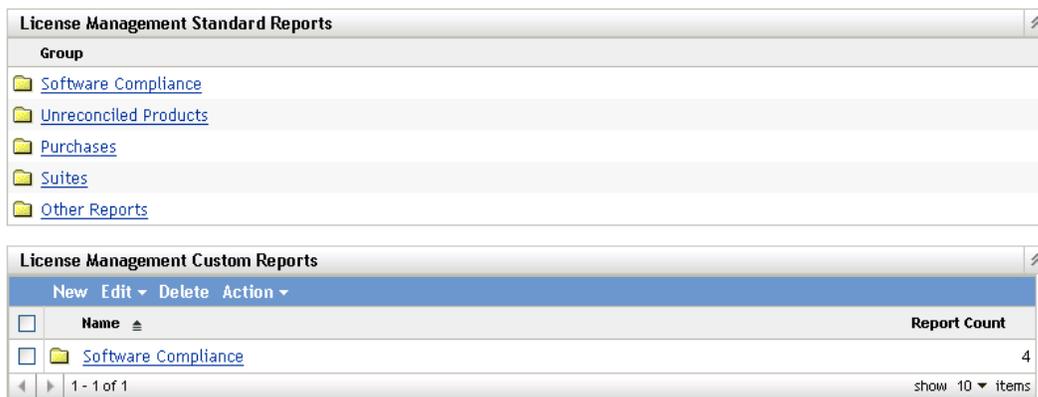
Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

7 Click *Save*.

6.2.7 Moving a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 In the License Management Custom Reports panel, click the folder containing the report or reports you want to move.
- 4 Select the report or reports you want to move.
- 5 Click *Edit > Move*.

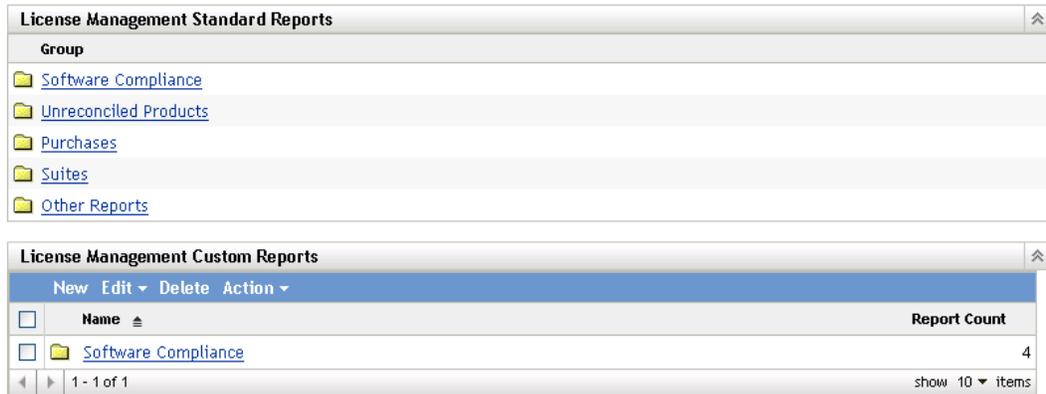


- 6 Select a new folder location.
- 7 Click *OK*.

6.2.8 Deleting a Custom Report or Folder

To delete a custom report:

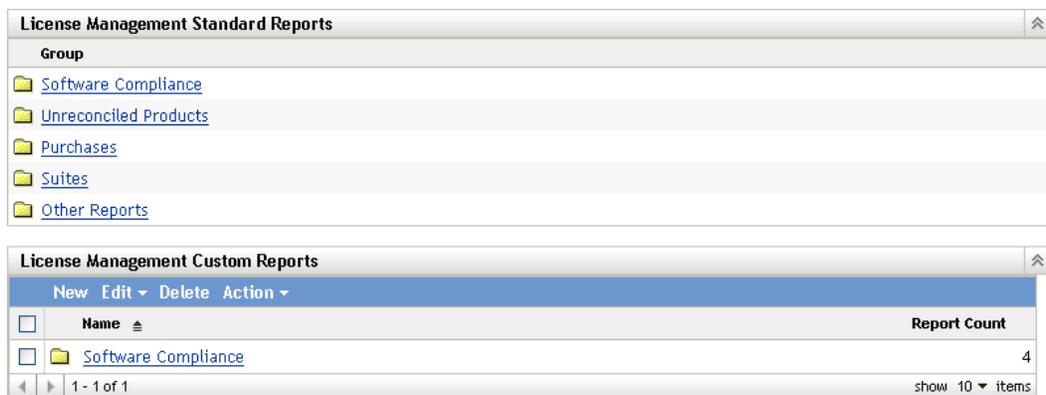
- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 In the License Management Custom Reports panel, click the folder containing the report you want to delete.
- 4 Select the report you want to delete.
- 5 Click *Delete*.

To delete a folder:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 In the License Management Custom Reports panel, select the folder you want to delete.
- 4 Click *Delete*.

NOTE: Deleting a folder deletes all the reports in that folder.

6.2.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see [Section 6.2.4, “Scheduling a Custom Report and Sending Notifications,”](#) on page 60.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.

The screenshot shows two panels. The top panel, titled "License Management Standard Reports", contains a list of report groups: Software Compliance, Unreconciled Products, Purchases, Suites, and Other Reports. The bottom panel, titled "License Management Custom Reports", shows a table with columns for "Name" and "Report Count". The table contains one entry: "Software Compliance" with a report count of 4. The panel also includes a menu bar with "New", "Edit", "Delete", and "Action" options, and a footer showing "1 - 1 of 1" and "show 10 items".

| License Management Standard Reports | |
|-------------------------------------|---------------------------------------|
| Group | |
| | Software Compliance |
| | Unreconciled Products |
| | Purchases |
| | Suites |
| | Other Reports |

| License Management Custom Reports | |
|-----------------------------------|-------------------------------------|
| New Edit Delete Action | |
| <input type="checkbox"/> | Name |
| Report Count | |
| <input type="checkbox"/> | Software Compliance |
| 4 | |

- 3 In the License Management Custom Reports panel, click one of the following:
 - ◆ *Action* > *View Scheduled Report Results by Date*
 - ◆ *Action* > *View Scheduled Report Results by Title*

The screenshot shows the "Scheduled Reports by Grouping" panel. It features a "Delete" button at the top. Below it is a table with columns for "Grouping" and "Report Count". The table contains one entry: "Aug 12, 2007" with a report count of 1. The panel also includes a footer showing "1 - 1 of 1" and "show 10 items".

| Scheduled Reports by Grouping | |
|-------------------------------|------------------------------|
| Delete | |
| <input type="checkbox"/> | Grouping |
| Report Count | |
| <input type="checkbox"/> | Aug 12, 2007 |
| 1 | |

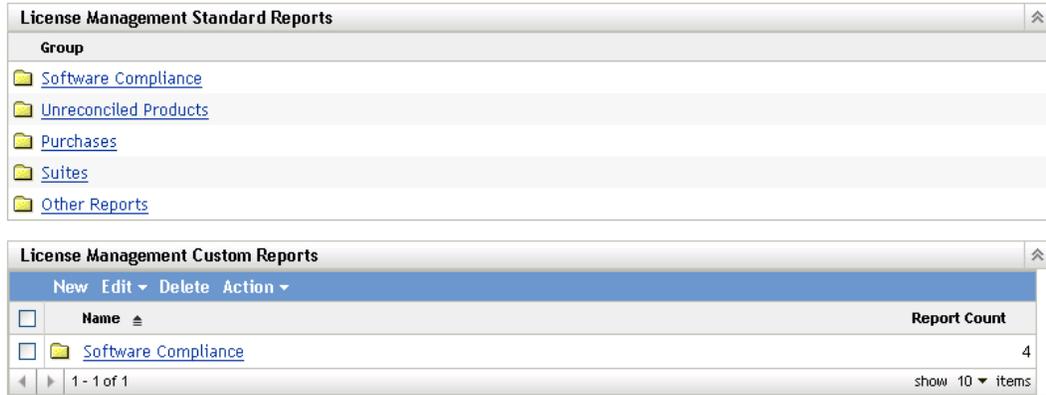
The Scheduled Reports by Grouping page opens and shows the saved scheduled custom reports grouped by date or title and a report count. Click the date or title to open the *Scheduled Reports* page, where you can select a report and view it. To delete a group of reports, select the group and click *Delete*.

6.2.10 Importing New Report Definitions

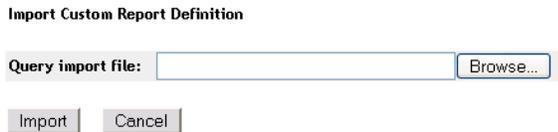
If you have defined reports in ZENworks Asset Management 7.5, you can import them into ZENworks Control Center. You can also re-import reports that have been exported by ZENworks Control Center. A predefined XML format is needed for import.

To import report definitions:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *License Management Reports*.



- 3 In the License Management Custom Reports panel, click *Action > Import New Report Definition*.



- 4 Specify the file in the *Query import file* field, or click *Browse* to search for and select the file.
- 5 Click *Import*.

6.3 Setting Asset Management Services Report Rights

Asset Management Services report rights allow you to manage each administrator's rights for each folder and its reports. Each report folder has rights associated with it, governing all the reports within that folder. For example, if you have full rights, you can edit a report; but with view/execute rights, you can only see the report and run it. With Asset Management Services report rights, you can limit who has access to certain reports and who can edit them. The report folder type, custom or standard, and the report name are listed along with the rights associated with the folder. The choices are:

- ♦ **Remove all rights:** This removes all rights to the folder, so the specified administrator cannot see it.
- ♦ **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- ♦ **Assign full rights:** This gives the specified administrator full rights to create, edit, move, and delete reports. For standard reports, this setting is the same as *View/Execute*, because you cannot alter a standard report.

To change inventory report rights:

- 1 In ZENworks Control Center, click *Configuration*.
- 2 In the Administrators panel, click an administrator.
- 3 In the Administrator Tasks panel, click *Asset Management Report Rights*.

| Asset Management Report Rights | | | | |
|--|------------------|----------------------------|---------------------|---------------------|
| Edit ▾ | | | | |
| <input type="checkbox"/> Folder Type ▲ | Folder Name | Source | Rights | |
| <input type="checkbox"/> | Custom Reports | Software Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Test Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Temp Contracts | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | All Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Network Software Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Other Reports | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Purchases | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software File Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Suites | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Unreconciled Products | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Web Application Usage | Usage | View/Execute Rights |

1 - 16 of 16 show 20 ▼ items

4 Select the folders you want to change the rights to.

5 Click one of the following:

- ◆ *Edit > Remove All Rights*
- ◆ *Edit > Assign View/Execute Rights*
- ◆ *Edit > Assign Full Rights*

The change is reflected in the *Rights* column.

Establishing Proof of Ownership

7

The following sections provide information on how to provide proof of ownership through contracts and documents and how to use contract reports:

- ◆ [Section 7.1, “Adding Contracts,” on page 71](#)
- ◆ [Section 7.2, “Defining the Contract,” on page 73](#)
- ◆ [Section 7.3, “Using Date Notification,” on page 81](#)
- ◆ [Section 7.4, “Using Contract Management Standard Reports,” on page 84](#)
- ◆ [Section 7.5, “Using License Management Custom Reports,” on page 85](#)
- ◆ [Section 7.6, “Setting Asset Management Services Report Rights,” on page 93](#)
- ◆ [Section 7.7, “Adding and Associating Documents,” on page 94](#)

7.1 Adding Contracts

Contracts, along with documents, are used to establish proof of ownership.

To create a new contract:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.

| Software Usage | License Management | Contract Management | Documents |
|---|--------------------|---------------------|-----------|
| Contract Management | | | |
| Name | | Type | |
| 📁 Contracts (Details) | | Folder | |
| 📁 Date Notifications (Details) | | Folder | |
| 📁 Contract Management Reports (Details) | | Folder | |

- 3 Click *Contracts*.
- 4 In the Contracts panel, click *New > Contract* to open the Create New Contract Wizard. Complete the wizard by using information from the following table to fill in the fields:

| Wizard Page | Details |
|-----------------------------------|---|
| General Contract Information page | <p>Fill in the following fields:</p> <p>Contract ID: The identifier of the contract. Required.</p> <p>Name: The name of the contract. Required.</p> <p>Description: A description of the contract.</p> <p>Total Cost: The total cost of the transaction.</p> <p>Parent Contract: If there is a parent contract, click the <i>Browse</i> button to find it, then click <i>OK</i>.</p> <p>Terms and Conditions: Specify any terms and conditions.</p> <p>Contract Type: Select one of the fourteen contract types or a custom one of your own.</p> <p>Status: Select <i>Pending</i>, <i>Active</i>, or <i>Expired</i>. You can also specify a custom status of your own.</p> <p>Original Start Date: Click the calendar icon to select a date. Click the X icon to clear it.</p> <p>Current End Date: Click the calendar icon to select a date. Click the X icon to clear it.</p> <p>Evergreen: Select <i>Evergreen</i> if the contract specifies it.</p> <p>Renewal Option: Select <i>Yes</i> or <i>No</i>.</p> <p>Renewal Provision: Specify any renewal provision.</p> <p>Notice Date: Click the calendar icon to select a date. Click the X icon to clear it.</p> <p>Notice Description: Specify a description for the notice.</p> |
| Vendor Information page | Specify the vendor information in the fields. If the contract type is Lease, there will be additional fields to fill out. |
| New Contract Summary page | Review the information you entered. Use the back button to go back. |

5 (Optional) Select *Define Additional Properties* to further define the contract.

6 Click *Finish*.

The contract is created. If you selected *Define Additional Properties* in **Step 5**, continue on to **Section 7.2, “Defining the Contract,” on page 73**.

7.2 Defining the Contract

There are eight areas where you can further define a contract. These are shown as tabs on the Contracts page. The topics are as follows:

- ◆ Section 7.2.1, “General Tab,” on page 73
- ◆ Section 7.2.2, “Vendor Tab,” on page 74
- ◆ Section 7.2.3, “Financial Tab,” on page 74
- ◆ Section 7.2.4, “SLA Tab,” on page 74
- ◆ Section 7.2.5, “Lease Tab,” on page 76
- ◆ Section 7.2.6, “Documents Tab,” on page 77
- ◆ Section 7.2.7, “Renewals Tab,” on page 78
- ◆ Section 7.2.8, “Relationships Tab,” on page 80

7.2.1 General Tab

The *General* tab is the contract’s general information, which was created with the Create New Contract Wizard. You can edit these fields directly.

Figure 7-1 Contract General Tab

The screenshot displays the 'General' tab of a contract management interface. At the top, there are eight tabs: General, Vendor, Financial, SLA, Lease, Documents, Renewals, and Relationships. The 'General' tab is active. Below the tabs is a window titled 'General' with an 'Action' dropdown menu. The window contains the following fields and controls:

- Contract ID:** 102
- Name:** First Contract
- Description:** (Empty text area)
- Total Cost:** 100.00
- Parent Contract:** (Empty field with a search icon and a 'Clear' button)
- Terms and Conditions:** (Large empty text area)
- Assistant Sales Person:** (Empty field)
- Internal ID:** 861
- Contract Type:** Software Maintenance
- Status:** Active
- Original Start Date:** 8/6/07 (with calendar and delete icons) and Date Notification
- Current End Date:** (Empty field with calendar and delete icons) and Evergreen, Date Notification
- Time Remaining:** (Empty field)
- Renewal Option:** Yes
- Renewal Provision:** (Empty field)
- Notice Date:** 8/29/07 (with calendar and delete icons) and Date Notification
- Notice Description:** (Empty text area)

At the bottom of the window are 'Apply' and 'Reset' buttons.

7.2.2 Vendor Tab

The *Vendor* tab contains information about the vendor, which was created with the Create New Contract Wizard. You can edit these fields directly.

Figure 7-2 *Contract Vendor Tab*

| | | | |
|-------------------------|----------------------|---------------------------|----------------------|
| Vendor Name: | <input type="text"/> | Internal Contact: | <input type="text"/> |
| Vendor ID: | <input type="text"/> | Phone Number: | <input type="text"/> |
| Account Number: | <input type="text"/> | E-mail Address: | <input type="text"/> |
| Program Name: | <input type="text"/> | | |
| Primary Vendor Contact: | <input type="text"/> | Secondary Vendor Contact: | <input type="text"/> |
| Phone Number: | <input type="text"/> | Phone Number: | <input type="text"/> |
| E-mail Address: | <input type="text"/> | E-mail Address: | <input type="text"/> |

Apply Reset

7.2.3 Financial Tab

The *Financial* tab shows costs associated with the contract. This information is calculated from data in the contract.

Figure 7-3 *Contract Financial Tab*

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|-----------------------|--------|-----------------------|------|-------|-----------|----------|---------------|
| Financial | | | | | | | |
| Total Cost: | 100.00 | Annualized Cost: | 0.00 | | | | |
| Per Asset: | | Per Asset: | | | | | |
| Per User: | | Per User: | | | | | |
| Per Department: | | Per Department: | | | | | |
| Per Cost Center: | | Per Cost Center: | | | | | |
| Per Site: | | Per Site: | | | | | |
| Per Licensed Product: | | Per Licensed Product: | | | | | |

7.2.4 SLA Tab

The *SLA* tab allows you to create and delete service level agreements.

To create a service level agreement:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.

| Software Usage | License Management | Contract Management | Documents |
|---|--------------------|---------------------|-----------|
| Contract Management | | | |
| Name | | Type | |
| Contracts (Details) | | Folder | |
| Date Notifications (Details) | | Folder | |
| Contract Management Reports (Details) | | Folder | |

3 Click *Contracts*.

4 Click an existing contract to open the Contract page.

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|--------------------------------|---|-----------|-----|-----------------------------|---|----------|---------------|
| General | | | | | | | |
| Action ▾ | | | | | | | |
| Contract ID: | 102 | | | Contract Type: | Software Maintenance ▾ | | |
| Name: | First Contract | | | Status: | Active ▾ | | |
| Description: | <input type="text"/> | | | Original Start Date: | 8/6/07 | | |
| Total Cost: | 100.00 | | | Date: | <input checked="" type="checkbox"/> Date Notification | | |
| Parent Contract: | <input type="text"/> <input type="button" value="Clear"/> | | | Current End Date: | <input type="text"/> | | |
| Terms and Conditions: | <input type="text"/> | | | Evergreen: | <input checked="" type="checkbox"/> | | |
| Assistant Sales Person: | <input type="text"/> | | | Date Notification: | <input type="checkbox"/> | | |
| Internal ID: | 861 ▾ | | | Time Remaining: | <input type="text"/> | | |
| Apply | <input type="button" value="Apply"/> | | | Renewal Option: | Yes ▾ | | |
| Reset | <input type="button" value="Reset"/> | | | Renewal Provision: | <input type="text"/> | | |
| | | | | Notice Date: | 8/29/07 | | |
| | | | | Date Notification: | <input type="checkbox"/> | | |
| | | | | Notice Description: | <input type="text"/> | | |

5 Click the *SLA* tab.

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|---------------------------------|---------------|---------------|--------------|----------------------|------------|----------------------|---------------|
| Service Level Agreements | | | | | | | |
| New Delete | | | | | | | |
| <input type="checkbox"/> | Metric | Actual | Start | Notification? | End | Notification? | |
| <input type="checkbox"/> | 123 | 456 | 8/6/07 | | 8/6/07 | | |
| 1 - 1 of 1 | | | | | | show 5 ▾ items | |

6 Click *New*.

New Service Level Agreement

Service Level Agreements

Service Level Metric: Start Date: 8/12/07 Date Notification

Actual Service Level: End Date: 8/12/07 Date Notification

- 7 In the dialog box, specify the service level metric and actual service level, and select start and end dates.
- 8 (Optional) If you want to be notified by e-mail of the approach of the start or end date, select *Date Notification*.

7.2.5 Lease Tab

The *Lease* tab shows the details of the lease and allows you to edit them. Specify values in the various fields. Click the calendar icon to select the date. Select *Date Notifications* to send out e-mail notifications. Click *Apply* to save changes.

Figure 7-4 Contract Lease Tab

Lease

Delivery Procedures:

Return Obligations:

Rights to Relocate, Alter, Sub-lease:

Defaults and Remedies:

Insurance Provisions:

Insurance Cost:

Equipment Modification Provisions:

Purchase Option:

End-of-Lease Provisions:

Prevailing Law:

Order Date: Date Notification

Ship Date: Date Notification

Delivery Date: Date Notification

Signature Date: Date Notification

Inspection Date: Date Notification

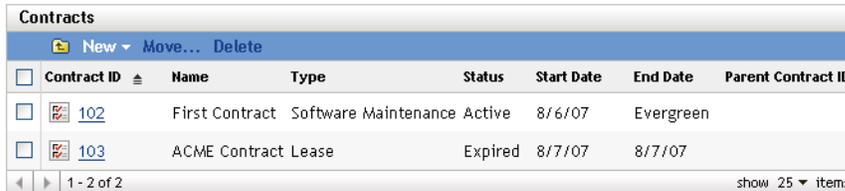
Acceptance Date: Date Notification

7.2.6 Documents Tab

The *Documents* tab shows existing documentation associated with the contract and allows you to add additional documentation.

To add documents:

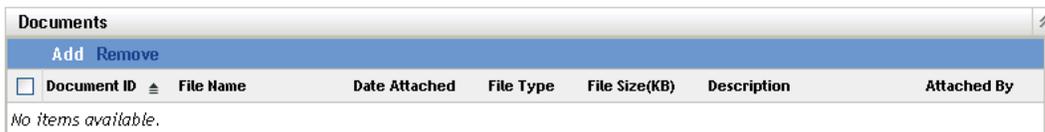
- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Contracts*.



The screenshot shows a table titled "Contracts" with a toolbar containing "New", "Move...", and "Delete". The table has columns for Contract ID, Name, Type, Status, Start Date, End Date, and Parent Contract ID. Two rows are visible: one for contract ID 102 (First Contract, Software Maintenance, Active, 8/6/07, Evergreen) and one for contract ID 103 (ACME Contract, Lease, Expired, 8/7/07, 8/7/07). A pagination bar at the bottom shows "1 - 2 of 2" and "show 25 items".

| <input type="checkbox"/> | Contract ID | Name | Type | Status | Start Date | End Date | Parent Contract ID |
|--------------------------|-------------|----------------|----------------------|---------|------------|-----------|--------------------|
| <input type="checkbox"/> | 102 | First Contract | Software Maintenance | Active | 8/6/07 | Evergreen | |
| <input type="checkbox"/> | 103 | ACME Contract | Lease | Expired | 8/7/07 | 8/7/07 | |

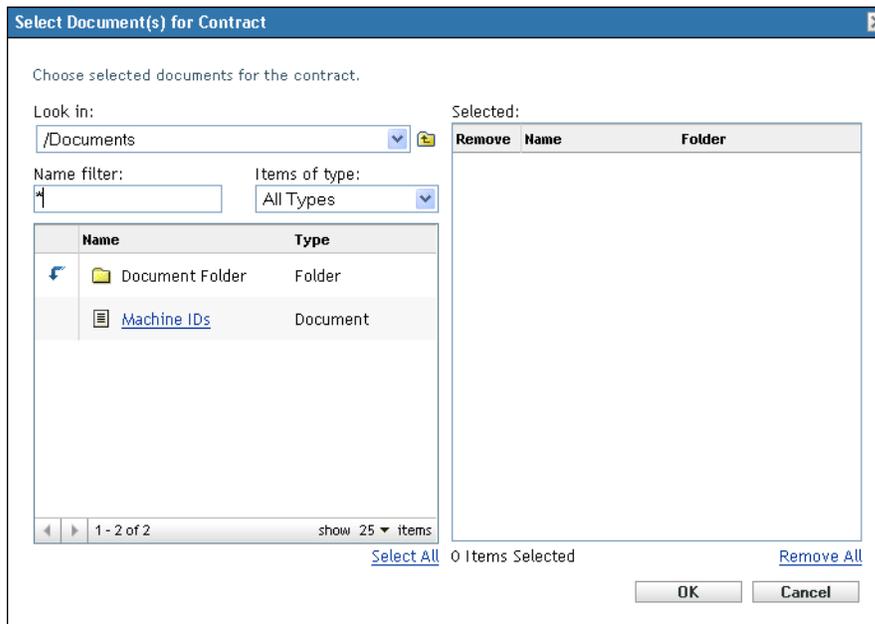
- 4 Click the contract you want to add a document to.
- 5 Click the *Documents* tab.



The screenshot shows a "Documents" panel with a toolbar containing "Add" and "Remove". The table has columns for Document ID, File Name, Date Attached, File Type, File Size(KB), Description, and Attached By. The text "No items available." is displayed below the table.

| <input type="checkbox"/> | Document ID | File Name | Date Attached | File Type | File Size(KB) | Description | Attached By |
|--------------------------|-------------|-----------|---------------|-----------|---------------|-------------|-------------|
| No items available. | | | | | | | |

- 6 In the *Documents* panel, click *Add*.



- 7 In the dialog box, select a document, then click *OK*.

To remove documents:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Contracts*.

| <input type="checkbox"/> | Contract ID | Name | Type | Status | Start Date | End Date | Parent Contract ID |
|--------------------------|---------------------|---------------------|----------------------|---------|------------|-----------|--------------------|
| <input type="checkbox"/> | 102 | First Contract | Software Maintenance | Active | 8/6/07 | Evergreen | |
| <input type="checkbox"/> | 103 | ACME Contract Lease | | Expired | 8/7/07 | 8/7/07 | |

- 4 Click the contract with the documents you want to remove.
- 5 Click the *Documents* tab.

| <input type="checkbox"/> | Document ID | File Name | Date Attached | File Type | File Size(KB) | Description | Attached By |
|--------------------------|-------------|-----------|---------------|-----------|---------------|-------------|-------------|
| No items available. | | | | | | | |

- 6 In the Documents panel, select the documents you want to remove.
- 7 On the *Documents* menu bar, click *Remove*.

7.2.7 Renewals Tab

The *Renewal* tab shows the contract's renewal history and allows you to add and delete renewal records.

To renew a contract:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Contracts*.

| <input type="checkbox"/> | Contract ID | Name | Type | Status | Start Date | End Date | Parent Contract ID |
|--------------------------|---------------------|---------------------|----------------------|---------|------------|-----------|--------------------|
| <input type="checkbox"/> | 102 | First Contract | Software Maintenance | Active | 8/6/07 | Evergreen | |
| <input type="checkbox"/> | 103 | ACME Contract Lease | | Expired | 8/7/07 | 8/7/07 | |

- 4 Click the contract you want to renew.
- 5 Click the *Renewals* tab.

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|--------------------------|----------------|------------|-----------------|----------------|----------------|----------|---------------|
| Renewal History | | | | | | | |
| Delete Action ▾ | | | | | | | |
| <input type="checkbox"/> | Date Entered ▲ | Entered By | End Date Before | End Date After | Effective Date | Notes | |
| No items available. | | | | | | | |

6 Click *Action > Renew Contract*.

Renew Contract [X]

Enter renewal information

Current End Date: 8/7/07

New End Date: 

Effective Date: 

Notes:

7 Specify a new *End Date* and *Effective Date* by clicking the calendar icons and selecting a date.

8 (Optional) Add notes, if any.

9 Click *Apply*.

To delete a contract renewal record:

1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

3 Click *Contracts*.

| Contracts | | | | | | | |
|--------------------------|---|----------------|----------------------|---------|------------|-----------------|--------------------|
| New ▾ Move... Delete | | | | | | | |
| <input type="checkbox"/> | Contract ID ▲ | Name | Type | Status | Start Date | End Date | Parent Contract ID |
| <input type="checkbox"/> |  102 | First Contract | Software Maintenance | Active | 8/6/07 | Evergreen | |
| <input type="checkbox"/> |  103 | ACME Contract | Lease | Expired | 8/7/07 | 8/7/07 | |
| 1 - 2 of 2 | | | | | | show 25 ▾ items | |

4 Click the contract with the renewal record that you want to delete.

5 Click the *Renewals* tab.

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|--------------------------|----------------|------------|-----------------|----------------|----------------|----------|---------------|
| Renewal History | | | | | | | |
| Delete Action ▾ | | | | | | | |
| <input type="checkbox"/> | Date Entered ▲ | Entered By | End Date Before | End Date After | Effective Date | Notes | |
| No items available. | | | | | | | |

6 Click the renewal record you want to delete.

7 Click *Delete*.

7.2.8 Relationships Tab

The *Relationships* tab allows you to associate the contract with the following:

- ♦ **Workstation/Server Devices:** Add a device by clicking *Add* and searching for the device. Then click *OK*. Delete the device by selecting it and clicking *Remove*.
- ♦ **Network Devices:** Add a network device by clicking *Add* and searching for the device. Then click *OK*. Delete the device by selecting it and clicking *Remove*.
- ♦ **License Entitlements:** Select a license entitlement and click *Remove* to sever the relationship.
- ♦ **Users:** Add a user by clicking *Add* and searching for the user name. Then click *OK*. Delete the user by selecting it and clicking *Remove*.
- ♦ **Sites:** Add a site by clicking *Add* and searching for the site name. Then click *OK*. Delete the site by selecting it and clicking *Remove*.
- ♦ **Cost Centers:** Add a cost center by clicking *Add* and searching for the cost center. Then click *OK*. Delete the cost center by selecting it and clicking *Remove*.
- ♦ **Departments:** Add a department by clicking *Add* and searching for the department name. Then click *OK*. Delete the department by selecting it and clicking *Remove*.

Figure 7-5 Document Relationships Tab

| General | Vendor | Financial | SLA | Lease | Documents | Renewals | Relationships |
|-----------------------------------|-------------|------------|----------------|---------------------|------------------|------------|---------------|
| Workstation/Server Devices | | | | | | | Advanced |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | Machine | Login | MAC Address | IP Address | Site | Department | Cost Center |
| No items available. | | | | | | | |
| Network Devices | | | | | | | Advanced |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | DNS Name | IP Address | Name | Type | Description | | |
| No items available. | | | | | | | |
| License Entitlements | | | | | | | |
| Remove | | | | | | | |
| <input type="checkbox"/> | Description | Type | License Period | Term License Status | License Quantity | | |
| No items available. | | | | | | | |
| Users | | | | | | | |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | Last Name | First Name | Middle Name | Phone Number | E-mail Address | | |
| No items available. | | | | | | | |
| Sites | | | | | | | |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | Description | | | | | | |
| No items available. | | | | | | | |
| Cost Centers | | | | | | | |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | Description | | | | | | |
| No items available. | | | | | | | |
| Departments | | | | | | | |
| Add Remove | | | | | | | |
| <input type="checkbox"/> | Description | | | | | | |
| No items available. | | | | | | | |

7.3 Using Date Notification

The Date Notifications page shows the date notifications that were configured when the contract was created. Click any existing notification to view or edit the e-mail settings.

- ◆ [Section 7.3.1, “Configuring Date Notification Settings,” on page 81](#)
- ◆ [Section 7.3.2, “Creating a Folder for Date Notification Records,” on page 82](#)
- ◆ [Section 7.3.3, “Moving a Date Notification Record,” on page 83](#)
- ◆ [Section 7.3.4, “Deleting a Date Notification Record,” on page 83](#)

7.3.1 Configuring Date Notification Settings

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.

3 Click *Date Notifications*.

| Date Notifications | | | | | | | |
|--|---------------------|-------------|------|----------|--------|--------|--|
| New Move... Delete Action | | | | | | | |
| Name | Field | Status | Sent | Failures | Last | Next | |
| <input type="checkbox"/> 102 - Original Start Date | Original Start Date | In-Progress | 0 | | 8/7/07 | 9/6/07 | |

4 Click *Action > Default Date Notification Settings*.

Default Date Notification Settings

Send Notification Days Before Associated Date

Repeat Notification

Every for Months

Delete Date Notification Record When Complete

From:

Recipients:

Contacts:

To:

Additional Recipients:

OK Cancel

5 Fill in the fields in the Default Date Notification Settings dialog box.

6 Click *OK*.

7.3.2 Creating a Folder for Date Notification Records

1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.

| Date Notifications | | | | | | | |
|--|---------------------|-------------|------|----------|--------|--------|--|
| New Move... Delete Action | | | | | | | |
| Name | Field | Status | Sent | Failures | Last | Next | |
| <input type="checkbox"/> 102 - Original Start Date | Original Start Date | In-Progress | 0 | | 8/7/07 | 9/6/07 | |

4 Click *New*.

- 5 Specify a name for the folder.
- 6 Click *OK*.

7.3.3 Moving a Date Notification Record

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Date Notifications*.

| Date Notifications | | | | | | | |
|---|---|---------------------|-------------|------|----------|--------|--------|
| New Move... Delete Action | | | | | | | |
| <input type="checkbox"/> | Name | Field | Status | Sent | Failures | Last | Next |
| <input type="checkbox"/> | 102 - Original Start Date | Original Start Date | In-Progress | 0 | | 8/7/07 | 9/6/07 |

1 - 1 of 1 show 25 items

- 4 Select the notification to move.
- 5 Click *Move*.

7.3.4 Deleting a Date Notification Record

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Date Notifications*.

| Date Notifications | | | | | | | |
|---|---|---------------------|-------------|------|----------|--------|--------|
| New Move... Delete Action | | | | | | | |
| <input type="checkbox"/> | Name | Field | Status | Sent | Failures | Last | Next |
| <input type="checkbox"/> | 102 - Original Start Date | Original Start Date | In-Progress | 0 | | 8/7/07 | 9/6/07 |

1 - 1 of 1 show 25 items

- 4 Select the notification to delete.

- 5 Click *Delete*.

7.4 Using Contract Management Standard Reports

Standard (predefined) reports provide contract information arranged according to the report configuration.

- ◆ [Section 7.4.1, “Available Standard Reports,” on page 84](#)
- ◆ [Section 7.4.2, “Running and Viewing Reports,” on page 84](#)

7.4.1 Available Standard Reports

ZENworks Control Center includes several predefined reports you can use to view contract data. The following standard reports are available:

- ◆ **General Contract:** Shows a list of contracts with general contract information.
- ◆ **Date Details:** Shows a list of contracts and key dates.
- ◆ **Vendor Details:** Shows a list of contracts and vendor information.
- ◆ **Financial Details:** Shows a list of contracts and key financial information.
- ◆ **SLA Details:** Shows a list of service level agreements from all contracts.
- ◆ **Lease Details:** Shows a list of contracts and key lease information.
- ◆ **Document Details:** Shows a list of documents from all contracts.
- ◆ **Renewal Details:** Shows the renewal history event list for all contracts.
- ◆ **Association Details:** Shows a list of contracts showing association counts.
- ◆ **Parent/Child Details:** Shows a hierarchical list of contracts showing parent/child relationships.

7.4.2 Running and Viewing Reports

You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management Services allows you to export data to another format, view the data as a graph, change the time period of the report, and change the filter criteria. The following sections provide more information:

- ◆ [“Running a Standard Report” on page 84](#)
- ◆ [“Exporting a Report to a Different Format” on page 85](#)
- ◆ [“Viewing the Report as a Graph” on page 85](#)

Running a Standard Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Standard Reports panel, click the report you want to run.

Reports are listed by name and description. For a list of reports and descriptions, see [Section 6.1.1, “Available Standard Reports,” on page 51.](#)

- 5 Click the links for more detailed information.

Exporting a Report to a Different Format

Asset Management Services allows you to export report data to three formats: Excel, CSV, and PDF.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Standard Reports panel, click the report you want to run.
Reports are listed by name and description. For a list of reports and descriptions, see [Section 6.1.1, “Available Standard Reports,” on page 51.](#)
- 5 Click the links in the report for more detailed information.
- 6 Select the format to export the report to by clicking one of the three formats on the bottom of the report.

Viewing the Report as a Graph

Many reports can be viewed as a graph. Three graphical formats are available: bar graph, pie chart, and line graph. (If this feature is available, *Graph* appears at the bottom of the report.)

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Standard Reports panel, click the report you want to run.
Reports are listed by name and description. For a list of reports and descriptions, see [Section 6.1.1, “Available Standard Reports,” on page 51.](#)
- 5 Click *Graph* on the bottom of the report.
A new window appears with the available graphs.

7.5 Using License Management Custom Reports

ZENworks Control Center allows you to create and run custom reports that you can use to analyze contract information.

- ♦ [Section 7.5.1, “Available Custom Reports,” on page 86](#)
- ♦ [Section 7.5.2, “Running a Custom Report,” on page 86](#)
- ♦ [Section 7.5.3, “Creating a Custom Report,” on page 87](#)
- ♦ [Section 7.5.4, “Scheduling a Custom Report and Sending Notifications,” on page 88](#)
- ♦ [Section 7.5.5, “Configuring E-Mail Addresses for Sending Notifications,” on page 89](#)
- ♦ [Section 7.5.6, “Editing a Custom Report,” on page 90](#)
- ♦ [Section 7.5.7, “Moving a Custom Report,” on page 91](#)

- ◆ [Section 7.5.8, “Deleting a Custom Report or Folder,” on page 92](#)
- ◆ [Section 7.5.9, “Viewing Scheduled Reports by Date and Title,” on page 92](#)
- ◆ [Section 7.5.10, “Importing New Report Definitions,” on page 93](#)

7.5.1 Available Custom Reports

ZENworks Control Center includes ten custom report templates you can modify to better suit your your Management Zone:

- ◆ **Contract Management (folder):** Reports focusing on software compliance.
 - ◆ **Active contracts with no associated assets:** Shows active contracts that have no associated assets, that is, workstation or network devices.
 - ◆ **Active Software Maintenance Contracts:** Shows the active contracts whose type is software maintenance.
 - ◆ **Contracts with Evergreen Provision:** Shows all active contracts with an Evergreen Provision.
 - ◆ **Contracts with no Attached Documents:** Shows all contracts with no attached documents.
 - ◆ **Contracts Ending w/in 90 days (no renewal option):** Shows all non-renewable contracts with end dates within 90 days after the run date.
 - ◆ **Contracts Ending w/in 90 days (renewal option):** Shows all renewable contracts with end dates within 90 days after the run date.
 - ◆ **Contracts Renewed in last 90 days:** Shows contracts that have been renewed in the last 90 days.
 - ◆ **Expired Contracts:** Shows all expired contracts.
 - ◆ **Lease Schedules ending w/in 90 days:** Shows contracts with a lease schedule and a current end date within 60 days of the report run date.
 - ◆ **Pending Contracts:** Shows all the pending contracts.

7.5.2 Running a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder containing the report you want to run.

The number of reports in each folder is shown in the *Report Count* column.

- 5 Click a report.

The report definition appears. For information on editing the report definition, see [Section 7.5.6, “Editing a Custom Report,” on page 90](#).

- 6 Click *Run* in the lower left corner.

On the report page, click the various links on the report for additional information. You can export the report to an Excel, CSV, or PDF format by clicking the corresponding link.

7.5.3 Creating a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder where you want to save the report, or create a new folder by clicking *New*, specifying a folder name, then clicking *OK*.
- 5 In the Custom Reports panel, click *New*.

The screenshot shows a dialog box titled "Custom Report Definition - Step 1 of 2: Choose Focus". It contains a "Name" field with a text input box. Below it, the "Type" is set to "Contract". The "Focus" section has a list of radio buttons: General (selected), Vendor, Financial, Service Level Agreement, Lease, Documents, Renewal History, and Associations. At the bottom, there are "Continue..." and "Cancel" buttons.

- 6 Specify a name in the *Name* field.
- 7 Select the focus of the report. The options are:
 - ♦ General
 - ♦ Vendor
 - ♦ Financial
 - ♦ Service Level Agreement
 - ♦ Lease
 - ♦ Documents
 - ♦ Renewal History
 - ♦ Associations
- 8 Click *Continue*.

Custom Report Definition - Step 2 of 2: Choose columns, column order, and criteria

Name **Description**

Folder

Type

Columns

| Available | Available | Column Order |
|---|---|--|
| <ul style="list-style-type: none"> Acceptance Date Account Number Actual Service Level Assoc. Cost Centers Assoc. Departments Assoc. Device Assets Assoc. Entitlements Assoc. Network Device Assets Assoc. Sites Assoc. Users | <ul style="list-style-type: none"> Contract ID Contract Name Contract Type Contract Status Original Start Date Current End Date Evergreen Total Cost (\$) Parent Contract ID Parent Contract Name | <ul style="list-style-type: none"> <input type="button" value="▲"/> <input type="button" value="▼"/> |

Criteria

| Criteria | Field | Operator | Value | <input type="button" value="+"/> |
|-------------------------|---------------|----------|-------|----------------------------------|
| Summary Criteria | Summary Field | Operator | Value | <input type="button" value="+"/> |

9 Fill in the following fields:

Name: Specify the name of the report.

Folder: Select a folder where you want to save the report.

Description: Specify a description for your report.

Type: Displays the report type you selected.

Columns: From the list on the left, select the data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators

10 Click *Save*.

The next time you open the Custom Reports page, the report appears in the Custom Reports panel.

7.5.4 Scheduling a Custom Report and Sending Notifications

You can schedule a report to run automatically and send out notifications to specified people when the report is ready.

1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder containing the report you want to schedule.
- 5 Click the report you want to schedule.
- 6 Click *Schedule/Notification*.

Schedule Report/Notification: Contracts with Evergreen Provision

Start Date

Frequency Yearly

Output

Stored Report Results

Send a Notification (E-mail)

Both

Send notification / Store results, only when matching records are found

Maximum Records

- 7 Fill in the following fields:

Start Date: Click the calendar icon to specify a date.

Frequency: Select how often you want to send the notification: yearly, monthly, weekly, daily, once, or never.

Output: Select whether you want to store the report, send an e-mail notification that the report is ready, or both. You can also choose to store the results or send a notification only when matching records are found. For information on configuring e-mail addresses, see [Section 6.2.5, “Configuring E-Mail Addresses for Sending Notifications,” on page 62](#).

Maximum Records: Specify the maximum number of records to store.

- 8 Click *Submit*.

7.5.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see [Section 6.2.4, “Scheduling a Custom Report and Sending Notifications,” on page 60](#).

The E-mail Addresses panel on the Asset Inventory page allows you to import e-mail addresses that can be used to send notifications when a custom report is ready, as configured in the report definition. Previously imported e-mail addresses are listed in the panel, along with the user’s first, last, and middle name.

To import e-mail addresses:

- 1 In ZENworks Control Center, click the *Configuration* tab.
- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.

The screenshot shows a dialog box titled "Manage E-mail Addresses". It features a dropdown menu labeled "Import From" with "Inventory Data" selected. Below the dropdown are three buttons: "Import", "Cancel", and "Delete...".

- 4 In the *Import From* field, select either *Inventory Data* or *Comma Separated File*.
If you select *Inventory Data*, the e-mail addresses found in an inventory scan are imported.
If you select *Comma Separated File*, specify the file location in the *E-mail Address File* field.
- 5 Click *Import*.
- 6 Click *Close*.

To delete all e-mail information:

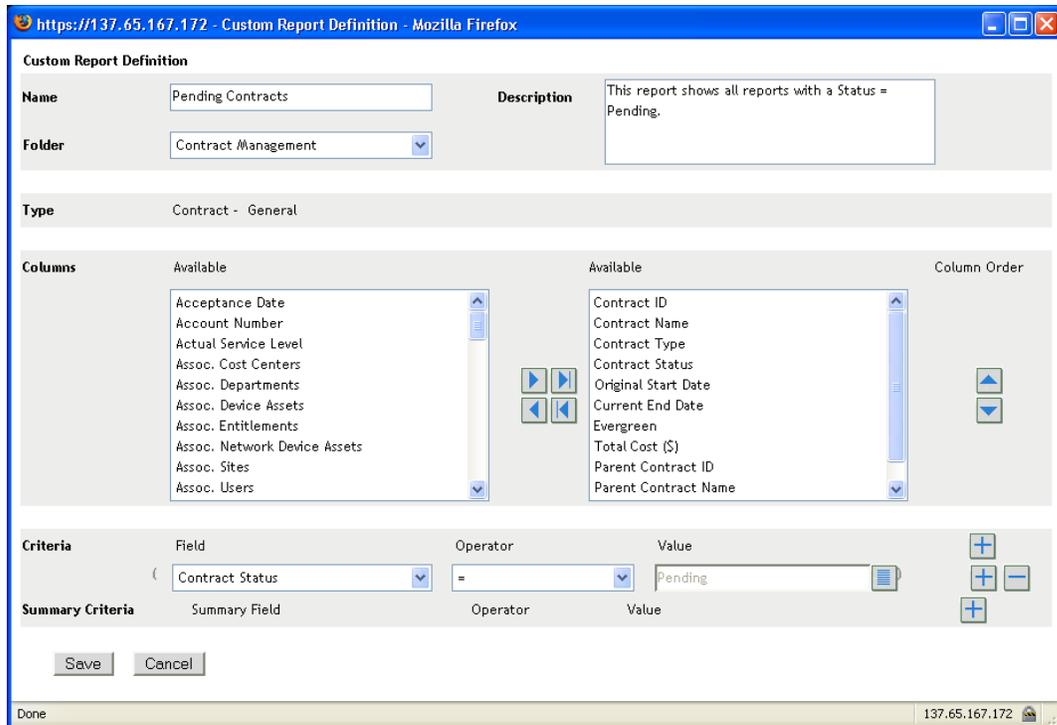
- 1 In ZENworks Control Center, click *Configuration*.
- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.

This screenshot is identical to the one above, showing the "Manage E-mail Addresses" dialog box with the "Import From" dropdown set to "Inventory Data" and the "Delete..." button highlighted.

- 4 Click *Delete*.
- 5 Click *OK*.
All e-mail information is deleted.

7.5.6 Editing a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 Click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder containing the report you want to edit.
- 5 Click the report.
- 6 Click *Edit* in the lower left corner.



7 Edit the following fields:

Name: The name of the report.

Folder: The folder where you want to save the report.

Description: The description for your report.

Columns: From the list on the left, select the data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

8 Click *Save*.

7.5.7 Moving a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder containing the report or reports you want to move.
- 5 Select the report or reports you want to move.
- 6 Click *Edit > Move*.

- 7 Select a new folder location.
- 8 Click *OK*.

7.5.8 Deleting a Custom Report or Folder

To delete a custom report:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click the folder containing the report you want to delete.
- 5 Select the report you want to delete.
- 6 Click *Delete*.

To delete a folder:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, select the folder you want to delete.
- 5 Click *Delete*.

NOTE: Deleting a folder deletes all the reports in that folder.

7.5.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see [Section 6.2.9, “Viewing Scheduled Reports by Date and Title,”](#) on page 67.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click one of the following:
 - ♦ *Action > View Scheduled Report Results by Date*
 - ♦ *Action > View Scheduled Report Results by Title*

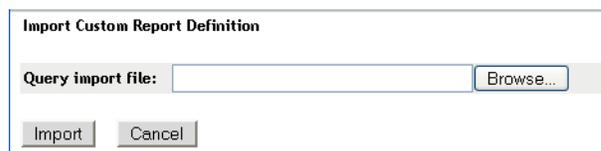
The Scheduled Reports by Grouping page opens and shows the saved scheduled custom reports grouped by date or title and a report count. Click the date or title to open the Scheduled Reports page, where you can select a report and view it. To delete a group of reports, select the group and click *Delete*.

7.5.10 Importing New Report Definitions

If you have defined reports in ZENworks Asset Management 7.5, you can import them into ZENworks Control Center. You can also re-import reports that have been exported by ZENworks Control Center. A predefined XML format is needed for import.

To import report definitions:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Contract Management* tab.
- 3 In the Contract Management panel, click *Contract Management Reports*.
- 4 In the Contract Management Custom Reports panel, click *Action > Import New Report Definition*.



- 5 Specify the file in the *Query import file* field, or click *Browse* to search.
- 6 Click *Import*.

7.6 Setting Asset Management Services Report Rights

Asset Management Services report rights allow you to manage each administrator's rights for each folder and its reports. Each report folder has rights associated with it, governing all the reports within that folder. For example, if you have full rights, you can edit a report; but with view/execute rights, you can only see the report and run it. With Asset Management Services report rights, you can limit who has access to certain reports and who can edit them. The report folder type, custom or standard, and the report name are listed along with the rights associated with the folder. The choices are:

- ♦ **Remove all rights:** This removes all rights to the folder, so the specified administrator cannot see it.
- ♦ **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- ♦ **Assign full rights:** This gives the specified administrator full rights to create, edit, move, and delete reports. For standard reports, this setting is the same as *View/Execute*, because you cannot alter a standard report.

To change inventory report rights:

- 1 In ZENworks Control Center, click *Configuration*.
- 2 In the Administrators panel, click an administrator.
- 3 In the Administrator Tasks panel, click *Asset Management Report Rights*.

| Asset Management Report Rights | | | | |
|--------------------------------|------------------|----------------------------|---------------------|---------------------|
| Edit ▾ | | | | |
| <input type="checkbox"/> | Folder Type ▲ | Folder Name | Source | Rights |
| <input type="checkbox"/> | Custom Reports | Software Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | All Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Network Software Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Other Reports | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Purchases | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software File Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Suites | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Unreconciled Products | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Web Application Usage | Usage | View/Execute Rights |

1 - 14 of 14 show 20 ▼ items

4 Select the folders you want to change the rights to.

5 Click one of the following:

- ◆ *Edit > Remove All Rights*
- ◆ *Edit > Assign View/Execute Rights*
- ◆ *Edit > Assign Full Rights*

The change is reflected in the *Rights* column.

7.7 Adding and Associating Documents

Asset Management Services allows you to add documentation to entitlements, contracts, and purchase summary records to help establish proof of ownership. It's a two-step process:

- ◆ [Section 7.7.1, "Adding Documents," on page 94](#)
- ◆ [Section 7.7.2, "Associating Documents," on page 95](#)

7.7.1 Adding Documents

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Documents* tab.
- 3 In the Documents panel, click *New > Upload Document* to open the Upload New Document Wizard. Complete the wizard by using information from the following table to fill in the fields:

| Wizard Page | Details |
|-----------------------------------|--|
| Specify Document File to Add page | Specify the file in the <i>File Name</i> field or click <i>Browse</i> to search. |

| Wizard Page | Details |
|--------------------------------|---|
| Document File Information page | <p>Fill in the following fields:</p> <p>Document ID: Specify a file ID.</p> <p>Local Path: This field displays the path of the file added in step 1.</p> <p>Source Location: Specify the location of the source file.</p> <p>As-Of Date: Click the calendar icon to select a date.</p> <p>Description: Add a description, if needed.</p> |
| New Document Summary | <p>Review the data entered. Use the <i>Back</i> button to make corrections. Click <i>Finish</i> to upload the document.</p> |

To move a document:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Documents* tab.
- 3 Select a document to move.
- 4 Select a destination folder in the Move Document(s) dialog box.
- 5 Click *OK*.

To delete a document or folder:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Documents* tab.
- 3 Select a document or folder to delete.
- 4 Click *Delete*.

7.7.2 Associating Documents

To associate documents with entitlements, see [Section 5.3.1, “Creating License Entitlements,” on page 43](#).

To associate documents with contracts, see [Section 7.2.6, “Documents Tab,” on page 77](#).

To associated documents with summary purchase records, see [Section 2.3, “Creating Purchase Summary Records,” on page 24](#).

Using Software Collections

8

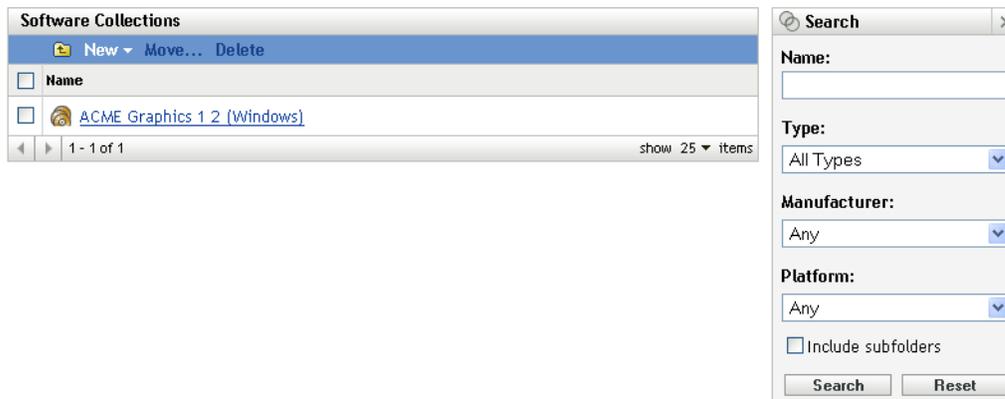
Software Collections allow you to consolidate products into a single collection, making it easier to keep track of compliance.

Managing your software collection involves three tasks:

- ♦ Section 8.1, “Creating a Software Collection,” on page 97
- ♦ Section 8.2, “Deleting a Software Collection,” on page 98
- ♦ Section 8.3, “Moving a Software Collection,” on page 98

8.1 Creating a Software Collection

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the License Management panel, click *Software Collections*.



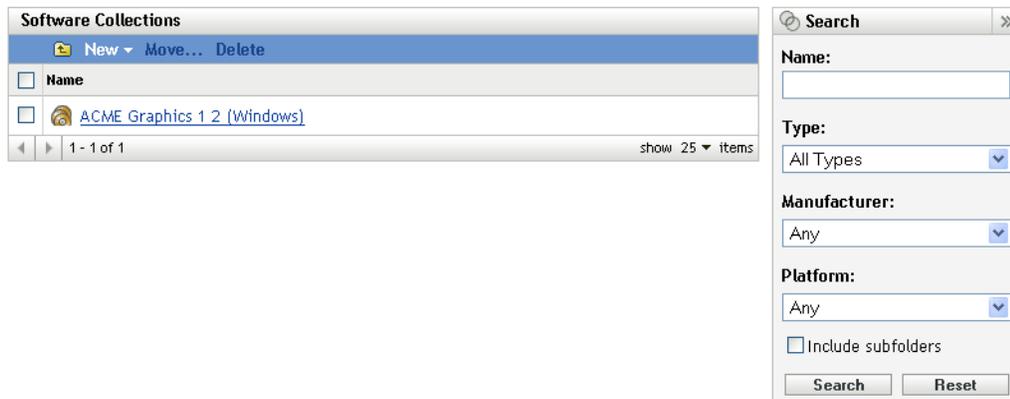
- 3 Click *New* > *Software Collection* to open the Create New Software Collection Wizard. Complete the wizard by using information from the following table to fill in the fields.

| Wizard Page | Details |
|--------------------------------------|---|
| General Information page | Fill in the following fields: Manufacturer: Specify the name of the manufacturer. Product: Specify the product name. Version: Specify the product version. Platform: Specify either Windows or Mac. Notes: Add notes, if any. |
| New Software Collection Summary page | Review the summary data. Click <i>Back</i> to make changes. Click <i>Finish</i> to create the software collection. |

- 4 (Optional) Select *Define Additional Properties* to add member products to the software collection after you click *Finish*.
- 5 Click *Finish* to create the software collection. If you selected *Define Additional Properties* in [Step 4](#), go on to [Step 6](#).
- 6 Add member products to the software collection.
 - 6a Click *Add > Installed Discovered Product* or *Add > Any Discovered Product*, depending on what you want to do.
 - 6b Select the products you want to add, then click *OK*.

8.2 Deleting a Software Collection

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click *Software Collections*.

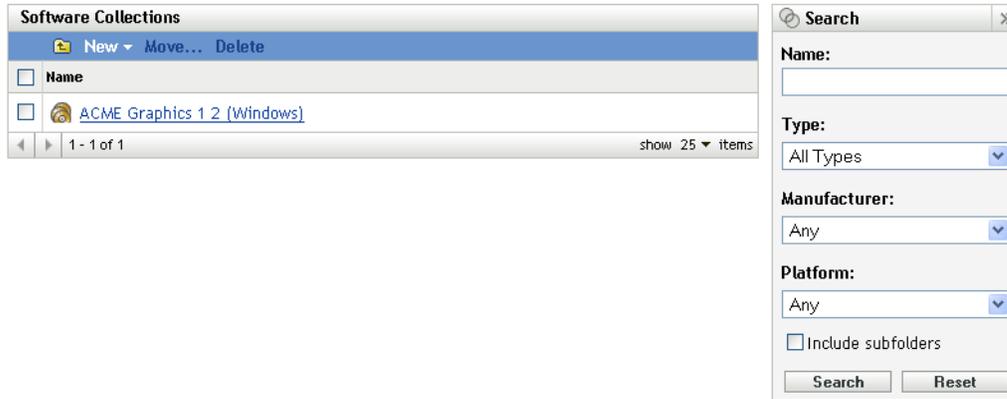


- 3 In the Software Collections panel, select the collections you want to delete.
- 4 Click *Delete*.

8.3 Moving a Software Collection

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click *Software Collections*.





- 3** In the Software Collections panel, select the collections you want to move.
- 4** Click *Move*.
- 5** Select a target folder in the Move Software Collection(s) dialog box.
- 6** Click *OK*.

Monitoring Software Usage

9

ZENworks® Control Center includes a variety of reports to help you make asset management decisions. Being able to see how often a product is used, for example, would help you make decisions on whether to buy additional licenses or reduce their number. The Software Usage page allows you to monitor software usage through a variety of standard and custom reports. This section includes the following topics:

- ◆ [Section 9.1, “Using Asset Management Services Standard Reports,” on page 101](#)
- ◆ [Section 9.2, “Using Asset Management Services Custom Reports,” on page 105](#)
- ◆ [Section 9.3, “Setting Asset Management Services Report Rights,” on page 112](#)
- ◆ [Section 9.4, “Monitoring Web Application Usage,” on page 113](#)

9.1 Using Asset Management Services Standard Reports

Standard (predefined) reports scan your software usage data and arrange the data according to the report configuration.

- ◆ [Section 9.1.1, “Available Standard Reports,” on page 101](#)
- ◆ [Section 9.1.2, “Running a Standard Report,” on page 102](#)

9.1.1 Available Standard Reports

ZENworks Control Center includes several predefined reports you can use to analyze software usage in your Management Zone. These reports are grouped into folders according to their function. The available folders and reports are as follows:

- ◆ **Application Usage (folder):** Reports focusing on application usage.
 - ◆ **Total Application Usage by Product:** Shows the total local and served application usage grouped by product.
 - ◆ **Total Application Usage by User:** Shows the total local and served application usage grouped by user.
 - ◆ **Total Application Usage by Device:** Shows the total local and served application usage grouped by device.
 - ◆ **Local Application Usage by Product:** Shows local application usage grouped by product.
 - ◆ **Local Application Usage by User:** Shows local application usage grouped by user.
 - ◆ **Local Application Usage by Device:** Shows local application usage grouped by device.
 - ◆ **Served Application Usage by Product:** Shows served application usage grouped by product.
 - ◆ **Served Application Usage by Server:** Shows served application usage grouped by server.
 - ◆ **Served Application Usage by User:** Shows served application usage grouped by user.

- ♦ **Served Application Usage by Device:** Shows served application usage grouped by device.
- ♦ **Usage Collection History:** Shows a history of data collection.
- ♦ **Web Application Usage (folder):** Reports focusing on Web application usage.
 - ♦ **Web Application Usage by Application:** Shows Web application usage grouped by application.
 - ♦ **Web Application Usage by User:** Shows Web application usage grouped by user.
 - ♦ **Web Application Usage by Device:** Shows Web application usage grouped by device.
- ♦ **Software File Usage (folder):** Reports focusing on software file usage. These reports are useful in determining software application usage for products not recognized by the ZENworks knowledgebase. For more information on the ZENworks knowledgebase and local software products (products not recognized by the knowledgebase), see [“ZENworks 10 Configuration Management Asset Inventory Reference”](#).
 - ♦ **Software File Usage by Category:** Shows a count of software files grouped by category (*All, Other, Ancillary*) with links to lists of the files.
 - ♦ **Software File Usage by Manufacturer:** Shows a count of software files grouped by manufacturer with links to lists of the files.
 - ♦ **Software File Usage by Device:** Shows a count of software files grouped by device with links to lists of the files.
- ♦ **Network Software Usage (folder):** Usage reports focusing on software launched from a network drive.
 - ♦ **Network Software Usage by Product:** Shows network software usage grouped by product.
 - ♦ **Network Software Usage by Server:** Shows network software usage grouped by server.
 - ♦ **Network Software Usage by User:** Shows network software usage grouped by user.
 - ♦ **Network Software Usage by Device:** Shows network software usage grouped by device.
- ♦ **All Usage (folder):** Reports that focus on total application usage: local, served, Web applications, and network usage.
 - ♦ **All Usage by User:** Shows all usage grouped by user.
 - ♦ **All Usage by Device:** Shows all usage grouped by device.

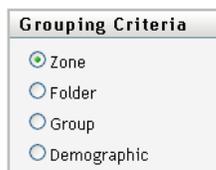
9.1.2 Running a Standard Report

You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management Services allows you to export data to another format, view the data as a graph, change the time period of the report, and change the filter criteria. The following sections provide more information:

- ♦ [“Running a Report” on page 103](#)
- ♦ [“Exporting a Report to a Different Format” on page 103](#)
- ♦ [“Viewing the Report as a Graph” on page 103](#)
- ♦ [“Changing the Time Period for a Report” on page 104](#)
- ♦ [“Changing the Filter Criteria for a Report” on page 104](#)

Running a Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.
Reports are listed by name and description. For a list of reports and descriptions, see [Section 9.1.1, “Available Standard Reports,” on page 101.](#)
- 4 (Optional) Select how you want to filter your search.



You can limit the scope of the report data by any of the following:

- ♦ **Zone:** Select *Zone* to collect data from the entire Management Zone.
 - ♦ **Folder:** Select *Folder* and specify a folder name to gather data about that folder.
 - ♦ **Group:** Select *Group* and specify a group name to gather data about that group.
 - ♦ **Demographic:** Select *Demographic*, then select the criteria you want to use to filter the data.
- 5 Click the report to run it.
 - 6 Click the links for more detailed information.

Exporting a Report to a Different Format

Asset Management Services allows you to export report data into three formats: Excel, CSV, and PDF.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Select the format to export the report to by clicking one of the three formats on the bottom of the report.

Viewing the Report as a Graph

Many reports can be viewed as a graph. Three graphical formats are available: bar graph, pie chart, and line graph. (If this feature is available, *Graph* appears at the bottom of the report.)

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.

- 3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Click *Graph* on the bottom of the report.
A new window appears with the available graphs.

Changing the Time Period for a Report

For greater flexibility, you can change the time period of some reports. (If this feature is available, *Change Time Period* appears at the bottom of the report.) You can select from the following time periods:

- ◆ Previous Month
- ◆ Previous 3 Months
- ◆ Previous 6 Months
- ◆ Previous 12 Months
- ◆ All History in Database

To change the time period:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.
- 4 Click the report to run it.
- 5 Click *Change Time Period*.

Report Filters

Time Period ▼

- 6 Select an interval in the *Time Period* field.
- 7 Click *Apply*.
The new time period is shown on the top left of the report.

Changing the Filter Criteria for a Report

Many reports allow you to change the report filter criteria. (If this feature is available, *Change Time Period/Filter* appears at the bottom of the report.)

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.
- 4 Click the report to run it.

5 Click *Change Time Period/Filter* on the bottom of the report.

Report Filters

Time Period: Previous 3 Months

Detail:

- Used Applications Only
- Unused Applications Only
- All Applications

Apply Cancel

6 Select an interval in the *Time Period* field.

7 Select one of the following filters:

- ◆ Used applications only
- ◆ Unused applications only
- ◆ All applications

8 Click *Apply*.

9.2 Using Asset Management Services Custom Reports

ZENworks Control Center allows you to create and run custom reports that you can use to analyze software usage in your Management Zone. These sections provide more information:

- ◆ [Section 9.2.1, “Available Custom Reports,” on page 105](#)
- ◆ [Section 9.2.2, “Running a Custom Report,” on page 106](#)
- ◆ [Section 9.2.3, “Creating a Custom Report,” on page 106](#)
- ◆ [Section 9.2.4, “Scheduling a Custom Report and Sending Notifications,” on page 108](#)
- ◆ [Section 9.2.5, “Configuring E-Mail Addresses for Sending Notifications,” on page 108](#)
- ◆ [Section 9.2.6, “Editing a Custom Report,” on page 109](#)
- ◆ [Section 9.2.7, “Moving a Custom Report,” on page 110](#)
- ◆ [Section 9.2.8, “Deleting a Custom Report or Folder,” on page 111](#)
- ◆ [Section 9.2.9, “Viewing Scheduled Reports by Date and Title,” on page 111](#)
- ◆ [Section 9.2.10, “Importing New Report Definitions,” on page 112](#)

9.2.1 Available Custom Reports

ZENworks Control Center includes three report templates you can use to analyze software usage in your Management Zone:

- ◆ **Software Application Usage (folder):** Reports focusing on software usage.
 - ◆ **Software applications not used in 90 days:** Shows the applications that haven’t been used in the previous 90 days.
 - ◆ **Software usage on virtual machines:** Shows software usage on virtual machines in the Management Zone.

- ♦ **Workstations with suspicious software used within 7 days:** Shows the workstations with suspicious software that has been used in the previous 7 days.

9.2.2 Running a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click the folder containing the report you want to run.

The number of reports in each folder is shown in the *Report Count* column.

- 4 Click a report.

The report definition appears. For information on editing the report definition, see [Section 9.2.6, “Editing a Custom Report,” on page 109](#).

- 5 Click *Run* in the lower left corner.

On the report page, click the various links on the report for additional information. You can export the report to an Excel, CSV, or PDF format by clicking the corresponding link.

9.2.3 Creating a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click the folder where you want to save the report, or create a new folder by clicking *New*, specifying a folder name, then clicking *OK*.
- 4 In the Custom Reports panel, click *New*.

Custom Report Definition - Step 1 of 2: Choose Type and Focus

Name

Type

- Total Software Usage
- Local Software Usage
- Served Software Usage
- Web Software Usage
- Software File Usage
- Network Software Usage

Focus

- Usage (Server Dev Details)
- Usage (Remote Dev Details)

- 5 Specify a name in the *Name* field.
- 6 Select the report type. The types are:
 - ♦ Total software usage
 - ♦ Local software usage
 - ♦ Served software usage
 - ♦ Web software usage
 - ♦ Software file usage

- ◆ Network software usage

7 Select the focus of the report.

8 Click *Continue*.

Custom Report Definition - Step 2 of 2: Choose columns, column order, and criteria

Name **Description**

Folder

Type Total Software Application Usage

Columns

| Available | Available | Column Order |
|----------------------|---------------------------------|--------------|
| Additional SW Info | Product Manufacturer | |
| App User Email | Product Name | |
| App User Fax | Product Version | |
| App User First Name | Hours Active (Local) (Summary) | |
| App User Is Deleted | Number of Local Users | |
| App User Last Name | Hours Active (Served) (Summary) | |
| App User Middle Name | Number of Served Users | |
| App User Name | | |
| App User Phone | | |
| App User Phone(2) | | |

Criteria

| Field | Operator | Value | |
|----------------------|----------|-------|-----|
| (Device Is Deleted | = | No | + - |
| (Product Is Deleted | = | No | + - |
| | | | AND |

Summary Criteria

| Summary Field | Operator | Value | |
|--------------------------------|----------|-------|-----|
| (Hours Used (Local) (Summary) | not = | 0 | + - |

Back Save Cancel

9 Fill in the following fields:

Name: Specify the name of the report.

Folder: Select a folder where you want to save the report.

Description: Specify a description for your report.

Type: Displays the report type you selected.

Columns: From the list on the left, select what data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators

10 Click *Save*.

The next time you open the Custom Reports page, the report appears in the Custom Reports panel.

9.2.4 Scheduling a Custom Report and Sending Notifications

You can schedule a report to run automatically and send out notifications to specified people when the report is ready.

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click the folder containing the report you want to schedule.
- 4 Click the report you want to schedule.
- 5 Click *Schedule/Notification*.

The screenshot shows a dialog box titled "Schedule Report/Notification: SW Usage on Virtual Machines". It contains the following fields and options:

- Start Date:** A text input field with a calendar icon to its right.
- Frequency:** A dropdown menu currently set to "Yearly".
- Output:** A group of radio buttons and a checked checkbox:
 - Stored Report Results
 - Send a Notification (E-mail)
 - Both
 - Send notification / Store results, only when matching records are found
- Maximum Records:** A text input field.

At the bottom of the dialog are two buttons: "Submit" and "Cancel".

- 6 Fill in the following fields:

Start Date: Click the calendar icon to specify a date.

Frequency: Select how often you want to send the notification: yearly, monthly, weekly, daily, once, or never.

Output: Select whether you want to store the report, send an e-mail notification that the report is ready, or both. You can also choose to store the results or send a notification only when matching records are found. For information on configuring e-mail addresses, see [Section 9.2.5, "Configuring E-Mail Addresses for Sending Notifications," on page 108](#).

Maximum Records: Specify the maximum number of records to store.

- 7 Click *Submit*.

9.2.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see [Section 9.2.4, "Scheduling a Custom Report and Sending Notifications," on page 108](#).

The E-mail Addresses panel on the Asset Inventory page allows you to import e-mail addresses that can be used to send notifications when a custom report is ready, as configured in the report definition. Previously imported e-mail addresses are listed in the panel, along with the user's first, last, and middle name.

To import e-mail addresses:

- 1 In ZENworks Control Center, click the *Configuration* tab.

- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.



The screenshot shows a dialog box titled "Manage E-mail Addresses". It features a dropdown menu labeled "Import From" with "Inventory Data" selected. Below the dropdown are three buttons: "Import", "Cancel", and "Delete...".

- 4 In the *Import From* field, select either *Inventory Data* or *Comma Separated File*.
If you select *Inventory Data*, the e-mail addresses found in an inventory scan are imported.
If you select *Comma Separated File*, specify the file location in the *E-mail Address File* field.
- 5 Click *Import*.
- 6 Click *Close*.

To delete all e-mail information:

- 1 In ZENworks Control Center, click *Configuration*.
- 2 Click the *Asset Inventory* tab.
- 3 In the E-mail Addresses Panel, click *Action > Manage E-mail Addresses*.
- 4 Click *Delete*.
- 5 Click *OK*.
All e-mail information is deleted.

9.2.6 Editing a Custom Report

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click the folder containing the report you want to edit.
- 4 Click the report.
- 5 Click *Edit* in the lower left corner.

Custom Report Definition

Name **Description**

Folder

Type Local Software Application Usage

Columns

| Available | Available | Column Order |
|----------------------|--------------------------|--------------|
| Additional SW Info | Product Manufacturer | |
| App Starts (Summary) | Product Name | |
| App User Email | Product Version | |
| App User Fax | Run Time Hours (Summary) | |
| App User First Name | Active Hours (Summary) | |
| App User Is Deleted | Instances (Summary) | |
| App User Last Name | | |
| App User Middle Name | | |
| App User Name | | |
| App User Phone | | |

Criteria

| Field | Operator | Value | |
|----------------------|----------|-------|---------|
| (Device Is Deleted | = | No | AND + - |
| (Product Is Deleted | = | No | AND + - |
| (Device is Virtual | = | Yes | + - |

Summary Criteria

| Summary Field | Operator | Value | |
|----------------------------|----------|-------|-----|
| (Run Time Hours (Summary) | not = | 0 | + - |

6 Edit the following fields:

Name: The name of the report.

Folder: The folder where you want to save the report.

Description: The description for your report.

Columns: From the list on the left, select the data you want to include in your report. Use the arrow icons to move the selected data to the list on the right. Use Ctrl+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

Criteria: Select your filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

7 Click *Save*.

9.2.7 Moving a Custom Report

1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Software Usage* tab.

3 In the Software Usage Custom Reports panel, click the folder containing the report or reports you want to move.

- 4 Select the report or reports you want to move.
- 5 Click *Edit > Move*.
- 6 Select a new folder location.
- 7 Click *OK*.

9.2.8 Deleting a Custom Report or Folder

To delete a custom report:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click the folder containing the report you want to delete.
- 4 Select the report you want to delete.
- 5 Click *Delete*.

To delete a folder:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, select the folder you want to delete.
- 4 Click *Delete*.

NOTE: Deleting a folder deletes all the reports in that folder.

9.2.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see [Section 9.2.4, “Scheduling a Custom Report and Sending Notifications,” on page 108](#).

To view a scheduled report by date or title:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 Click the *Software Usage* tab.
- 3 In the Software Usage Custom Reports panel, click one of the following:
 - ♦ *Action > View Scheduled Report Results by Date*
 - ♦ *Action > View Scheduled Report Results by Title*

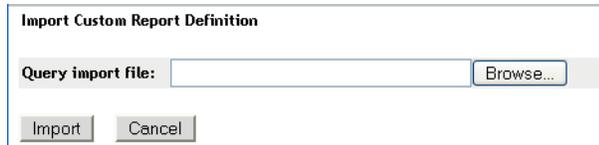
The Scheduled Reports by Grouping page opens and shows the saved scheduled custom reports grouped by date or title and a report count. Click the date or title to open the *Scheduled Reports* page, where you can select a report and view it. To delete a group of reports, select the group and click *Delete*.

9.2.10 Importing New Report Definitions

If you have defined reports in ZENworks Asset Management 7.5, you can import them into ZENworks Control Center. You can also re-import reports that have been exported by ZENworks Control Center. A predefined XML format is needed for import.

To import report definitions:

- 1 In ZENworks Control Center, click the *Asset Management* tab.
- 2 In the Software Usage Custom Reports panel, click *Action > Import New Report Definition*.



- 3 Specify the file in the *Query import file* field, or click *Browse* to search.
- 4 Click *Import*.

9.3 Setting Asset Management Services Report Rights

Asset Management Services report rights allow you to manage each administrator's rights for each folder and its reports. Each report folder has rights associated with it, governing all the reports within that folder. For example, if you have full rights, you can edit a report; but with view/execute rights, you can only see the report and run it. With Asset Management Services report rights, you can limit who has access to certain reports and who can edit them. The report folder type, custom or standard, and the report name are listed along with the rights associated with the folder. The choices are:

- ♦ **Remove all rights:** This removes all rights to the folder, so the specified administrator cannot see it.
- ♦ **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- ♦ **Assign full rights:** This gives the specified administrator full rights to create, edit, move, and delete reports. For standard reports, this setting is the same as *View/Execute*, because you cannot alter a standard report.

To change inventory report rights:

- 1 In ZENworks Control Center, click *Configuration*.
- 2 In the Administrators panel, click an administrator.
- 3 In the Administrator Tasks panel, click *Asset Management Report Rights*.

| Asset Management Report Rights | | | | |
|--------------------------------|------------------|----------------------------|---------------------|---------------------|
| Edit ▾ | | | | |
| <input type="checkbox"/> | Folder Type ▲ | Folder Name | Source | Rights |
| <input type="checkbox"/> | Custom Reports | Software Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Custom Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | All Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Application Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Contract Management | Contract Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Network Software Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Other Reports | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Purchases | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software Compliance | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Software File Usage | Usage | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Suites | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Unreconciled Products | License Management | View/Execute Rights |
| <input type="checkbox"/> | Standard Reports | Web Application Usage | Usage | View/Execute Rights |

4 Select the folders you want to change the rights to.

5 Click one of the following:

- ◆ *Edit > Remove All Rights*
- ◆ *Edit > Assign View/Execute Rights*
- ◆ *Edit > Assign Full Rights*

The change is reflected in the *Rights* column.

9.4 Monitoring Web Application Usage

Asset Management Services also allows you to monitor Web application usage. Web applications must first be defined, then you can use the reports in the Web Application folder on the Software Usage page to track usage. The Web Applications panel displays the following information:

- ◆ **Manufacturer:** The manufacturer of the Web application.
- ◆ **Application:** The name of the Web application.
- ◆ **Version:** The version of the Web application.
- ◆ **Last Modified:** The date the Web application definition was last modified.

Figure 9-1 Web Applications Panel

| Web Applications | | | | |
|--------------------------|--------------|----------------------------|---------|---------------|
| New Delete | | | | |
| <input type="checkbox"/> | Manufacturer | Application ▲ | Version | Last Modified |
| <input type="checkbox"/> | ACME | Graphics 1 | 3 | 9/11/07 |

More information is contained in the following sections:

- ◆ [Section 9.4.1, “Defining a Web Application,” on page 114](#)
- ◆ [Section 9.4.2, “Editing a Web Application Definition,” on page 114](#)

9.4.1 Defining a Web Application

- 1 In ZENworks Control Center, click the *Configuration* tab.
- 2 Click the *Asset Management* tab.
- 3 In the Web Applications panel, click *New* to open the Create New Web Application Wizard. Complete the wizard by using the information in the following table to fill in the fields.

| Wizard Page | Details |
|------------------------------|---|
| Application Naming page | Fill in the following fields: Manufacturer: The manufacturer of the Web application. Application: The application name. Version: The version of the application. |
| Application Recognition page | This page allows you to enter the window title bar text for the application. <ol style="list-style-type: none">1. Specify a name in the <i>Window Title(s)</i> field.2. Click <i>Add</i>.3. Repeat for additional values. Use the <i>Edit</i> and <i>Remove</i> buttons to change or delete values. |
| Summary page | Review your data. Use the <i>Back</i> button to edit the specified values. |

- 4 Click *Finish*.

9.4.2 Editing a Web Application Definition

- 1 In ZENworks Control Center, click the *Configuration* tab.
- 2 Click the *Asset Management* tab.
- 3 In the Web Applications panel, click the name of the application you want to edit.

The image shows a 'Details' dialog box with two main sections: 'Application Naming' and 'Application Recognition'.
In the 'Application Naming' section, there are three text input fields: 'Manufacturer' with the value 'ACME', 'Application' with the value 'Graphics 1', and 'Version' with the value '3'.
In the 'Application Recognition' section, there is a 'Window Title(s):' label above a list box. The list box contains one entry, 'graphics', which is currently selected. To the right of the list box are three buttons: 'Add', 'Edit', and 'Remove'.
At the bottom of the dialog box, there are four buttons: 'OK', 'Apply', 'Reset', and 'Cancel'.

- 4 In the Details panel, edit the fields using information found in the table in [Step 3 on page 114](#).
- 5 Click *OK* or *Apply*.

Using Administrator-Defined Fields

10

Administrator-defined fields allow you to add custom fields to contracts and to licensed products. The following sections contain more information:

- ◆ [Section 10.1, “About Administrator-Defined Fields,” on page 117](#)
- ◆ [Section 10.2, “Creating an Administrator-Defined Field,” on page 117](#)
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10.1 About Administrator-Defined Fields

Administrator-defined fields allow you to add custom fields to further define contracts and licensed products. For example, you could add “Cost Center” to a contract’s general information.

The Administrator-Defined Fields panel shows the type of field (either Contract or Licensed Product) and the number of custom fields in each category.

10.2 Creating an Administrator-Defined Field

Whether you want to create a Contract or Licensed Product administrator-defined field, the steps are the same.

- 1 In ZENworks Control Center, click *Configuration*, then click the *Asset Management* tab.
- 2 In the Administrator-Defined Fields panel, click the type of field you want to create: Contract or Licensed Product.
- 3 Click *New* to open the New Administrator-Defined Field Wizard. Complete the wizard by using information from the following table to fill in the fields:

| Wizard Page | Details |
|--------------------------|--|
| General Information page | <p>Fill in the following fields:</p> <p>Type: Filled in by default depending on the type of field you selected.</p> <p>Name: Specify the name of the administrator-defined field. This field is required.</p> <p>Default Value: Specify the default value of the field.</p> <p>Data Type: Select the type of data allowed in the field: <i>Character</i>, <i>Integer</i>, <i>Decimal</i>, or <i>Date</i>.</p> <p>Size: Specify the maximum number of alphanumeric characters allowed in the field. This applies only to character-type fields.</p> <p>Edit Type: Allows greater flexibility in entering and selecting field values. There are three options you can select:</p> <ul style="list-style-type: none"> ◆ Edit: Allows you to enter a value or edit the default value. ◆ List: Allows you to select a value from a list of possible choices. ◆ Combo: Allows you to enter a value or select from a list. <p>Edit Mask: Select a format from the <i>Edit Mask</i> field list to restrict how a value is entered. The choices are phone, time, and currency. This applies only to character-type fields.</p> |
| Choice List Values page | <p>This page appears if you chose <i>List</i> or <i>Combo</i> as the Edit Type.</p> <p>To create a list of choices:</p> <ol style="list-style-type: none"> 1. Specify a value in the <i>Choice List Values</i> field. 2. Click <i>Add</i>. Repeat for additional values. <p>Edit: Select a value and click <i>Edit</i> to change it.</p> <p>Remove: Select a value and click <i>Remove</i> to delete it.</p> <p>Import: Click <i>Import</i> to open the Import Choice List Values dialog box where you can specify a file to import.</p> |
| Field Summary page | <p>Review the data. Use the <i>Back</i> button to go back to a previous page to edit any fields.</p> |

- 4 Click *Finish* to create the new administrator-defined field.

10.3 Editing an Administrator-Defined Field

- 1 In ZENworks Control Center, click *Configuration*, then click the *Asset Management* tab.
- 2 In the Administrator-Defined Fields panel, click the type of field you want to edit: Contract or Licensed Product.

The Fields panel shows the following information:

Name: The name of the field.

Data Type: The data type: character, integer, decimal, or date.

Size: The number of alphanumeric characters. This applies only to character-type fields.

Edit Type: Specifies how the user enters a response. The values are *Edit*, *List*, and *Combo*.

Default Value: The value that is specified when the field is created.

Internal Name: The field's internal ID.

- 3 Click the field you want to edit.
- 4 Edit the fields in the Field Details panel.
The fields are described in the table in [Step 3 on page 117](#).
- 5 Click *OK* or *Apply*.