Reference

Novell®
ZENworks® 10 Asset Management SP2

10.2
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Contents

About This Guide

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

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) and enter your comments there.

Additional Documentation

ZENworks 10 Asset Management is supported by other documentation (in both PDF and HTML formats) that you can use to learn about and implement the product. See the ZENworks 10 Asset Management documentation (http://www.novell.com/documentation/zam10/index.html).

Documentation Conventions

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

A trademark symbol (®, ™, etc.) denotes a Novell trademark. An asterisk (*) denotes a third-party trademark.

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 Asset Management allows you to monitor software license compliance, track software usage, manage contracts, and manage licenses.

The following sections contain additional information:

- Section 1.1, "Monitoring License Compliance," on page 11
- Section 1.2, "Tracking Software Usage," on page 11
- Section 1.3, "Managing Contracts," on page 12
- Section 1.4, "Managing Product Licenses," on page 12

1.1 Monitoring License Compliance

ZENworks Asset Management 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 2, "Creating Purchase Records," on page 13 and Chapter 3, "Working with Catalog Products," on page 27.

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 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 39.

4 Add proof of ownership data.

For more information, see Chapter 8, "Establishing Proof of Ownership," on page 77.

After you complete the steps above, the compliance engine calculates your license compliance for a product by comparing the number of purchased licenses to the number of software installations. You can then run a variety of reports to view the data.

1.2 Tracking Software Usage

ZENworks Asset Management allows you to track usage of software applications (including run time, active time, logged in user, machine, and application used) in your existing inventory. This includes tracking and reporting on software that is run via Terminal Server and Citrix*, as well as Web applications that are 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 10, "Monitoring Software Usage," on page 107.

1.3 Managing Contracts

ZENworks Asset Management 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 8, "Establishing Proof of Ownership," on page 77.

1.4 Managing Product Licenses

ZENworks Asset Management allows you to create software purchase records, define license entitlements, attach supporting documentation, reconcile discovered software products to entitlements, and track ongoing compliance status. ZENworks Asset Management 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 39.

Creating Purchase Records

<div style="text-align: right; font-size: 3em;">2</div>

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.

- 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
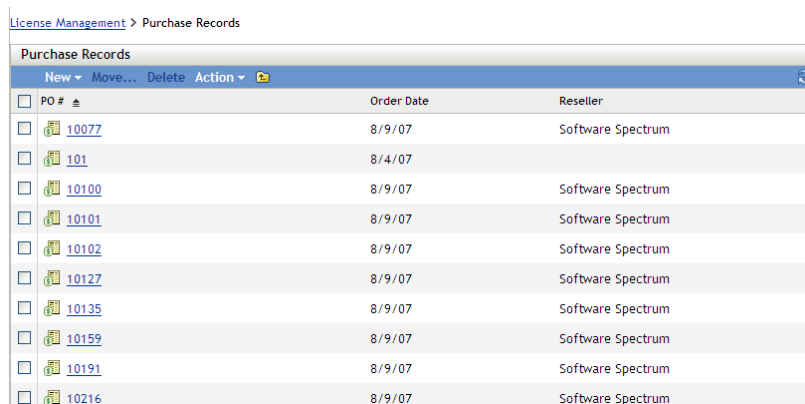
2.1 Importing Purchase Records

The easiest way to create purchase records is to import them. ZENworks® Asset Management supports several purchase record formats. For information about supported formats, see Section 2.1.1, "ZENworks Asset Management Import File Formats," on page 14).

If you are unable to import data from a supported purchase record file, you must manually create purchase records. For information, see Section 2.2, "Manually Creating Purchase Records," on page 22.

To import purchase records:

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 ▾ 📁			
☐ PO # ⬆		Order Date	Reseller
☐ 📊 10077		8/9/07	Software Spectrum
☐ 📊 101		8/4/07	
☐ 📊 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* to display the Import Purchase Records dialog box.
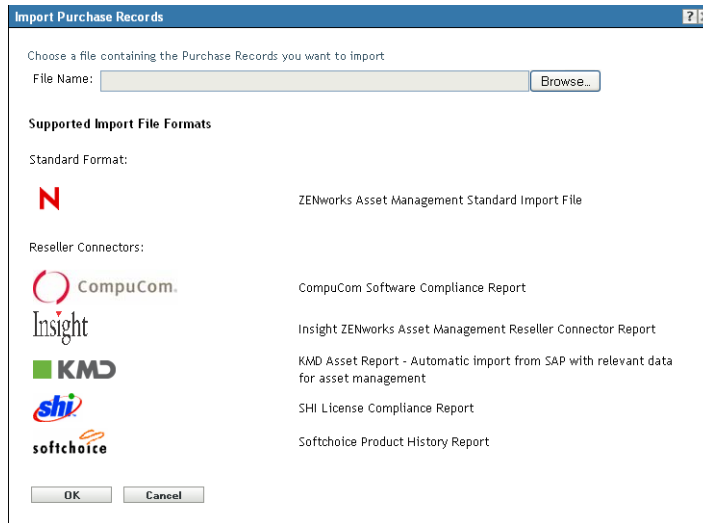
4 In the *File Name* field, click *Browse* to locate and select the import file.

5 Click *OK* to start the import.

During the import, the progress is displayed above the *Purchase Records* list. You can also click the *Import Status* tab to see the progress of the import and a record of previous imports.

When the import is complete, the new purchase records are added to the list.

After you import the purchase records, ZENworks Asset Management creates catalog products with license information to 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 39.

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). ZENworks Asset Management 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
- ◆ KMD Asset Report: Automatic import from SAP* with relevant data for asset management

ZENworks Asset Management Standard Import File Format

The ZENworks Asset Management Standard Import File is a tab-delimited ASCII 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 15.

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 15. 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 14–31 of Table 2-1 on page 15. 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 OrderDate 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 PO# 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	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	

Column	Field Name	Field Definition	Comments
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 Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage 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 Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.
16	Version	The version of the ordered product	The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.
17	ProductType	The type of product ordered	The ProductType field helps establish what the product represents, such as full license, upgrade, or media. The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.
18	LicensesPerPackage	The number of licenses represented by this form of the product	For example, if the product is a 5-pack, this value is 5. The default is 1. The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.
19	ResellerSKU	The SKU number assigned by the reseller	This value might 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	

Column	Field Name	Field Definition	Comments
22	Serial#	The software serial number associated with the ordered product	
23	Site[1]	The site where the software licenses are assigned	The Site, Department, and CostCenter fields are used by ZENworks Asset Management for tracking demographics. 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 ZENworks Asset Management inventory.
24	Department[1]	The department where the licenses are assigned	
25	CostCenter[1]	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	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 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 might be incorrect.
29	UnitPrice	A numeric field representing the product's unit price	
30	ExtendedPrice	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.

[1]*Cost Center, Department*, and *Site* values are meaningful for licensed products with demographic allocations enabled. The allocated quantity is updated (along with the license quantity) for licensed products that have the corresponding demographic allocation type (site, department, or cost center) and have enabled *Update license allocations with demographic data from future purchase record imports*.

Softchoice Import File Format

The Softchoice import file is a tab-delimited ASCII 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 . 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 14–31 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 *Softchoice 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 PO# or OrderDate 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 PO# or OrderDate 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	

Column	Field Name	Softchoice Field Name	Field Definition	Comments
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	
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 Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage 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 Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.
16	Version		The version of the ordered product	The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.

Column	Field Name	Softchoice Field Name	Field Definition	Comments
17	ProductType		The type of product ordered	The ProductType field helps establish what the product represents, such as full license, upgrade, or media. The Manufacturer, ProductName, Version, ProductType, and *LicensesPerPackage* fields are used to determine the existence of a unique product.
18	LicensesPerPackage		The number of licenses represented by this form of the product	For example, if the product is a 5-pack, this value is 5. The default is 1. The *Manufacturer, ProductName, Version, ProductType*, and *LicensesPerPackage* fields are used to determine the existence of a unique product.
19	ResellerSKU	SKU	The SKU number assigned by the reseller	This value might 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[1]		The site where the software licenses are assigned	The *Site, Department*, and *CostCenter* fields are used by ZENworks Asset Management for tracking demographics. 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 ZENworks Asset Management inventory.
24	Department[1]		The department where the licenses are assigned	
25	CostCenter[1]		The cost center where the licenses are assigned	

Column	Field Name	Softchoice Field Name	Field Definition	Comments
26	Comment	COMMENTS	A text field for general comments about the purchased product	
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 Manufaturer'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 might 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.

[1]*Cost Center, Department*, and *Site* values are meaningful for licensed products with demographic allocations enabled. The allocated quantity is updated (along with the license quantity) for licensed products that have the corresponding demographic allocation type (site, department, or cost center) and have enabled *Update license allocations with demographic data from future purchase record imports*.

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

- ORDERNO
- INVDATE
- PURCHASEREF
- ORDERSTATUS
- LINENO
- QTYSHP
- 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.

The following steps explain how to manually create purchase records. You can also import purchase records. For information, see Section 2.1, "Importing Purchase Records," on page 13.
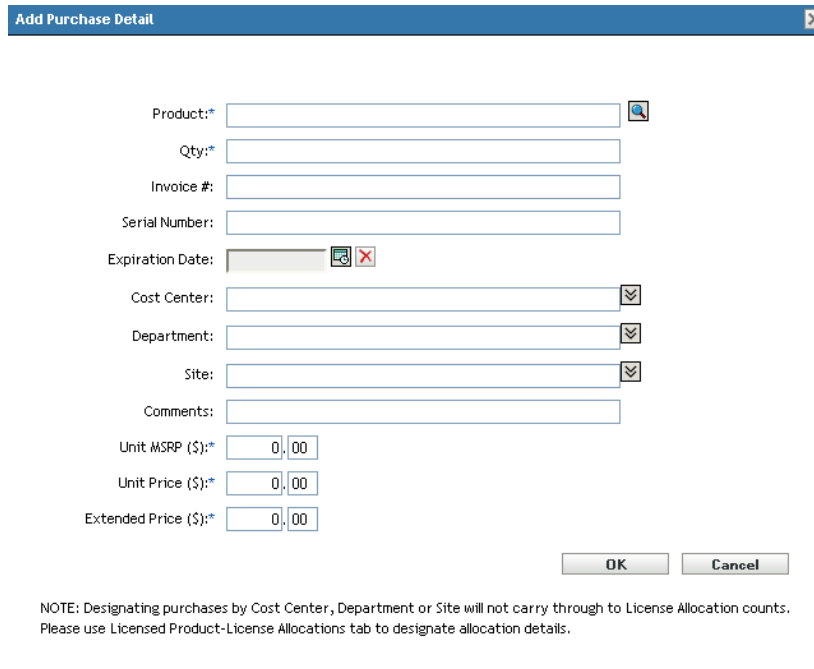
1 In ZENworks Control Center, click the *Asset Management* tab.

2 In the License Management panel, click *Purchase Records*.

License Management > Purchase Records

Purchase Records			
New ▾ Move... Delete Action ▾ 🗀			🔁
☐ PO # ▲	Order Date	Reseller	
☐ 10077	8/9/07	Software Spectrum	
☐ 101	8/4/07		
☐ 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 In the Purchase Record Panel, click *New* > *Purchase Record* to launch the Create New Purchase Record Wizard.

4 On the General Information page, fill in the following fields.

PO Number: The purchase order number. This entry is required.

Recipient: The recipient shown on the purchase order.

Company: The company selling the product.

Shipping Address: The address of the company, including city, state/province, postal code, and country.

Order Date: The date the product was ordered. To select a date, click the calendar icon, select a date from the pop-up calendar, then click *Close*.

Reseller: The name of the reseller.

Notes: Add any notes as necessary.

5 Click Next to display the New Purchase Record Summary page.

6 Select *Define Additional Properties* to further define the purchase record.

7 Click *Finish* to create the purchase record and display its details

8 In the Purchase Details panel, click *Add*.

9 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.

Expiration Date: The expiration date of the purchase. Click the calendar icon to select a date. Click *Close* to finish.

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's 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.
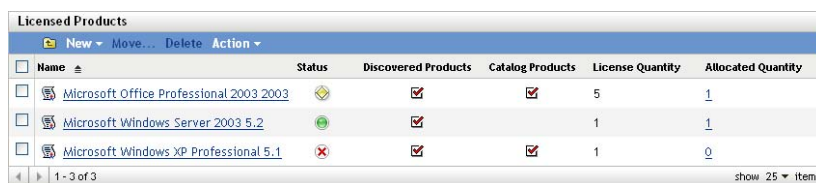
NOTE: The Site, Department, and Cost Center fields are used for tracking demographics so that license quantities can be summarized within a particular demographic. However, quantities entered here do not carry through to Demographic License Allocations. Use the License Allocations page for a licensed product to specify allocation quantities.

10 Click *OK*.

2.3 Creating Purchase Summary Records

Purchase summary records allow you to manually enter the number of licenses to use for calculation purposes.

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

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

3 In the Licensed Products panel, click the product you want to create a purchase summary record for.

4 Click the *License Entitlements* tab.

5 Click the entitlement you want to associate with the purchase summary record.

6 Click the *Proof of Ownership* tab.

7 In the Purchase Summary Records panel, click *New* to open the Create New Purchase Summary Record Wizard.

8 On the 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.

9 Click Next to display the New Purchase Record Summary page.

10 Select *Define Additional Properties* to further define the purchase record.

11 Click *Finish* to create the purchase record summary and display its details

12 In the General panel, make any edits as desired.

13 Associate any documents with the purchase summary record:

13a In the Documents panel, click *Add*.

13b Select a file in the Select Document(s) for Entitlement dialog box.

13c Click *OK*.

14 Click *Apply*.

Working with Catalog Products

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Catalog products are created automatically when you importing a purchase record. If you do not import purchase records, you need to manually create catalog products.The following sections provide more information on creating catalog products:

3.1 Creating Catalog Products from Purchase Records

ZENworks® Asset Management 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*.

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

4 Click *Finish* to create the catalog product.

3.3 Including and Excluding Catalog Products

There might be situations where you want to add a catalog product to a licensed product but don't want the catalog product included in the license compliance calculations. If so, you can exclude the catalog product from these calculations.

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

2 In the License Management panel, click *Catalog Products*.

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

When you add a catalog product to a licensed product, any licenses associated with the catalog product are applied to the licensed product.

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

2 In the License Management panel, click *Catalog Products*.

3 Select the catalog product that you want to add to a licensed product.

You can select one or more catalog products.

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 products you selected.
	Licensed Products: Click the search icon to find the licensed product that you want to associate with the catalog products.
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

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Discovered products are those products identified by an inventory scan of devices in the Management Zone. For more information on inventory scans, see the *ZENworks 10 Asset Inventory Reference*.

- 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 35
- Section 4.6, "Refreshing Compliance Status," 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*.

Discovered Products					
▣ Action ▾					
☐ Name ▲	Excluded	Licensed Product	Installed Quantity	Active Usage Quantity	Standards Category
☐ 🗟 Microsoft Office Professional 2003 2003 (Windows)		Office Professional 2003	10	10	
☐ 🗟 Microsoft Windows Server 2003 5.2 (Windows)		Windows Server 2003	5	5	
☐ 🗟 Microsoft Windows XP Professional 5.1 (Windows)		Windows XP Professional	15	11	
☐ 🗟 Sun Java2 Runtime Environment 1.5 (Windows)			15	12	
☐ 🗟 Sybase SQL Anywhere Developer Edition 10.0 (Windows)			1	0	
☐ 🗟 Symantec Symantec AntiVirus Corporate Edition 8.1 (Windows)			30	25	
☐ 🗟 VMware VMware Tools - (Windows)			2	2	
☐ 🗟 Yahoo! Yahoo! Companion Toolbar - (Windows)			1	0	
◄ ▶ 1 - 8 of 8				show 25 ▾ items	

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.

Active Usage Quantity: The number of installed products that are actively being used. Active Usage Quantity is not displayed when the *Do not show usage on License Management pages* option is selected (Configuration > Management Zone Settings > Asset Management > Usage Display).

Standards Category: The category for the product.

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

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.

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.

   ◆ **Hours Active:** How long the product has been active. For activity that is less than 30 minutes, the column shows 0 (zero).

   ◆ **Active Installation Usage Quantity:** The total number of workstations on which the installed product has seen active usage over the specified usage period.

Consumption Panel: Details about consumption, including the following:

   ◆ **Ignored Installations:** The total number of ignored installations of the discovered product.

   ◆ **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

There might be situations where you want to add a discovered product to a licensed product but don't want the discovered product included in the license compliance calculations. If so, you can exclude the discovered product from these calculations.

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

2 In the License Management panel, click *Discovered Products*.

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

When you associate a discovered product with a licensed product, the discovered product consumes one of the licenses. This, along with associating catalog products to licensed products, is what determines compliance for the licensed product.

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

2 In the License Management panel, click *Discovered Products*.

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.

5 Click *Finish* 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*.

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 9.1, "Creating a Software Collection," on page 103.

4.5 Setting Standards Categories

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

2 In the License Management panel, click *Discovered Products*.

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

4 In the *Standards Category* field, specify a category.

5 Click *Apply*.

4.6 Refreshing Compliance Status

Refreshing compliance data recalculates all discovered product installation counts and recalculates compliance status for all licenses.

- Section 4.6.1, "Triggering a Refresh," on page 36
- Section 4.6.2, "Viewing Refresh Details," on page 37

4.6.1 Triggering a Refresh

Compliance data is refreshed under various circumstances. To manually trigger a refresh, you can click *Action > Refresh Compliance Status* on either the Licensed Products page or the Discovered Product page. A refresh is triggered automatically when you import purchase records; however, performing an auto-reconcile of licensed products won't trigger an automatic refresh.

A refresh of a single license is triggered automatically under the following circumstances:

- Creating or deleting an entitlement
- Adding a purchase summary to an entitlement
- Adding a catalog product to a license
- Modifying a catalog product that is associated with a license
- Adding a discovered product to a license
- Modifying a discovered product that is associated with a license
- Marking a discovered product installation (associated with a license) as ignored
- Deleting a purchase record associated with a license
- Deleting a software collection associated with a license

4.6.2 Viewing Refresh Details

You can see information about the latest refresh above the menu bar of both the Licensed Products page and the Discovered Products page. This information includes the following:

- The last time a compliance refresh was started and ended
- What initiated the refresh
- Whether it was a refresh of all products or a single product

The *Compliance Status* tab of the Licensed Products page also shows the time the license was last refreshed. In addition, clicking *License Management Reports > Software Compliance > Compliance Report* displays a column called *More Recent Recalc* that indicates if a license has been refreshed more recently than the last full refresh of all licenses.

Creating Licensed Products

<div style="text-align: right; font-size: 3em;">5</div>

Licensed products are used to determine compliance

5.1 Viewing Licensed Product Details

You can view the details for a licensed product to see general information such as license compliance and entitlements. You can also perform tasks such as adding entitlements and allocating licenses based on demographics or device.

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

2 In the License Management tab, click *Licensed Products*.

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

Name: The name of the licensed product.

Status: Indicates the product's license compliance status:

- ◉ Properly licensed: The number of licenses match the number of installations.
- ◈ Over licensed: There are more licenses than installations.
- ✕ Under licensed: There are more installations than licenses.

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.

Allocated Quantity: Shows the total allocated quantity. Click the number to show the License Allocations page, which lists the license allocations by demographic and by device.

3 Click a licensed product.

Each of the pages (General, License Entitlements, Compliance Status, and License Allocations) are described in the following sections:

5.1.1 General

The General page lets you view general information about the licensed product and configure whether or not the license supports demographic allocations.

The tab includes the following panels:

- "General Panel" on page 41
- "License Allocation Panel" on page 41

General Panel

The General panel provides 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 11, "Using Administrator-Defined Fields," on page 121.

License Allocation Panel

The License Allocation Settings panel provides the following data:

- **Enable Demographic Allocations:** Select this option to enable licenses to be allocated by site, department, or cost center.

- **Demographic Allocation Type:** Select the demographic type (Site, Department, or Cost Center) you want to use for allocation of this license.

* **Update License Allocations:** Select this option to have the license allocation updated whenever a new purchase record is added. For example, if the license is using a Site allocation and you add a purchase record with 20 new licenses for SiteA, that allocation is added to the allocation list on the License Allocations page.

* **Allocated Quantity:** The total number of licenses that are allocated. This number summarizes the allocations listed on the License Allocations page.

5.1.2 License Entitlements

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

General	License Entitlements						Compliance Status	
Entitlements (Consumption Data Source: Inventory)								
New Delete								
Description ▲	Type	License Period	Term License Status	License Model	License Quantity	Quantity Available	Versions Covered	Upgrade From
ACME Standard	Full License	Perpetual		Active	Per-Installation	4	4	Unknown (Windows)
Total:					4	4		
Entitlements (Consumption Data Source: Manual)								
New Delete								
Description ▲	Type	License Period	Term License Status	License Model	License Quantity	Quantity Available	Versions Covered	Upgrade From
No items available.								

These panels display the following details:

* **Description:** The description of the entitlement.

* **Type:** The license type.

* **License Period:** Indicates if the license period is 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.

1 Click an entitlement to display information about that entitlement:

General

The General page displays general information about the entitlement.

- **Description:** Displays the description or name of the entitlement.

- **Entitlement Type:** Displays the entitlement type you chose when you created the entitlement.

- **Platform:** Displays the product's platform.

- **License Period:** Displays the license period you selected when you created the entitlement.

- **License Model:** Displays the license model. The available options depend on whether it is an inventory or a manual model.

- **License Quantity:** Displays the number of licenses.

- **Quantity Consumed (Manual Consumption Only):** Displays the quantity of licenses consumed.

- **Virtual Machine Use Rights:** Specify any conditions associated with the entitlement related to installation and licensing on virtual machines.

- **Notes:** Displays any notes.

- **Change History (Manual Consumption Only):** Displays the entitlement's change history, including information about when a change occurred, who made the change, and what modifications were made to the consumed quantity and description.

Proof of Ownership

The Proof of Ownership page shows the ownership information associated with the entitlement.

The Proof of Ownership page includes the following panels:

- ◆ **Catalog Products:** Lists the catalog products associated with this license and entitlement. Click *Add* to associate additional catalog products.

- ◆ **Purchase Summary Records:** Lists the summary records associated with this license and entitlement. Click *New* to create a new record.

- ◆ **Contracts:** Lists the contracts associated with this license and entitlement. Click *Add* to associate additional contracts.

- ◆ **Documents:** Lists the documents associated with this license and entitlement. Click *Add* to associate additional documents.

Coverage

The Coverage page lists the discovered product versions and machines included in the entitlement. The Covered Machines panel is displayed only if the entitlement license model is *OEM* or *Machine*.

5.1.3 Compliance Status

The Compliance Status page lets you view the number of licenses associated with the product and the number of licenses consumed by devices. The result is a view of whether or not your usage is in compliance with the license agreement.

The Compliance Status page includes three panels:

◆ **License Consumption (Consumption Data Source: Inventory):** Shows license consumption that has been determined by an inventory scan.

◆ **Compliance Status (Consumption Data Source: Inventory):** Shows the compliance status of the license from information gathered by an inventory scan.

◆ **Compliance Status (Consumption Data Source: Manual):** Shows license compliance status calculated from license quantities entered manually.

NOTE: Compliance status is refreshed daily. To refresh compliance status manually, open the Licensed Products page and click *Action > Refresh Compliance Status*.

5.1.4 License Allocations

The License Allocations page displays how the product's licenses are allocated.

The page includes the following panels:

◆ **Demographic Allocations:** Shows the number of licenses allocated by demographic type (site, department, or cost center) along with device count and installed quantity per demographic value. This panel is displayed only when demographic allocations are enabled (*General* tab > License Allocation Settings panel).

◆ **Device Allocations:** Shows a list of devices to which the license has been allocated, along with details about the device, machine name, login name, and so on. It also shows the number of installations of the product that have no allocations. Click the number to display the Devices: Installations with no Allocations panel. The *Duplicate Allocation* column shows if a device is allocated to a demographic type.

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/zam10/).

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 ▲	Status	Discovered Products	Catalog Products	License Quantity	Allocated Quantity	
☐ 🗐 Microsoft Office Professional 2003 2003	🔶	☑	☑	5	1	
☐ 🗐 Microsoft Windows Server 2003 5.2	🟢	☑		1	1	
☐ 🗐 Microsoft Windows XP Professional 5.1	❌	☑	☑	1	0	
◀ ▶ 1 - 3 of 3					show 25 ▾ items	

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.
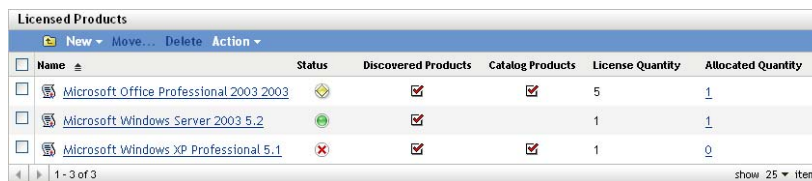
Wizard Page	Details
Discovered Product Filter page	Select the discovered products to reconcile. Select *Any* to reconcile with all discovered products, or select *Products Specified Below* and provide a manufacturer and product name to reconcile a specific product.
Select Licensed Products to Create page	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.
Destination Folder page	Lets you specify where in the Licensed Products folder hierarchy you want to place the new licensed products. The field defaults to the current folder (the folder from which you launched the Auto-Reconcile wizard). To specify another folder, click 🔍 to browse for and select the folder. The folder must already exist; you cannot use the selection dialog box to create a new folder.
License Entitlements page	Add a description for the license entitlement. Select one of the following license models: **Per-Installation:** Software is licensed per installation. **OEM:** Software is licensed as part of the OEM package. **Machine:** Software is licensed per machine.
Auto-reconcile Create Summary page	Review your data.

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 55.

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*.

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.

5 Click *Finish*.

If you selected *Define Additional Properties*, continue with .

5.3.1 Creating License Entitlements

1 If you are continuing from , and you selected *Define Additional Properties*, skip to in this procedure.

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

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

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

5 Click the *License Entitlements* tab.

6 Click *New* in the appropriate Entitlements panel (Inventory or Manual) to launch 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: ◆ Full License ◆ Version Upgrade (If you select Version Upgrade, you will need to identify the entitlement that it is upgraded from.) ◆ License/Maintenance
General Information Page	Fill in the following fields: **Description:** A description of the entitlement. **Platform:** Select a platform from the list. **License Period:** Select a license period: *Perpetual* or *Term*. If you select *Term*, use the calendar icons to select start and end dates. **Quantity Consumed:** Specify the number of licenses consumed. (Available only for entitlements whose consumption data source is manual.) **Virtual Machine Use Rights:** Specify any virtual machine use rights. **Notes:** Specify any notes.
New Entitlement Summary page	Review the data.

7 (Optional) Select *Define Additional Properties* to further define the entitlement.

8 Click *Finish*.

If you selected *Define Additional Properties*, continue with .

5.4 Defining License Entitlements

1 If you are continuing from , and you selected *Define Additional Properties*, skip to in this procedure.

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

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

4 Click the product whose entitlement you want to modify.

5 Click the *License Entitlements* tab.

6 Click the entitlement you want to define.

7 Click the *Proof of Ownership* tab.

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 *Define additional Properties* to edit the summary record, see a change history, or add documents to the purchase summary record after you click *Finish*.

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 50.

11 Add any contracts:

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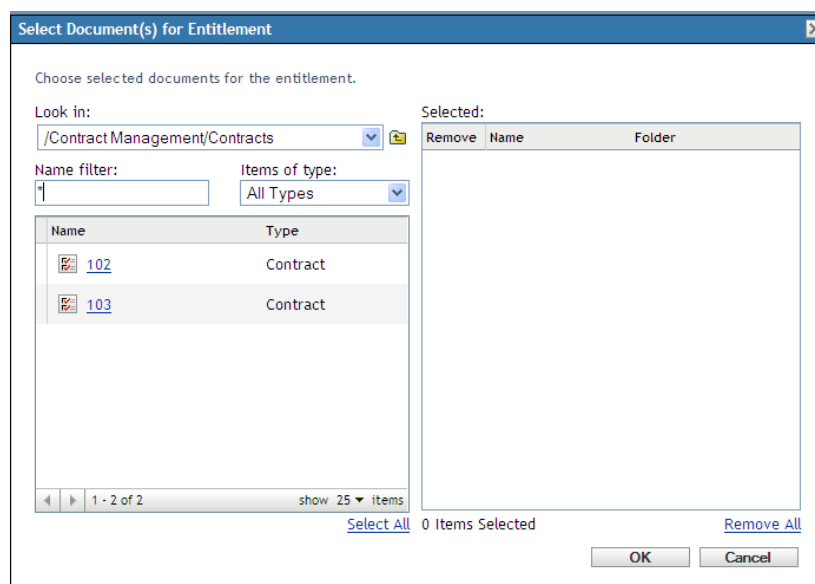
11b In the Select Document(s) for Entitlement dialog box, specify a contract, then click *OK*.

12 Add any documents:

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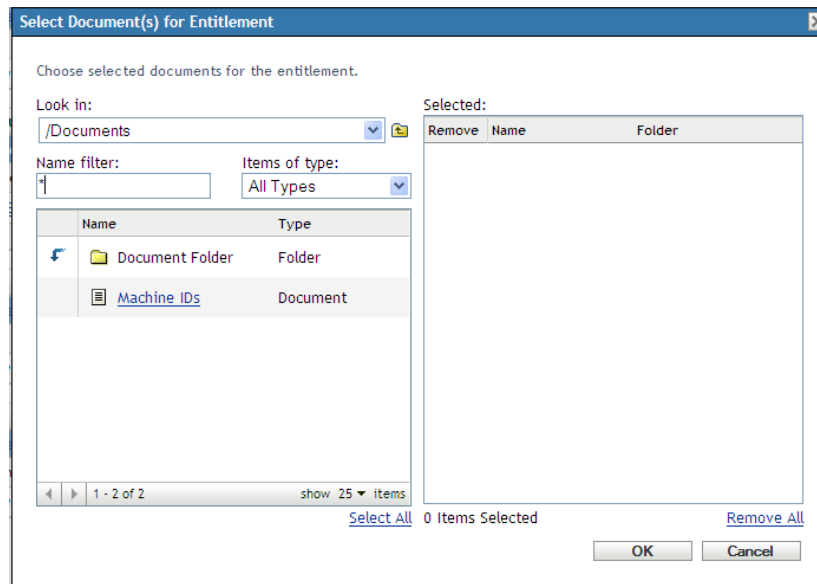
12b In the Select Document(s) for Entitlement dialog box, specify a document, then click *OK*.

13 Click the *Coverage* tab.
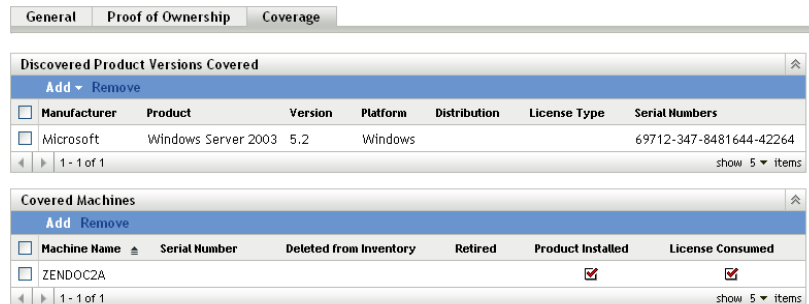
14 Add any discovered product versions covered by this entitlement:

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*.

5.5 Refreshing Compliance Status

Refreshing compliance data recalculates all discovered product installation counts and recalculates compliance status for all licenses.

- Section 5.5.1, "Triggering a Refresh," on page 54
- Section 5.5.2, "Viewing Refresh Details," on page 54

5.5.1 Triggering a Refresh

Compliance data is refreshed under various circumstances. To manually trigger a refresh, you can click *Action > Refresh Compliance Status* on either the Licensed Products page or the Discovered Products page. A refresh is triggered automatically when you import purchase records; however, performing an auto-reconcile of licensed products won't trigger an automatic refresh.

A refresh of a single license is triggered automatically under the following circumstances:

- Creating or deleting an entitlement
- Adding a purchase summary to an entitlement
- Adding a catalog product to a license
- Modifying a catalog product that is associated with a license
- Adding a discovered product to a license
- Modifying a discovered product that is associated with a license
- Marking a discovered product installation (associated with a license) as ignored
- Deleting a purchase record associated with a license
- Deleting a software collection associated with a license

5.5.2 Viewing Refresh Details

You can see information about the latest refresh above the menu bar of both the Licensed Products page and Discovered Products page. This information includes the following:

- The last time a compliance refresh was started and ended
- What initiated the refresh
- Whether it was a refresh of all products or a single product

The *Compliance Status* tab of the Licensed Product page also shows the time the license was last refreshed. In addition, clicking *License Management Reports > Software Compliance > Compliance Report* displays a column called *More Recent Recalc* that indicates if a license has been refreshed more recently than the last full refresh of all licenses.

Using License Management Reports

<div style="text-align: right; font-size: large;">6</div>

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.

- Section 6.1, "Using License Management Standard Reports," on page 55
- Section 6.2, "Using License Management Custom Reports," on page 60
- Section 6.3, "Setting ZENworks Asset Management Report Rights," on page 71
- Section 6.4, "Excluding Software Usage Data from Reports," on page 72

If you have installed the ZENworks Reporting Server, you have access to additional Asset Management reports. For information, see Chapter 7, "Using Reporting Server Reports," on page 73.

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 55
- Section 6.1.2, "Running a Standard Report," on page 56

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 according to their function. The available reports are as follows:

- **Software Compliance:** 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:** 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:** Reports focusing on software purchases.
  - **Purchase Summary:** Shows a summary list of purchase records.
  - **Purchase Detail:** Lists purchase records and details.

- **Suites:** 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:** 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. ZENworks Asset Management 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 56
- "Exporting a Report to a Different Format" on page 57
- "Viewing the Report as a Graph" on page 57
- "Changing the Time Period" on page 58
- "Changing the Filter Criteria" on page 59

Running a Report

Many of the License Management standard reports include usage data associated with the software product. If you are not interested in this data, you can exclude the data to make the reports generate more quickly. For information, see Section 6.4, "Excluding Software Usage Data from Reports," on page 72.

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 are listed by name and description. For a list of reports and descriptions, see Section 6.1.1, "Available Standard Reports," on page 55.

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

ZENworks Asset Management 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.

4 Click the report to run it.

5 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.

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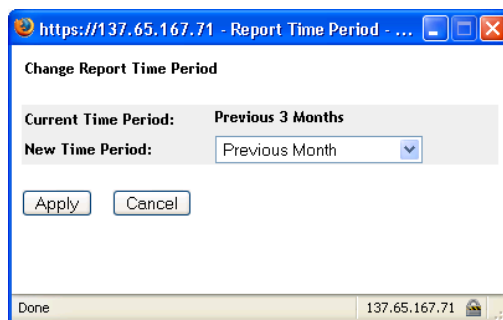
6 Select an interval in the *New Time Period* field.

7 Click *Apply*.

The report is run again and 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*.
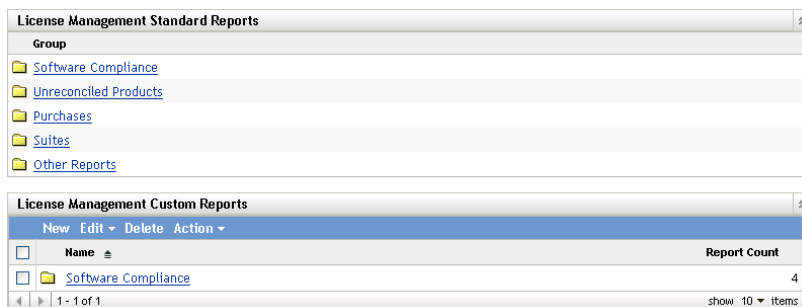
3 Click the folder containing the report you want to run.

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:

6.2.1 Sample Custom Reports

ZENworks Asset Management provides four sample custom reports that demonstrate the different types of reports you can create.

  ◆ **Excluded catalog products:** Shows the catalog products that are excluded from license compliance calculations.

  ◆ **Excluded discovered products:** Shows the discovered products that are excluded from license 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.

For information about running one of the sample custom reports, see Section 6.2.2, "Running a Custom Report," on page 61.

For information about creating your own custom reports, see Section 6.2.3, "Creating a Custom Report," on page 62.

6.2.2 Running a Custom Report

If a custom reports include usage data associated with software products, and you are not interested in the usage data, you can exclude the data to make the reports generate more quickly. For information, see Section 6.4, "Excluding Software Usage Data from Reports," on page 72.

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

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

License Management Standard Reports	⌃
Group	
📁 Software Compliance	
📁 Unreconciled Products	
📁 Purchases	
📁 Suites	
📁 Other Reports	

License Management Custom Reports		⌃
New Edit ▼ Delete Action ▼		
☐ **Name** ≜		**Report Count**
☐ 📁 Software Compliance		4
◁ ▷ 1 - 1 of 1		show 10 ▼ items
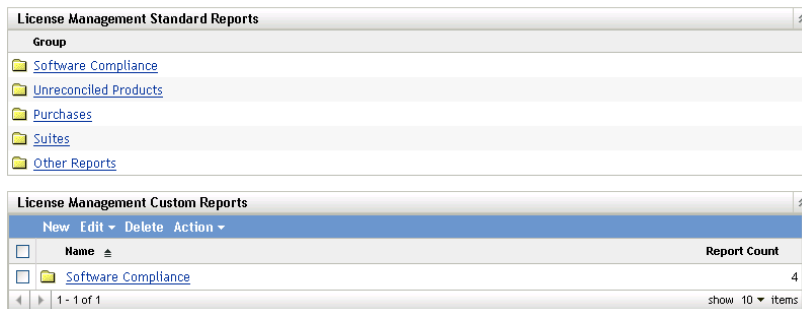
3 In the License Management Custom Reports panel, click the folder containing the report you want to run.

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 66.

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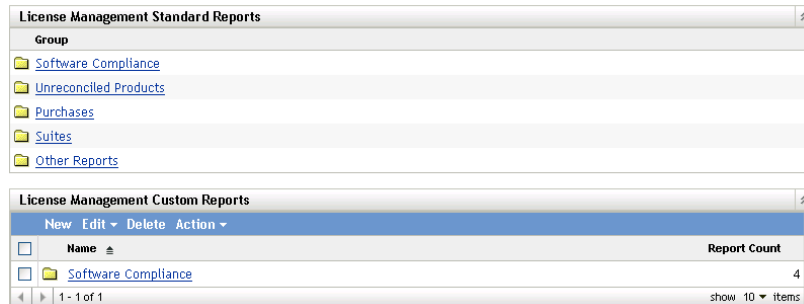
3 In the License Management Custom Reports panel, click the folder where you want to save the report, or create a new folder by clicking *New*, specifying a folder name, then clicking *OK*.
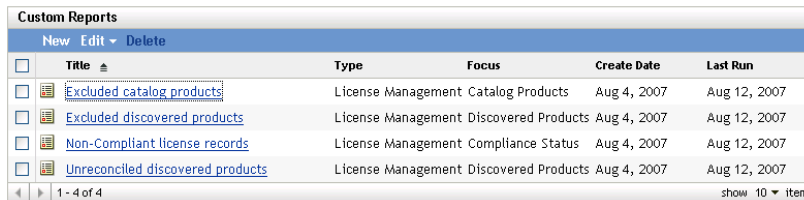
4 In the Custom Reports panel, click *New*.
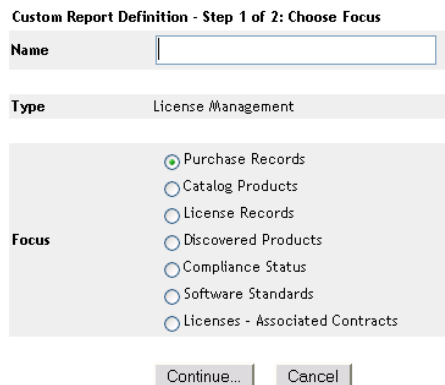
5 Specify a name in the *Name* field.

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*.

8 Fill in the following fields:

Name: The name you entered in Step 5 is displayed. You can change it if necessary.

Folder: The folder you selected in Step 3 is displayed. You can change it if necessary.

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 or 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.

You must have already defined an SMTP e-mail server if you want to send e-mail notifications. This is done through the SMTP Settings option (Configuration tab > Management Zone Settings panel > Event and Messaging > SMTP Settings).

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 schedule.

4 Click the report you want to schedule.

5 Click *Schedule/Notification*.

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 65.

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

7 Click *Submit*.

The report runs at the scheduled times.

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 63.

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*.

Manage E-mail Addresses

Import From   Inventory Data

Import   Cancel   Delete...

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*.

License Management Standard Reports

Group
📁 Software Compliance
📁 Unreconciled Products
📁 Purchases
📁 Suites
📁 Other Reports

License Management Custom Reports

New Edit ▾ Delete Action ▾

☐	Name ▲	Report Count
☐	📁 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 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.

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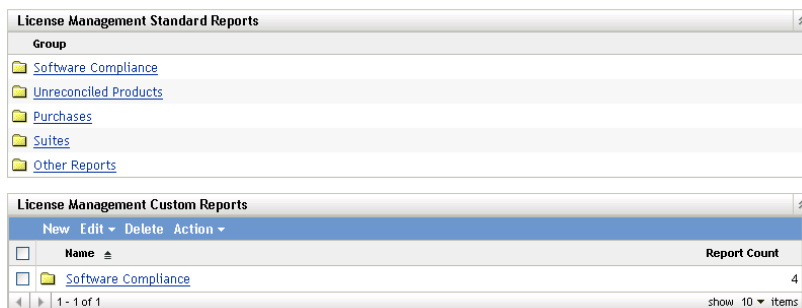
Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters or click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

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*.
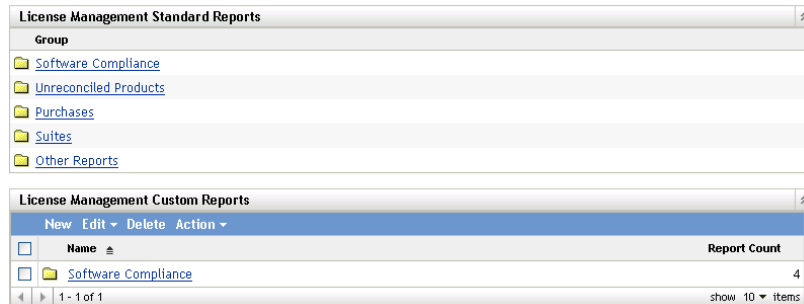
3 In the License Management Custom Reports panel, click the folder containing the report or reports you want to move.

4 Select the report or reports you want to move.

5 Click *Edit > Move*.
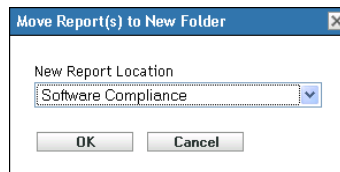
6 Select a new folder location.

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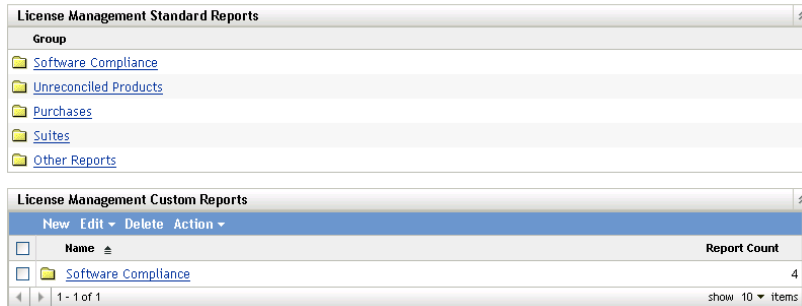
3 In the License Management Custom Reports panel, click the folder containing the report you want to delete.

4 Select the report you want to delete.

5 Click *Delete*.

To delete a folder (and all the reports in it):

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

2 In the License Management panel, click *License Management Reports*.
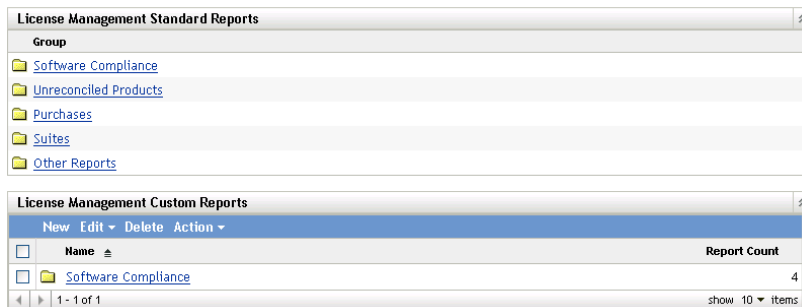
3 In the License Management Custom Reports panel, select the folder you want to delete.

4 Click *Delete*.

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 .

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 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*.

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*.

Import Custom Report Definition

Query import file: [   ] [Browse...]

[Import] [Cancel]

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 ZENworks Asset Management Report Rights

ZENworks Asset Management 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 ZENworks Asset Management 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:** Removes all rights to the folder, so the specified administrator cannot see it.

◆ **Assign view/execute rights:** Allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in the folder.

◆ **Assign full rights:** 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

|	Folder Type ⬆	Folder Name	Source	Rights
☐	Custom Reports	Software Application Usage	Usage	View/Execute Rights
☐	Custom Reports	Test Usage	Usage	View/Execute Rights
☐	Custom Reports	Software Compliance	License Management	View/Execute Rights
☐	Custom Reports	Contract Management	Contract Management	View/Execute Rights
☐	Custom Reports	Temp Contracts	Contract Management	View/Execute Rights
☐	Standard Reports	All Usage	Usage	View/Execute Rights
☐	Standard Reports	Application Usage	Usage	View/Execute Rights
☐	Standard Reports	Contract Management	Contract Management	View/Execute Rights
☐	Standard Reports	Network Software Usage	Usage	View/Execute Rights
☐	Standard Reports	Other Reports	License Management	View/Execute Rights
☐	Standard Reports	Purchases	License Management	View/Execute Rights
☐	Standard Reports	Software Compliance	License Management	View/Execute Rights
☐	Standard Reports	Software File Usage	Usage	View/Execute Rights
☐	Standard Reports	Suites	License Management	View/Execute Rights
☐	Standard Reports	Unreconciled Products	License Management	View/Execute Rights
☐	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.

6.4 Excluding Software Usage Data from Reports

Many of the License Management reports include usage data associated with the software product. If you are not interested in this data, you can exclude the data to make the reports generate more quickly.

1 In ZENworks Control Center, click *Configuration*.

2 In the Management Zone Settings panel, click *Asset Management*, then click *Reports*.

3 Select the *Do not show usage on License Management reports* option.

4 Click *OK* to save the setting.

Using Reporting Server Reports

7

In addition to the software usage, license management, and contract management reports you can create and generate from the Asset Management tab in ZENworks Control Center, you can use the ZENworks Reporting Server to generate additional reports.

The ZENworks Reporting Server is a powerful, flexible, and customizable reporting tool that is installed and configured separately from the ZENworks system (see the *ZENworks 10 Asset Management Reporting Server Installation Guide*).

Using the Reporting Server, you can view predefined Asset Management reports and create custom reports. The following sections describe the predefined reports and how to view them.

For information about creating custom reports, see the *ZENworks 10 Asset Management System Reporting Reference*.

7.1 Predefined Reports

The predefined Asset Management reports are organized into four categories:

7.1.1 License Allocation Reports

Report Title	Description
Allocation Status by Cost Center	Groups licensed products by cost center and shows if a licensed product is over-allocated (more licenses than installations) or under-allocated (more installations than licenses).
Allocation Status by Department	Groups licensed products by department and shows if a licensed product is over-allocated (more licenses than installations) or under-allocated (more installations than licenses).
Allocation Status by Site	Groups licensed products by site and shows if a licensed product is over-allocated (more licenses than installations) or under-allocated (more installations than licenses).
Allocations vs. Installations	For each licensed product, shows the variance between allocated licenses and the total number of installations. The result is the number of over-allocated licenses or under-allocated licenses.
Current Allocations	For each licensed product, shows the total number of licenses and how many are allocated and unallocated.

Report Title	Description
Demographic Over-Allocation	Lists all licensed products whose number of demographically-allocated licenses is more than the number of installations associated with the demographic.
Demographic Under-Allocation	Lists all licensed products whose number of demographically-allocated licenses is less than the number of installations associated with the demographic.
Device Over-Allocation	Lists all licensed products whose number of device-allocated licenses is less than the number of installations associated with devices.
Duplicate Allocations	Lists all licensed products with device allocations that duplicate demographic allocations.
Installations with no Allocations	Lists all licensed products with installed licenses that are not covered by demographic or device allocations.

7.1.2 Purchases Reports

Report Title	Description
Purchase Record Detail	Lists all purchase records with complete details such as PO number, reseller, manufacturer, and price.
Purchase Record Summary	Compiles the purchase records by catalog product. For each catalog product, lists the product type, purchase quantity, average unit price, and total price.

7.1.3 Software Compliance Reports

Report Title	Description
Software Compliance by Cost Center	Groups licensed products by cost center and shows if a licensed product is over-licensed (more licenses than installations) or under-licensed (more installations than licenses).
Software Compliance by Department	Groups licensed products by department and shows if a licensed product is over-licensed (more licenses than installations) or under-licensed (more installations than licenses).
Software Compliance by Site	Groups licensed products by site and shows if a licensed product is over-licensed (more licenses than installations) or under-licensed (more installations than licenses).

7.1.4 Suites Reports

Report Title	Description
Discovered Standalone Components	Lists the individual components of a suite that have been discovered through an inventory scan of devices. For each component, lists the number of installations and how many are being used.

7.2 Viewing a Predefined Report

The ZENworks Reporting Server must be installed and configured before you can use the predefined reports. For information, see the *ZENworks 10 Asset Management Reporting Server Installation Guide*.

1 In the ZENworks Control Center, click the *Reports* tab.

2 In the ZENworks Reporting Server panel, click ZENworks Reporting Server InfoView.

The InfoView is the main interface for working with the ZENworks Reporting Server reports.

3 Click Document List.

4 Navigate to the All > Public Folders > Novell ZENworks Reports > Predefined Reports > Asset Management > License Management folder.

The Asset Management reports are organized in four subfolders: License Allocation, Purchases, Software Compliance, and Suites. For a brief description of each report, see Section 7.1, "Predefined Reports," on page 73.

5 Open the folder that contains a report you want to view.

6 Double-click the report to view it.

Establishing Proof of Ownership

<div style="text-align: right">8</div>

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

8.1 Adding Contracts

Contracts, along with documents, are used to establish proof of ownership. You can add contracts by creating a new contract or copying an existing contract.

8.1.1 Creating 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	Fill in the following fields:
	Contract ID: The identifier of the contract. Required.
	Name: The name of the contract. Required.
	Description: A description of the contract.
	Total Cost: The total cost of the transaction.
	Parent Contract: If there is a parent contract, click the *Browse* button to find and select it, then click *OK*.
	Terms and Conditions: Specify any terms and conditions.
	Contract Type: Select one of the fourteen contract types or type a custom one of your own.
	Status: Select *Pending, Active*, or *Expired*. You can also type a custom status of your own.
	Original Start Date: Click the calendar icon to select a date. Click the X icon to clear it.
	Current End Date: Click the calendar icon to select a date. Click the X icon to clear it.
	Evergreen: Select *Evergreen* if the contract specifies it.
	Renewal Option: Select *Yes* or *No*.
	Renewal Provision: Specify any renewal provision.
	Notice Date: Click the calendar icon to select a date. Click the X icon to clear it.
	Notice Description: Specify a description for the notice.
Vendor Information page	Specify the vendor information in the fields. If the contract type is Lease, there are additional fields to fill in.
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 with Section 8.2, "Defining the Contract," on page 79.

8.1.2 Copying an Existing 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, select the check box next to the contract you want to copy, then click *Copy* to display the Copy Contract dialog box.

Copy Contract

Enter values for new contract.

Contract ID:	Contract12(1)
Name:	Software Supplier Contract(1)
Parent Contract:	⦿ No parent
	○ Source contract (adasdfasd)

OK   Cancel

5 Fill in the following fields:

Contract ID: Specify a new identifier for the contract. The contract ID cannot be the same as any other contract ID in the folder.

Name: Specify a new name for the contract

Parent Contract: If you want to designate the source contract as this contract's parent, select *Source contract*. If you want to designate the source contract's parent as this contract's parent, select *Same parent as source*. Otherwise, select *No parent*.

If you need to designate some other contract as the parent, you can create the contract and then edit it (see). At that point, you can select any existing contract.

6 Click *OK* to create the new contract and add it to the *Contracts* list.

7 If you need to edit the contract to change information, click the contract, then continue with the next section, .

8.2 Defining the Contract

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

8.2.1 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 8-1 *Contract General Tab*

8.2.2 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 8-2   *Contract Vendor Tab*

8.2.3 Financial Tab

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

Figure 8-3   *Contract Financial Tab*

8.2.4 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.

3 Click *Contracts*.

4 Click an existing contract to open the Contract page.

5 Click the *SLA* tab.

6 Click *New*.

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*.

9 Click *Apply*.

8.2.5 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 8-4   *Contract Lease Tab*

8.2.6 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*.

4 Click the contract you want to add a document to.

5 Click the *Documents* tab.

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*.

4 Click the contract with the documents you want to remove.

5 Click the *Documents* tab.

6 In the Documents panel, select the documents you want to remove.

7 On the *Documents* menu bar, click *Remove*.

8.2.7 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*.

4 Click the contract you want to renew.

5 Click the *Renewals* tab.

6 Click *Action > Renew Contract*.

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						
☐ Contract ID ▲	Name	Type	Status	Start Date	End Date	Parent Contract ID
☐ 📄 102	First Contract	Software Maintenance	Active	8/6/07	Evergreen	
☐ 📄 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 ▾						
☐ 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*.

8.2.8 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*, selecting the device, then clicking *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*, selecting the user name, then clicking *OK*. Delete the user by selecting it and clicking *Remove*.

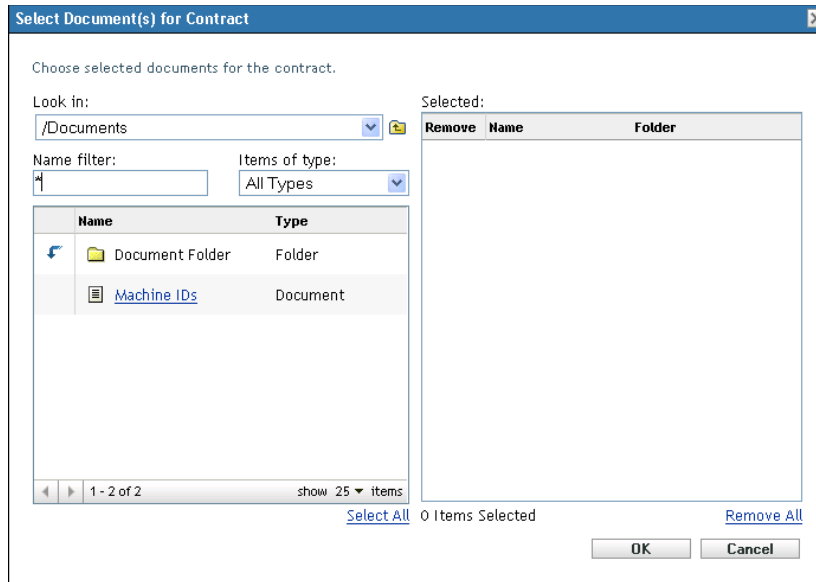- **Sites:** Add a site by clicking *Add*, selecting the site name, then clicking *OK*. Delete the site by selecting it and clicking *Remove*.

- **Cost Centers:** Add a cost center by clicking *Add*, selecting the cost center, then clicking *OK*. Delete the cost center by selecting it and clicking *Remove*.

- **Departments:** Add a department by clicking *Add*, selecting the department name, then clicking *OK*. Delete the department by selecting it and clicking *Remove*.

Figure 8-5 *Document Relationships Tab*

8.3 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.
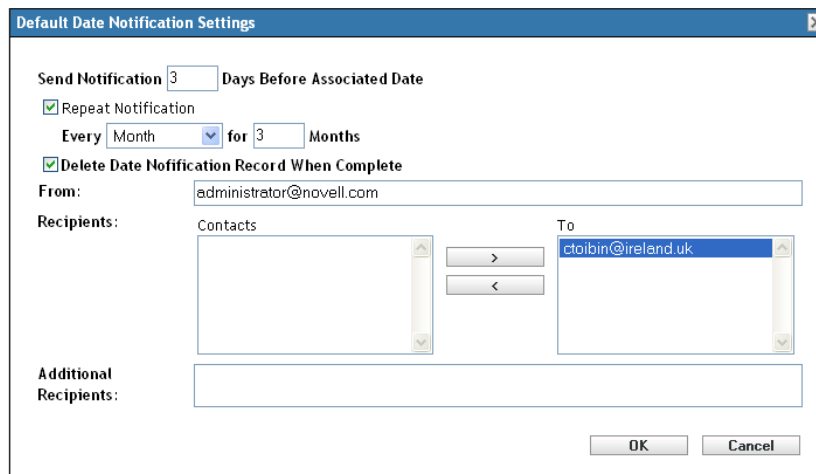
8.3.1 Configuring Date Notification Settings

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

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.

4 Click *Action > Default Date Notification Settings*.

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

6 Click *OK*.

8.3.2 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*.

4 Click *New*.

5 Specify a name for the folder.

6 Click *OK*.

8.3.3 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*.

4 Select the notification to move.

5 Click *Move*.

6 Select the new location for the notification record.

7 Click *OK*.

8.3.4 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*.

4 Select the notification to delete.

5 Click *Delete*.

8.4 Using Contract Management Standard Reports

ZENworks® Control Center includes a variety of reports to help you manage the assets in your Management Zone. The Contract Management Reports page allows you to view contract data through a variety of standard and custom reports.

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

- Section 8.4.1, "Available Standard Reports," on page 90
- Section 8.4.2, "Running and Viewing Reports," on page 90

If you have installed the ZENworks Reporting Server, you have access to additional Asset Management reports. For information, see Chapter 7, "Using Reporting Server Reports," on page 73.

8.4.1 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, along with association counts.
- **Parent/Child Details:** Shows a hierarchical list of contracts and indicates parent/child relationships.

8.4.2 Running and Viewing Reports

You run a standard report by clicking it. Click the links in the report for more detailed information. ZENworks Asset Management 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 90
- "Exporting a Report to a Different Format" on page 91
- "Viewing the Report as a Graph" on page 91

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 55.

5 Click the links for more detailed information.

Exporting a Report to a Different Format

ZENworks Asset Management 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 55.

5 Click the links in the report for more detailed information.

6 Export the report 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 55.

5 Click *Graph* on the bottom of the report.

A new window appears with the available graphs.

8.5 Using Contract Management Custom Reports

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

8.5.1 Sample Custom Reports

ZENworks Asset Management provides four sample custom reports that demonstrate the different types of contract management reports you can create.

- **Active contracts with no associated assets:** Shows active contracts that have no associated assets; that is, no 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 60 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.

For information about running one of the sample custom reports, see Section 8.5.2, "Running a Custom Report," on page 92.

For information about creating your own custom reports, see Section 8.5.3, "Creating a Custom Report," on page 92.

8.5.2 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 8.5.6, "Editing a Custom Report," on page 96.

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.

8.5.3 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*.

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 Contract Management

Type Contract - General

Columns Available

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

Available Column Order

Contract ID
Contract Name
Contract Type
Contract Status
Original Start Date
Current End Date
Evergreen
Total Cost ($)
Parent Contract ID
Parent Contract Name

Criteria Field Operator Value

Summary Criteria Summary Field Operator Value

Back Save Cancel

9 Fill in the following fields:

Name: The name you entered in Step 6 is displayed. You can change it if necessary.

Folder: The folder you selected in Step 4 is displayed. You can change it if necessary.

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 or 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 or 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.

8.5.4 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.

You must have already defined an SMTP e-mail server if you want to send e-mail notifications. This is done through the SMTP Settings option (Configuration tab > Management Zone Settings panel > Event and Messaging > SMTP Settings).

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	

Submit   Cancel

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 65.

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

8 Click *Submit*.

The report runs at the scheduled times.

8.5.5 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 63.

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.

8.5.6 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 or 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 or click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

8 Click *Save*.

8.5.7 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*.

8.5.8 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 (and all reports in the 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*.

8.5.9 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 69.

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*.

8.5.10 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*.

Import Custom Report Definition

Query import file: [   ] [Browse...]

[Import] [Cancel]

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

6 Click *Import*.

8.6 Setting Report Rights

ZENworks Asset Management 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 ZENworks Asset Management 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:** Removes all rights to the folder, so the specified administrator cannot see it.

◆ **Assign view/execute rights:** Allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in the folder.

◆ **Assign full rights:** 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*.

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.

8.7 Adding and Associating Documents

ZENworks Asset Management 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 8.7.1, "Adding Documents," on page 100

  ◆ Section 8.7.2, "Associating Documents," on page 101

8.7.1 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 *File Name* field or click *Browse* to search.

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

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*.

8.7.2 Associating Documents

To associate documents with entitlements, see .

To associate documents with contracts, see .

To associated documents with summary purchase records, see .

Using Software Collections

9

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:

9.1 Creating a Software Collection

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

2 In the License Management panel, click *Software Collections*.
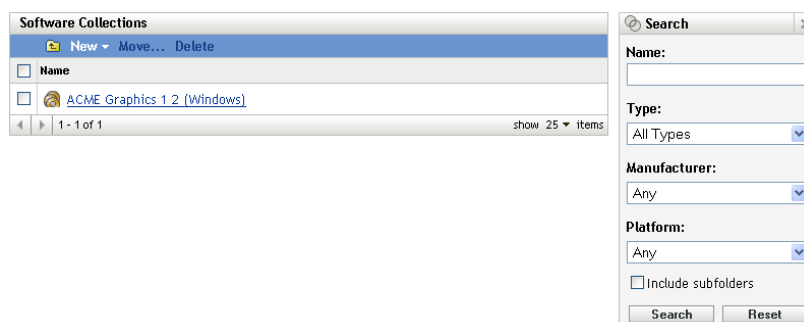
3 Click *New > Software Collection* to open the Create New Software Collection Wizard. Complete the wizard by using information from the following table to fill in the fields.

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 *Back* to make changes.

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, continue with 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*.

9.2 Deleting a Software Collection

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

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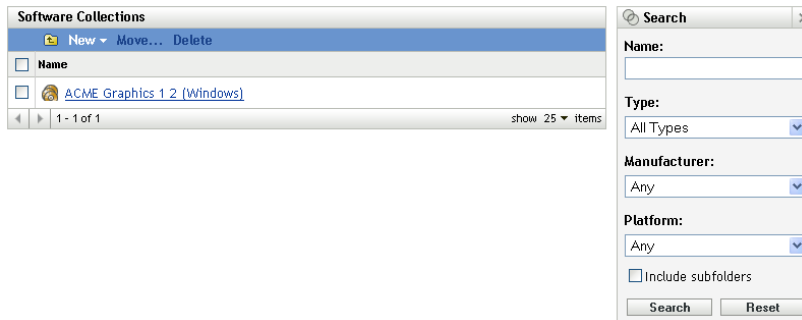
3 In the Software Collections panel, select the collections you want to delete.

4 Click *Delete*.

9.3 Moving a Software Collection

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

2 Click *Software Collections*.
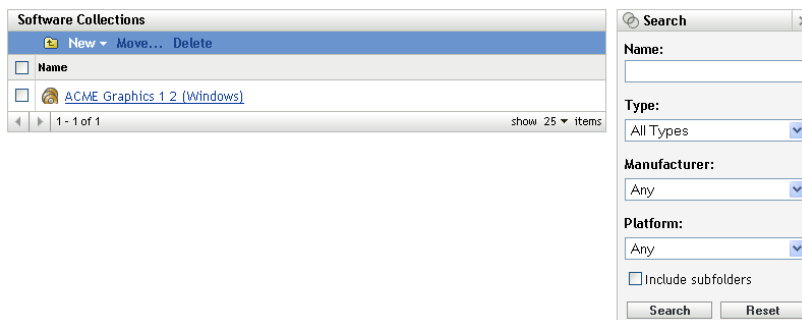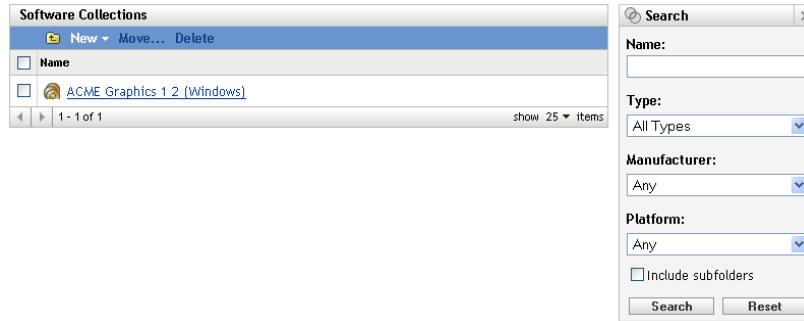
3 In the Software Collections panel, select the collections you want to move.

4 Click *Move*.

5 Select a target folder in the Move Software Collection(s) dialog box.

6 Click *OK*.

Monitoring Software Usage

<div style="text-align: right; font-size: large;">10</div>

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, could 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:

If you have installed the ZENworks Reporting Server, you have access to additional Asset Management reports. For information, see Chapter 7, "Using Reporting Server Reports," on page 73.

10.1 Using Software Usage Standard Reports

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

10.1.1 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 according to their function. The available reports are as follows:

- **Application Usage:** 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:** 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:** 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 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:** 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:** Reports that focus on total application usage, including 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.

10.1.2 Running a Standard Report

You run a standard report by clicking it. ZENworks Asset Management 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 109
- "Exporting a Report to a Different Format" on page 109
- "Viewing the Report as a Graph" on page 109

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 10.1.1, "Available Standard Reports," on page 107.

4 (Optional) Select how you want to filter your search.
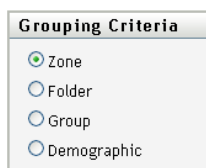
You can limit the scope of the report data by any of the following:

◆ **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

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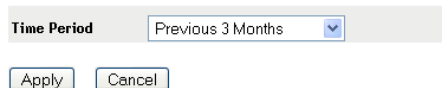
For greater flexibility, you can change the time period of some reports. (If this feature is available, *Change Time Period* appears at the bottom of the report.) You can select from the following time periods:

* 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   Previous 3 Months

Apply   Cancel

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

7 Click *Apply*.

The report is run again and 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*.

10.2 Using Software Usage 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:

10.2.1 Available Custom Reports

ZENworks Asset Management provides four sample custom reports that demonstrate the different types of software usage reports you can create.

- **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.

10.2.2 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 10.2.6, "Editing a Custom Report," on page 115.

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.

10.2.3 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*.

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*.

9 Fill in the following fields:

Name: The name you entered in Step 5 is displayed. You can change it if necessary.

Folder: The folder you selected in Step 3 is displayed. You can change it if necessary.

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 or 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 or 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.

10.2.4 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.

You must have already defined an SMTP e-mail server if you want to send e-mail notifications. This is done through the SMTP Settings option (Configuration tab > Management Zone Settings panel > Event and Messaging > SMTP Settings).

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*.

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 10.2.5, "Configuring E-Mail Addresses for Sending Notifications," on page 114.

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

7 Click *Submit*.

The report runs at the scheduled times.

10.2.5 Configuring E-Mail Addresses for Sending Notifications
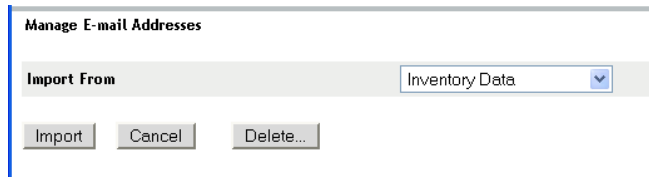
You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see Section 10.2.4, "Scheduling a Custom Report and Sending Notifications," on page 113.

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.

10.2.6 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.

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 or 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 or click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

7 Click *Save*.

10.2.7 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*.

10.2.8 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 (and the reports in the 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*.

10.2.9 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 .

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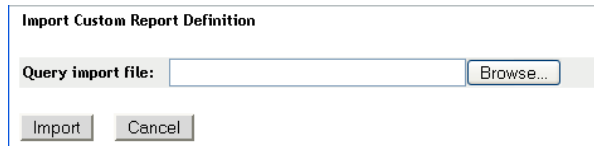
   The Scheduled Reports by Grouping page opens and shows the saved scheduled custom reports grouped by date or title and a report count. Click the date or title to open the *Scheduled Reports* page, where you can select a report and view it. To delete a group of reports, select the group and click *Delete*.

10.2.10 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*.

10.3 Setting Report Rights

ZENworks Asset Management 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 ZENworks Asset Management 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:** Removes all rights to the folder, so the specified administrator cannot see it.

- **Assign view/execute rights:** 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:** 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*.

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.

10.4 Monitoring Web Application Usage

ZENworks Asset Management 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 10-1   *Web Applications Panel*

More information is contained in the following sections:

  ◆ Section 10.4.1, "Defining a Web Application," on page 119

  ◆ Section 10.4.2, "Editing a Web Application Definition," on page 120

10.4.1 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 specify the window title bar text for the application.
	1. Specify a name in the *Window Title(s)* field.
	2. Click *Add*.
	3. Repeat for additional values. Use the *Edit* and *Remove* buttons to change or delete values.
Summary page	Review your data. Use the *Back* button to edit the specified values.

4 Click *Finish*.

10.4.2 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.

4 In the Details panel, edit the fields using information found in the table in .

5 Click *OK* or *Apply*.

Using Administrator-Defined Fields

11

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

11.1 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.

11.2 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	Fill in the following fields:
	
	Type: Filled in by default depending on the type of field you selected.
	
	Name: Specify the name of the administrator-defined field. This field is required.
	
	Default Value: Specify the default value of the field.
	
	Data Type: Select the type of data allowed in the field: *Character, Integer, Decimal*, or *Date*.
	
	Size: Specify the maximum number of alphanumeric characters allowed in the field. This applies only to character-type fields.
	
	Edit Type: Allows greater flexibility in entering and selecting field values. There are three options you can select:
	
	    ◆ **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.
	
	Edit Mask: Select a format from the *Edit Mask* field list to restrict how a value is entered. The choices are phone, time, and currency. This applies only to character-type fields.

Choice List Values page	This page appears if you chose *List* or *Combo* as the Edit Type.
	
	To create a list of choices:
	
	  1. Specify a value in the *Choice List Values* field.
	  2. Click *Add*. Repeat for additional values.
	
	Edit: Select a value and click *Edit* to change it.
	
	Remove: Select a value and click *Remove* to delete it.
	
	Import: Click *Import* to open the Import Choice List Values dialog box where you can specify a file to import.

Field Summary page	Review the data. Use the *Back* button to go back to a previous page to edit any fields.

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

11.3 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, either 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 .

5 Click *OK* or *Apply*.