Novell ZENworks® Asset Management

10

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REFERENCE

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Contents

About This Guide

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

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

Overview

1

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

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

The following sections contain additional information:

1.1 Monitor License Compliance

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 3, "Working with Catalog Products," on page 19*ZENworks 10 Configuration Management Administration Quick Start*.
2. Run an inventory scan to discover the number of installed products in your Management Zone.

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

   For more information, see Chapter 5, "Creating Licensed Products," on page 29.
4. Add proof of ownership data.

   For more information, see Chapter 7, "Establishing Proof of Ownership," on page 63.

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

1.2 Track Software Usage

Asset Management allows you to track usage of software applications (including run time, active time, logged in user, machine, and application used) in your existing inventory. You can also track and report on software run via Terminal Server and Citrix*, as well as Web applications run through the browser. To make this data more useful, you can run a full range of predefined software usage reports, as well as create, save, and run custom reports. This information is useful in helping you make purchase decisions based on your license compliance. For more information, see Chapter 9, "Monitoring Software Usage," on page 93.

1.3 Manage Contracts

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 7, "Establishing Proof of Ownership," on page 63.

1.4 Manage Product Licenses

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. 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 29.

Creating Purchase Records

2

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

- Section 2.1, "Importing Purchase Records," on page 13
- Section 2.2, "Manually Creating Purchase Records," on page 14
- Section 2.3, "Creating Purchase Summary Records," on page 16

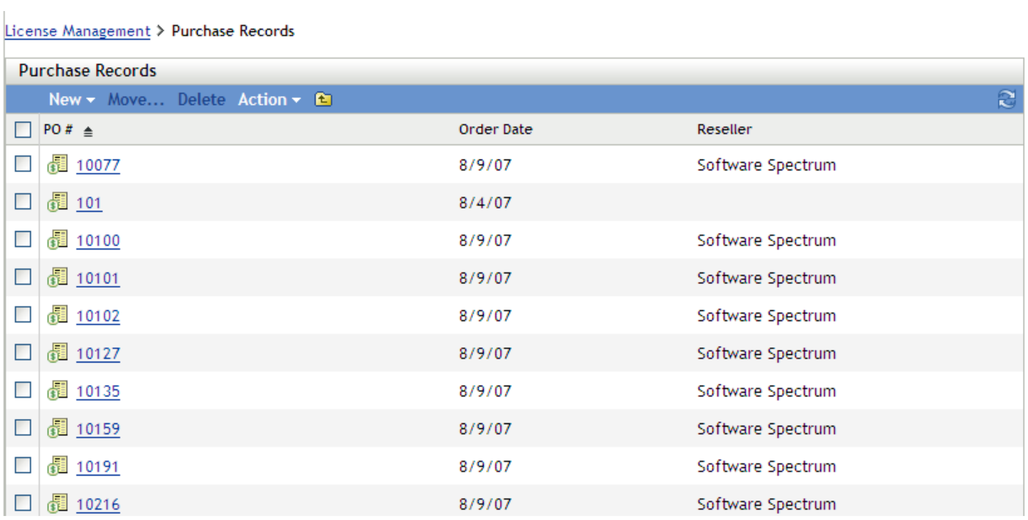
2.1 Importing Purchase Records

The easiest way to create purchase records is to import them. Asset Management supports several purchase record formats. The standard format is the ZENworks® Asset Management Standard Import File. Asset Management also supports the following reseller connectors:

- CompuCom CompuCom* Software Compliance Report
- softchoice Softchoice Product History Report
- Insight ZENworks Asset Management Reseller Connector Report
- shi SHI License Compliance Report

To import purchase records:

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



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

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

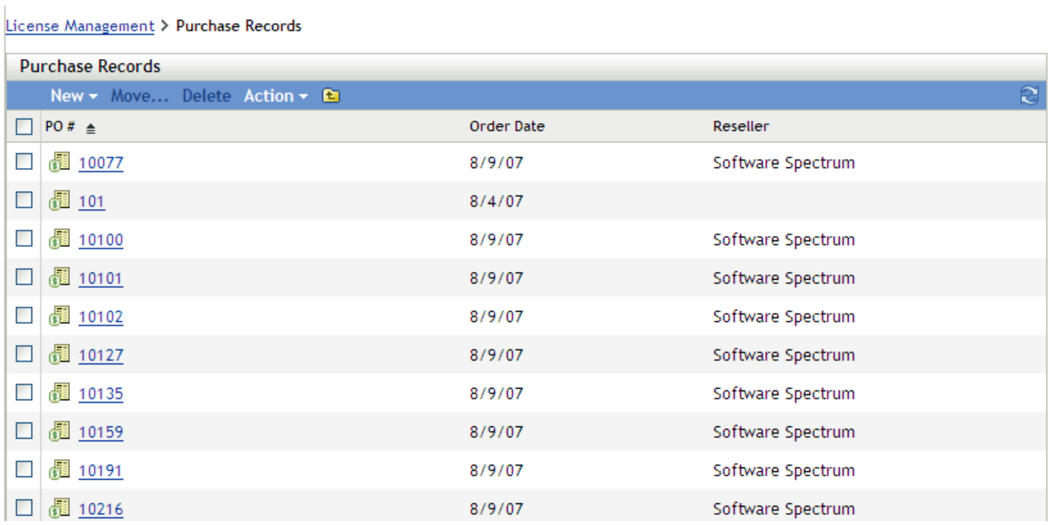
After you've imported the purchase records, Asset Management creates catalog products with license information that will be used for compliance calculations. The next step is to create licensed products and reconcile them with the newly created catalog products. For information on creating licensed products from imported records, see Chapter 5, "Creating Licensed Products," on page 29.

2.2 Manually Creating Purchase Records

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

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

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



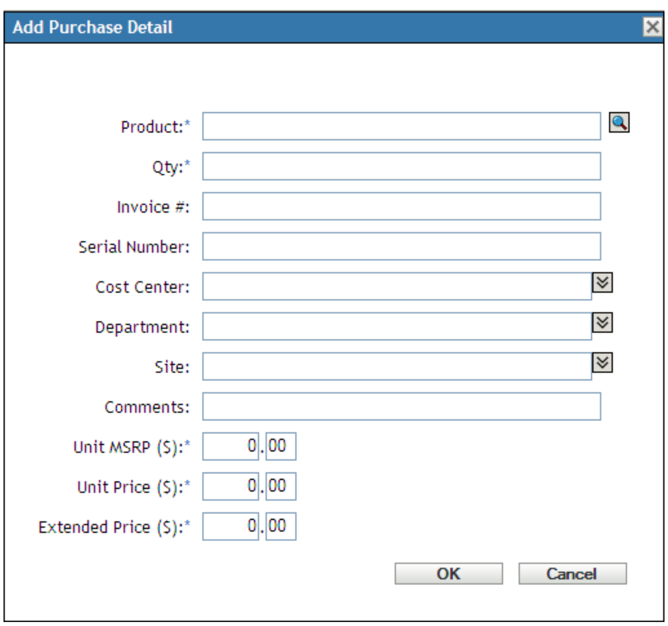
3 In the Purchase Record Panel, click *New* > *Purchase Record* to launch the Create New Purchase Record Wizard. Complete the wizard by using information from the following table to fill in the fields.

Wizard Page	Details
General Information page	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. 1. Click the calendar icon. 2. Select a date from the pop up calendar. 3. Click *Close*. **Reseller:** The name of the reseller. **Notes:** Add any notes as necessary.
New Purchase Summary Record page	Review the summary data. Click *Back* to make changes. Click *Finish* to create the purchase record.

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

5 Click *Finish* to create the purchase record. If you selected *Define Additional Properties* in Step 4, go on to Step 6 in this procedure.

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



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

Product: Click the browse icon to search for a product. These products are created either by importing a purchase record or creating a catalog product. For information on importing a purchase record, see Section 2.1, “Importing Purchase Records,” on page 13. For information on creating a catalog product, see Chapter 3, “Working with Catalog Products,” on page 19.

Qty: Specify the quantity.

Invoice#: Specify the invoice number.

Serial Number: The product’s serial number.

Cost Center: The cost center responsible for the purchase.

Department: The department associated with the purchase.

Site: The department location.

Comments: Specify any comments.

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

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

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

8 Click *OK*.

2.3 Creating Purchase Summary Records

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

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

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

Licensed Products

New Move... Delete Action

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

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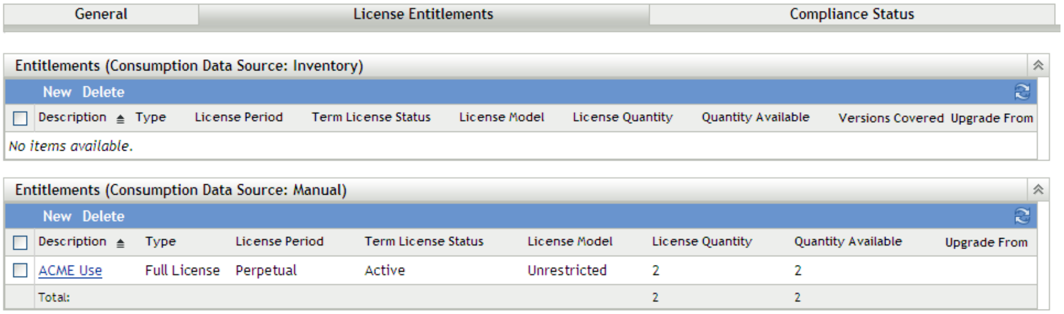
3 In the Licensed Products panel, click the product you want to create a purchase summary record for.

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.

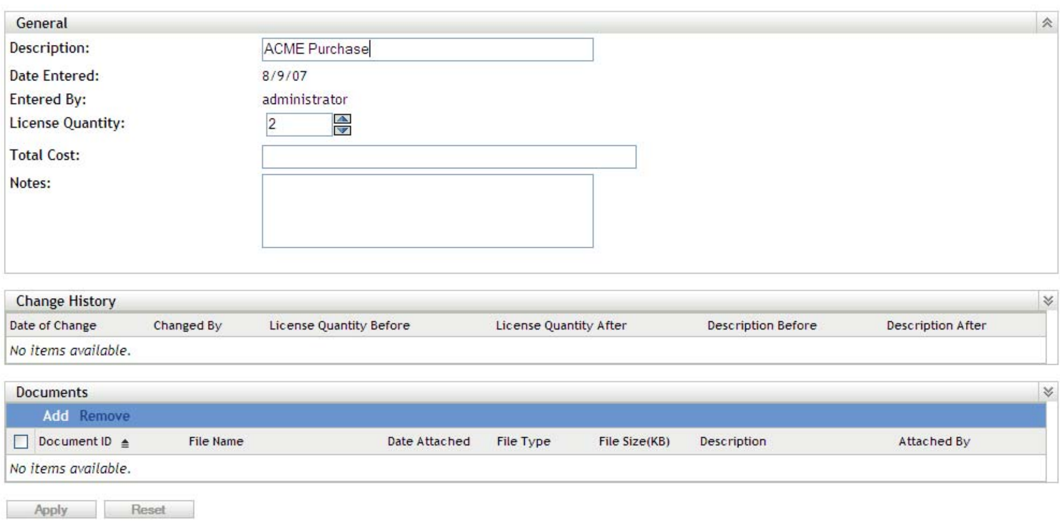
7 In the Purchase Summary Records panel, click *New* to open the Create New Purchase Summary Record Wizard. Complete the wizard by using information from the following table to fill in the fields.

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

8 (Optional) Select *Define Additional Properties* to further define the purchase record after you click *Finish*.

9 Click *Finish* to create the purchase record. If you selected *Define Additional Properties* in Step 8, go on to Step 10.

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



11 Associate any documents with the purchase summary record.

11a In the Documents panel, click *Add*.

11b Select a file in the Select Document(s) for Entitlement dialog box.

11c Click *OK*.

12 Click *Apply*.

Working with Catalog Products

3

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

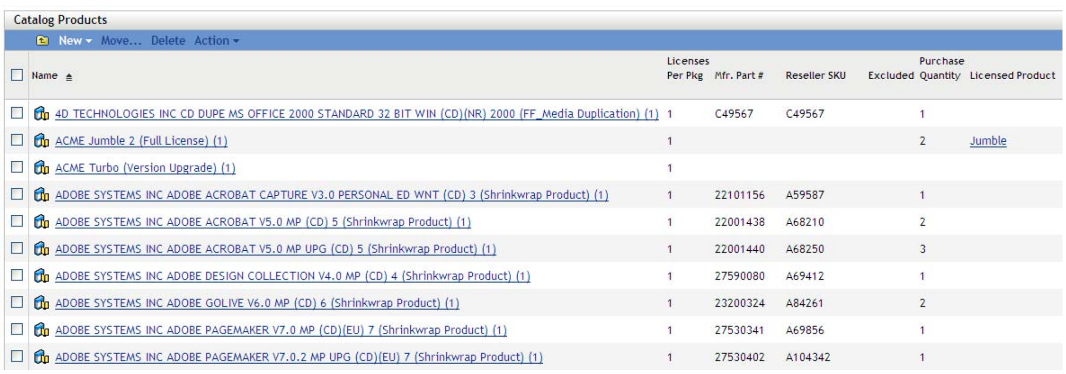
3.1 Creating Catalog Products from Purchase Records

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*.



Catalog Products

New Move... Delete Action

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

3 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

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

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.

4 Click *Action* > *Add to Licensed Product* to open the Add Catalog Products to Licensed Product Wizard. Complete the wizard by using information from the following table to fill in the fields.

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

5 Click *Finish* to complete the wizard.

Working with Discovered Products

4

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

- Section 4.1, “Viewing Discovered Product Details,” on page 23
- Section 4.2, “Including and Excluding Discovered Products,” on page 26
- Section 4.3, “Associating Discovered Products with Licensed Products,” on page 26
- Section 4.4, “Adding Discovered Products to Software Collections,” on page 27
- Section 4.5, “Setting Standards Categories,” on page 28

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*.

The Discovered Products panel appears, showing the following details:

Name: The name of the discovered product.

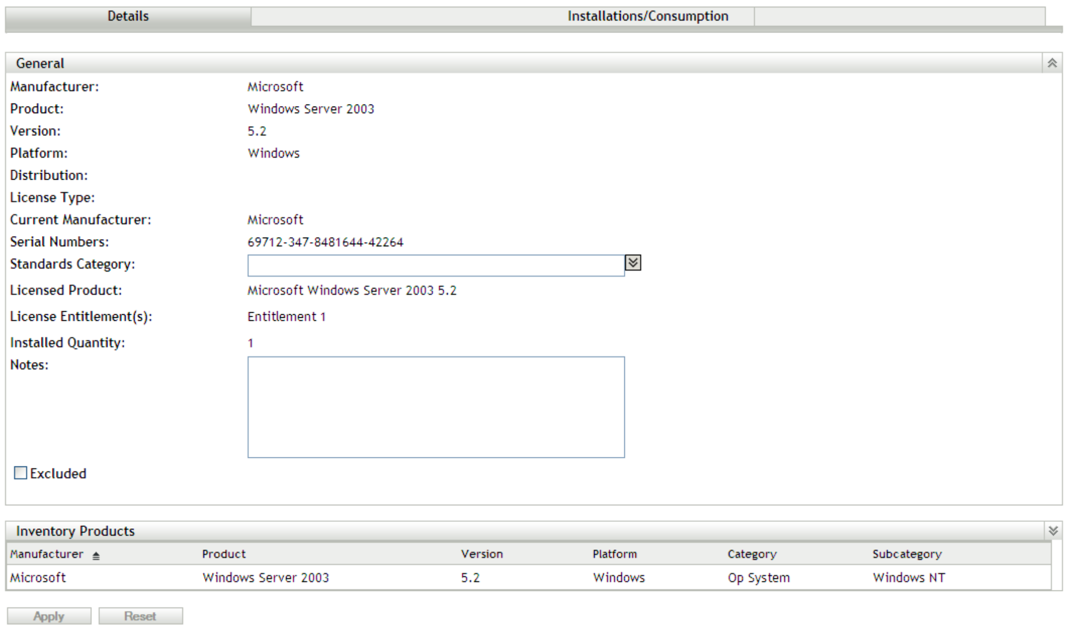
Excluded: Indicates that the discovered product is excluded from compliance calculations.

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

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

Standards Category: The category for the product.

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



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

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

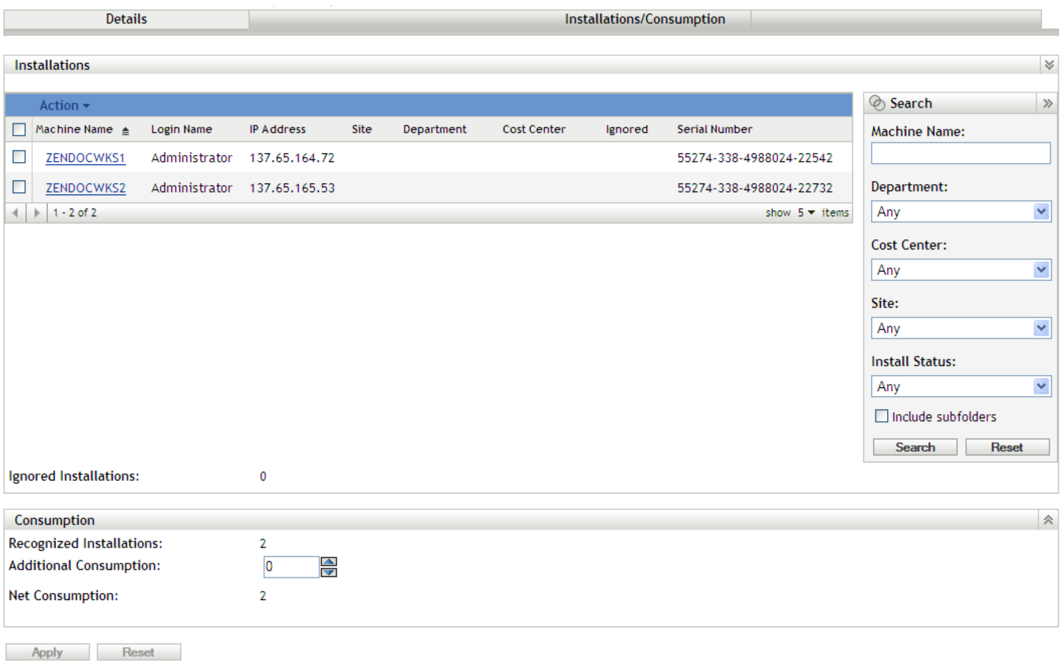
- **Manufacturer:** The manufacturer of the product.
- **Product:** The product name.
- **Version:** The product version.
- **Platform:** The product platform: Windows or Mac.
- **Distribution:** The type of license distribution.
- **License Type:** The type of license.
- **Current Manufacturer:** The 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.

Consumption Panel: Details about consumption, including the following:

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

4.2 Including and Excluding Discovered Products

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

To include or exclude a discovered product:

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

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

4.3 Associating Discovered Products with Licensed Products

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

To associate a discovered product with a licensed product:

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

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

3 Select the discovered product you want to associate with a licensed product.

4 Click *Action* > *Add to Licensed Product* to open the Add Discovered Products to Licensed Products Wizard. Complete the wizard by using information in the table below to fill in the fields.

Wizard Page	Details
Licensed Product page	Select a licensed product to associate with the discovered product.
License Entitlement page	Select a license entitlement for the licensed product.
Summary page	Review the data. Click *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*.

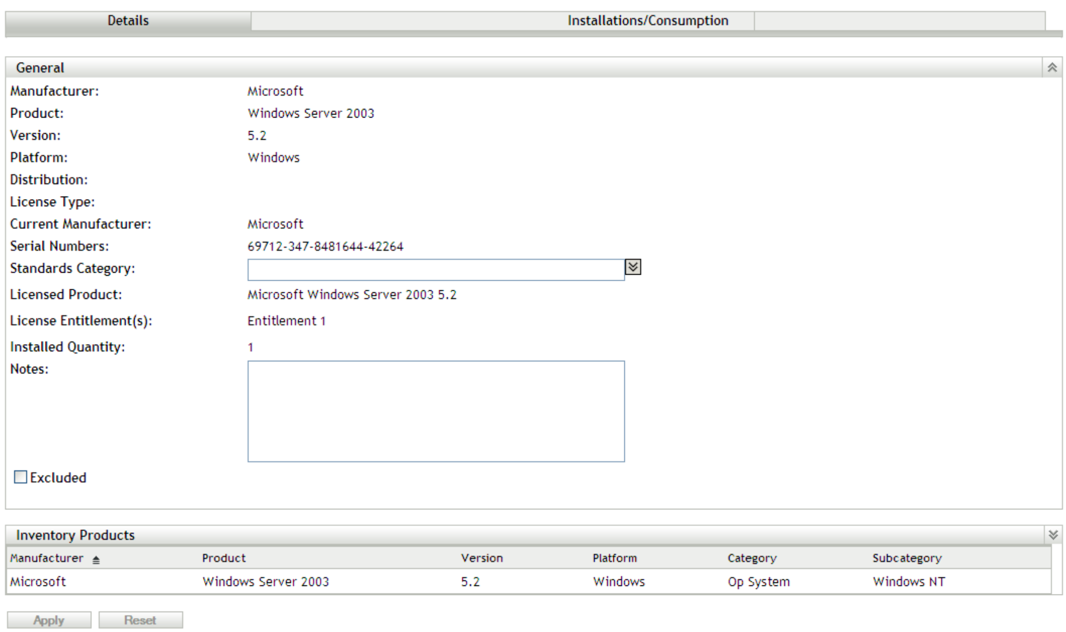
For information on creating a software collection, see Section 8.1, "Creating a Software Collection," on page 89.

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 standard category for.



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

5 Click *Apply*.

Creating Licensed Products

5

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

5.1 Viewing Licensed Product Detail

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

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

Licensed Products

New Move... Delete Action

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

1 - 13 of 13 show 25 items

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

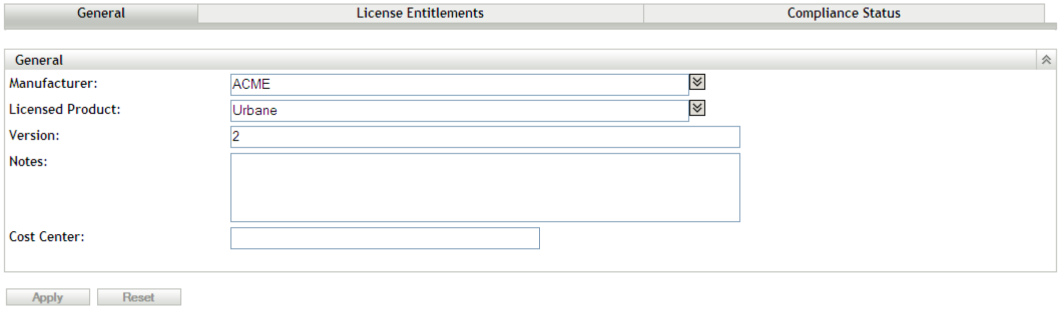
Name: The name of the licensed product.

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

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

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

3 Click a licensed product.



The General panel appears with the following data:

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

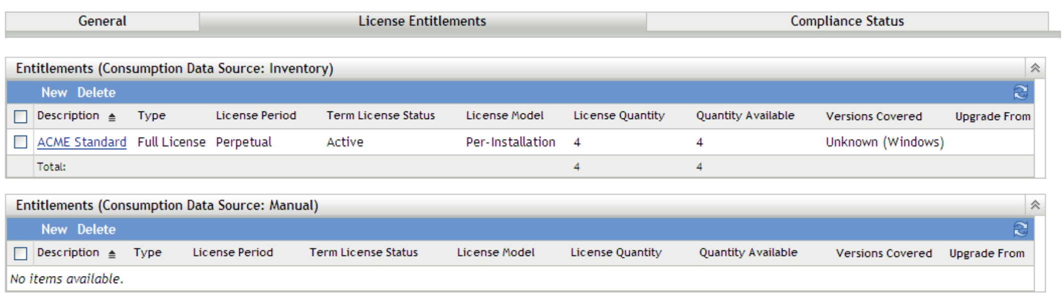
Licensed Product: The name of the product. To change the name, specify a new value, then click *Apply*.

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

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

Administrator-defined Field: Any administrator-defined field for a license appears here. To edit the field, specify a new value, then click *Apply*. For more information, see Chapter 10, "Using Administrator-Defined Fields," on page 109.

4 Click the *License Entitlements* tab.



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

These panels display the following details:

Description: The description of the entitlement.

Type: The license type.

License Period: The license period: perpetual or term.

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

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

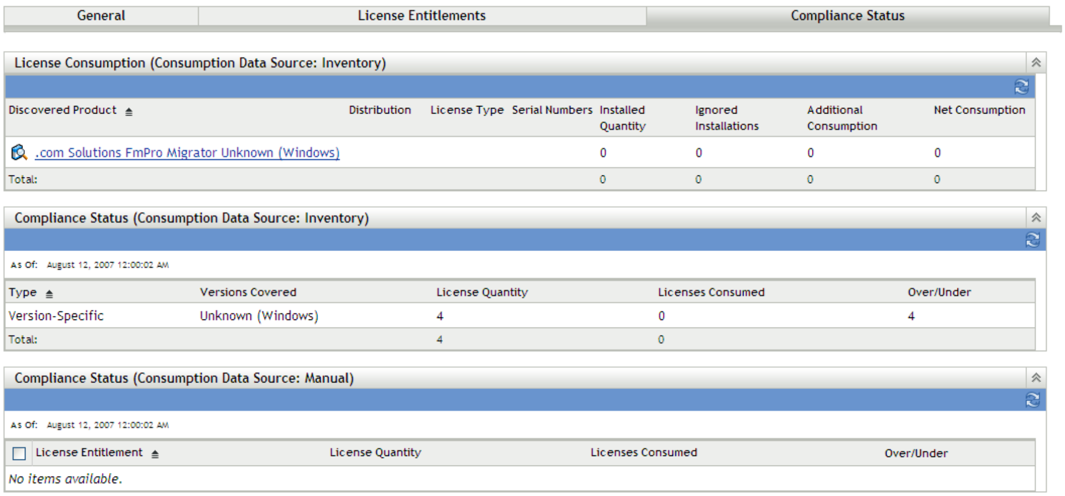
License Quantity: The number of licenses

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

Versions Covered: The versions covered by this license entitlement.

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

5 Click the *Compliance Status* tab.



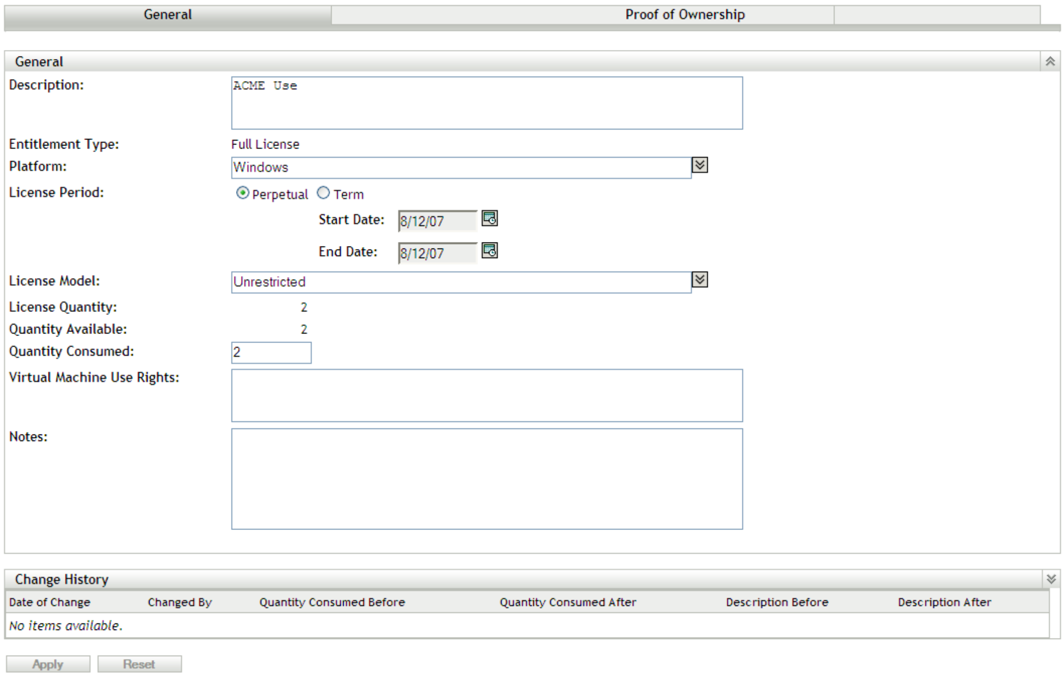
The Compliance Status page appears, which consists of three panels:

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

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

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

6 Click an entitlement to display information about that entitlement.



The General page appears with details about the entitlement.

7 Click the *Proof of Ownership* tab.

The Proof of Ownership page displays the following panels:

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

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

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

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

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

5.2 Reconciling Licensed Products with Purchase Records

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

To create licensed products and reconcile them with discovered products:

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

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

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

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


Licensed Products

New Move... Delete Action

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

1 - 13 of 13 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
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.
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.
Auto-reconcile Create Summary page	Review your data.

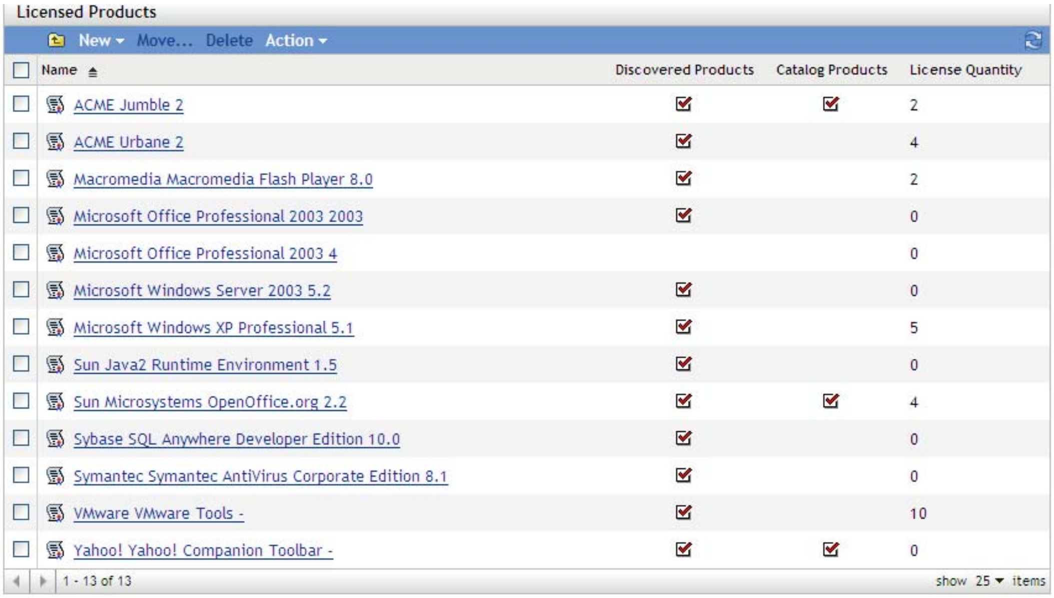
5 Click *Finish* to create the licensed product and reconcile it with the associated discovered products and catalog products.

You can now check license compliance. For more information, see Chapter 6, "Using License Management Reports," on page 43.

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 after you click *Finish*.

5 Click *Finish*.

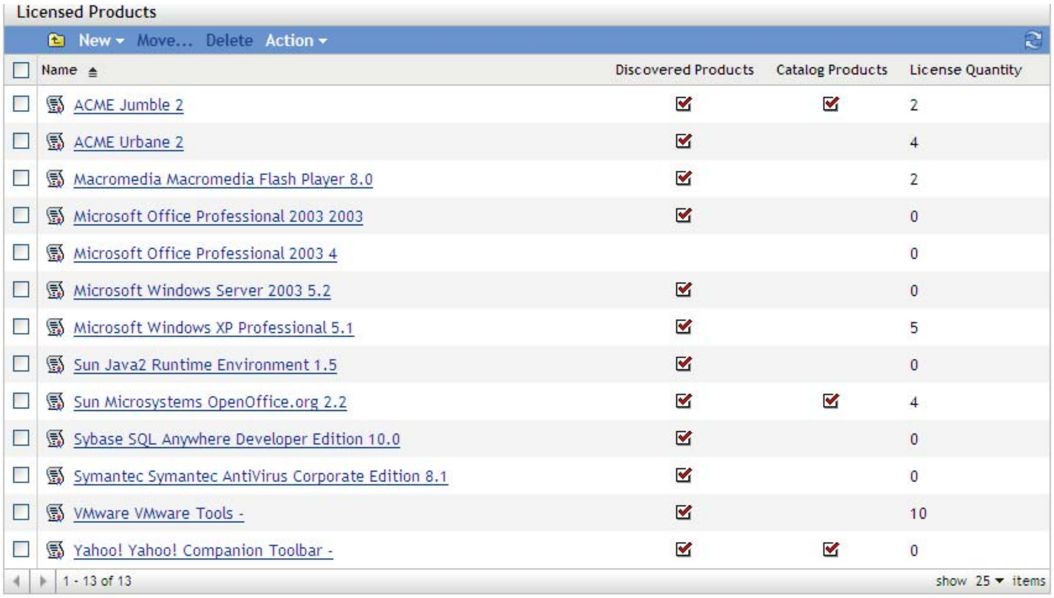
If you selected *Define Additional Properties*, continue with Section 5.3.1, "Creating License Entitlements," on page 35.

5.3.1 Creating License Entitlements

1 If you are continuing from Step 5 on page 35, and selected *Define Additional Properties*, skip to Step 6 in this procedure.

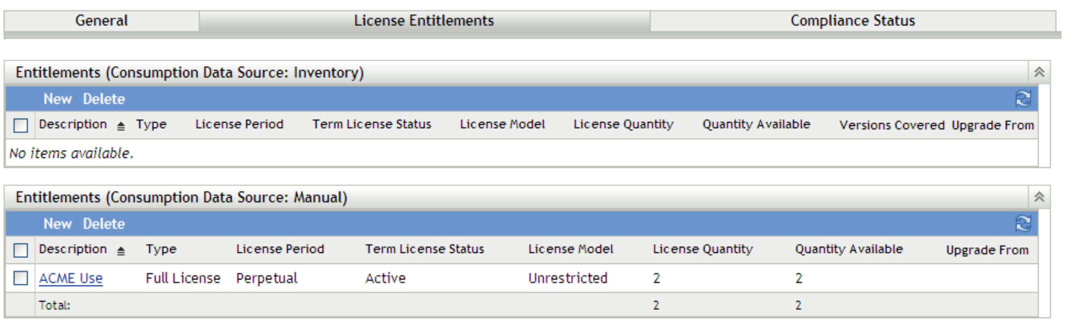
2 In ZENworks Control Center, click the *Asset Management* tab.

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



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

5 Click the *License Entitlements* tab.



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

Wizard Page	Details
License Model page	Select a license model.
Entitlement Type page	Select an entitlement type: ◆ Full License ◆ Version Upgrade (If you select Version Upgrade, you will need to identify the entitlement that it is upgraded from.) ◆ License/Maintenance

Wizard Page	Details
General Information Page	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 after you click *Finish*.

8 Click *Finish*.

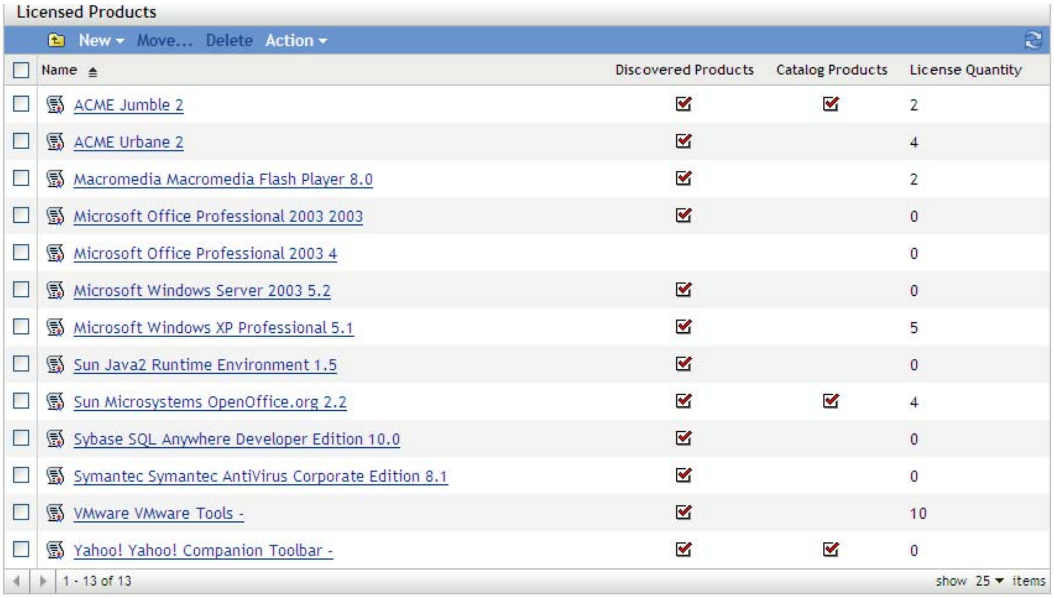
If you selected *Define Additional Properties*, continue with Section 5.4, "Defining License Entitlements," on page 37.

5.4 Defining License Entitlements

1 If you are continuing from Step 8 on page 37, and selected *Define Additional Properties*, skip to Step 7 in this procedure.

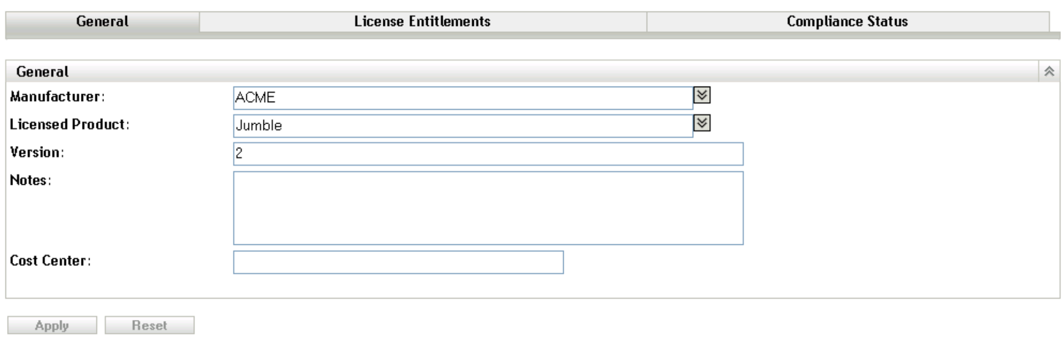
2 In ZENworks Control Center, click the *Asset Management* tab.

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

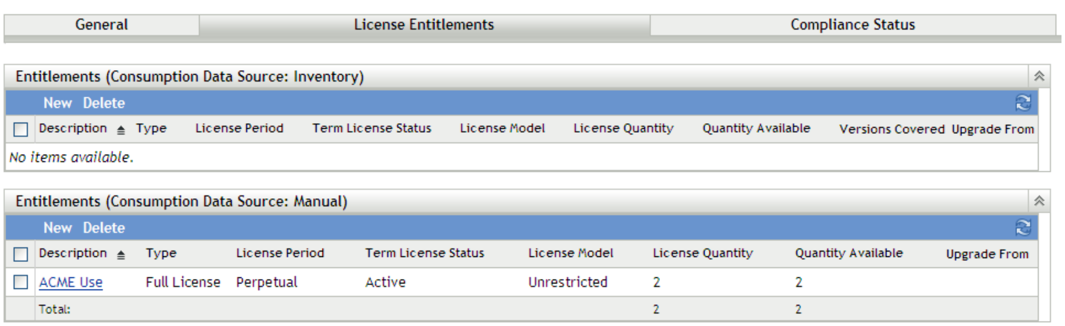


Name	Discovered Products	Catalog Products	License Quantity
ACME Jumble 2	✔	✔	2
ACME Urbane 2	✔		4
Macromedia Macromedia Flash Player 8.0	✔		2
Microsoft Office Professional 2003 2003	✔		0
Microsoft Office Professional 2003 4			0
Microsoft Windows Server 2003 5.2	✔		0
Microsoft Windows XP Professional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

4 Click the product whose entitlement you want to modify.

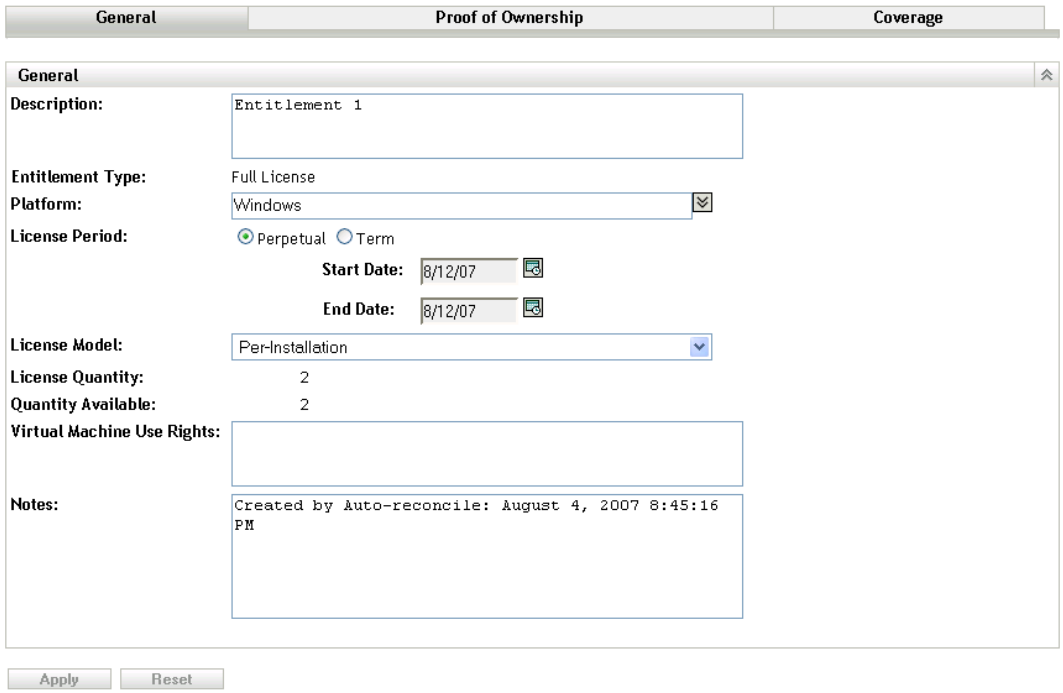


5 Click the *License Entitlements* tab.



Description	Type	License Period	Term License Status	License Model	License Quantity	Quantity Available	Upgrade From
ACME Use	Full License	Perpetual	Active	Unrestricted	2	2	
Total:					2	2	

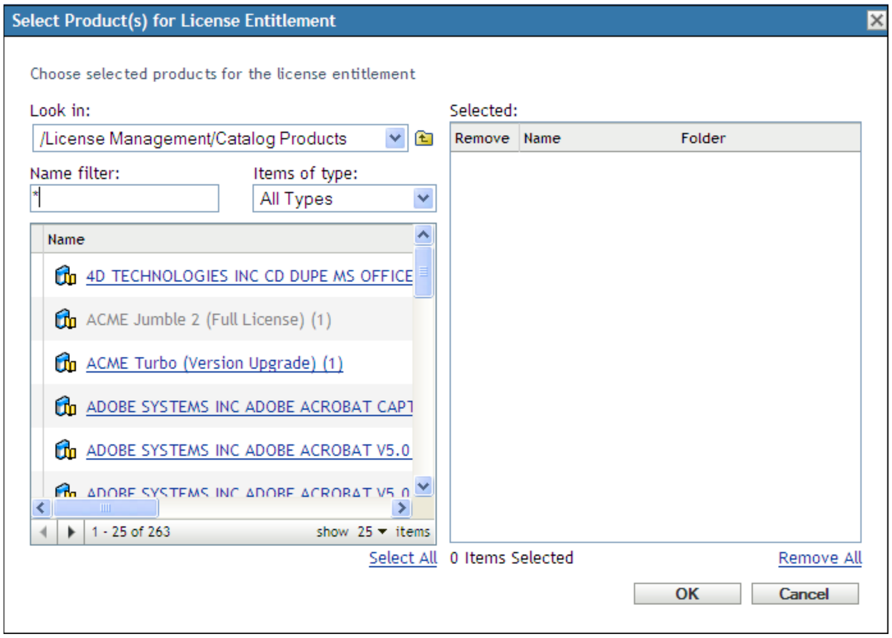
6 Click the entitlement you want to define.



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.

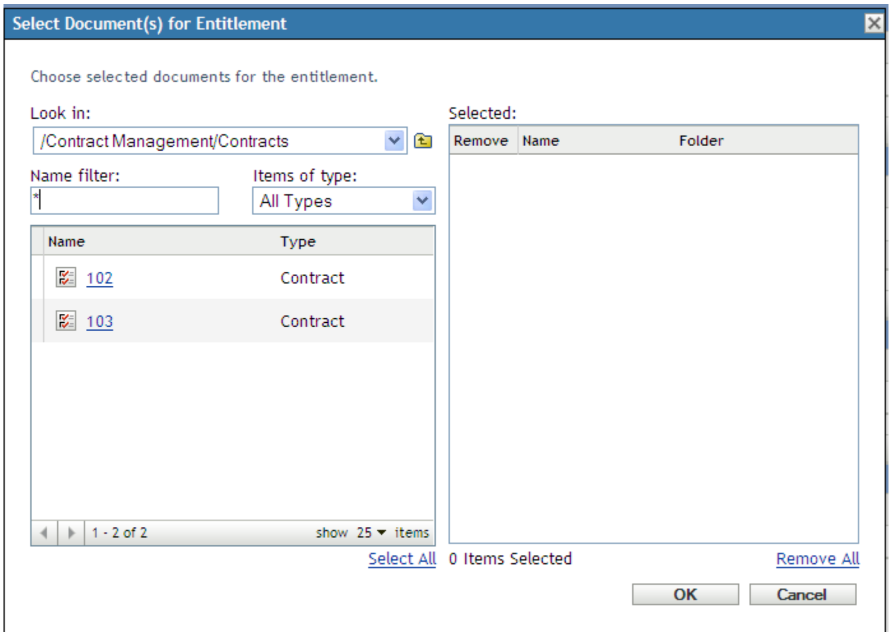
Wizard Page	Details
General Information page	Fill in the following fields: **Description:** A description of the summary record. **License Quantity:** The number of licenses. **Total Cost:** The cost of the product licenses. **Notes:** Specify any notes.
New Purchase Summary Record page	Review the data. 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 39.

11 Add any contracts:

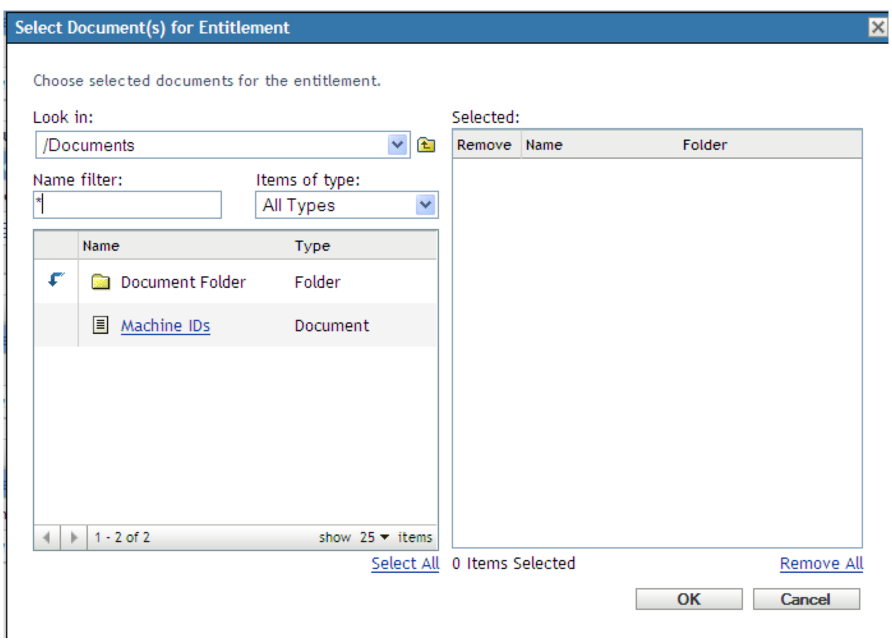
11a In the Contracts panel, click *Add*.



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

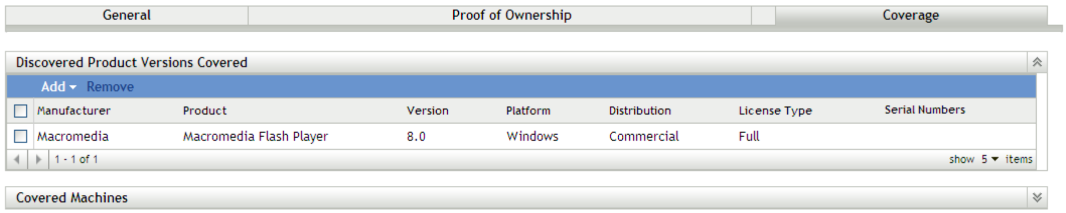
12 Add any documents:

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*.

Using License Management Reports 6

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

6.1 Using License Management Standard Reports

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

6.1.1 Available Standard Reports

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

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

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

6.1.2 Running a Standard Report

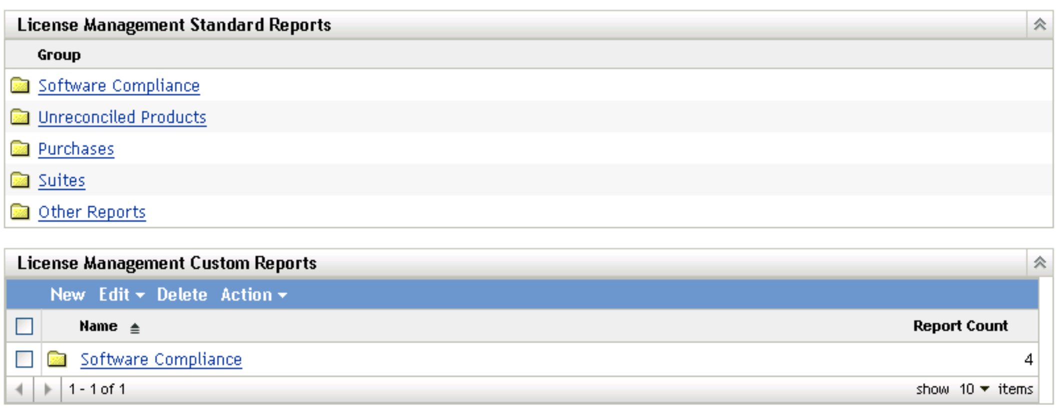
You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management allows you to export data to another format, view the data as a graph, change the time period of the report, and change the filter criteria. The following sections provide more information:

- "Running a Report" on page 44
- "Exporting a Report to a Different Format" on page 45
- "Viewing the Report as a Graph" on page 45
- "Changing the Time Period" on page 46
- "Changing the Filter Criteria" on page 47

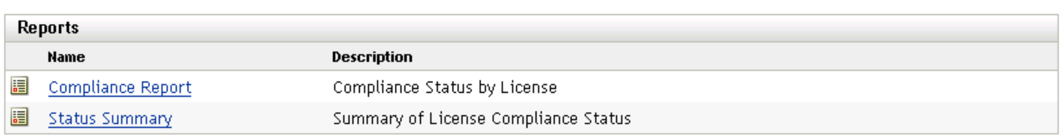
Running a Report

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

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



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



Reports are listed by name and description. For a list of reports and descriptions, see Section 6.1.1, "Available Standard Reports," on page 43.

4 Click the report to run it.

5 (Optional) Filter the data by selecting filtering criteria from the left panel and clicking *Search*.

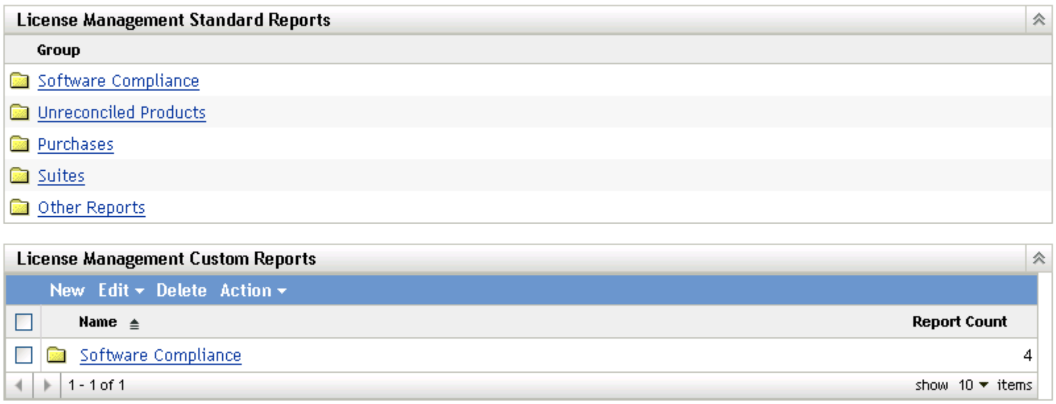
6 Click the links for more detailed information.

Exporting a Report to a Different Format

Asset Management 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.

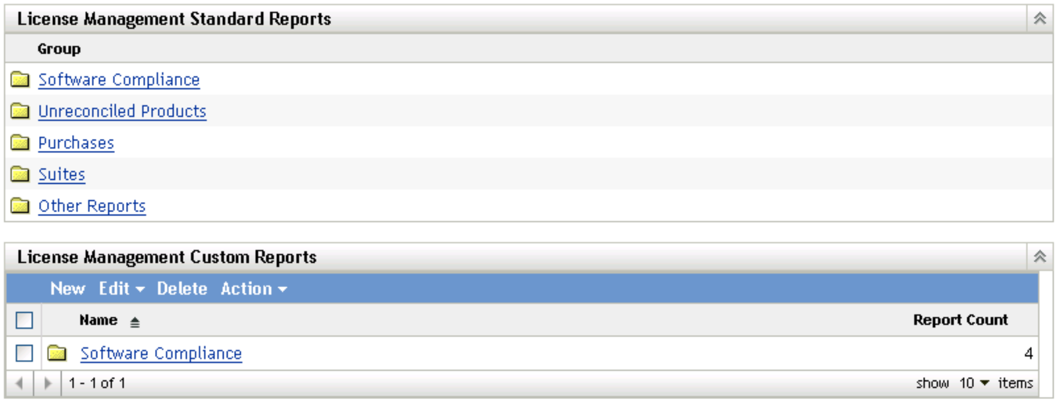
5 Select the format to export the report to by clicking one of the three formats on the bottom of the report.

Viewing the Report as a Graph

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

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

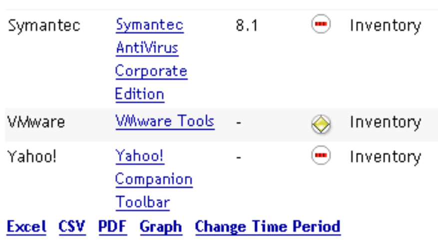
2 In the License Management panel, click *License Management Reports*.



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

4 Click the report to run it.

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



A new window appears with the available graphs.

Changing the Time Period

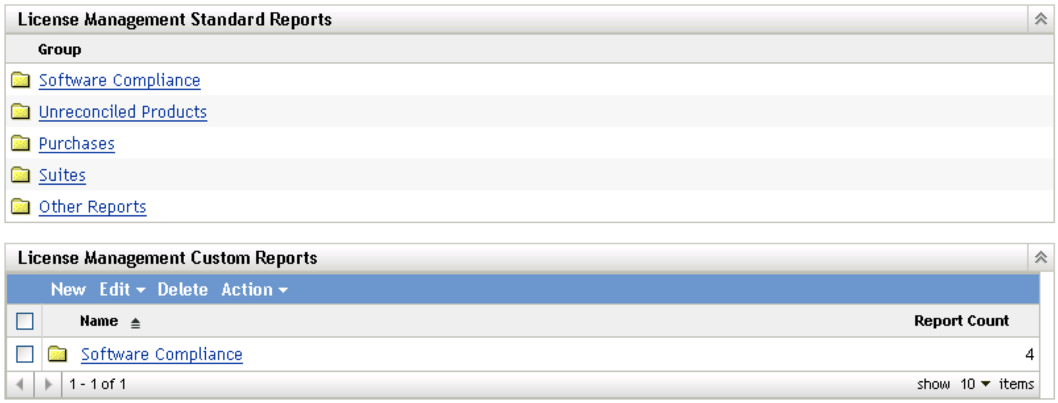
For greater flexibility, you can change the time period of some reports. (If this feature is available, *Change Time Period* appears at the bottom of the report.) You can select from the following time periods:

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

To change the time period:

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

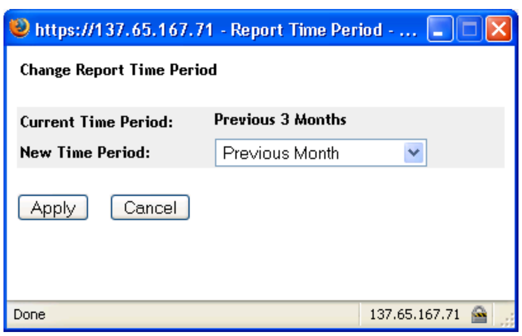
2 In the License Management panel, click *License Management Reports*.



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

4 Click the report to run it.

5 Click *Change Time Period*.



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

7 Click *Apply*.

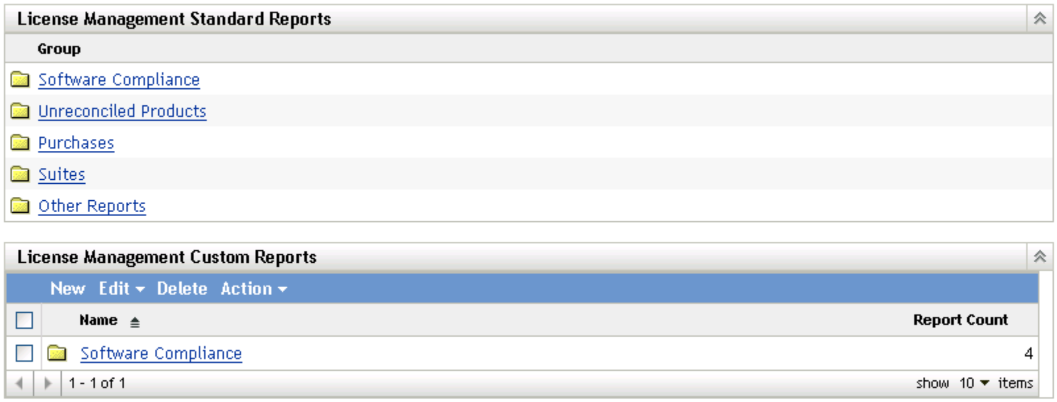
The new time period is shown on the top left of the report.

Changing the Filter Criteria

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

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

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



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

4 Click the report to run it.

5 Click *Change Filter* on the bottom of the report.

6 Select one of the following filters:

- Used applications only
- Unused applications only
- All applications

7 Click *Apply*.

6.2 Using License Management Custom Reports

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

- Section 6.2.1, "Available Custom Reports," on page 49
- Section 6.2.2, "Running a Custom Report," on page 49
- Section 6.2.3, "Creating a Custom Report," on page 50
- Section 6.2.4, "Scheduling a Custom Report and Sending Notifications," on page 52
- Section 6.2.5, "Configuring E-Mail Addresses for Sending Notifications," on page 54
- Section 6.2.6, "Editing a Custom Report," on page 55
- Section 6.2.7, "Moving a Custom Report," on page 57
- Section 6.2.8, "Deleting a Custom Report or Folder," on page 58
- Section 6.2.9, "Viewing Scheduled Reports by Date and Title," on page 59
- Section 6.2.10, "Importing New Report Definitions," on page 59

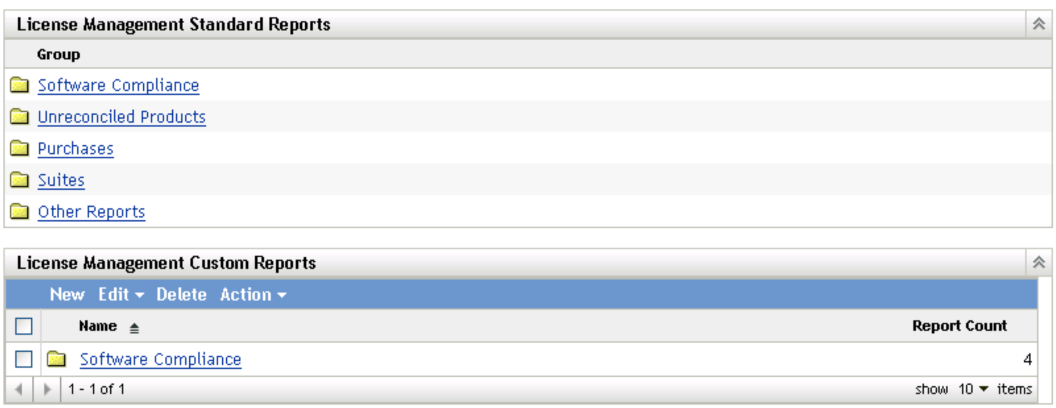
6.2.1 Available Custom Reports

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

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

6.2.2 Running a Custom Report

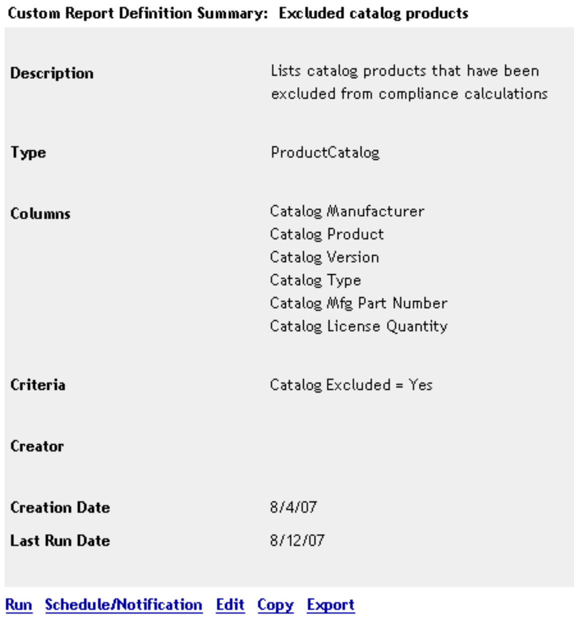
1. In ZENworks Control Center, click the *Asset Management* tab.
2. In the License Management panel, click *License Management Reports*.



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

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

4 Click a report.



The report definition appears. For information on editing the report definition, see Section 6.2.6, "Editing a Custom Report," on page 55.

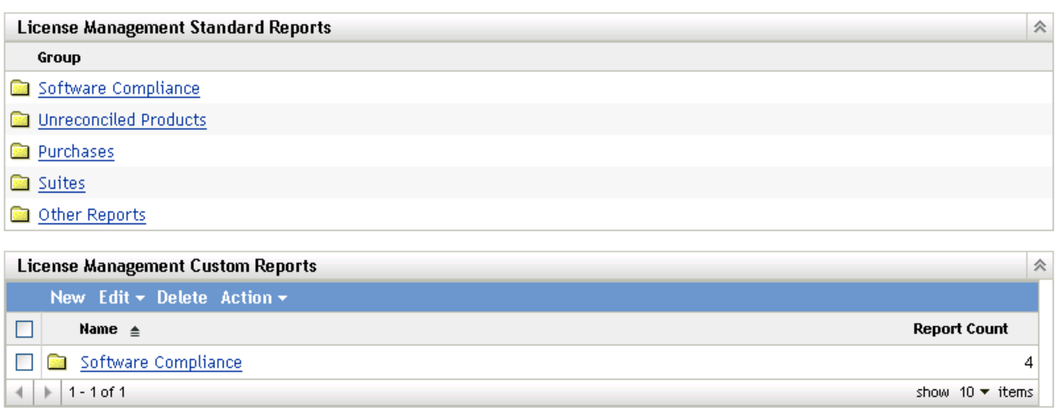
5 Click *Run* in the lower left corner.

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.

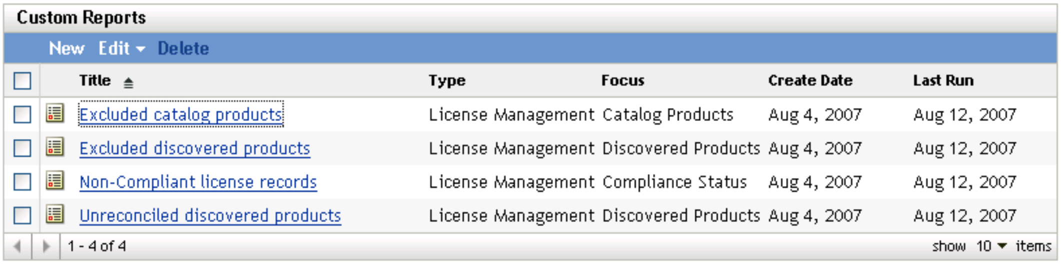
6.2.3 Creating a Custom Report

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

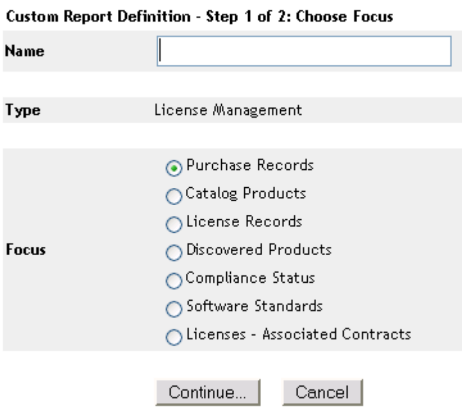
2 In the License Management panel, click *License Management Reports*.



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*.

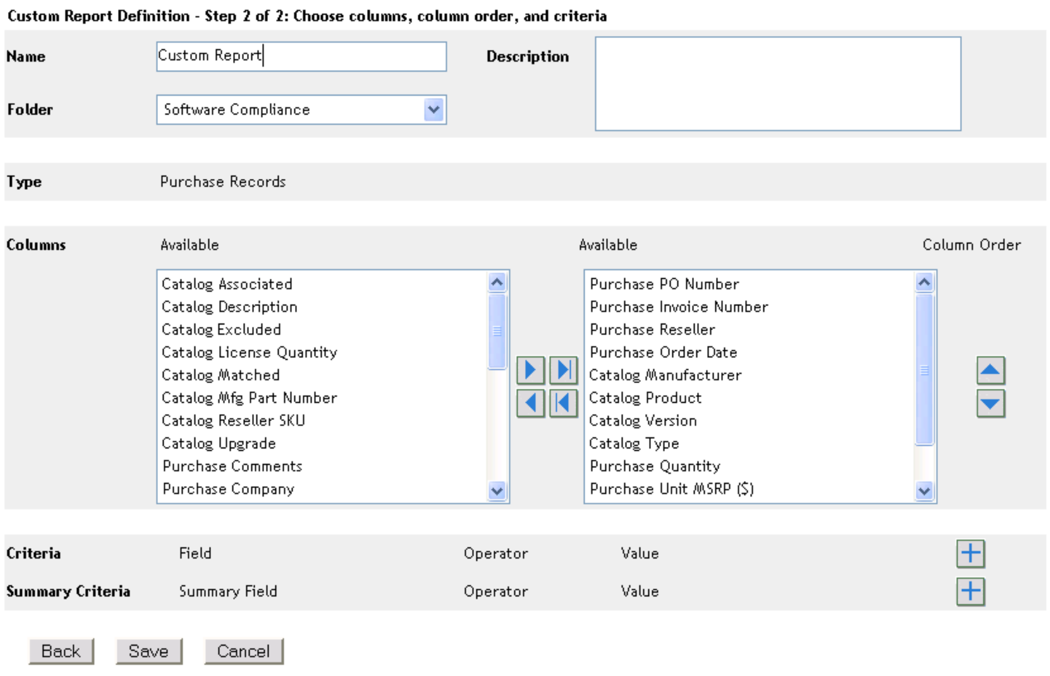


5 Specify a name in the *Name* field.

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: Specify the name of the report.

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

Description: Specify a description for your report.

Type: Displays the report type you selected.

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

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

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

9 Click *Save*.

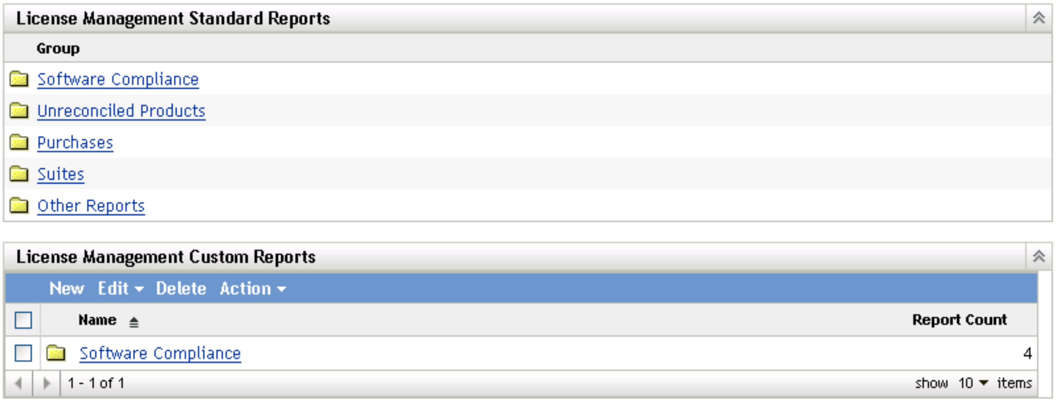
The next time you open the Custom Reports page, the report appears in the Custom Reports panel.

6.2.4 Scheduling a Custom Report and Sending Notifications

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

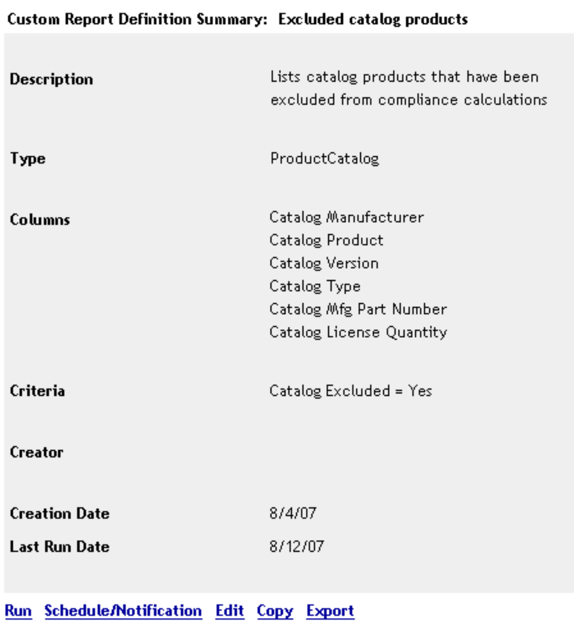
1 In ZENworks Control Center, click the *Asset Management* tab.

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

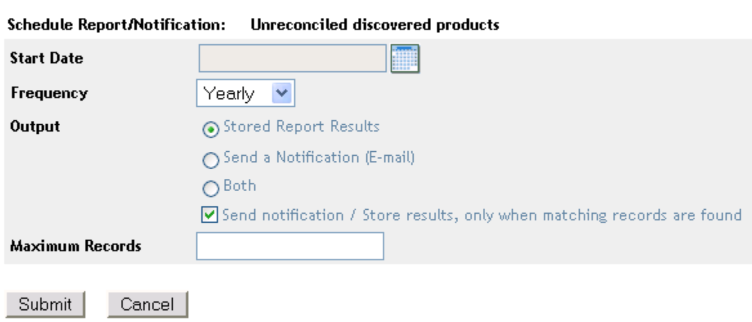


3 In the License Management Custom Reports panel, click the folder containing the report you want to schedule.

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 54.

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

7. Click *Submit*.

6.2.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see Section 6.2.4, "Scheduling a Custom Report and Sending Notifications," on page 52.

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

To import e-mail addresses:

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

4. In the *Import From* field, select either *Inventory Data* or *Comma Separated File*.

   If you select *Inventory Data*, the e-mail addresses found in an inventory scan are imported.

   If you select *Comma Separated File*, specify the file location in the *E-mail Address File* field.
5. Click *Import*.
6. Click *Close*.

To delete all e-mail information:

1. In ZENworks Control Center, click *Configuration*.
2. Click the *Asset Inventory* tab.

3 In the E-mail Addresses Panel, click *Action* > *Manage E-mail Addresses*.

4 Click *Delete*.

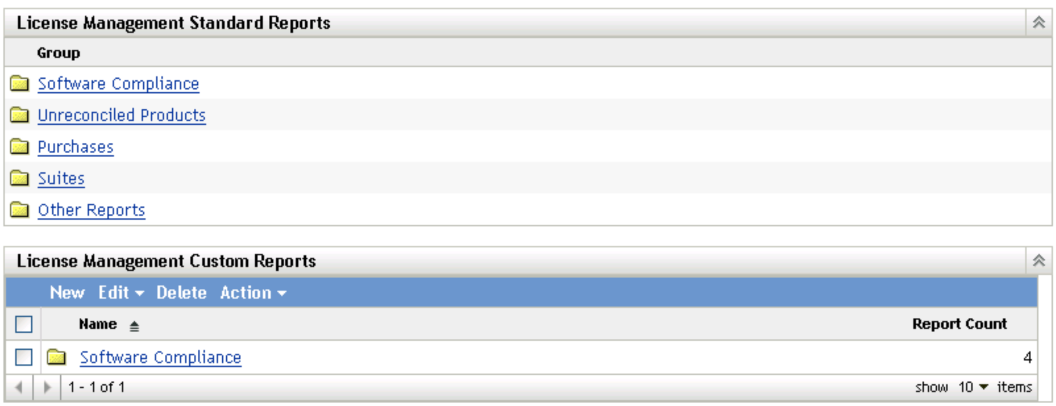
5 Click *OK*.

All e-mail information is deleted.

6.2.6 Editing a Custom Report

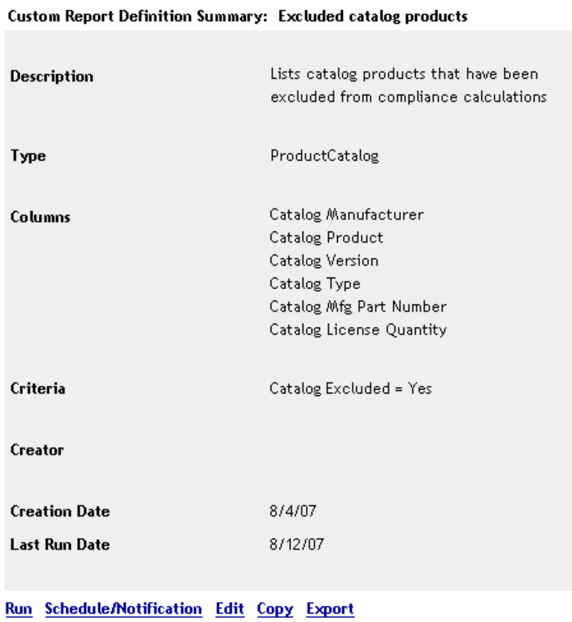
1 In ZENworks Control Center, click the *Asset Management* tab.

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

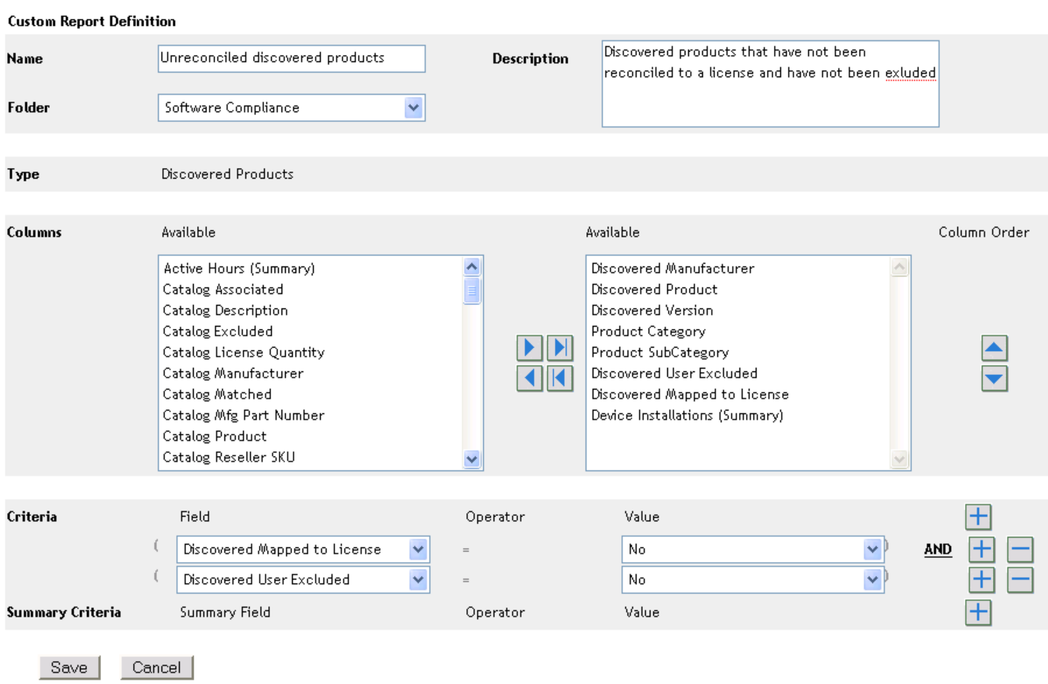


3 In the License Management Custom Reports panel, click the folder containing the report you want to edit.

4 Click the report.



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

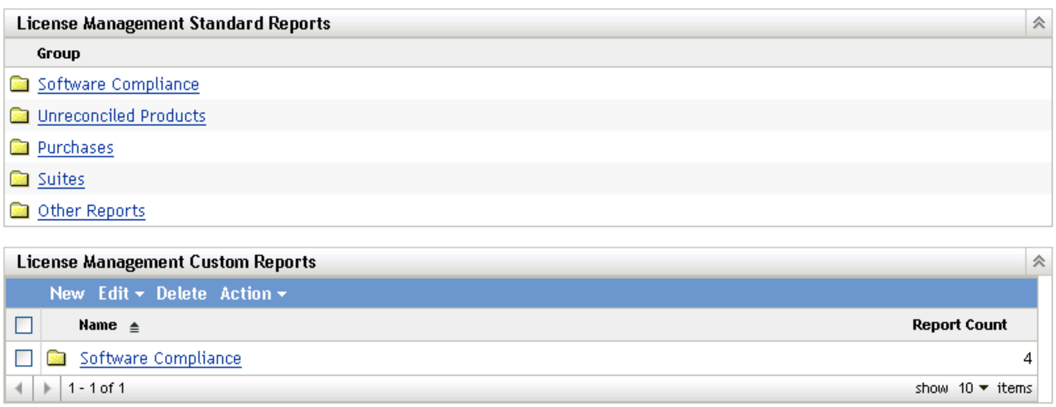
Summary Criteria: Select your summary filter criteria in the *Field*, *Operator*, and *Value* fields. Use the + icons to add filters; click the - icon to delete a filter. Click *OR* or *AND* to toggle back and forth between the two operators.

7 Click *Save*.

6.2.7 Moving a Custom Report

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

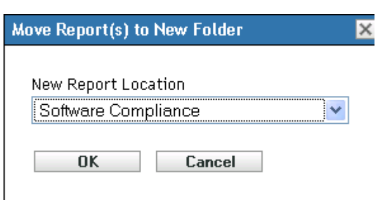
2 In the License Management panel, click *License Management Reports*.



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

4 Select the report or reports you want to move.

5 Click *Edit* > *Move*.



6 Select a new folder location.

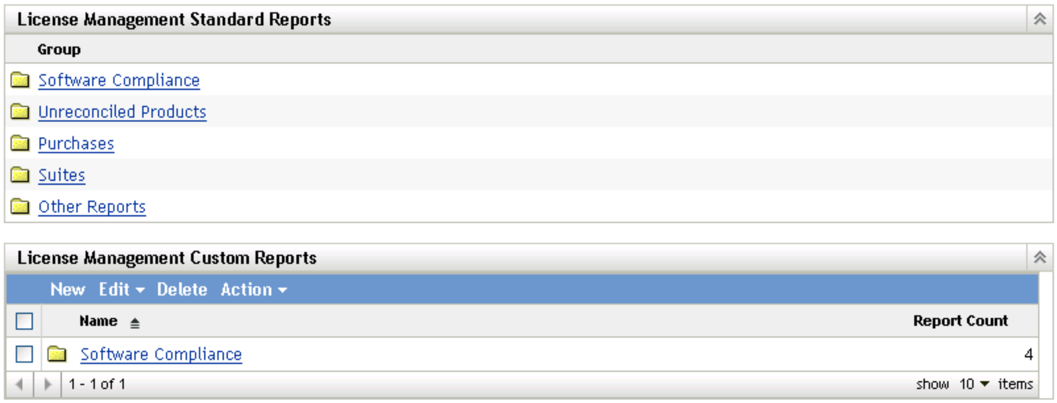
7 Click *OK*.

6.2.8 Deleting a Custom Report or Folder

To delete a custom report:

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

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



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

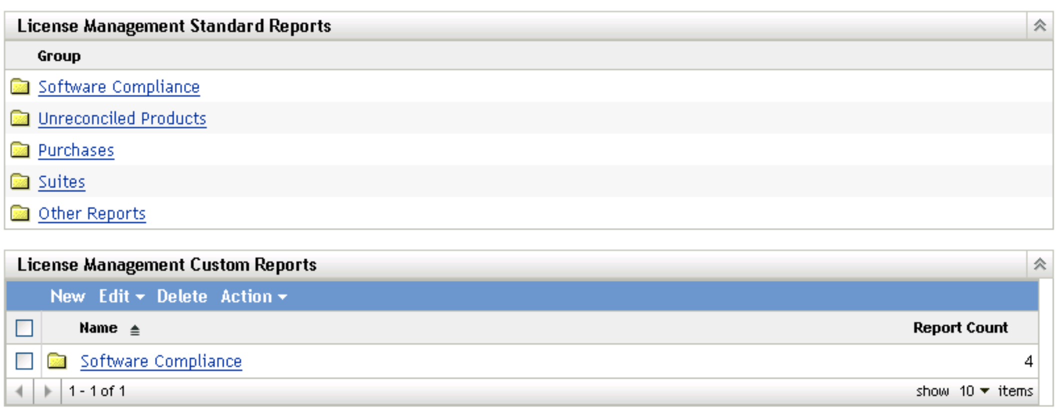
4 Select the report you want to delete.

5 Click *Delete*.

To delete a folder:

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

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



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

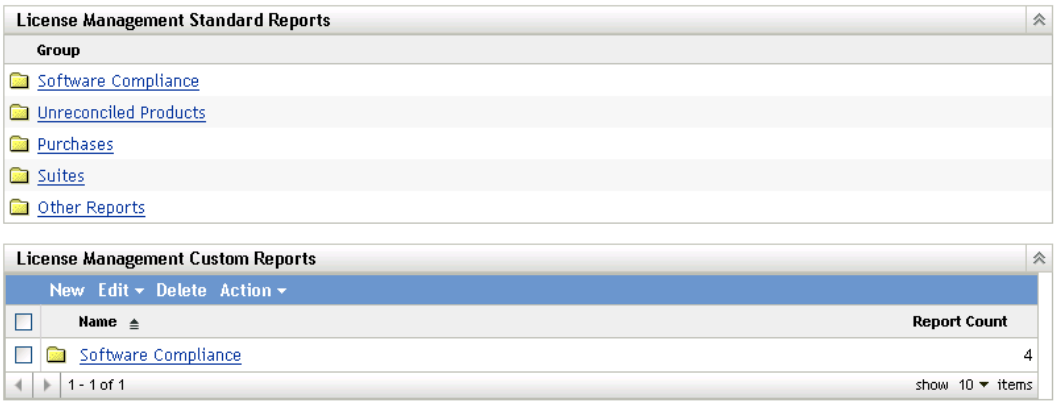
4 Click *Delete*.

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

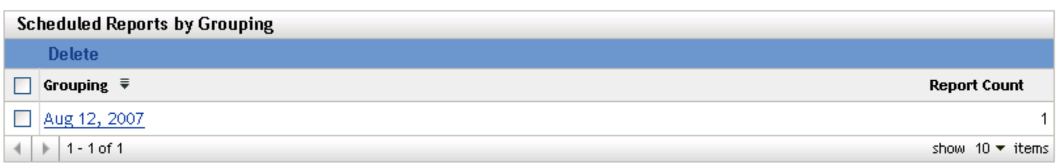
6.2.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see Section 6.2.4, "Scheduling a Custom Report and Sending Notifications," on page 52.

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*.

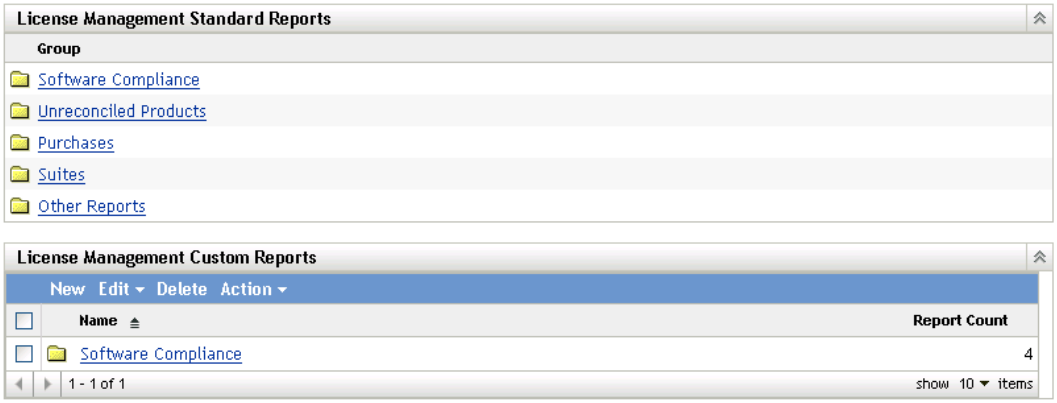
6.2.10 Importing New Report Definitions

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.

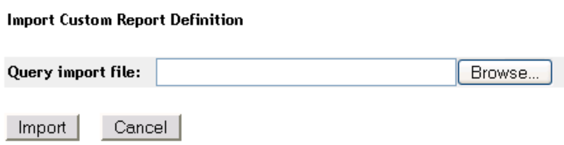
To import report definitions:

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*.



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

5 Click *Import*.

6.3 Setting Asset Management Report Rights

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 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:

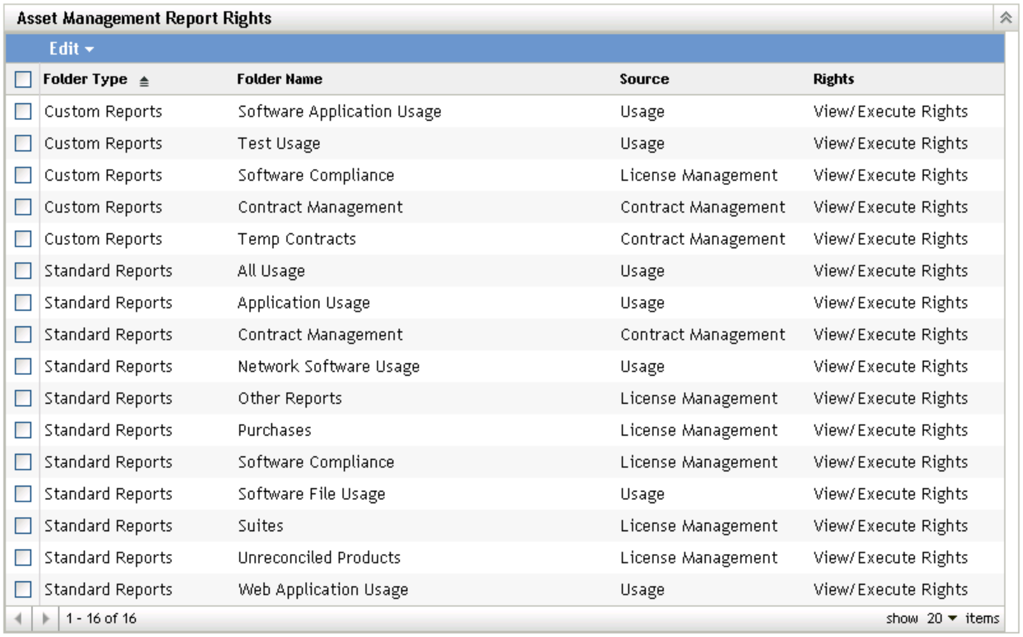
- **Remove all rights:** This removes all rights to the folder, so the specified administrator cannot see it.
- **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- **Assign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

To change inventory report rights:

1 In ZENworks Control Center, click *Configuration*.

2 In the Administrators panel, click an administrator.

3 In the Administrator Tasks panel, click *Asset Management Report Rights*.



Asset Management Report Rights

Edit

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.

Establishing Proof of Ownership

7

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

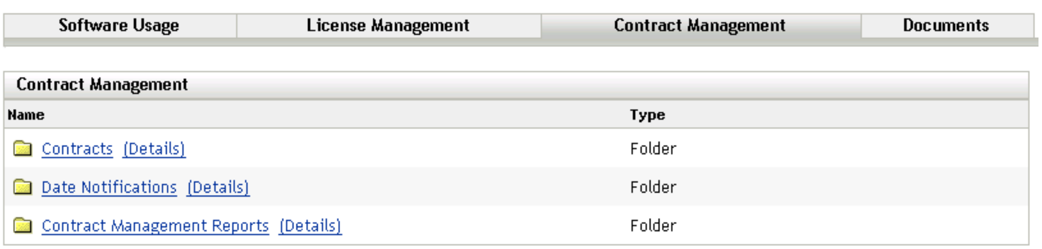
- Section 7.1, "Adding Contracts," on page 63
- Section 7.2, "Defining the Contract," on page 65
- Section 7.3, "Using Date Notification," on page 73
- Section 7.4, "Using Contract Management Standard Reports," on page 76
- Section 7.5, "Using License Management Custom Reports," on page 77
- Section 7.6, "Setting Asset Management Report Rights," on page 85
- Section 7.7, "Adding and Associating Documents," on page 86

7.1 Adding Contracts

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

To create a new contract:

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



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 it, then click *OK*. **Terms and Conditions:** Specify any terms and conditions. **Contract Type:** Select one of the fourteen contract types or a custom one of your own. **Status:** Select *Pending, Active*, or *Expired*. You can also specify 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 will be additional fields to fill out.
New Contract Summary page	Review the information you entered. Use the back button to go back.

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

6 Click *Finish*.

The contract is created. If you selected *Define Additional Properties* in Step 5, continue on to Section 7.2, “Defining the Contract,” on page 65.

7.2 Defining the Contract

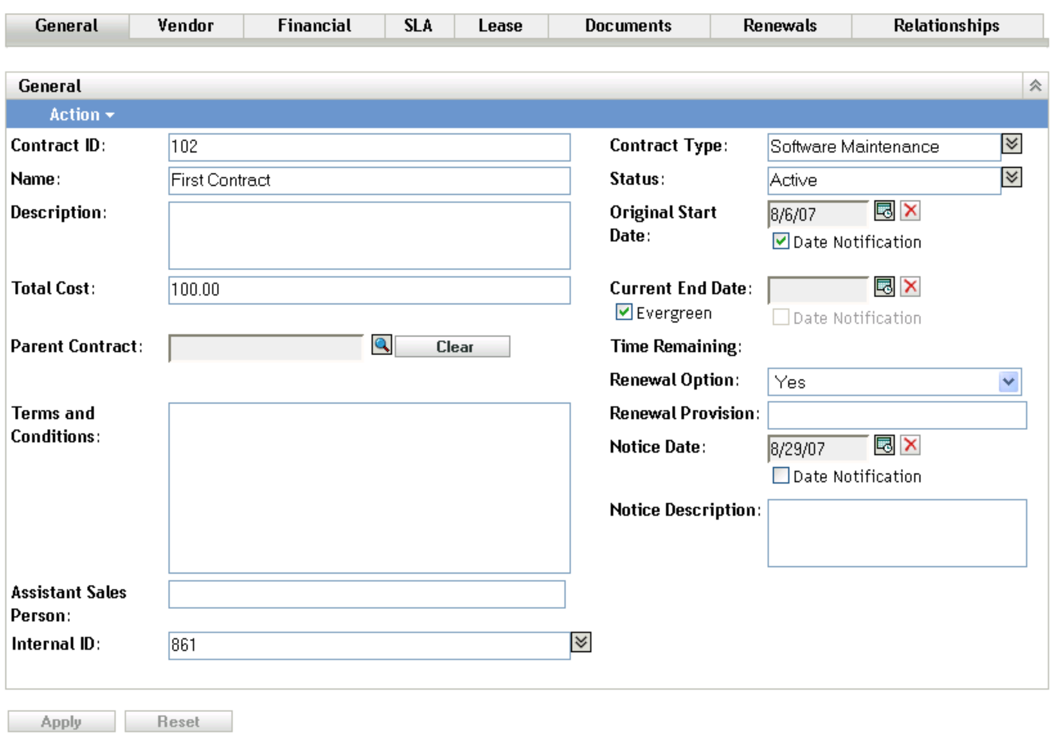
There are eight areas where you can further define a contract. These are shown as tabs on the Contracts page. The topics are as follows:

- Section 7.2.1, "General Tab," on page 65
- Section 7.2.2, "Vendor Tab," on page 66
- Section 7.2.3, "Financial Tab," on page 66
- Section 7.2.4, "SLA Tab," on page 66
- Section 7.2.5, "Lease Tab," on page 68
- Section 7.2.6, "Documents Tab," on page 69
- Section 7.2.7, "Renewals Tab," on page 71
- Section 7.2.8, "Relationships Tab," on page 72

7.2.1 General Tab

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

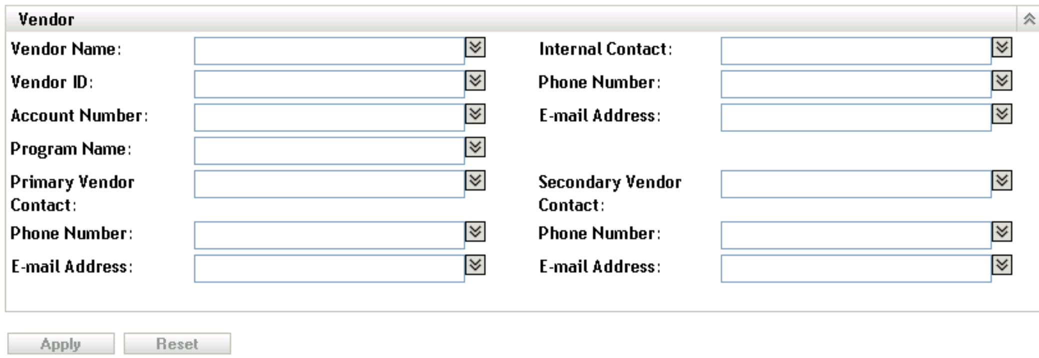
Figure 7-1 *Contract General Tab*



7.2.2 Vendor Tab

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

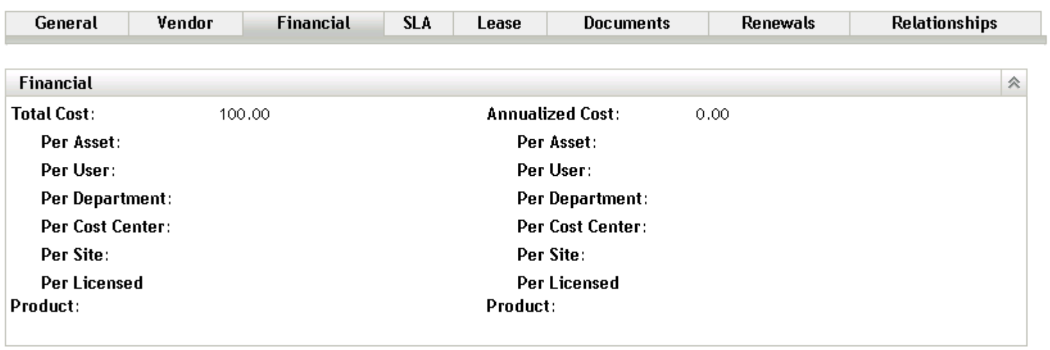
***Figure 7-2** Contract Vendor Tab*



7.2.3 Financial Tab

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

***Figure 7-3** Contract Financial Tab*



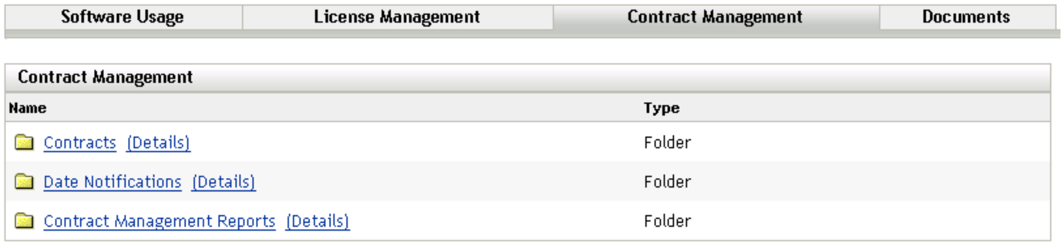
7.2.4 SLA Tab

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

To create a service level agreement:

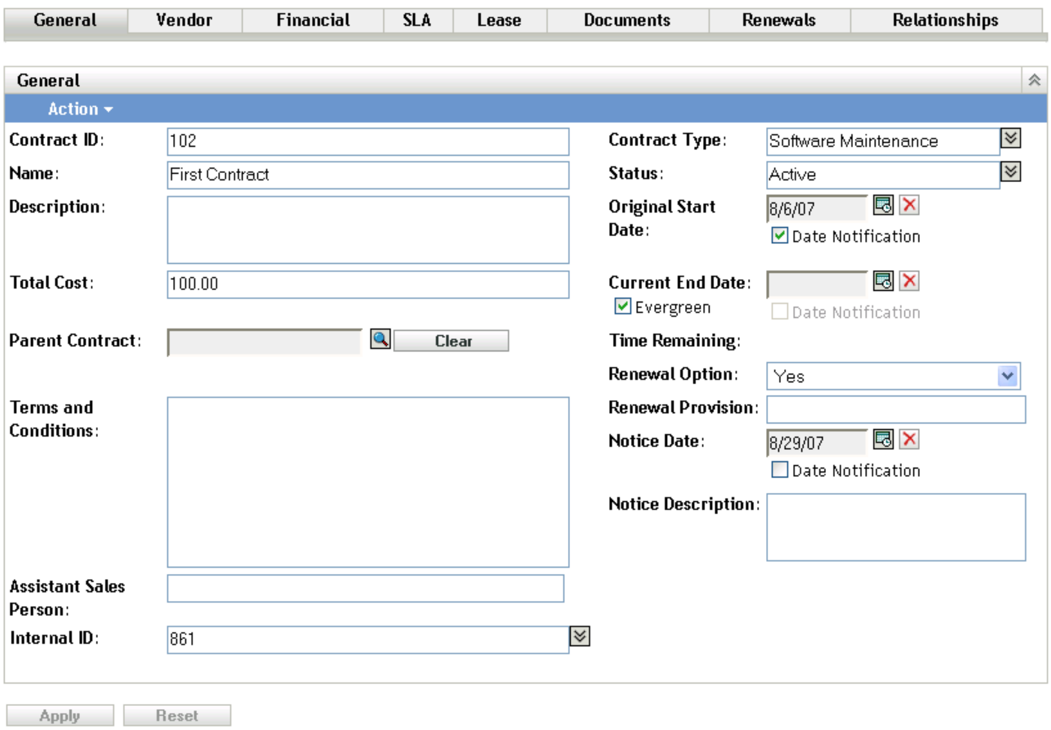
1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

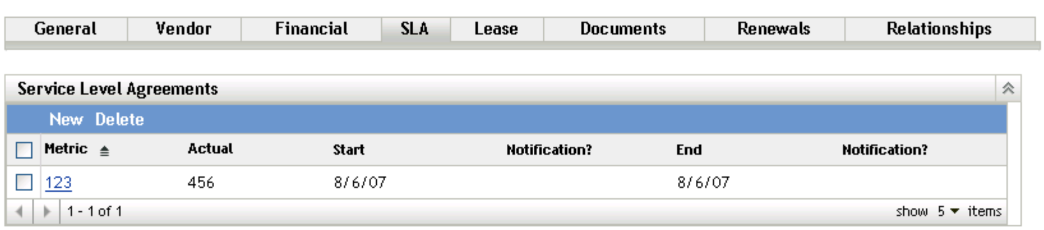


3 Click *Contracts*.

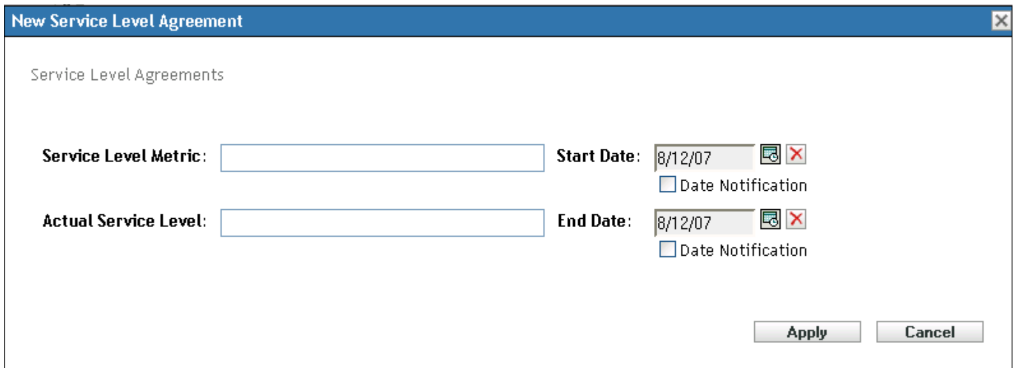
4 Click an existing contract to open the Contract page.



5 Click the *SLA* tab.



6 Click *New*.



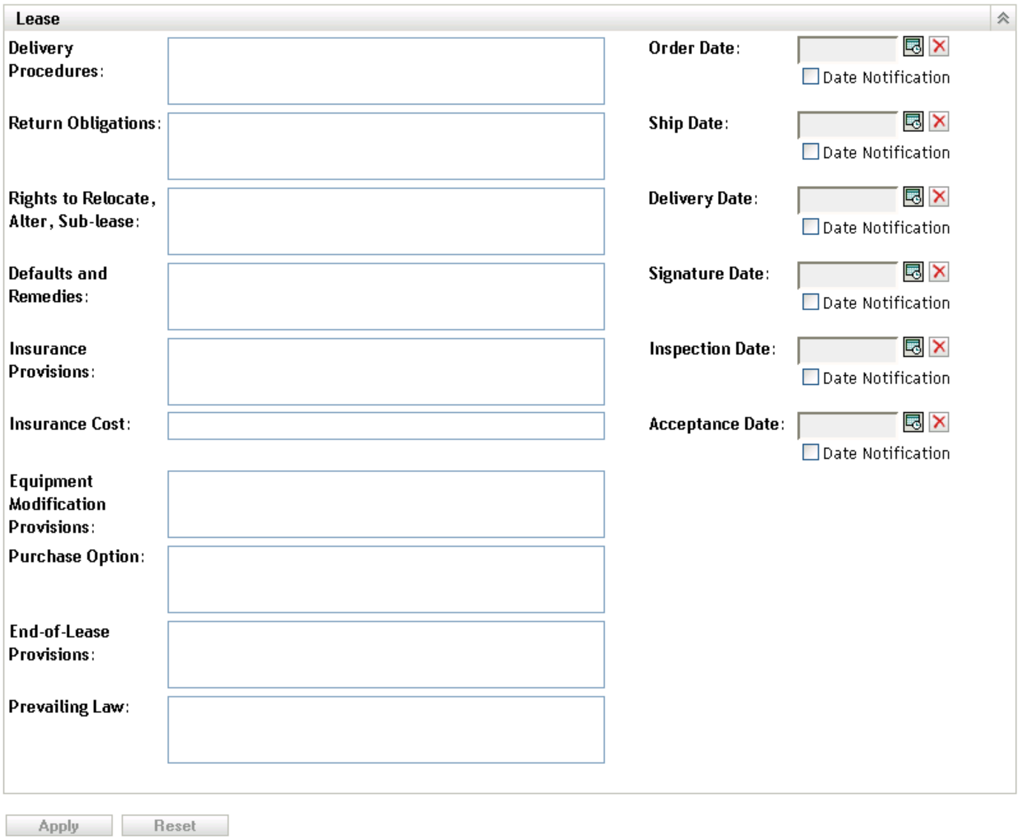
7 In the dialog box, specify the service level metric and actual service level, and select start and end dates.

8 (Optional) If you want to be notified by e-mail of the approach of the start or end date, select *Date Notification*.

7.2.5 Lease Tab

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

Figure 7-4 Contract Lease Tab

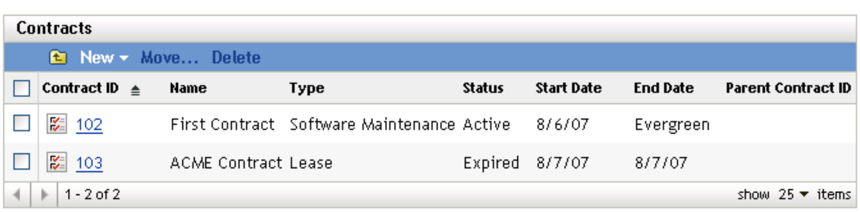


7.2.6 Documents Tab

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

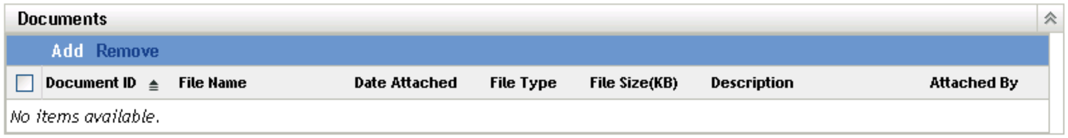
To add documents:

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

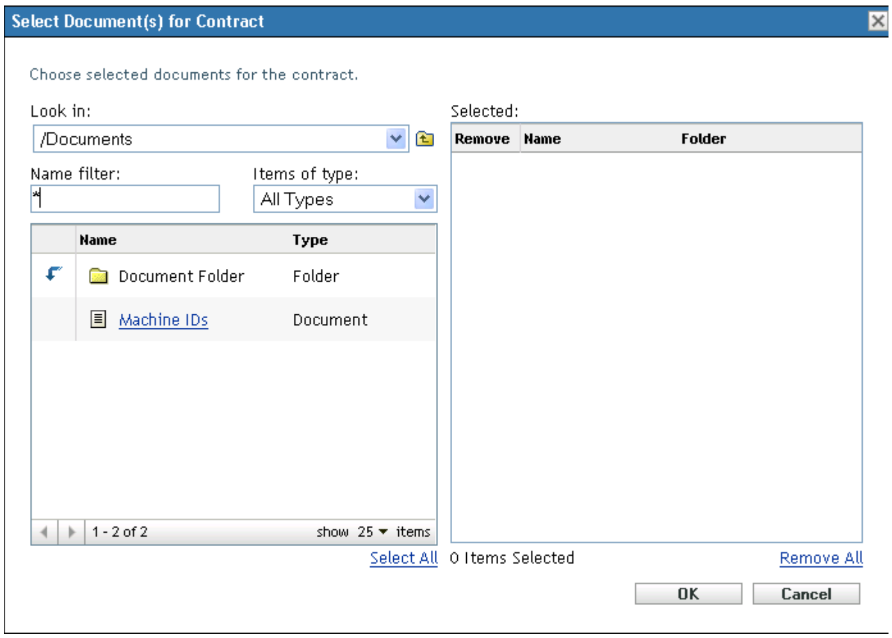


4. Click the contract you want to add a document to.

5 Click the *Documents* tab.



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



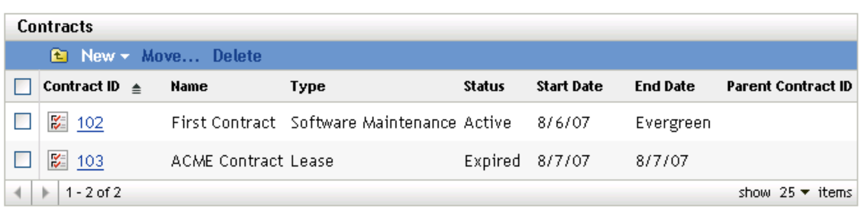
7 In the dialog box, select a document, then click *OK*.

To remove documents:

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

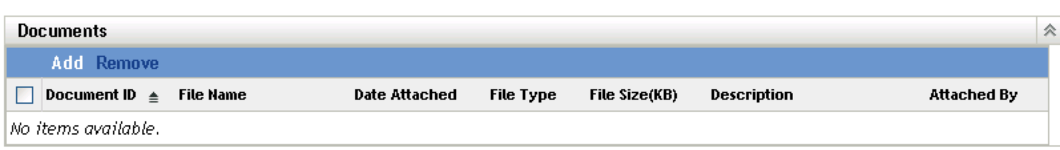
2 Click the *Contract Management* tab.

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*.

7.2.7 Renewals Tab

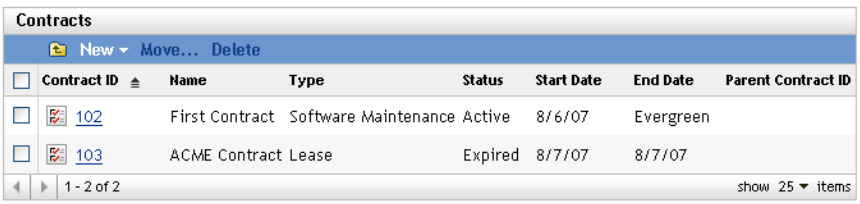
The *Renewal* tab shows the contract's renewal history and allows you to add and delete renewal records.

To renew a contract:

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

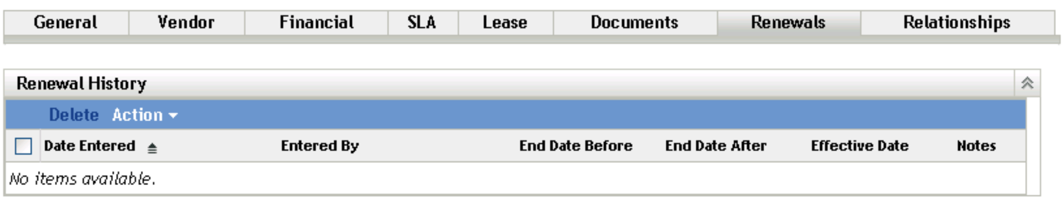
2 Click the *Contract Management* tab.

3 Click *Contracts*.



4 Click the contract you want to renew.

5 Click the *Renewals* tab.



6 Click *Action* > *Renew Contract*.

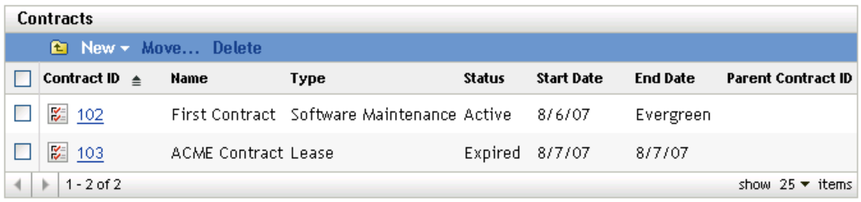
7 Specify a new *End Date* and *Effective Date* by clicking the calendar icons and selecting a date.

8 (Optional) Add notes, if any.

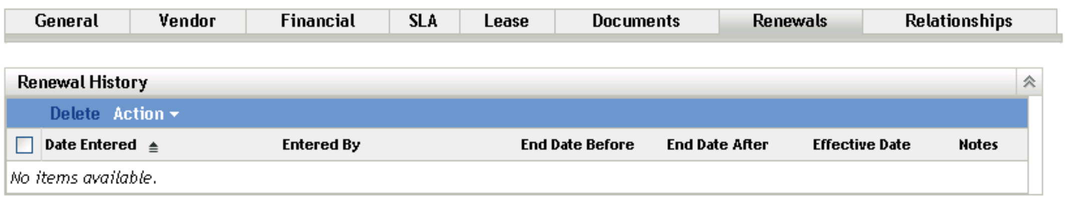
9 Click *Apply*.

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*.



4. Click the contract with the renewal record that you want to delete.
5. Click the *Renewals* tab.



6. Click the renewal record you want to delete.
7. Click *Delete*.

7.2.8 Relationships Tab

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

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

Figure 7-5 Document Relationships Tab

7.3 Using Date Notification

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

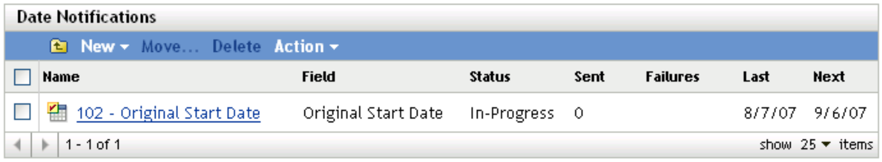
- Section 7.3.1, "Configuring Date Notification Settings," on page 73
- Section 7.3.2, "Creating a Folder for Date Notification Records," on page 74
- Section 7.3.3, "Moving a Date Notification Record," on page 75
- Section 7.3.4, "Deleting a Date Notification Record," on page 75

7.3.1 Configuring Date Notification Settings

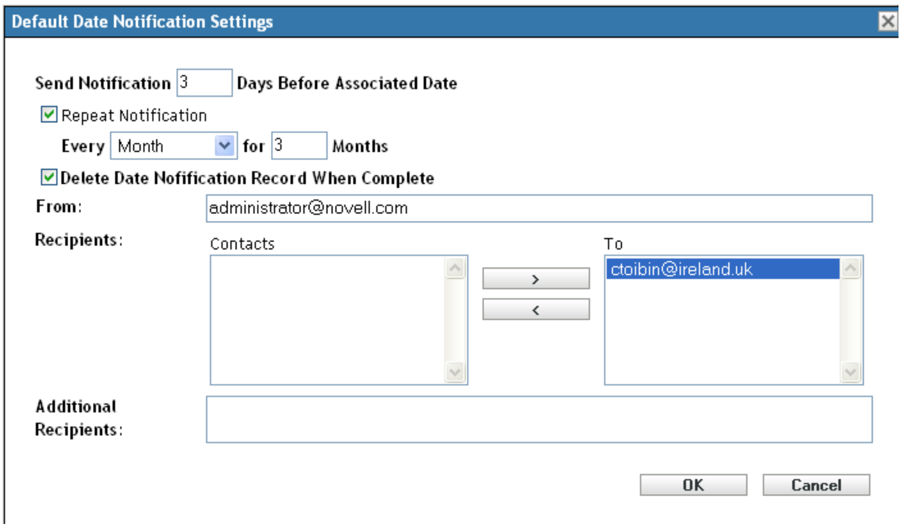
1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.



4 Click *Action* > *Default Date Notification Settings*.



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

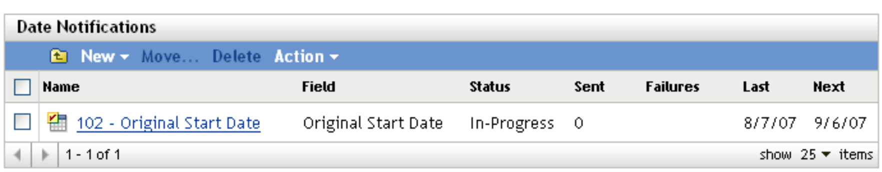
6 Click *OK*.

7.3.2 Creating a Folder for Date Notification Records

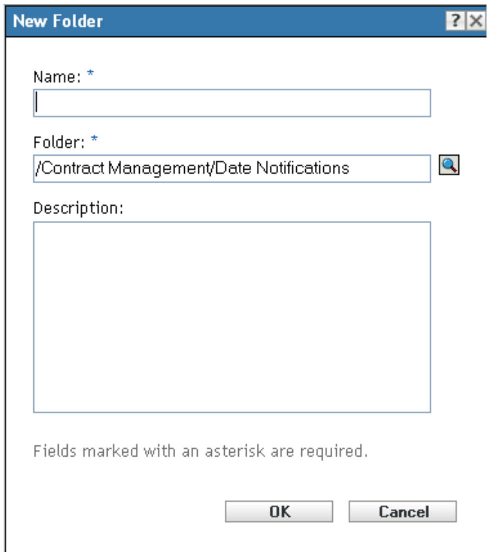
1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.



4 Click *New*.



5 Specify a name for the folder.

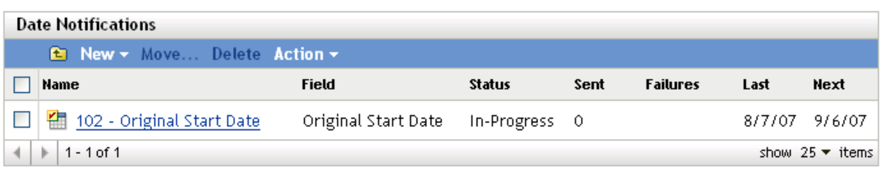
6 Click *OK*.

7.3.3 Moving a Date Notification Record

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

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.



4 Select the notification to move.

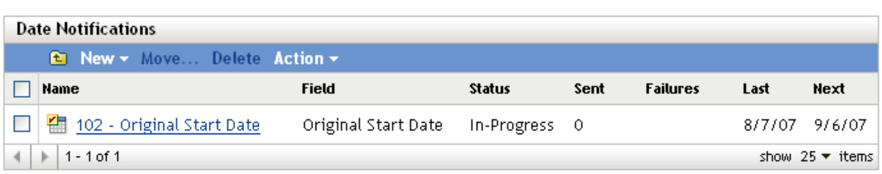
5 Click *Move*.

7.3.4 Deleting a Date Notification Record

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

2 Click the *Contract Management* tab.

3 Click *Date Notifications*.



4 Select the notification to delete.

5 Click *Delete*.

7.4 Using Contract Management Standard Reports

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

- Section 7.4.1, "Available Standard Reports," on page 76
- Section 7.4.2, "Running and Viewing Reports," on page 76

7.4.1 Available Standard Reports

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

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

7.4.2 Running and Viewing Reports

You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management 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 76
- "Exporting a Report to a Different Format" on page 77
- "Viewing the Report as a Graph" on page 77

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 43.

5 Click the links for more detailed information.

Exporting a Report to a Different Format

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 43.

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

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

Viewing the Report as a Graph

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

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

2 Click the *Contract Management* tab.

3 In the Contract Management panel, click *Contract Management Reports*.

4 In the Contract Management Standard Reports panel, click the report you want to run.

   Reports are listed by name and description. For a list of reports and descriptions, see Section 6.1.1, "Available Standard Reports," on page 43.

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

   A new window appears with the available graphs.

7.5 Using License Management Custom Reports

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

- Section 7.5.8, "Deleting a Custom Report or Folder," on page 84
- Section 7.5.9, "Viewing Scheduled Reports by Date and Title," on page 84
- Section 7.5.10, "Importing New Report Definitions," on page 85

7.5.1 Available Custom Reports

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

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

7.5.2 Running a Custom Report

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

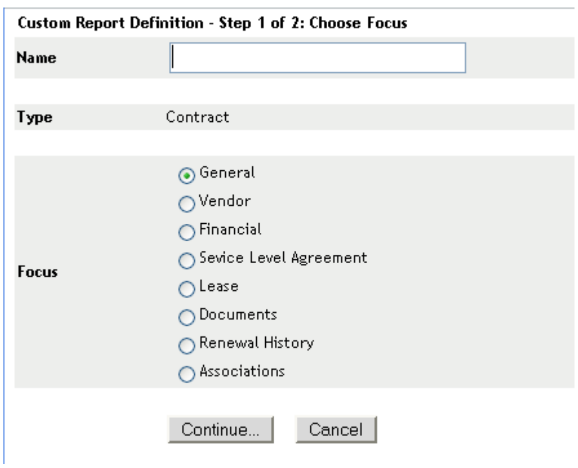
   The number of reports in each folder is shown in the *Report Count* column.
5. Click a report.

   The report definition appears. For information on editing the report definition, see Section 7.5.6, "Editing a Custom Report," on page 82.
6. Click *Run* in the lower left corner.

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

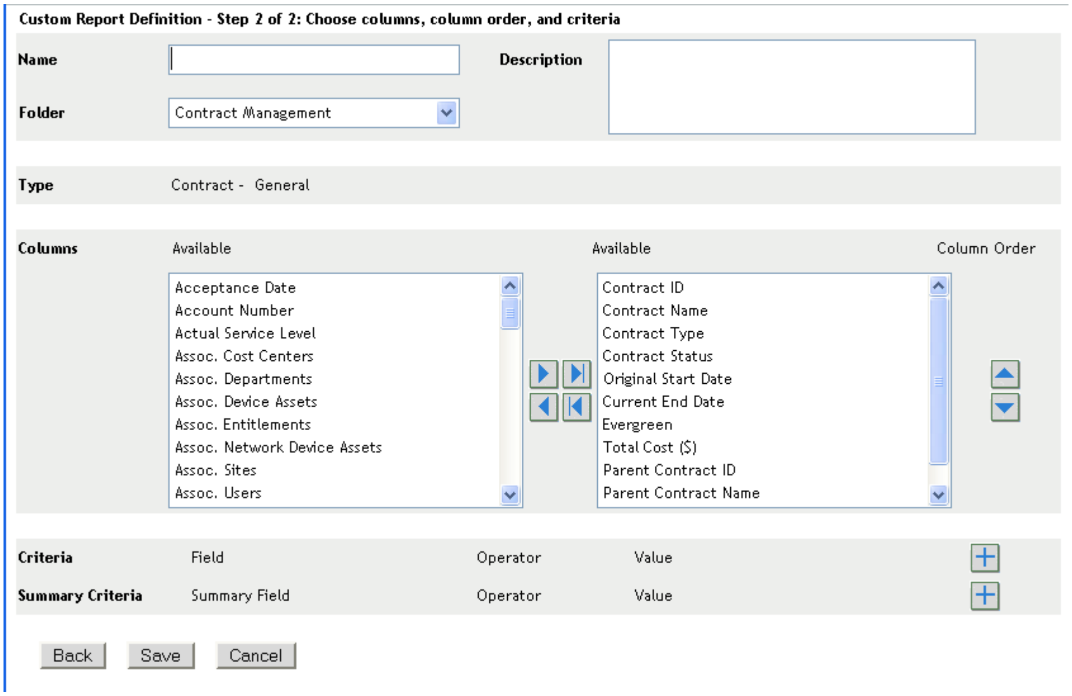
7.5.3 Creating a Custom Report

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



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*.



9 Fill in the following fields:

Name: Specify the name of the report.

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

Description: Specify a description for your report.

Type: Displays the report type you selected.

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

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

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

10 Click *Save*.

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

7.5.4 Scheduling a Custom Report and Sending Notifications

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

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

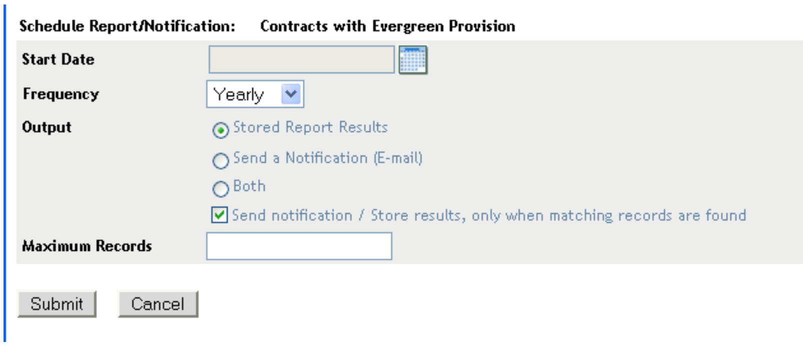
2 Click the *Contract Management* tab.

3 In the Contract Management panel, click *Contract Management Reports*.

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

5 Click the report you want to schedule.

6 Click *Schedule/Notification*.



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 54.

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

8 Click *Submit*.

7.5.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see Section 6.2.4, "Scheduling a Custom Report and Sending Notifications," on page 52.

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.

7.5.6 Editing a Custom Report

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

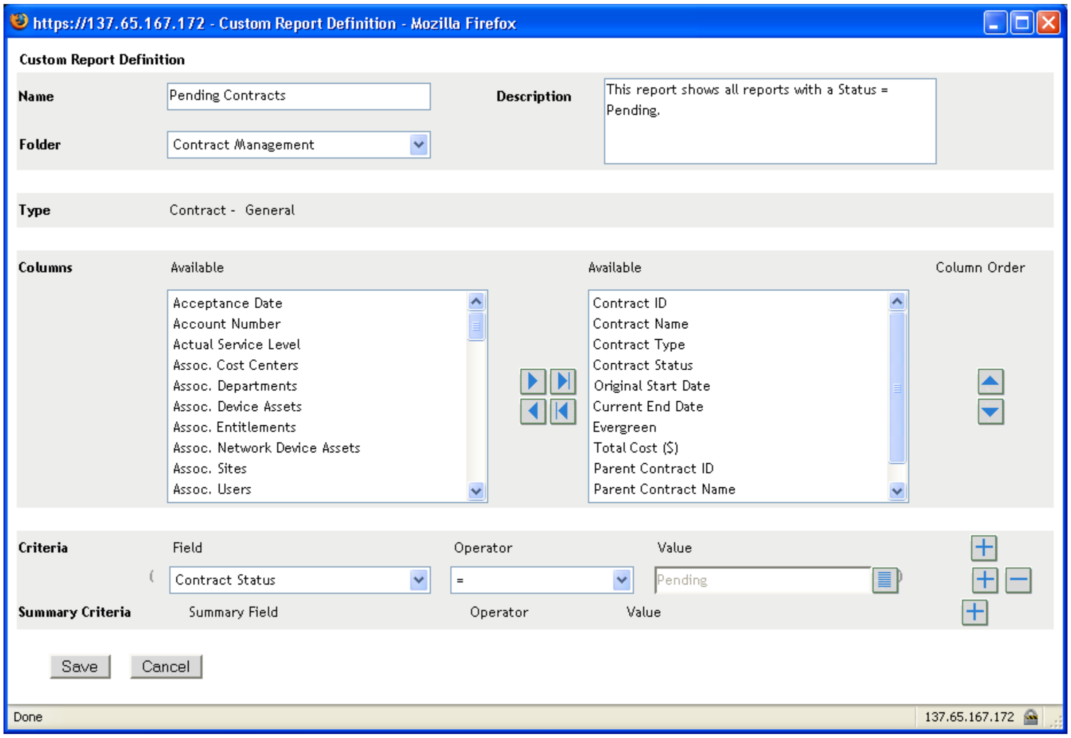
2 Click the *Contract Management* tab.

3 Click *Contract Management Reports*.

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

5 Click the report.

6 Click *Edit* in the lower left corner.



7 Edit the following fields:

Name: The name of the report.

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

Description: The description for your report.

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

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

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

8 Click *Save*.

7.5.7 Moving a Custom Report

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

2 Click the *Contract Management* tab.

3 In the Contract Management panel, click *Contract Management Reports*.

4 In the Contract Management Custom Reports panel, click the folder containing the report or reports you want to move.

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

7.5.8 Deleting a Custom Report or Folder

To delete a custom report:

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

To delete a folder:

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

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

7.5.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see Section 6.2.9, "Viewing Scheduled Reports by Date and Title," on page 59.

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

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

7.5.10 Importing New Report Definitions

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

To import report definitions:

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

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

7.6 Setting Asset Management Report Rights

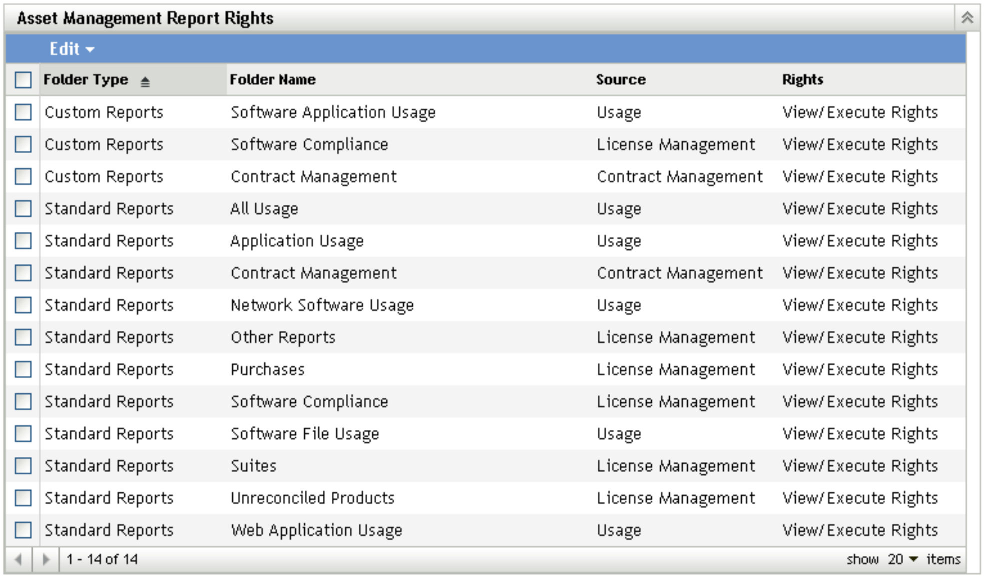
Asset Management report rights allow you to manage each administrator's rights for each folder and its reports. Each report folder has rights associated with it, governing all the reports within that folder. For example, if you have full rights, you can edit a report; but with view/execute rights, you can only see the report and run it. With 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:** This removes all rights to the folder, so the specified administrator cannot see it.
- **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- **Assign full rights:** This gives the specified administrator full rights to create, edit, move, and delete reports. For standard reports, this setting is the same as *View/Execute*, because you cannot alter a standard report.

To change inventory report rights:

1. In ZENworks Control Center, click *Configuration*.
2. In the Administrators panel, click an administrator.

3 In the Administrator Tasks panel, click *Asset Management Report Rights*.


Asset Management Report Rights

Edit

Folder Type	Folder Name	Source	Rights
Custom Reports	Software Application Usage	Usage	View/Execute Rights
Custom Reports	Software Compliance	License Management	View/Execute Rights
Custom Reports	Contract Management	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 - 14 of 14 show 20 items

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

5 Click one of the following:

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

The change is reflected in the *Rights* column.

7.7 Adding and Associating Documents

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

- Section 7.7.1, "Adding Documents," on page 86
- Section 7.7.2, "Associating Documents," on page 87

7.7.1 Adding Documents

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

2 Click the *Documents* tab.

3 In the Documents panel, click *New > Upload Document* to open the Upload New Document Wizard. Complete the wizard by using information from the following table to fill in the fields:

Wizard Page	Details
Specify Document File to Add page	Specify the file in the *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 added in step 1. **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*.

7.7.2 Associating Documents

To associate documents with entitlements, see Section 5.3.1, "Creating License Entitlements," on page 35.

To associate documents with contracts, see Section 7.2.6, "Documents Tab," on page 69.

To associated documents with summary purchase records, see Section 2.3, "Creating Purchase Summary Records," on page 16.

8 Using Software Collections

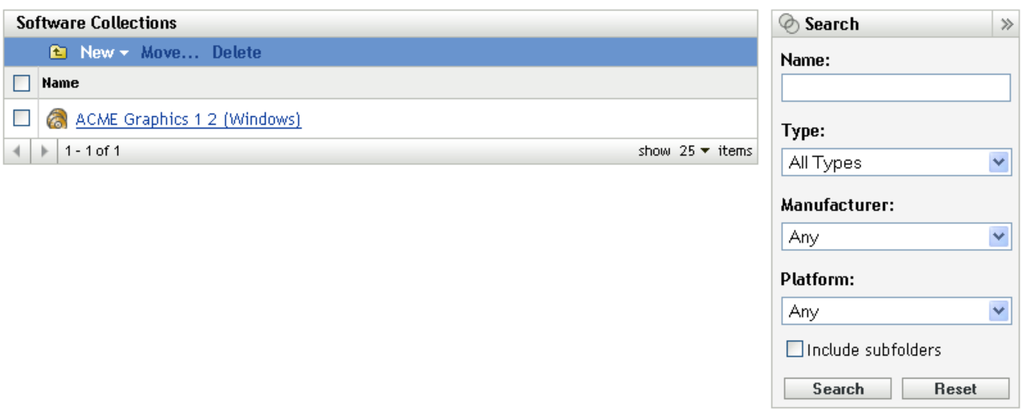
Software Collections allow you to consolidate products into a single collection, making it easier to keep track of compliance.

Managing your software collection involves three tasks:

- Section 8.1, "Creating a Software Collection," on page 89
- Section 8.2, "Deleting a Software Collection," on page 90
- Section 8.3, "Moving a Software Collection," on page 90

8.1 Creating a Software Collection

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



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

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

4 (Optional) Select *Define Additional Properties* to add member products to the software collection after you click *Finish*.

5 Click *Finish* to create the software collection. If you selected *Define Additional Properties* in Step 4, go on to Step 6.

6 Add member products to the software collection.

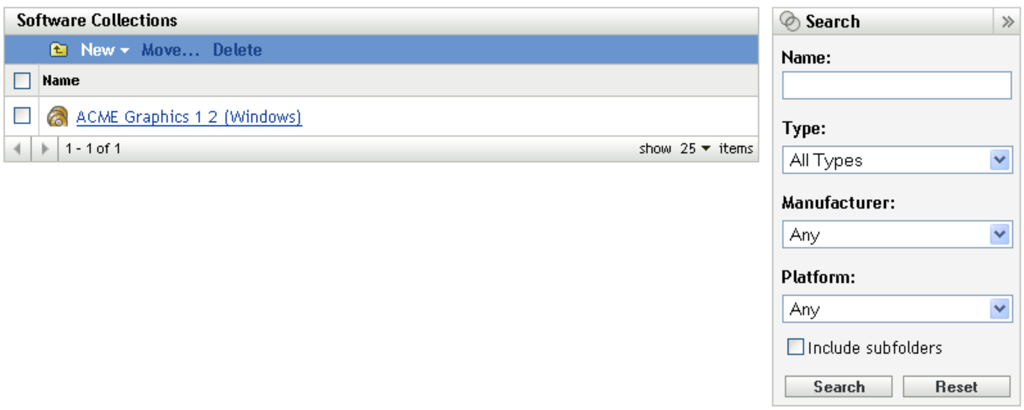
6a Click *Add > Installed Discovered Product* or *Add > Any Discovered Product*, depending on what you want to do.

6b Select the products you want to add, then click *OK*.

8.2 Deleting a Software Collection

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

2 Click *Software Collections*.



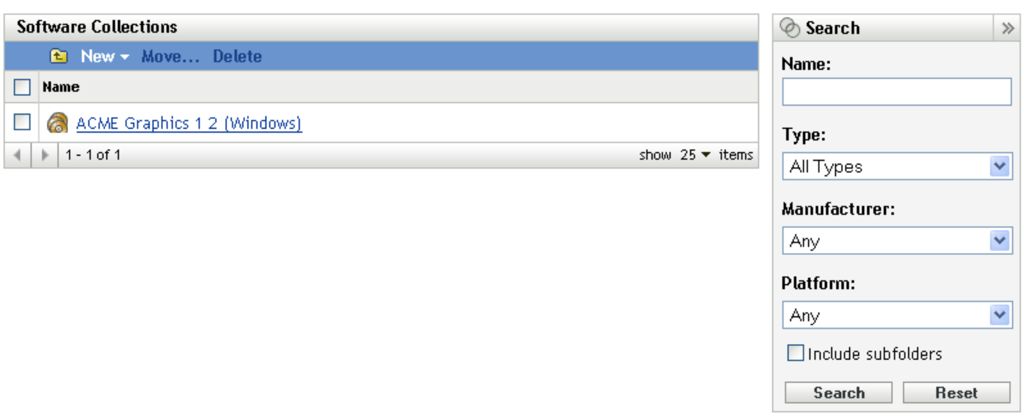
3 In the Software Collections panel, select the collections you want to delete.

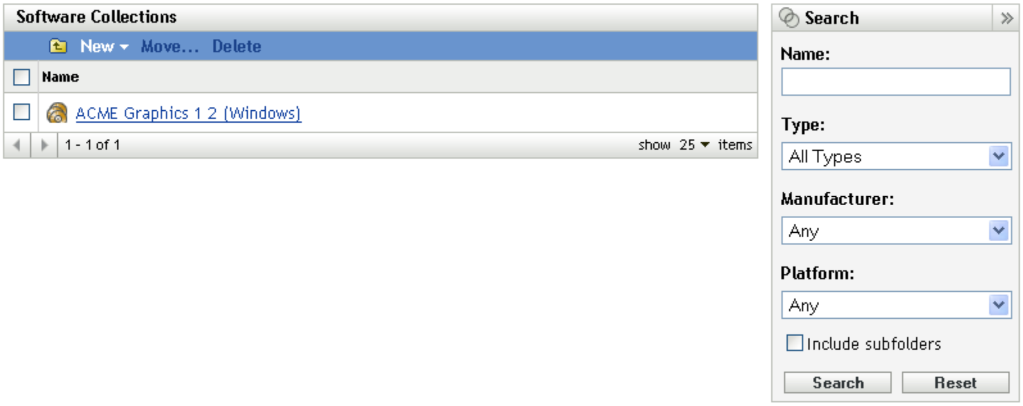
4 Click *Delete*.

8.3 Moving a Software Collection

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

2 Click *Software Collections*.





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

4 Click *Move*.

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

6 Click *OK*.

Monitoring Software Usage

9

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

9.1 Using Asset Management Standard Reports

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

9.1.1 Available Standard Reports

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

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

- **Served Application Usage by Device:** Shows served application usage grouped by device.
- **Usage Collection History:** Shows a history of data collection.

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

9.1.2 Running a Standard Report

You run a standard report by clicking it. Click the links in the report for more detailed information. Asset Management 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 95
- "Exporting a Report to a Different Format" on page 95
- "Viewing the Report as a Graph" on page 95
- "Changing the Time Period for a Report" on page 96
- "Changing the Filter Criteria for a Report" on page 96

Running a Report

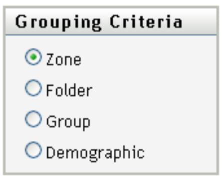
1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Software Usage* tab.

3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.

Reports are listed by name and description. For a list of reports and descriptions, see Section 9.1.1, "Available Standard Reports," on page 93.

4 (Optional) Select how you want to filter your search.



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

- **Zone:** Select *Zone* to collect data from the entire Management Zone.
- **Folder:** Select *Folder* and specify a folder name to gather data about that folder.
- **Group:** Select *Group* and specify a group name to gather data about that group.
- **Demographic:** Select *Demographic*, then select the criteria you want to use to filter the data.

5 Click the report to run it.

6 Click the links for more detailed information.

Exporting a Report to a Different Format

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

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

2 Click the *Software Usage* tab.

3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.

4 Click the report to run it.

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

Viewing the Report as a Graph

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

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

2 Click the *Software Usage* tab.

3 In the Software Usage Standard Reports panel, click the folder containing the report you want to run.

4. Click the report to run it.
5. Click *Graph* on the bottom of the report.

   A new window appears with the available graphs.

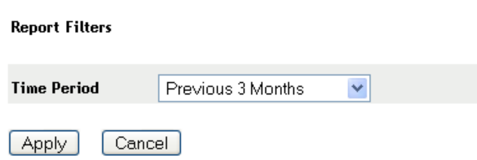
Changing the Time Period for a Report

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

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

To change the time period:

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



6. Select an interval in the *Time Period* field.
7. Click *Apply*.

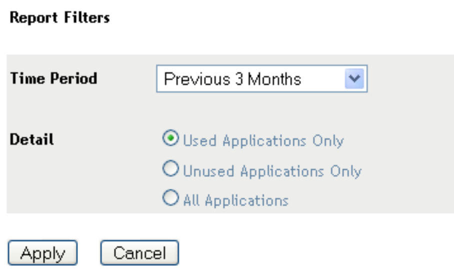
   The new time period is shown on the top left of the report.

Changing the Filter Criteria for a Report

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

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

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



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

7 Select one of the following filters:

- Used applications only
- Unused applications only
- All applications

8 Click *Apply*.

9.2 Using Asset Management Custom Reports

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

- Section 9.2.1, "Available Custom Reports," on page 97
- Section 9.2.2, "Running a Custom Report," on page 98
- Section 9.2.3, "Creating a Custom Report," on page 98
- Section 9.2.4, "Scheduling a Custom Report and Sending Notifications," on page 100
- Section 9.2.5, "Configuring E-Mail Addresses for Sending Notifications," on page 100
- Section 9.2.6, "Editing a Custom Report," on page 101
- Section 9.2.7, "Moving a Custom Report," on page 102
- Section 9.2.8, "Deleting a Custom Report or Folder," on page 103
- Section 9.2.9, "Viewing Scheduled Reports by Date and Title," on page 103
- Section 9.2.10, "Importing New Report Definitions," on page 104

9.2.1 Available Custom Reports

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

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

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

9.2.2 Running a Custom Report

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

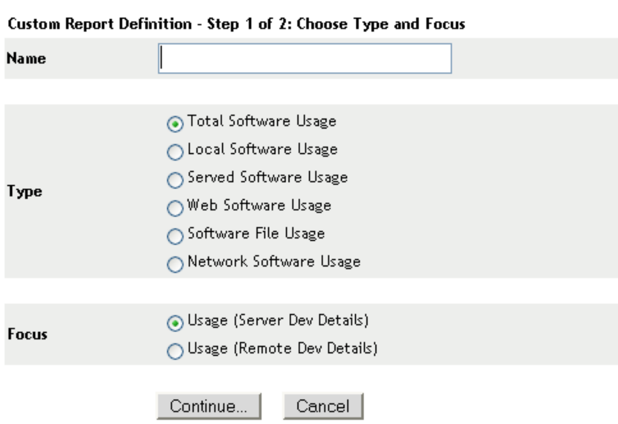
   The number of reports in each folder is shown in the *Report Count* column.
4. Click a report.

   The report definition appears. For information on editing the report definition, see Section 9.2.6, “Editing a Custom Report,” on page 101.
5. Click *Run* in the lower left corner.

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

9.2.3 Creating a Custom Report

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

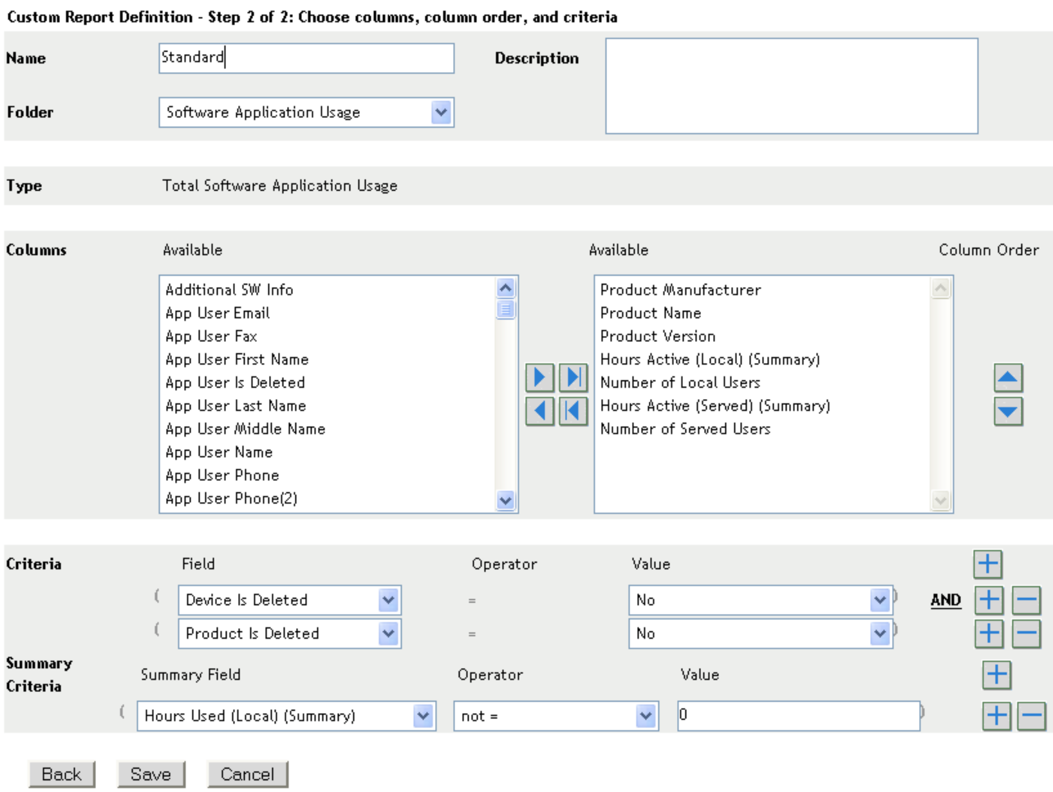


5. Specify a name in the *Name* field.
6. Select the report type. The types are:
   - Total software usage
   - Local software usage
   - Served software usage
   - Web software usage
   - Software file usage

- Network software usage

7 Select the focus of the report.

8 Click *Continue*.



9 Fill in the following fields:

Name: Specify the name of the report.

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

Description: Specify a description for your report.

Type: Displays the report type you selected.

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

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

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

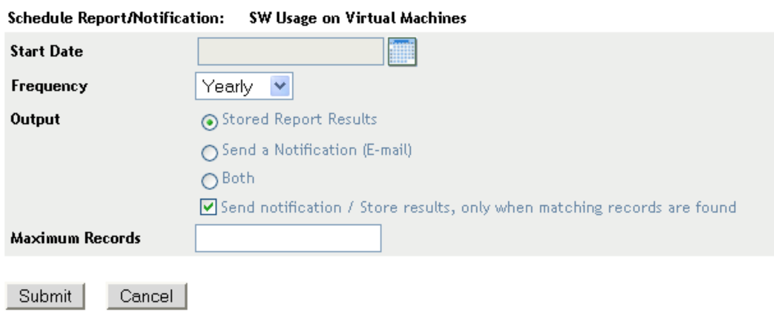
10 Click *Save*.

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

9.2.4 Scheduling a Custom Report and Sending Notifications

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

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



6. Fill in the following fields:

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

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

   Output: Select whether you want to store the report, send an e-mail notification that the report is ready, or both. You can also choose to store the results or send a notification only when matching records are found. For information on configuring e-mail addresses, see Section 9.2.5, "Configuring E-Mail Addresses for Sending Notifications," on page 100.

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

7. Click *Submit*.

9.2.5 Configuring E-Mail Addresses for Sending Notifications

You can send notifications to selected people when a custom report is run. To do this, you need to import the e-mail addresses of those you want to notify into ZENworks Control Center. For information on sending notifications, see Section 9.2.4, "Scheduling a Custom Report and Sending Notifications," on page 100.

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.

9.2.6 Editing a Custom Report

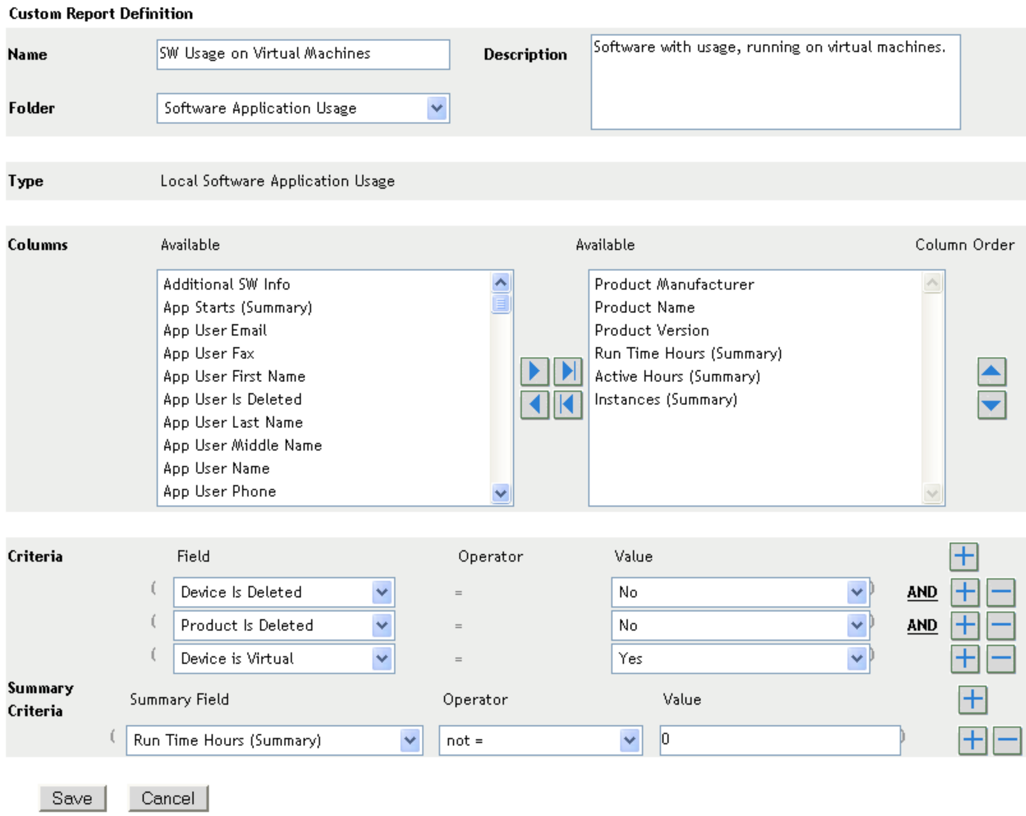
1 In ZENworks Control Center, click the *Asset Management* tab.

2 Click the *Software Usage* tab.

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

4 Click the report.

5 Click *Edit* in the lower left corner.



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 Ctr+click to select more than one option at a time. Use the up and down icons to arrange how you want the data displayed.

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

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

7 Click *Save*.

9.2.7 Moving a Custom Report

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

2 Click the *Software Usage* tab.

3 In the Software Usage Custom Reports panel, click the folder containing the report or reports you want to move.
4 Select the report or reports you want to move.
5 Click *Edit* > *Move*.
6 Select a new folder location.
7 Click *OK*.

9.2.8 Deleting a Custom Report or Folder

To delete a custom report:

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

To delete a folder:

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

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

9.2.9 Viewing Scheduled Reports by Date and Title

Reports that are run on a schedule are stored in a database. You can view these reports either by title or date. For information on scheduling reports, see Section 9.2.4, "Scheduling a Custom Report and Sending Notifications," on page 100.

To view a scheduled report by date or title:

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

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

9.2.10 Importing New Report Definitions

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

To import report definitions:

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

2 In the Software Usage Custom Reports panel, click *Action* > *Import New Report Definition*.

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

4 Click *Import*.

9.3 Setting Asset Management Report Rights

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 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:

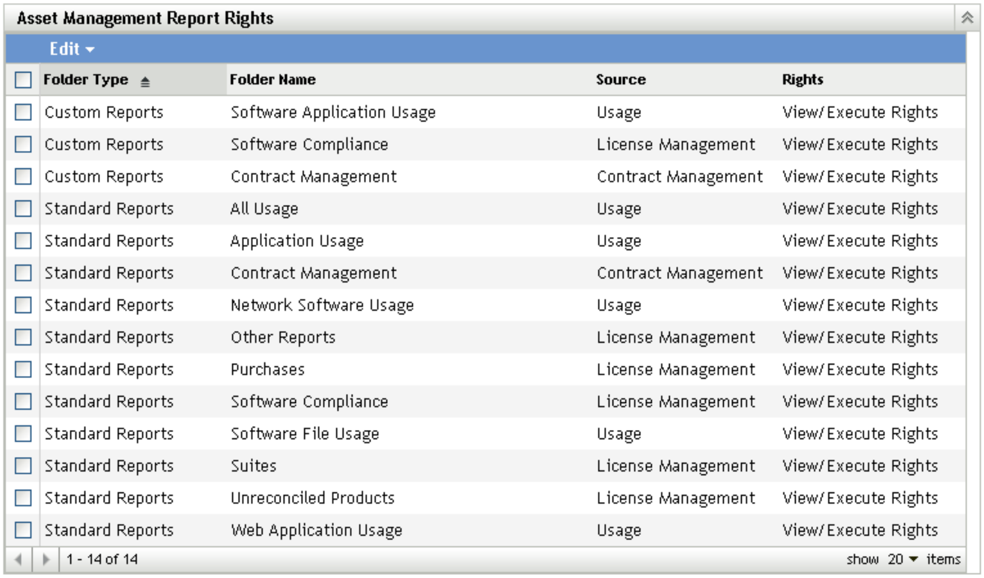
- **Remove all rights:** This removes all rights to the folder, so the specified administrator cannot see it.
- **Assign view/execute rights:** This allows the specified administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in that folder.
- **Assign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

To change inventory report rights:

1 In ZENworks Control Center, click *Configuration*.

2 In the Administrators panel, click an administrator.

3 In the Administrator Tasks panel, click *Asset Management Report Rights*.



Asset Management Report Rights

Edit

Folder Type	Folder Name	Source	Rights
Custom Reports	Software Application Usage	Usage	View/Execute Rights
Custom Reports	Software Compliance	License Management	View/Execute Rights
Custom Reports	Contract Management	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 - 14 of 14 show 20 items

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

5 Click one of the following:

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

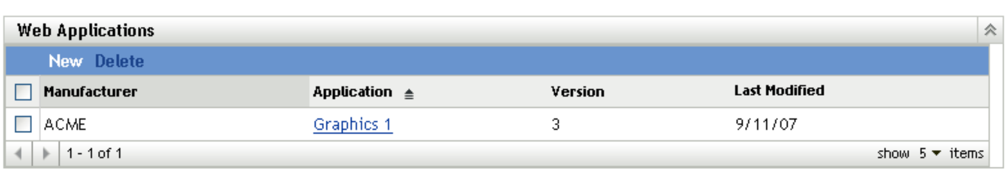
The change is reflected in the *Rights* column.

9.4 Monitoring Web Application Usage

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 9-1 *Web Applications Panel*



Web Applications

New Delete

Manufacturer	Application	Version	Last Modified
ACME	Graphics 1	3	9/11/07

1 - 1 of 1 show 5 items

More information is contained in the following sections:

- Section 9.4.1, “Defining a Web Application,” on page 106
- Section 9.4.2, “Editing a Web Application Definition,” on page 106

9.4.1 Defining a Web Application

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

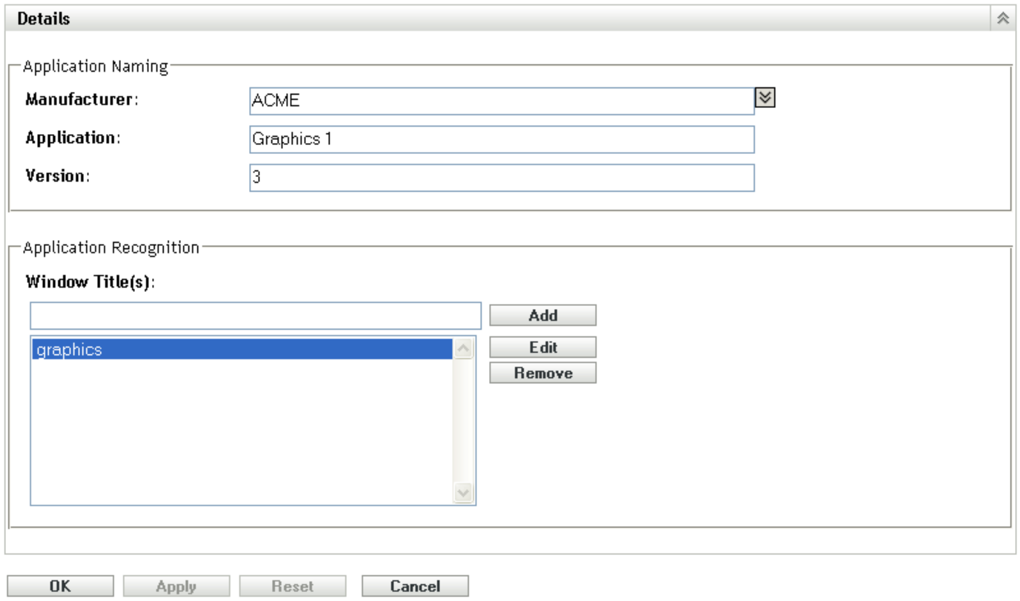
Wizard Page	Details
Application Naming page	Fill in the following fields: **Manufacturer:** The manufacturer of the Web application. **Application:** The application name. **Version:** The version of the application.
Application Recognition page	This page allows you to enter the window title bar text for the application. 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*.

9.4.2 Editing a Web Application Definition

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

3 In the Web Applications panel, click the name of the application you want to edit.



4 In the Details panel, edit the fields using information found in the table in Step 3 on page 106.

5 Click *OK* or *Apply*.

Using Administrator-Defined Fields

10

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

10.1 About Administrator-Defined Fields

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

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

10.2 Creating an Administrator-Defined Field

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

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

Wizard Page	Details
General Information page	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.

10.3 Editing an Administrator-Defined Field

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

2 In the Administrator-Defined Fields panel, click the type of field you want to edit: Contract or Licensed Product.

The Fields panel shows the following information:

Name: The name of the field.

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

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

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

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

Internal Name: The field's internal ID.

3 Click the field you want to edit.

4 Edit the fields in the Field Details panel.

The fields are described in the table in Step 3 on page 109.

5 Click *OK* or *Apply*.