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About This Guide

This *Novell ZENworks Asset Management Reference* includes information to help you manage the software licenses within your organization. The information in this guide is organized as follows:

- ♦ [Part I, “License Compliance,” on page 13](#)
- ♦ [Part II, “License Allocation,” on page 111](#)
- ♦ [Part III, “Software Usage,” on page 131](#)
- ♦ [Part IV, “Contracts,” on page 147](#)
- ♦ [Part V, “Documents,” on page 169](#)
- ♦ [Part VI, “Reports,” on page 177](#)

Audience

This guide is intended for ZENworks administrators.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation.

Additional Documentation

ZENworks Asset 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 .

License Compliance

ZENworks Asset Management lets you monitor software products in your organization to know whether or not your software deployment complies with your software licensing.

- ◆ Chapter 1, “License Compliance Concepts,” on page 15
- ◆ Chapter 2, “Setting Up License Compliance,” on page 25
- ◆ Chapter 3, “Configuring Compliance Settings,” on page 29
- ◆ Chapter 4, “Monitoring Compliance Status,” on page 31
- ◆ Chapter 5, “Generating Compliance Reports,” on page 39
- ◆ Chapter 6, “Working with Licensed Products,” on page 41
- ◆ Chapter 7, “Working with Entitlements,” on page 51
- ◆ Chapter 8, “Working with Discovered Products,” on page 65
- ◆ Chapter 9, “Working with Purchase Records,” on page 75
- ◆ Chapter 10, “Working with Catalog Products,” on page 87
- ◆ Chapter 11, “Working with Software Collections,” on page 97
- ◆ Chapter 12, “Configuring License Information Sources,” on page 101
- ◆ Chapter 13, “Asset Management Dashboard,” on page 109

1 License Compliance Concepts

Ensuring that your organization owns the licenses needed to cover the products your users have installed is a critical component of license management. At the same time, you want to minimize costs by purchasing only the number of licenses that you really need.

ZENworks Asset Management helps you attain this balance by monitoring and reporting the license compliance status (compliant, overcompliant, or undercompliant) of your software products.

The following sections introduce the concepts you should understand to effectively use Asset Management to manage software license compliance in your organization:

- ♦ [“License Compliance Components” on page 15](#)
- ♦ [“Entitlements” on page 18](#)
- ♦ [“Installation Data” on page 22](#)
- ♦ [“License Data” on page 23](#)
- ♦ [“Suites and Software Collections” on page 23](#)
- ♦ [“Version Upgrades” on page 24](#)

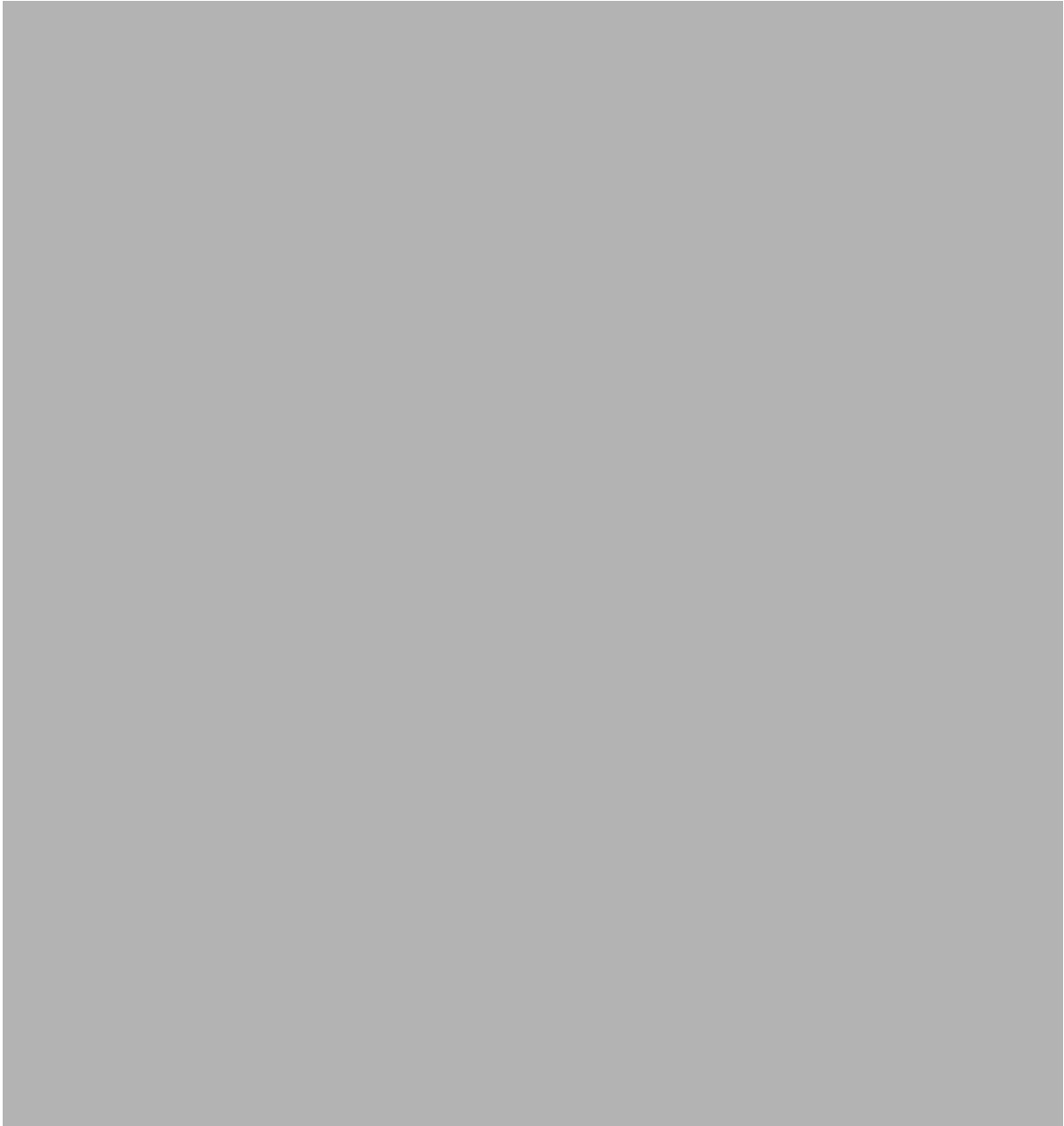
License Compliance Components

To know whether or not a software product’s deployment within your organization complies with your software product license records, you must reconcile three important pieces of information about the product:

- ♦ **Entitlement:** The rights to the software product, including how, where, and how long the product can be used. Can the user use the product only on the OEM machine with which it came? Can the user install the product on multiple machines under one license? Does each installation of the product require a license? Can the product be used forever, or does it have an expiration date? This information is contained in the software product’s license agreement or in a software purchase contract.
- ♦ **Licenses:** The number of licenses of the software product that your organization has purchased. Typically, this information comes from purchase records provided by the software vendor.
- ♦ **Installations:** The actual number of installations of the software product in your organization. ZENworks Asset Inventory can provide this information by scanning the devices in your organization (as long as the devices are registered in your ZENworks Management Zone). Or, you can manually provide this information.

The following illustration shows the components that Asset Management uses to bring your product information together:

Figure 1-1 Compliance Components



Licensed Product: A *licensed product* is the software product whose license compliance status you want to monitor. The information (entitlements, installations, and purchased licenses) needed to determine the compliance status is provided through the licensed product's components (entitlements, discovered products, catalog products, and purchase records).

A licensed product can be version independent (such as Product A) to cover multiple versions, or it can be version-specific (such as Product B Version 11).

License Entitlement: More than likely, not all of your purchases of a software product fall under the same license agreement. Some agreements might specify different license types (full, upgrade, and so forth), some might specify different license models (per-user, per-installation, OEM, and so forth), or some might have different license periods (perpetual or fixed-term).

Each different license agreement for the software product must be represented by a unique *license entitlement*. A license entitlement defines the agreement details such as the license type, license model, and license period. In addition, a license entitlement includes the number of product installations, the number of purchased licenses, and the users and devices whose product installations can be covered by the entitlement. Based on the entitlement details and the available licenses, consumed licenses (from installations), and coverage information, Asset Management determines the licensed product's compliance status.

In the example, Product A has two entitlements representing two license agreements with different license models:

- ♦ An OEM license agreement. The installations of the product on the covered OEM machines (M1, M2, M3, M4, and M5) are tracked against the OEM entitlement to monitor compliance with the OEM license agreement.
- ♦ A Per-User license agreement. All other installations are tracked against the Per-User entitlement to monitor compliance with that agreement.

More information about entitlements is included in [“Entitlements” on page 18](#).

Catalog Products: A *catalog product* identifies a software product for which you've purchased licenses. When added to an entitlement, a catalog product's licenses become available for consumption by the entitlement's installations.

Typically, a catalog product corresponds to a specific product part number. For example, when you purchase a single copy, a 10-pack, and a 100-pack of the same software product, each has a different product part number. As a result, each is a separate catalog product. Likewise, if you purchase two 10-packs of the same software product, one a full license pack and the other an upgrade license pack, each of these is a separate catalog product.

As a result, a single software product might have multiple catalog products. This allows you to assign the appropriate catalog products to the appropriate entitlements. In the example, the catalog products that represent non-OEM versions of Product A are associated with the Product A Per-User entitlement, resulting in 25 available licenses. The Product A OEM catalog product is associated with the Product A OEM entitlement, resulting in 5 available licenses.

More information about catalog products is found in [“License Data” on page 23](#).

Purchase Records: A *purchase record* provides details about the number of licenses purchased for a software product. The licenses roll up to the catalog product that represents the purchased software product.

When you purchase a software product over time, you end up with multiple purchase records for the same software product. In this case, the software product's licenses (included in each purchase record) roll up to the same catalog product. In the example, Product A (10-Pack) was purchased at two different times; however, the licenses from both purchase records are rolled into the Product A (10-Pack) catalog product.

If you have electronic purchase record files, you can import the purchase records. When you import a purchase record file, Asset Management creates catalog products for the software products included in the file. If you do not have purchase record files, you must manually enter the purchase records and manually create the catalog products.

If you do not have purchase records that include detailed software purchase information, you can create *purchase summary records* to represent the purchased licenses. To provide proof of purchases, you can attach supporting documents to the purchase summary records.

More information about purchase records is found in [“License Data” on page 23](#).

Discovered Products: A *discovered product* represents a software product installed in your Management Zone. When associated with an entitlement, the discovered product’s installations are eligible to consume the entitlement’s licenses.

If a discovered product’s installations can be covered by different entitlements (for the same licensed product), you can assign the discovered product to each entitlement. Based on the entitlements’ license models and coverage, the Asset Management compliance engine determines which entitlement covers each installation.

In the example, Product A (the discovered product) is associated with both entitlements. Five of the installations (on M1, M2, M3, M4, and M5) consume licenses in the Product A OEM entitlement. The other 20 installations consume licenses in the Product A Per-User entitlement.

More information about discovered products is found in [“Installation Data” on page 22](#).

Entitlements

As explained in [“License Compliance Components” on page 15](#), license entitlements are one of the three pieces of information that you need to understand and manage to effectively maintain license compliance for a software product. The following sections explain concepts that apply to entitlements:

- ♦ [“Entitlement Types” on page 18](#)
- ♦ [“License Models” on page 19](#)
- ♦ [“User Sources for User-Based License Models” on page 21](#)
- ♦ [“License Periods” on page 22](#)
- ♦ [“Compliance Calculations for Multiple Entitlements” on page 22](#)

Entitlement Types

When you create an entitlement, you specify the entitlement type. There are three different types of entitlements:

- ♦ **Full License:** Represents a license agreement that gives users the right to install the product without owning a previous version.
- ♦ **License/Maintenance:** Represents a license agreement that gives users full license rights to the purchased version and subsequent maintenance versions.
- ♦ **Version Upgrade:** Represents a license agreement that gives users rights to upgrade a previous product version to the new version. A Version Upgrade entitlement references a base entitlement to automatically adjust available licenses between itself and the base entitlement. More information about Version Upgrade entitlements is provided in [“Version Upgrades” on page 24](#).

License Models

When you create an entitlement, you specify the license model for the entitlement. The entitlement's license model determines 1) how license consumption is calculated and 2) which product installations can be covered by the entitlement.

There are different license models for entitlements that use Inventory installation data and for entitlements that use manually-entered installation data.

- ◆ [“License Models for Inventory Entitlements” on page 19](#)
- ◆ [“License Models for Manual Entitlements” on page 20](#)

License Models for Inventory Entitlements

The Inventory data for a discovered product includes information about the devices on which the product is installed and the primary users associated with those devices. This installation-to-device-to-user association supports the following *device-based* and *user-based* license models:

Table 1-1 License Models for Inventory Entitlements

License Model	License Consumption	Coverage	Example
Per-Installation	Each installation of the entitlement's discovered products consumes a license.	All devices.	20 users have the product installed on one device each. An additional 5 users each have the product installed on two devices. There are 30 total installations, and each installation consumes a license.
OEM	A covered device consumes a license whether or not any of the entitlement's discovered products are installed on the device.	Only the devices you specify as covered devices.	You specify 15 devices as covered devices. The product is installed on only 12 of the devices because three users have uninstalled the product. Even though there are 12 total installations, all 15 covered devices consume a license.
Machine	A covered device consumes a license only if one or more of the entitlement's discovered products are installed on the device.	Only the devices you specify as covered devices.	You specify 15 devices as covered devices. The product is installed on only 12 of the devices. Even though you specified 15 covered devices, there are 12 total installations, so 12 covered devices consume a license.

License Model	License Consumption	Coverage	Example
Per-User	Each user consumes a single license for any installations of the entitlement's discovered products, regardless of the number of installations.	All users. You can exclude specific users.	The entitlement includes two discovered products (DP1 and DP2). Both products are installed on User1's device. User1 consumes one license. Or, DP1 is installed on one of User1's devices and DP1 and DP2 are installed on another of User1's devices, User1 still consumes only one of the entitlement's licenses.
Per-Named User	Each covered user consumes a single license for any installations of the entitlement's discovered products, regardless of the number of installations.	Only the users you specify as covered users.	Same as the Per-User model.
Per Machine - Multi-Version	This license model consumes only one license if you have installed different versions of the same software on the same machine.	Only the devices you specify as covered devices.	If the entitlement discovers two versions of the same software (DP version 1 and DP version 2) on a user's (User 1) device, then only one license is consumed.

License Models for Manual Entitlements

When you manually enter installation data (rather than use the Inventory data), no device or user information is associated with the installations. Because of this, entitlements with manual data source support only *installation-based* license models. You provide the total installation quantity, and that quantity consumes any of the entitlement's available licenses.

There are several predefined license models for manual entitlements. These license models are intended to match the license models most commonly used in license agreements. If your license model is not represented, you can define it.

Table 1-2 License Models for Manual Entitlements

License Model	License Consumption	Coverage	Example
Unrestricted	Each installation consumes a license.	The specified installation quantity.	Example 1: 20 users have the product installed. The license agreement specifies a User license model. You select User as the entitlement's license model and enter 20 total installations to cover the product installations. The 20 installations consume any licenses associated with the entitlement.
Qualified Desktop CPU			
User			Example 2: 15 servers have a server product installed. The license agreement specifies a Server license model. You select Server as the entitlement's license model and enter 15 total installations to cover the product installations. The 15 installations consume any licenses associated with the entitlement.
Named User			
Server			
CAL			
Site			
Enterprise			

User Sources for User-Based License Models

Discovered product installations are associated with devices. For example, if a discovered product is found on two devices, both devices are recorded in the discovered product's information. This installation-to-device association enables the use of *device-based* license models (Per-Installation, OEM, and Machine).

To enable *user-based* license models (Per-User and Per-Named User), Asset Management uses an installation-to-device-to-user association. This means that each device must have a user associated with it. There are two different user sources that can provide this association. You must choose one or the other:

- ♦ **Inventory User Data:** Each device's Inventory data includes a user field. Asset Inventory does not automatically populate the field. There are three ways that you can populate the user information: 1) collect the information from users through an automated Inventory Collection Data form, 2) manually enter the user information by editing a device's Inventory data in ZENworks Control Center, or 3) migrate Inventory data from ZENworks 7.5 Asset Management.
- ♦ **Authoritative User Source:** This is the LDAP directory (or directories) your ZENworks Management Zone connects to for user information. By default, the ZENworks system is configured to automatically assign users from this source as primary users on devices. If a device has multiple users, the primary user is determined by a calculation method that you can select (usage based, login based, or direct assignment).

Both options work equally well. The Authoritative User Source method provides greater automation because you don't need to manually enter user information, migrate information, or rely on users to complete the automated collection form.

If you are using Asset Management with ZENworks 7 Desktop Management, you must use the Inventory User Data method. The ZENworks Agent's User Management feature, which is required with the Authoritative User Source method, cannot coexist on the same device with the ZENworks 7 Desktop Management Agent. Installing the User Management feature automatically uninstalls the Desktop Management Agent.

License Periods

License agreements (or contracts) might stipulate a period of time during which the product can be used. When you create an entitlement, you specify whether the license period is perpetual (never ending) or fixed term. With fixed term, you specify the start date and end date.

Compliance Calculations for Multiple Entitlements

It is common for a licensed product to have multiple entitlements that share the same discovered product. When this happens, the Software Compliance Engine must determine how the discovered product's installations are allocated among the entitlements.

The Software Compliance Engine processes the entitlements with the most restrictive license models first. The most restrictive entitlements have fewer installations that meet the restrictions. By processing them first, the greatest number of installations can be processed against the entitlements, increasing the likelihood that the entitlement's licenses are consumed.

Entitlements are processed in the following order (most restrictive to least restrictive):

1. **OEM:** Covers an installation only if it is on a specified device.
2. **Machine:** Covers an installation only if it is on a specified device.
3. **Named User:** Covers an installation only if it is associated with a specified user.
4. **Per User (with Installations > 1):** Covers an installation only if it is associated with a user that has the product installed at least twice.
5. **Per Installation:** Covers an installation on any device.
6. **Per User (with Installations = 1):** Covers an installation associated with any user.
7. **Manual:** Covers the manually specified number of installations.

If, after processing all of a licensed product's entitlements, there are discovered product installations that have not been consumed by an entitlement, the Software Compliance Engine reports the licensed product as undercompliant (more installations than licenses). Each unconsumed installation is also reported as an unresolved installation on the licensed product's Compliance Status page.

Installation Data

As explained in [“License Compliance Components” on page 15](#), the number of installations of a product is one of the three primary pieces of information that is required to determine the product's license compliance. Your installation data can come from two different sources:

- ♦ **Inventory Data:** Asset Inventory scans the devices in your ZENworks Management Zone and saves the installed software product information to the ZENworks database. Asset Management maps the installation information to discovered products. When a discovered product is associated with an entitlement, the discovered product's installations are eligible to consume one of the entitlement's licenses.

Using Inventory to provide the installation data is the recommended approach because it is the most automated. If a product is installed or uninstalled on a device, the change is automatically reflected in the data (and the corresponding discovered product) after the next Inventory scan. In addition, using Inventory data provides the ability to use both device-based and user-based license models (see [“License Models for Inventory Entitlements” on page 19](#)).

- ◆ **Manual Data:** You manually edit an entitlement (in ZENworks Control Center) to provide the number of product installations. This requires you to know how many devices have the product installed, and to change the number whenever installations are added or removed. In addition, you are limited to using only installation-based license models; device-based and user-based license models are not available (see [“License Models for Manual Entitlements” on page 20](#)).

An entitlement can use only one source for its installation data. However, a licensed product can include multiple entitlements, with some entitlements drawing installation data from Inventory data and other entitlements using manual data.

License Data

As explained in [“License Compliance Components” on page 15](#), the number of purchased licenses is one of the three primary pieces of information that is required to determine the product’s license compliance. You license data can come from two different sources:

- ◆ **Catalog Products and Purchase Records:** A catalog product identifies a software product for which you have purchased licenses. When added to an entitlement, a catalog product’s licenses become available for consumption by the entitlement’s installations.

A catalog product’s licenses come from purchase records for the software product. If multiple purchase records include license purchases for the software product, all licenses are rolled up to the catalog product.

Using catalog products and purchase records as the data source for your purchased licenses is the recommended method. Each time you add a purchase record for the software product, the catalog product’s available license quantity is automatically increased by the number of new licenses.

- ◆ **Purchase Summary Records:** A purchase summary record lets you directly enter a license quantity on an entitlement. The summary record includes the product’s description, cost, and license quantity. The disadvantage to using a purchase record summary is that it doesn’t enable you to track the product licenses through a catalog product and a purchase record.

An entitlement can use one or both sources for its available licenses.

Suites and Software Collections

In addition to standalone products, Asset Management can maintain license compliance for suite products such as Microsoft Office and OpenOffice.org. Suites are included as discovered products in the ZENworks Knowledgebase. A suite discovered product includes information about the suite members.

When an Inventory scan discovers a suite installed on a device (for example, through the registry settings), the installation is counted toward the suite’s installation total rather than the suite members’ installation totals. For example, if Microsoft Word, Microsoft Excel, and Microsoft

PowerPoint are installed as a Microsoft Office suite on a device, the installation is applied to the Microsoft Office discovered product and not the Word, Excel, and PowerPoint discovered products. However, if these applications are discovered as standalone products (no Microsoft Office installation), the installation is applied to each individual discovered products.

Software collections are administrator-defined suites. You can use them to account for suites that are not included in the ZENworks Knowledgebase. With a software collection, you define the member products and specify which member products must be installed on a device to qualify as a software collection installation. If all required member products are installed on a device, the installation counts towards the software collection. If some required member products are missing, the member product installations count towards the individual discovered products.

Version Upgrades

A typical license agreement for a software version upgrade stipulates that you replace installations of the base product with the upgrade product. In other words, the license entitlement (usage, quantity, and so forth) is transferred from the base product to the upgrade product.

For example, if you purchase 10 licenses of the base product and then purchase 6 licenses of the upgrade product, you are entitled to 4 installations of the base product and 6 installations of the upgrade product. The total number of installations (10) you are entitled to remains the same.

To account for version upgrades, Asset Management provides a type of entitlement called a Version Upgrade. With a Version Upgrade entitlement, you specify a base entitlement for the upgrade. The following applies to the base entitlement:

- ♦ It must belong to the same licensed product as the upgrade entitlement. In other words, you can't create an Upgrade Version entitlement in LicensedProduct1 and use a base entitlement from LicensedProduct2.
- ♦ It can be any of the three entitlement types: Full License, License/Maintenance, or Version Upgrade. This supports upgrades of upgrades.
- ♦ It can support multiple Version Upgrade entitlements. For example, EntitlementA can be the base entitlement for VersionUpgradeEntitlement1 and VersionUpgradeEntitlement2.

When a licensed product contains a Version Upgrade entitlement, the Software Compliance Engine calculates the available license quantity for the Version Upgrade entitlement and subtracts that license quantity from the base entitlement.

2 Setting Up License Compliance

The following sections provide instructions to help you set up license compliance for your software products:

- ♦ [“Preparing Your Management Zone” on page 25](#)
- ♦ [“Setting Up Compliance for Software Products” on page 26](#)
- ♦ [“Monitoring Compliance” on page 28](#)

If you have not already done so, review the concepts in [Chapter 1, “License Compliance Concepts,” on page 15](#) before beginning. In particular, make sure you understand the components introduced in [“License Compliance Components” on page 15](#).

Preparing Your Management Zone

Before you can begin setting up compliance for your software products, you need to prepare your ZENworks Management Zone. This includes configuring several Management Zone settings, discovering software products that are installed on devices in your Management Zone, and populating your Management Zone with software purchase information.

The following table explains the tasks you need to complete and where you can find specific instructions to help you complete them.

Table 2-1 Management Zone Preparation Tasks

Task	Details
■ Configure ZENworks Management Zone settings	<p>There are two ZENworks Management Zone settings related to license compliance. One setting determines when the compliance engine runs each day and the other setting determines the user source (authoritative user source or Inventory user data) for user-based license models.</p> <p>For instructions, see Chapter 3, “Configuring Compliance Settings,” on page 29.</p>

Task	Details
<p>■ Discover installed software products</p>	<p>Asset Management needs to know what software products are installed in your organization and how many installations exist for each product.</p> <p>Asset Inventory provides this information by scanning the devices in your ZENworks Management Zone to discover installed software products. Asset Management then filters the installed products through the Asset Management Knowledgebase to consolidate and combine the installed products into the list of discovered products used with license compliance.</p> <p>If you have not performed a software inventory scan of the devices in your zone, or if the software inventory data has not been updated recently, you must scan the devices to create a list of discovered products. You cannot manually create discovered products.</p> <p>For instructions, see the ZENworks Asset Inventory Reference.</p>
<p>■ Record software purchase information</p>	<p>Asset Management needs to know what software products you've purchased and how many licenses you've purchased for each product.</p> <p>You enter this information into the Asset Management system as purchase records and catalog products.</p> <p>For instructions, see "Creating Purchase Records" on page 77.</p>

Setting Up Compliance for Software Products

The following table explains the tasks you need to complete to configure software products for license compliance.

These tasks assume that you've already completed the tasks in ["Preparing Your Management Zone" on page 25](#) to populate your ZENworks Management Zone with discovered products and catalog products.

Table 2-2 *Compliance Setup Tasks*

Task	Details
<p>■ Create licensed products</p>	<p>A licensed product represents a software product whose license compliance you want to monitor. All of the information needed to determine a licensed product's compliance status (installations, purchased licenses, license usage agreements) is provided through the components associated with the licensed product</p> <p>For instructions, see "Creating a Licensed Product" on page 44.</p>

Task	Details
<p>■ Create entitlements</p>	<p>A license entitlement typically represents a license agreement for a licensed product. It includes such agreement details as the license type (full, upgrade, maintenance, and so forth) and the license model (per-user, per-installation, OEM, machine, and so forth). Based on the license model, it also specifies which users or machines are covered by the entitlement.</p> <p>Some licensed products might have only one entitlement. For example, you might have a product whose installations all fall under a full license, per-installation agreement.</p> <p>Other products, however, might have multiple entitlements. For example, you might have a product for which you have OEM-licensed installations and per-user licensed installations. To correctly cover both license agreements, you need two entitlements with different license models and user/machine coverage. A second example might be a product that includes a full license agreement and a version upgrade agreement.</p> <p>If you used the Auto-Reconcile Wizard to create licensed products, an entitlement was created for each licensed product. If any of the licensed products require additional entitlements, you can add them at this time. If you manually created licensed products, they do not yet have entitlements; you must create them.</p> <p>For instructions, see “Creating an Entitlement” on page 52.</p>
<p>■ Add catalog products or Add purchase summary records</p>	<p>To populate a licensed product with the number of licenses you have purchased for the product, you add catalog products to the licensed product’s entitlements.</p> <p>If you used the Auto-Reconcile Wizard to create licensed products, catalog products might already have been added to some of the licensed products. If any licensed products require additional catalog products, you can add them at this time. For instructions, see “Adding Catalog Products” on page 57.</p> <p>If you don’t have a catalog product to assign to a licensed product, you can use purchase summary records to add licenses to the licensed product. For instructions, see “Adding Purchase Summary Records” on page 58.</p>
<p>■ Add discovered products</p>	<p>If a licensed product you created includes an Inventory entitlement (an entitlement that draws its installation counts from Inventory data), you need to add discovered products to the entitlement. The discovered products associate the appropriate software product installations with the licensed product, Per-User, Per-Named User, OEM, Machine, and Per-Installation are the Inventory entitlements.</p> <p>For instructions, see “Adding Discovered Products” on page 58.</p>

Task	Details
■ Specify users and devices covered by the entitlement	<p>If you created an entitlement that uses an OEM, Machine, Per-Named User, or Per-User license model, you must specify with devices or users are covered by the entitlement.</p> <p>For instructions, see “Specifying User and Device Coverage” on page 59.</p>

Monitoring Compliance

The following table explains how you can monitor a product’s compliance status.

Table 2-3 *Compliance Monitoring Tasks*

Task	Details
■ View compliance status in ZENworks Control Center	<p>ZENworks Control Center provides both high-level and detailed views of a product’s compliance status. The high-level views let you see if a product is compliant, undercompliant, or overcompliant. The detailed views let you see why a product’s compliance status is what it is.</p> <p>For instructions, see Chapter 4, “Monitoring Compliance Status,” on page 31.</p>
■ Generate compliance reports	<p>You can generate reports that show the compliance status for all products or only the products that have a specific compliance status. You can also generate reports that help you manage your discovered products, catalog products, and purchase records.</p> <p>For instructions, see Chapter 5, “Generating Compliance Reports,” on page 39.</p>

3 Configuring Compliance Settings

There are two ZENworks Management Zone settings related to license compliance. One setting determines when the compliance engine runs each day and the other setting determines the user source (authoritative user source or Inventory user data) for user-based license models.

To configure the settings:

- 1 In ZENworks Control Center, click the **Configuration** tab.
- 2 In the Management Zone Settings panel, click **Asset Management** to display the settings.
- 3 Configure the Compliance setting:

3a Click **Compliance**.

3b Select the time you want the compliance engine to run each day.

The compliance engine refreshes the compliance data and status for each licensed product. The default run time is 11:00 pm each day.

3c Click **OK**.

- 4 Configure the User Source setting:

To support user-based license models (Per-User and Per-Named User), Asset Management requires an installation-to-device-to-user association so that any product installations on a device can be assigned to the device's user. The installation-to-device association is created through Inventory scans. There are two different user sources that can be used to provide the device-to-user association.

4a Click **User Source**, then select one of the following user sources:

- ♦ **Inventory user data:** Each device's Inventory data includes an **Entered User** field that associates a user to the device (**Device** tab > device > **Inventory** page > **Detailed Hardware/Software Inventory** link > **Entered User** field).

Asset Inventory does not automatically populate the **Entered User** field. If you use this source, make sure that each device has an **Entered User**. There are three ways that you can populate the user information: 1) collect the information from users through an automated Inventory Collection Data form, 2) manually enter the user information by editing a device's Inventory data in ZENworks Control Center, or 3) migrate Inventory data from ZENworks 7.5 Asset Management.

- ♦ **Authoritative user source:** This is the LDAP directory (or directories) your ZENworks Management Zone connects to for user information. By default, the ZENworks system is configured to automatically assign users from this source as primary users on devices. If a device has multiple users, the primary user is determined by a calculation method that you can select (usage based, login based, or direct assignment).

You can use only one source at a time. If you change the source, all existing assignments of licenses to users are removed.

IMPORTANT: If you are using ZENworks 7 Desktop Management with ZENworks Asset Management on the same devices, use the **Inventory user data** option instead of the **Authoritative user source** option. The **Authoritative user source** option requires the

ZENworks Agent User Management feature to be installed. However, the User Management feature cannot coexist with the ZENworks 7 Desktop Management Agent, which results in the ZENworks 7 Desktop Management Agent being uninstalled.

4b Click **OK**.

4 Monitoring Compliance Status

There are multiple locations in ZENworks Control Center where you can view the compliance status of licensed products.

- ♦ [“Home Page” on page 31](#)
- ♦ [“Licensed Products List” on page 31](#)
- ♦ [“Licensed Product’s Compliance Status Page” on page 32](#)

Home Page

The Asset Management panel on the Home page lists the total number of properly licensed products (■), underlicensed products (■), and overlicensed products (■). You can click a status to view the licensed products with that status.



Licensed Products List

The Licensed Products list (**Asset Management** tab > **License Management** tab > **Licensed Products**) displays whether a product is properly licensed (■), under licensed (■), or over licensed (■).



You can click a licensed product to display details about the compliance status (see [“Licensed Product’s Compliance Status Page”](#) on page 32). You can also use the Search filter to display only the licensed products with a specific status.

Licensed Product’s Compliance Status Page

A licensed product’s compliance status is determined by the compliance status of each of its entitlements. For example, three entitlements might be properly licensed and one entitlement underlicensed. The licensed product’s status shows as underlicensed.

A licensed product’s Compliance Status page shows details about the license compliance status for each entitlement. If the licensed product is non-compliant, you can use the details to understand what needs to be done to make it compliant.

To access a licensed product’s Compliance Status page:

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



- 3 Click the licensed product.
- 4 Click the **Compliance Status** tab.

The Compliance Status page includes the following panels:

- ◆ **License Consumption (Consumption Data Source: Inventory):** Displays the installation data for discovered products associated with this licensed product.
The **Net Consumption** field provides the total number of installations for a discovered product. It is determined by the following formula: $Net\ Consumption = (Installed\ Quantity + Additional\ Consumption) - Ignored\ Installations$. Installed Quantity is the number of installations discovered by Inventory scans. Additional Consumption and Ignored Installations are manual adjustments that can be made by editing the discovered product's details.
- ◆ **Compliance Status (Consumption Data Source: Inventory):** Displays the compliance status for all entitlements that use Inventory installation data.
- ◆ **Unresolved Installations:** Displays any discovered products with installations that are not covered by an entitlement. This panel is displayed only when there are unresolved installations.
- ◆ **Compliance Status (Consumption Data Source: Manual):** Displays the compliance status for all entitlements that use manually entered installation data.

License Consumption (Consumption Data Source: Inventory)

This panel displays the installation data for discovered products associated with this licensed product.

For license compliance, the following fields are important:

- ◆ **Net Consumption:** Provides the total number of installations for a discovered product. All of these installations must be covered by the entitlements in order for the licensed product to be compliant. The net consumption is determined by the following formula:

$Net\ Consumption = (Installed\ Quantity + Additional\ Consumption) - Ignored\ Installations$.

Click the consumption number to view the discovered product's Installations/Consumptions page. This page provides details for the installation and consumption data and lets you ignore installations and specify additional consumption.

- ◆ **Installed Quantity:** Displays the number of installations discovered by Inventory scans.
- ◆ **Additional Consumption:** Displays the number of extra installations that are included in the compliance calculations. This is a manual adjustment that you can make if there are installations that were not found by Inventory scans that you want included in the net consumption. For instructions, see [“Adjusting a Discovered Product's Installation Count” on page 70](#).
- ◆ **Ignored Installations:** Displays the number of installations that are excluded from the compliance calculations. This is a manual adjustment that you can make if there are installations you don't want included in the net consumption. For instructions, see [“Adjusting a Discovered Product's Installation Count” on page 70](#).

Compliance Status (Consumption Data Source: Inventory)

This panel displays the compliance status for all entitlements that use Inventory installation data.

For license compliance, the following fields are important:

- ♦ **Installations Covered:** Displays the number of installations covered by the entitlement.

For Machine, OEM, and Per-Installation entitlements, each installation consumes a license. Therefore, for these entitlements, the number of covered installations equals the number of consumed licenses.

For Per-User and Per-Named User entitlements, a user consumes one license regardless of the number of installations associated with the user. A user might have installations on five devices, but only one license is consumed. Therefore, for these entitlements, the number of covered installations can be greater than the number of consumed licenses.

The total Installations Covered (for all entitlements) should equal the total Net Consumption in the License Consumption (Consumption Data Source: Inventory) panel. If it does not, some discovered product installations are not being covered by an entitlement. These installations are listed in the Unresolved Installations panel.

- ♦ **License Quantity:** Displays the number of licenses included in the entitlement, either through catalog products assigned to the entitlement or purchase summary records created for the entitlement.
- ♦ **Licenses Consumed:** Displays the number of licenses consumed by the covered installations.
- ♦ **Over/Under:** Displays the license compliance status. 0 indicates that the consumed licenses (Licenses Consumed) equal the number of available licenses (License Quantity). A negative number indicates that consumed licenses exceed the number of available licenses (undercompliant). A positive number indicates that available licenses exceed the consumed licenses (overcompliant).

If there are multiple entitlements, the licensed product's overall compliance status is determined as follows:

- ♦ If any entitlement is undercompliant, the licensed product is assigned an undercompliant status (■).
- ♦ If no entitlements are undercompliant but an entitlement is overcompliant, the licensed product is assigned an overcompliant status (■).
- ♦ If all entitlements are compliant, the licensed product is assigned a compliant status (■).

Unresolved Installations

This panel lists any discovered products with installations that are unable to consume an entitlement's license.

The following information is provided for each unresolved installation:

- ♦ **Discovered Product:** The discovered product that has unresolved installations. You can click the discovered product to view its details.
- ♦ **Licenses Consumed:** The number of installations that are unable to consume a license from one of the entitlements. You can click the number to view a list of the devices associated with the unresolved installations.

Unresolved installations can be caused by a variety of reasons. The following sections provide examples and solutions for unresolved installations.

Example 1

Product A includes the following two entitlements:

Entitlement	License Model	License Quantity	Discovered Products	Coverage
Version 6	Per-Named User	3	Product A Version 6	User 1, User 2, User 3
Version 7	OEM	5	Product A Version 7	Machine 1, Machine 2, Machine 3, Machine 4, Machine 5

An Inventory scan discovers installations of Version 6 on the machines of User 1, User 2, and User 4. The installation on User 4's machine is not covered by the Version 6 entitlement (because User 4 is not one of the named users) and it is not covered by the Version 7 entitlement (because it is the wrong version). Therefore, Product A has one unresolved installation of Version 6 because the installation cannot consume licenses from either of the entitlements.

There are several solutions to this situation, including the following:

- ♦ Modify the Version 6 entitlement so that it covers User 4.
- ♦ Create a Per-Installation entitlement that also covers Product A Version 6. User-based entitlements (Per-User and Per-Named User) and machine-based entitlements (OEM and Machine) are evaluated first, then any Per-Installation entitlements are checked. In this situation, the installation would be covered by the Per-Installation entitlement.

Example 2

Product A includes the following entitlements:

Entitlement	License Model	License Quantity	Discovered Products	Coverage
Version 6	Per-User	15	Product A Version 6	Any users
All	Per-Installation	40	Product A Version 6 Product A Version 7	Any installation

An Inventory scan discovers 26 installations of Version 6. The 26 installations belong to 22 users; 21 users are associated with one installation each, and 1 user is associated with 5 installations.

All 15 Per-User licenses are consumed, accounting for 19 of the installations (1 user with 5 installations and 14 users with 1 installation). The installations for users 16 through 22 cannot consume a license because there are no more licenses available, so the remaining 7 installations associated with those users fall through to the All entitlement. Because the All entitlement's licenses also cover Product A Version 6, the installations consume 7 of the 40 licenses for that entitlement.

If the All entitlement did not exist, the 7 installations would remain unresolved and Version 6 would be listed in the Unresolved Installations panel.

There are several solutions to this situation, including the following:

- ◆ Add 7 additional licenses to the Version 6 entitlement to cover the installations.
- ◆ Create a Per-Installation entitlement that also covers Product A Version 6. User-based entitlements (Per-User and Per-Named User) and machine-based entitlements (OEM and Machine) are evaluated first, then any Per-Installation entitlements are checked. In this situation, the installation would be covered by the Per-Installation entitlement.

Example 3

Product A includes the following entitlement:

Entitlement	License Model	License Quantity	Discovered Products	Coverage
Version 6	Machine	10	Product A Version 6	Machine1, Machine2, Machine3

An Inventory scan discovers 5 installations of Product A Version 6 on Machine1 through Machine5. The installations on Machine4 and Machine5 are reported as unresolved installations because the two machines are not covered by the Version 6 entitlement.

There are several solutions to this situation, including the following:

- ◆ Modify the Version 6 entitlement so that it covers Machine4 and Machine5.
- ◆ Create a Per-Installation entitlement that also covers Product A Version 6. Machine-based entitlements (OEM and Machine) and user-based entitlements (Per-User and Per-Named User) are evaluated first, then any Per-Installation entitlements are checked. In this situation, the two installations would be covered by the Per-Installation entitlement.

Compliance Status (Consumption Data Source: Manual)

This panel displays the compliance status for all entitlements that use manually-entered installation data.



For license compliance, the following fields are important:

- ◆ **License Quantity:** Displays the number of licenses included in the entitlement, either through catalog products assigned to the entitlement or through purchase summary records created for the entitlement.
- ◆ **Licenses Consumed:** Displays the number of the entitlement's licenses that have been consumed. This number comes from the Quantity Consumed number assigned to the entitlement (entitlement > **General** tab > **Quantity Consumed**).

- ♦ **Over/Under:** Displays the license compliance status. 0 indicates that the consumed licenses (**Licenses Consumed**) equal the number of available licenses (**License Quantity**). A negative number indicates that consumed licenses exceed the number of available licenses (undercompliant). A positive number indicates that available licenses exceed the consumed licenses (overcompliant).

If there are multiple entitlements, the licensed product's overall compliance status is determined as follows:

- ♦ If any entitlement is undercompliant, the licensed product is assigned an undercompliant status (■).
- ♦ If no entitlements are undercompliant but an entitlement is overcompliant, the licensed product is assigned an overcompliant status (■).
- ♦ If all entitlements are compliant, the licensed product is assigned a compliant status (■).

5 Generating Compliance Reports

ZENworks Asset Management includes a variety of reports that you can generate to view compliance and compliance-related data. In addition to viewing predefined reports, you can create custom reports and export reports to several file formats.

The compliance report information is combined with the software usage and contract management report information in [Part VI, “Reports,” on page 177](#). The following list provides direct links to compliance report sections:

- ◆ Descriptions for all standard and custom reports: [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#).
- ◆ How to run standard reports: [Chapter 36, “Working with Standard Reports,” on page 189](#).
- ◆ How to create and generate custom reports: [Chapter 37, “Working with Custom Reports,” on page 193](#)

6 Working with Licensed Products

A licensed product represents a software product whose license compliance you want to monitor. All of the information needed to determine a licensed product's compliance status (installations, purchased licenses, license usage agreements) is provided through the components associated with the licensed product (see [“License Compliance Components” on page 15](#)).

The following sections explain the tasks associated with managing licensed products:

- ◆ [“Viewing the Licensed Products List” on page 41](#)
- ◆ [“Filtering the Licensed Products List” on page 42](#)
- ◆ [“Creating a Licensed Product Folder” on page 43](#)
- ◆ [“Refreshing Compliance Status” on page 43](#)
- ◆ [“Creating a Licensed Product” on page 44](#)
- ◆ [“Changing a Licensed Product’s General Information” on page 48](#)
- ◆ [“Adding Custom Fields to Licensed Products” on page 48](#)
- ◆ [“Merging Licensed Products” on page 50](#)
- ◆ [“Deleting a Licensed Product” on page 50](#)
- ◆ [“Moving a Licensed Product” on page 50](#)

Viewing the Licensed Products List





You can view a list of all of your licensed products. The list provides general information about each licensed product, such as its compliance status and whether or not discovered products and catalog products are associated with it.

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

The list provides the following information for each licensed product:

Name: Displays the name of the licensed product. You can click the name to display the licensed product's details.

Status: Indicates the product's license compliance status:

- ◆  Properly licensed: The number of licenses match the number of installations.
- ◆  overlicensed: There are more licenses than installations.
- ◆  underlicensed: There are more installations than licenses.
- ◆  Unknown: The compliance status has not been evaluated. If you don't want to wait for the next scheduled compliance status refresh, click **Action > Refresh Compliance Status**.

Click the status to view detailed compliance status information.

Discovered Products: Indicates that at least one discovered product is associated with the licensed product.

Catalog Products: Indicates that at least one catalog product is associated with the licensed product.

License Quantity: Displays the number of licenses associated with the licensed product through entitlements. Click the quantity number to manage (view, add, or remove) the product's entitlements.

Allocated Quantity: Displays the number of licenses that are allocated, either through allocations to specific devices or allocations to a department, site, or cost center. Click the number to display the allocation details.

Filtering the Licensed Products List

You can filter the Licensed Product list to display only the licensed products that meet certain criteria.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Search panel (located next to the Licensed Products panel), specify the criteria to use for the filter. A product must match all criteria to be displayed.

Name: Specify the text that the licensed product name (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a licensed product name, the product matches the criteria.

Type: Select whether you want to match folders, licensed products, or both.

Manufacturer: Select a specific manufacturer, or select **Any** to match any manufacturers.

Reconciliation Status: Select one of the following to match:

- ◆ **Any:** Ignore the reconciliation status. Match any licensed products.
- ◆ **Without Catalog Products:** Match licensed products that don't have any catalog products, but have discovered products.
- ◆ **Without Discovered Products:** Match licensed products that don't have any discovered products, but have catalog products.
- ◆ **Without Any Products:** Match licensed products that don't have any catalog products and discovered products.
- ◆ **With Catalog and Discovered Products:** Match licensed products that have both catalog products and discovered products.

Allocation Status: Select whether to match licensed products with allocations, without allocations, or both.

Compliance Status: Select one of the following to match:

- ◆ **Any:** Ignore the compliance status. Match any licensed products.
- ◆ **Over:** Match licensed products that are overlicensed; there are more licenses than installations.
- ◆ **Under:** Match licensed products that are underlicensed; there are more installations than licenses.
- ◆ **Properly Licensed:** Match licensed products that have the same number of licenses and installations.

- ♦ **Not Evaluated:** Match licensed products whose compliance status has not been calculated yet.
- ♦ **Evaluated:** Match licensed products whose compliance status is calculated (overlicensed, underlicensed, or properly licensed).

Include Subfolders: Select this option to search the current folder and its subfolders.

- 4 Click **Search** to apply the search criteria and filter the list.

Creating a Licensed Product Folder

You can create folders in the Licensed Products list to better organize your licensed products. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management > License Management > Licensed Products**.
- 2 In the Licensed Products panel, click **New > Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and licensed products at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.
 - Description:** Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Refreshing Compliance Status

A licensed product's compliance status can change if new installations are discovered or new licenses are purchased. The following sections explain when automatic refreshes occur, how to manually trigger a refresh, and how to find out when the last scheduled refresh occurred.

- ♦ [“Automatically Refreshing Status” on page 43](#)
- ♦ [“Manually Triggering a Refresh” on page 44](#)
- ♦ [“Viewing Refresh Details” on page 44](#)

Automatically Refreshing Status

The compliance status for all licensed products is automatically refreshed at the following times:

- ♦ When you import purchase records. This ensures that a product's compliance status immediately reflects any newly purchased licenses.
- ♦ Each day at the time specified for the compliance engine's refresh schedule (see [Chapter 3, “Configuring Compliance Settings,” on page 29](#)). This ensures that a product's compliance status reflects any changes to the installation count for its discovered products.

In addition, the compliance status for an individual product is automatically refreshed when the following actions occur on the product:

- ♦ Creating or deleting an entitlement.

- ♦ Adding, modifying, or deleting any entitlement entry that affects license quantity or installation quantity. This includes purchase records, purchase record summaries, catalog products, discovered products, and software collections.
- ♦ Marking a discovered product installation (associated with an entitlement) as ignored.

Manually Triggering a Refresh

You can manually trigger a refresh of the compliance status for all licensed products. You cannot manually trigger a refresh of an individual licensed product.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** to display the License Management page.
- 2 Click **Licensed Products** to display the Licensed Products page.
A compliance refresh can also be triggered from the Discovered Products page.
- 3 In the Licensed Products panel, click **Actions** > **Refresh Compliance Status**.

Viewing Refresh Details

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

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

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

Creating a Licensed Product

There are three methods you can use to create a licensed product:

- ♦ You can manually create a licensed product. You then need to create the licensed product's entitlements and add catalog products and discovered products.
- ♦ You can use the Auto-Reconcile Wizard to create a licensed product from a discovered product. During the process, you create an entitlement and reconcile any catalog products (identified by the wizard as possible matches for the licensed product) to the licensed product. The wizard can create multiple licensed products at one time.
- ♦ You can use the Asset Management Dashboard to create a license product from a discovered product.

Refer to the following sections for instructions:

- ♦ [“Manually Creating a Licensed Product” on page 45](#)
- ♦ [“Creating a Licensed Product from a Discovered Product” on page 45](#)
- ♦ [“Creating Licensed Product from the Dashboard” on page 48](#)

Manually Creating a Licensed Product

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click **New > Licensed Product** to launch the Create New Licensed Product Wizard.
- 4 On the General Information page, fill in the following fields:
 - Manufacturer (Optional):** The manufacturer of the product.
 - Licensed Product (Required):** The name of the product.
 - Version (Optional):** The product version.
 - License information source configured:** Select this option if you have configured a license information source for the licensed product. Selecting this check box enables you to select a licensed information source.
 - License information source:** Specify or select a licensed information source for the licensed product. This option is enabled only when the License Information Source Configured check box is selected.
 - Notes (Optional):** Specify any notes.
- 5 Click **Next**, review the information on the New Licensed Product Summary page, then click **Finish** to add the product to the Licensed Products list.
- 6 Configure the licensed product by completing these additional tasks:
 - ♦ Create one or more entitlements. See [“Creating an Entitlement” on page 52](#).
 - ♦ Add catalog products to the entitlements. See [“Adding Catalog Products” on page 57](#).
 - ♦ Add discovered products to the entitlements. See [“Adding Discovered Products” on page 58](#).
 - ♦ Specify the users or devices covered by the entitlements. See [“Specifying User and Device Coverage” on page 59](#).

Creating a Licensed Product from a Discovered Product

The Auto-Reconcile Wizard creates licensed products from discovered products. The wizard does the following:


- ♦ Lets you select the discovered product from which you want to create a licensed product. You can select multiple discovered products at one time to create multiple licensed products.
- ♦ Creates a licensed product with the same name as the discovered product.
- ♦ Creates an entitlement for the licensed product. You specify the entitlement’s description and license model. If you are creating multiple licensed products, the same entitlement (description and license model) is created for each product.
- ♦ Adds the discovered product to the entitlement.
- ♦ Identifies any catalog products that might match the licensed product. Lets you choose whether or not to add the catalog products to the licensed product’s entitlement.

When you run the Auto-Reconcile Wizard, you should select discovered products that require the same entitlement license model. As mentioned above, the wizard applies the same entitlement to all licensed products created during the process. If you create a licensed product from a discovered product that does not fit the entitlement license model, you need to manually edit the licensed product's entitlement and change its license model.

To create licensed products from discovered products:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products panel, click **Action > Auto-Reconcile: Create Licensed Products** to launch the Auto-Reconcile Wizard. Complete the wizard by using information from the following table to fill in the fields:

Wizard Page	Details
Discovered Product Filter	<p>You can filter the list of discovered products so that you have a smaller list of products from which to select.</p> <p>Any: Select this option to ignore the filter; all discovered products are displayed.</p> <p>Products Specified Below: Select this option to filter the discovered products list. Fill in the following fields:</p> <ul style="list-style-type: none"> ◆ Manufacturer: Click Select, then select one of the listed manufacturers. Or, click Search and specify the text string that will display the manufacturers. ◆ Product: Specify a text string that will display the products you want. <p>You can use an asterisk (*) as a wildcard. For example, if you want to display all discovered products from manufacturers that start with M, enter M* in the Manufacturer field and * in the Product field.</p>
Select Licensed Products to Create	<p>This page lists all the discovered products that meet the filter criteria defined on the previous page.</p> <p>The first column displays the name of the licensed product that will be created. The second column displays the discovered product that will be associated with the licensed product. The third column displays any catalog products that the wizard thinks are candidates for association with the licensed product.</p> <p>By default, all licensed products are selected and will be created. You can deselect any licensed products you don't want created.</p> <p>You can also deselect any catalog products that you don't want associated with a licensed product.</p>

Wizard Page	Details
Destination Folder	<p>Lets you specify where in the Licensed Products folder hierarchy you want to place the new licensed products.</p> <p>The field defaults to the current folder (the folder from which you launched the Auto-Reconcile Wizard). To specify another folder, click  to browse for and select the folder. The folder must already exist; you cannot use the selection dialog box to create a new folder.</p>
License Entitlements	<p>Every licensed product must have at least one entitlement. This page lets you specify a description and license model for the entitlement that will be added to the licensed products you are creating.</p> <p>Description: Add a description for the license entitlement. The entitlement description serves as a name for the entitlement and identifies it in the licensed product’s entitlement list. The description can reflect the product name and version, the license model, the license type, or any other information that makes sense to you.</p> <p>License Model: Select one of the following license models:</p> <ul style="list-style-type: none"> ◆ Per-Installation: Each installation of the entitlement’s discovered products consumes a license. ◆ OEM: For each covered device, a license is consumed whether or not any of the entitlement’s discovered products are installed on the device. You specify the devices covered by the entitlement. ◆ Machine: For each covered device, a license is consumed only if one of the entitlement’s discovered products is installed on the device. You specify the devices covered by the entitlement. ◆ Per-Machine - Multi-Version This license model consumes only one license if you have installed different versions of the same software on the same machine. ◆ Per-User: Each user consumes a single license for any installations of the entitlement’s discovered products, regardless of the number of installations. ◆ Per-Named User: Identical to the Per-User model, but you specify the users covered by the entitlement.
Auto-reconcile Create Summary	Review your data.

- 4 If you have not already done so, click **Finish** to create the licensed products and add them to the Licensed Products panel.
- 5 If necessary, configure the licensed product by completing these additional tasks:
 - ◆ Specify the users or devices covered by the entitlement. See [“Specifying User and Device Coverage” on page 59.](#)
 - ◆ Add additional catalog products. See [“Adding Catalog Products” on page 57.](#)
 - ◆ Add additional discovered products. See [“Adding Discovered Products” on page 58.](#)
 - ◆ Create additional entitlements. See [“Creating an Entitlement” on page 52.](#)

Creating Licensed Product from the Dashboard

To create a licensed product from the dashboard, see [“Creating a Licensed Product from the Dashboard” on page 110](#).

Changing a Licensed Product’s General Information

A licensed product includes general information such as its manufacturer, product name, and version. You can modify this information as necessary. If you’ve created any custom fields (see [“Adding Custom Fields to Licensed Products” on page 48](#)), you can modify those as well.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Licensed Products** to display the Licensed Products page.
- 2 In the Licensed Products panel, click the licensed product whose general information you want to edit.
- 3 Modify the fields as needed:

Manufacturer: Select the product’s manufacturer from the list or enter a new manufacturer.

Licensed Product: Select a name for the licensed product from the list or enter a new name.

Version: If the licensed product represents a specific version, specify the version. If not, leave the field empty.

Notes: Add any information you want to retain with the product.

Cost Center: This is a custom field added as an example. It is not included in the predefined general information. You can add as many custom fields as you’d like. For information, see [“Adding Custom Fields to Licensed Products” on page 48](#).

Adding Custom Fields to Licensed Products

A licensed product includes predefined fields for recording the product’s manufacturer, name, and version. These fields are displayed on the licensed product’s General page.

You can create custom fields to record additional information for licensed products. When you create a custom field, it is added to each licensed product’s General page. It is also included in the Create New Licensed Product Wizard so that you can populate the field during creation of licensed products.

To create custom fields:

- 1 In ZENworks Control Center, click **Configuration**, then click the **Asset Management** tab.
- 2 In the Administrator-Defined Fields panel, click **Licensed Product** to display the Licensed Product Fields page.
- 3 Click **New** to launch 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	<p>Fill in the following fields:</p> <p>Type: Filled in by default depending on the type of field you selected.</p> <p>Name: Specify the field label. This field is required.</p> <p>Default Value: Specify the default value of the field. The default value must be valid for the field's data type. For example, the default cannot be A if the data type is Integer.</p> <p>Data Type: Select the type of data allowed in the field: Character, Integer, Decimal, or Date.</p> <p>Size: Specify the maximum number of alphanumeric characters allowed in the field. This applies only to character-type fields.</p> <p>Edit Type: Determines how you enter values into the field. There are three options you can select:</p> <ul style="list-style-type: none"> ◆ Edit: Allows you to enter a value or edit the default value. ◆ List: Allows you to select a value from a list of values. ◆ Combo: Allows you to select a value from a list of values or enter a new value. <p>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.</p>
Choice List Values	<p>This page appears if you chose List or Combo as the Edit Type.</p> <p>To create a list of choices:</p> <ol style="list-style-type: none"> 1. Specify a value in the Choice List Values field. 2. Click Add. Repeat for additional values. <p>Edit: Select a value and click Edit to change it.</p> <p>Remove: Select a value and click Remove to delete it.</p> <p>Import: Click Import to open the Import Choice List Values dialog box where you can specify a file to import.</p>
Field Summary	<p>Review the data. Use the Back button to go back to a previous page to edit any fields.</p>

- 4 Click **Finish** to create the new administrator-defined field.
The field is added to each licensed product's General page.

Merging Licensed Products

You can merge two or more licensed products into one licensed product. When you do so, you select one of the licensed products as the target product and the entitlements for each of the products are moved into the target product. All merged products, other than the target product, are deleted after the merge.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Licensed Products** to display the **Licensed Products** page.
- 2 In the Licensed Products panel, select the licensed products you want to merge.
- 3 Click **Action** > **Merge Licensed Products**.
- 4 In the **Target Product** list, select the licensed product into which all the selected products will be merged, then click **OK**.

The products are merged. The target product is displayed in the Licensed Products list and all other merged products are deleted.

Deleting a Licensed Product

You can remove a licensed product from the Licensed Product list by deleting it. Only the licensed product is deleted; any catalog products and discovered products associated with the licensed product are not deleted.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Licensed Products** to display the Licensed Products page.
- 2 In the Licensed Products panel, select the licensed product you want to delete.
- 3 Click **Delete**, then click **OK** to confirm the deletion.

Moving a Licensed Product

You can move a licensed product from one folder to another in the Licensed Product list.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Licensed Products** to display the Licensed Products page.
- 2 In the Licensed Products panel, select the licensed product you want to move.
- 3 Click **Move** to display the Move Licensed Product(s) dialog box.
- 4 Browse for and select the target folder, then click **OK**.

7 Working with Entitlements

A license entitlement typically represents a license agreement for a licensed product. It includes such agreement details as the license type (full, upgrade, maintenance, and so forth) and the license model (Per-User, Per-Installation, OEM, Machine, and so forth). Based on the license model, it also specifies which users or machines are covered by the entitlement.

Some licensed products might only have one entitlement. For example, you might have a product whose installations all fall under a full license, Per-Installation agreement.

Other products, however, might have multiple entitlements. For example, you might have a product for which you have OEM-licensed installations and Per-User licensed installations. To correctly cover both license agreements, you would need two entitlements with different license models and user/machine coverage. A second example might be a product that includes a full license agreement and a version upgrade agreement.

The following sections explain the tasks associated with managing entitlements:

- ♦ [“Viewing a Licensed Product’s Entitlements” on page 51](#)
- ♦ [“Creating an Entitlement” on page 52](#)
- ♦ [“Adding Catalog Products” on page 57](#)
- ♦ [“Adding Purchase Summary Records” on page 58](#)
- ♦ [“Adding Discovered Products” on page 58](#)
- ♦ [“Specifying User and Device Coverage” on page 59](#)
- ♦ [“Adding Contracts and Documents” on page 63](#)

Viewing a Licensed Product’s Entitlements

You can view the list of entitlements for a licensed product. The list provides general information about each entitlement, such as its license type, license model, license quantity, and discovered products covered.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Product panel, click the licensed product whose entitlements you want to view.
- 4 Click the **License Entitlements** tab

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

The Entitlements (Consumption Data Source: Inventory) panel is used to manage the entitlements that pull their product installation data from the Inventory data collected during scans of devices in the Management Zone.

The Entitlements (Consumption Data Source: Manual) panel is used to manage entitlements that require product installation data to be manually entered into the entitlement.

These panels display the following details:

Description: The name of the entitlement. Click the name to display the entitlement's details.

Type: The entitlement type: **Full**, **License/Maintenance**, or **Version Upgrade**.

License Period: Indicates if the license period is perpetual or for a specific term.

Term License Status: Indicates if the license is active or expired.

License Model: The type of license model.

License Quantity: The total number of licenses included in the entitlement, either through catalog products assigned to the entitlement or purchase summary records created for the entitlement. Click the quantity number to manage (view, add, or remove) the catalog products and purchase summary records that are contributing to the total license quantity.

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

Versions Covered: This column is included only in the Inventory panel. It shows the discovered products, listed by version, that are covered by the entitlement. Click a version to manage (view, add, or remove) the entitlement's covered product versions.

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

Creating an Entitlement

There are two categories of entitlements that you can create: Inventory entitlements and manual entitlements. Inventory entitlements pull the installation data for their discovered products from the Inventory database. Manual entitlements require you to manually enter the installation data.

- ♦ [“Creating an Inventory Entitlement” on page 52](#)
- ♦ [“Creating a Manual Entitlement” on page 55](#)

Creating an Inventory Entitlement

The following steps explain how to create entitlements that use Inventory data as their source of discovered product installation data. If you need to create entitlements where you manually enter the installation data, see [“Creating a Manual Entitlement” on page 55](#).

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the product for which you want to create an entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements (Consumption Data Source: Inventory) panel, click **New** to launch the Create New Entitlement Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
License Model	<p>The license model determines how license consumption is calculated for eligible installations. Select one of the following license models:</p> <ul style="list-style-type: none"> ◆ Per-Installation: Each installation of the entitlement's discovered products consumes a license. ◆ OEM: For each covered device, a license is consumed whether or not any of the entitlement's discovered products are installed on the device. You specify the devices covered by the entitlement. <p>If you use an OEM license model for the entitlement, you should associate only one discovered product with the entitlement. If multiple discovered products are assigned to an OEM entitlement, consumption is limited to the total number of covered devices. Remaining installations overflow to any Per-Installation entitlements or become unresolved installations.</p> <p>For example, assume an OEM entitlement with 10 licenses includes two discovered products (DP1 and DP2). You assign 10 devices to the entitlement and each device has both products installed. Of the 20 discovered product installations (10 for DP1 and 10 for DP2), only 10 are covered by the 10 licenses. The others become unresolved installations.</p> <p>In addition to limiting an OEM entitlement to one discovered product, we recommend that you organize all OEM entitlements for different products into different licenses, so that each license product includes only the OEM entitlements for that product.</p> <p>For example, you have two OEM versions of ProductA installed in your environment: ProductA V6 and ProductA V7. You also have two versions of ProductB: ProductB V6 and ProductB V7. We recommend that you create separate licensed product for each. Therefore, you would have licensed ProductA with a ProductA V6 OEM entitlement and a ProductA V7 OEM entitlement. You might also have another type of entitlement for ProductA, such as a ProductA V6 Per-Named User entitlement, based on your other ProductA installations. For ProductB, you would have a licensed product with a ProductB V6 OEM entitlement, a ProductB V7 OEM entitlement, and other types of ProductB entitlements.</p> <ul style="list-style-type: none"> ◆ Per-Machine - Multi-Version: This license model consumes only one license if you have installed different versions of the same software on the same machine. ◆ Machine: For each covered device, a license is consumed only if one of the entitlement's discovered products is installed on the device. You specify the devices covered by the entitlement. <p>We recommend that you follow the best practices discussed for OEM entitlements when using Machine entitlements.</p> <ul style="list-style-type: none"> ◆ Per-User: Each user consumes a single license for any installations of the entitlement's discovered products, regardless of the number of installations. ◆ Per-Named User: Identical to the Per-User model, except you specify the users covered by the entitlement.

Wizard Page	Details
Entitlement Type	<p>Select the type of license represented by the entitlement:</p> <ul style="list-style-type: none"> ◆ Full License: Entitles the user to new product installations (as opposed to upgrade installations). ◆ Version Upgrade: Entitles the user to upgrade a previous product version to the new version. This option is not displayed when creating the first entitlement for a licensed product. ◆ License/Maintenance: Entitles the user to new product installations and subsequent maintenance versions.
Entitlement Upgrade	<p>This page is displayed only if you selected Version Upgrade as the entitlement type.</p> <p>Select the entitlement that is being upgraded by this entitlement.</p>
General Information	<p>Fill in the following fields:</p> <p>Description: Specify a description for the entitlement. For example, <i>Product A OEM License</i> or <i>Product A Version 6 Per-User License</i>.</p> <p>Platform: Select the product's platform from the list.</p> <p>License Period: The effective time period for the license. Select Perpetual if the license does not include a termination date. Select Term if the license is for a fixed period, then click the calendar icons to select the start and end dates.</p> <p>Virtual Machine Use Rights: Specify any software use rights that apply when using the product in a virtual machine.</p> <p>Notes: Provide any notes.</p>
New Entitlement Summary	Review the data.

6 If you have not already done so, click **Finish** to create the entitlement and add it to the Entitlements panel.

7 Configure the entitlement by doing the following:

- ◆ Add information about purchased licenses. See [“Adding Catalog Products” on page 57](#) and [“Adding Purchase Summary Records” on page 58](#).
- ◆ Add information about installations. See [“Adding Discovered Products” on page 58](#).
- ◆ Specify the users or devices covered by the entitlement. See [“Specifying User and Device Coverage” on page 59](#).

Creating a Manual Entitlement

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the product for which you want to create an entitlement.
- 4 Click the **License Entitlements** tab.

- 5 In the Entitlements (Consumption Data Source: Manual) panel, click **New** to launch the Create New Entitlement Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
License Model	Choose one of the predefined license models. These license models are intended to match the license models most commonly used in license agreements. If your license model is not represented, select Other and specify the license model.
Entitlement Type	Select the type of license represented by the entitlement: <ul style="list-style-type: none"> ◆ Full License: Entitles the user to new product installations (as opposed to upgrade installations). ◆ Version Upgrade: Entitles the user to upgrade a previous product version to the new version. This option is not displayed when creating the first entitlement for a licensed product. ◆ License/Maintenance: Entitles the user to new product installations and subsequent maintenance versions.
Entitlement Upgrade	This page is displayed only if you selected Version Upgrade as the entitlement type. Select the entitlement that is being upgraded by this entitlement.
General Information	Fill in the following fields: Description: Specify a description for the entitlement. For example, <i>Product A OEM License</i> or <i>Product A Version 6 Per-User License</i> . Platform: Select the product’s platform from the list. License Period: The effective time period for the license. Select Perpetual if the license does not include a termination date. Select Term if the license is for a fixed period, then click the calendar icons to select the start and end dates. Quantity Consumed: Specify the number of installations you want to count against the entitlement. Virtual Machine Use Rights: Specify any software use rights that apply when using the product in a virtual machine. Notes: Provide any notes.
New Entitlement Summary	Review the data.

- 6 If you have not already done so, click **Finish** to create the entitlement and add it to the Entitlements panel.

- 7 Configure the entitlement by doing the following:

- ◆ Add information about purchased licenses. See [“Adding Catalog Products” on page 57](#) and [“Adding Purchase Summary Records” on page 58](#).
- ◆ Add information about installations. See [“Adding Discovered Products” on page 58](#).
- ◆ Specify the users or devices covered by the entitlement. See [“Specifying User and Device Coverage” on page 59](#).

Adding Catalog Products

To populate a licensed product with the number of licenses you've purchased for the product, you add catalog products to the licensed product's entitlements. If you don't have catalog products, you can create purchase summary records instead (see ["Adding Purchase Summary Records" on page 58](#)).

There are two ways to add a catalog product to an entitlement:

- ♦ ["Editing an Entitlement to Add Catalog Products" on page 57](#)
- ♦ ["Using the Catalog Products List to Add Catalog Products" on page 57](#)


Editing an Entitlement to Add Catalog Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements panel, click the entitlement to which you want to add catalog products.
- 6 Click the **Proof of Ownership** tab.
- 7 In the Catalog Products panel, click **Add**.
- 8 Select the desired catalog products, then click **OK** to add them to the Catalog Products panel.

The Catalog Products panel displays each catalog product's Purchase Quantity, which is the number of units of the catalog product that you've purchased (according to the purchase records). It also displays the License Quantity, which is the total number of licenses included in the purchased units.

Using the Catalog Products List to Add Catalog Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 Select the catalog products that you want to add to an entitlement.
- 4 Click **Action > Add to Licensed Product** to launch the Add Catalog Products to Licensed Product Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
Licensed Product	Click  to browse for and select the licensed product that contains the entitlement to which you want to add the catalog products.
License Entitlement	Select the entitlement to which you want to add the catalog products,
Summary	Review the data.

- 5 If you have not already done so, click **Finish** to add the catalog products to the entitlement.
In the Catalog Products list, each catalog product you added displays the licensed product and entitlement with which it is now associated.

Adding Purchase Summary Records

A purchase summary record lets you add licenses to an entitlement without requiring a catalog product or a purchase record.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements panel, click the entitlement to which you want to add purchase summary records.
- 6 Click the **Proof of Ownership** tab.
- 7 In the Purchase Summary Records panel, click **New**.
- 8 On the General Information page, fill in the following fields:
 - Description:** Specify a description or name to identify the record.
 - License Quantity:** Specify the number of purchased licenses.
 - Total Cost:** Specify the total cost of the licenses. This information is optional.
 - Notes:** Specify any optional notes to identify the record.
- 9 Click **Next** to display the Summary page.
- 10 Click **Finish** to create the purchase summary record.

Adding Discovered Products

To associate product installations with a licensed product, you add discovered products to the licensed product's entitlements.

Discovered products can only be added to Inventory entitlements. Manual entitlements do not use discovered products.

There are two ways to add a discovered product to an entitlement:

- ♦ [“Editing an Entitlement to Add Discovered Products” on page 58](#)
- ♦ [“Using the Discovered Products List to Add Discovered Products” on page 59](#)


Editing an Entitlement to Add Discovered Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.

- 5 In the Entitlements panel, click the entitlement to which you want to add discovered products.
- 6 Click the **Coverage** tab.
- 7 In the Discovered Product Versions Covered panel, click **Add > Installed Discovered Products** if you only want to choose from discover products that are installed in your Management Zone.
or
Click **Add > Any Discovered Product** to see all discovered products contained in the ZENworks Knowledgebase.
- 8 Select the desired discovered products, then click **OK** to add them to the Discovered Product Versions Covered panel.

Using the Discovered Products List to Add Discovered Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Select the discover products that you want to add to an entitlement.
- 4 Click **Action > Add to Licensed Product** to launch the Add Discovered Products to Licensed Product Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
Licensed Product	Click  to browse for and select the licensed product that contains the entitlement to which you want to add the discovered products.
License Entitlement	Select the entitlement to which you want to add the discovered products.
Summary	Review the data.

- 5 If you have not already done so, click **Finish** to add the discovered products to the entitlement.
In the Discovered Products list, the discovered product displays the licensed product with which it is now associated.

Specifying User and Device Coverage

When you have an entitlement that uses an OEM, Machine, Per-Named User, or Per-User license model, you must specify which devices or users are covered by the entitlement. The following sections provide instructions:

- ◆ [“Adding Covered Devices to OEM and Machine Entitlements” on page 60](#)
- ◆ [“Removing Covered Devices” on page 61](#)
- ◆ [“Adding Covered Users to Per-Named User Entitlements” on page 61](#)
- ◆ [“Excluding Users from Per-User Entitlements” on page 62](#)

Adding Covered Devices to OEM and Machine Entitlements

When you create an entitlement with an OEM or Machine license model, you must specify the devices that you want covered by the entitlement. Only the covered devices are eligible to consume the entitlement's licenses.

- 1 If you are on the licensed product's License Entitlements page, skip to [Step 2](#). Otherwise, open the page:
 - 1a In ZENworks Control Center, click the **Asset Management** tab.
 - 1b In the License Management page, click **Licensed Products**.
 - 1c Click the product whose entitlement coverage you want to modify.
 - 1d Click the **License Entitlements** tab.
- 2 In the Entitlements panel, click the OEM or Machine entitlement.
- 3 Click the **Coverage** tab.
- 4 In the **Covered Machines** panel, click **Add** and perform any of the following:
 - 4a Select **Devices with Product Installed** if you only want to see devices that have the product installed.
or
Select **Any Devices** if you want to see all devices.
The Search for Device dialog box is displayed. Because your system might include many devices, the Search for Device dialog box lets you limit the displays to only those devices that meet your defined criteria.
 - 4a1 Use the **Search Criteria** to specify which devices you want to display. If you don't want to limit the search results, skip to 4b.
Device Type: Select the types of device (managed, inventoried, migrated) you want included in the search results.
Device Filter: The filters let you define specific criteria that a device must meet to be included in the search results. Use the **Add Filter**, **Add Filter Set**, and **Insert Filter** options to create the search criteria.
Maximum Number of Devices to Display: Specify the maximum number of devices to include in the search results.
 - 4a2 In the **Columns to Display in Search Results** list, Ctrl+click and Shift+click to select the columns you want displayed in the search results.
 - 4a3 Click **Search** to display the search results.
 - 4a4 Select the devices you want to add to the Covered Machines list, then click **OK**.
 - 4b Select **Folder or Group**, in the **Choose Machine Coverage Folder or Group**, select the required group or folder.
To include devices from the subfolder, select the **Include Subfolder** checkbox.
Click **OK** to add all the selected folder or group.

Removing Covered Devices

If you do not want to consider a device or a folders or a groups for license compliance, you can exclude them by removing it from the covered devices.

To remove a device, or a folder or a group, select the required device, and then click **Remove**.

NOTE: You are allowed to remove a folder or a group, but not the devices available within the folder or a group.

Adding Covered Users to Per-Named User Entitlements

When you create an entitlement with a Per-Named User license model, you must specify the users that you want covered by the entitlement. Only the covered users are eligible to consume the entitlement's licenses.

- 1 If you are on the licensed product's License Entitlements page, skip to [Step 2](#). Otherwise, open the page:
 - 1a In ZENworks Control Center, click the **Asset Management** tab.
 - 1b In the License Management page, click **Licensed Products**.
 - 1c Click the product whose entitlement coverage you want to modify.
 - 1d Click the **License Entitlements** tab.
- 2 In the Entitlements panel, click the Per-Named User entitlement.
- 3 Click the **Coverage** tab.
- 4 In the Covered Users panel, click **Add > Users with Product Installed** if you only want to see users who have the product installed.

or

Click **Add > Any Users** if you want to see all users.
- 5 If you are selecting users from your authoritative user source, browse for and select the users you want to add to the Covered Users list, then click **OK**.

or

If you are selecting users from the Inventory data source, do the following:

 - 5a Use the Search Criteria to specify which users you want to display. If you don't want to limit the search results, skip to [Step 5b](#).

User Filter: The filters let you define specific criteria that a user must meet to be included in the search results. Use the **Add Filter**, **Add Filter Set**, and **Insert Filter** options to create the search criteria.

Maximum Number of Users to Display: Specify the maximum number of users to include in the search results.
 - 5b In the **Columns to Display in Search Results** list, Ctrl+click and Shift+click to select the columns you want displayed in the search results.
 - 5c Click **Search** to display the search results.
 - 5d Select the users you want to add to the Covered Users list, then click **OK**.

Excluding Users from Per-User Entitlements

When you create an entitlement with a Per-User license model, all users are covered by the entitlement. If necessary, you can exclude users. An excluded user does not consume a license even if a discovered product installation is associated with the user.

- 1 If you are on the licensed product's License Entitlements page, skip to [Step 2](#). Otherwise, open the page:
 - 1a In ZENworks Control Center, click the **Asset Management** tab.
 - 1b In the License Management page, click **Licensed Products**.
 - 1c Click the product whose entitlement coverage you want to modify.
 - 1d Click the **License Entitlements** tab.
- 2 In the Entitlements panel, click the Per-User entitlement.
- 3 Click the **Coverage** tab.
- 4 In the Covered Users panel, click **Add > Users with Product Installed** if you only want to see users who have the product installed.

or

Click **Add > Any Users** if you want to see all users.
- 5 If you are selecting users from the authoritative user source, browse for and select the users you want to add to the Covered Users list, then click **OK**.

or

If you are selecting users from the Inventory data source, do the following:

 - 5a Use the Search Criteria to specify which users you want to display. If you don't want to limit the search results, skip to [Step 5b](#).

User Filter: The filters let you define specific criteria that a user must meet to be included in the search results. Use the **Add Filter**, **Add Filter Set**, and **Insert Filter** options to create the search criteria.

Maximum Number of Users to Display: Specify the maximum number of users to include in the search results.
 - 5b In the **Columns to Display in Search Results** list, Ctrl+click and Shift+click to select the columns you want displayed in the search results.
 - 5c Click **Search** to display the search results.
 - 5d Select the users you want to add to the Covered Users list, then click **OK**.

Adding Contracts and Documents

You can add contracts and documents to an entitlement to provide proof that you own the licenses associated with the entitlement.

The following instructions assume that you've already added contracts and uploaded documents to your Asset Management system. If not, see [Part IV, "Contracts," on page 147](#) and [Part V, "Documents," on page 169](#).

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements panel, click the entitlement to which you want to add contracts or documents.
- 6 Click the **Proof of Ownership** tab.
- 7 In the Contracts panel, click **Add**.
or
In the Documents panel, click **Add**.
- 8 Browse for and select the contracts or documents you want to add, then click **OK** to add them to the Contracts list or Documents list.

8

Working with Discovered Products

Discovered products are used to associate installations with licensed products. Each discovered product includes information about its total number of installations on devices in the Management Zone. When you associate a discovered product with a licensed products' entitlement, its installations become eligible to consume the entitlement's licenses.

The following sections explain the tasks associated with managing entitlements:

- ◆ [“How Installed Software Products Become Discovered Products” on page 65](#)
- ◆ [“Viewing the Discovered Products List” on page 66](#)
- ◆ [“Filtering the Discovered Products List” on page 66](#)
- ◆ [“Excluding Discovered Products from Compliance Calculations” on page 68](#)
- ◆ [“Adding Discovered Products to Licensed Products” on page 68](#)
- ◆ [“Adding Discovered Products to Software Collections” on page 69](#)
- ◆ [“Viewing a Discovered Product’s Installations” on page 69](#)
- ◆ [“Adjusting a Discovered Product’s Installation Count” on page 70](#)
- ◆ [“Assigning a Standards Category” on page 70](#)
- ◆ [“Manually Reconciling Duplicate Products” on page 71](#)
- ◆ [“Viewing the Inventory Products Included in a Discovered Product” on page 72](#)
- ◆ [“Refreshing Compliance Status” on page 72](#)

How Installed Software Products Become Discovered Products

Asset Management includes a product Knowledgebase that includes over 76,000 predefined discovered products. The following process is used to map installed software products to the Knowledgebase discovered products:

1. Asset Inventory scans devices to collect information about installed software products. These installed software products are referred to as Inventory products.
2. Asset Management filters the Inventory products through the Knowledgebase to map the Inventory products to discovered products. During this process, the following occurs:
 - ◆ All related versions, service releases, and language versions are mapped to the same minor-version discovered product. For example, Product A 5.5, Product A 5.5 (JP) and Product A 5.5.1 are consolidated under one Product A 5.5 discovered product.
 - ◆ Products that do not require licensing, such as browsers and viewers, are excluded.
 - ◆ Software suites and their member products are identified.
3. Asset Management sets the discovered products' installation quantity equal to the total installations for its mapped Inventory products.

As you work with discovered products, you'll see the term *installed discovered products*. Discovered products are all 76,000+ products included in the Knowledgebase. Installed discovered products are only those discovered products that are actually installed in your organization (as discovered through Inventory scans). By default, the Discovered Products list in the ZENworks Control Center is filtered to show installed discovered products.

Viewing the Discovered Products List

You can view a list of all of your discovered products. The list provides general information about each discovered product, such as its number of installations and the licensed product with which it is associated

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

The list provides the following information for each discovered product:

Name: The name of the discovered product. The name consists of four parts: *Manufacturer Product Version (Platform)*. For example, with *Acme Product A 8.5 (Windows)*, *Acme* is the manufacturer, *Product A* is the product, *8.5* is the version, and *Windows* is the platform. Click the name to display the discovered product's details.

Excluded: Indicates if the discovered product is excluded from compliance calculations. Excluded products cannot be added to a licensed product.

Licensed Product: The licensed product with which the discovered product is associated. Click the licensed product to display its entitlements. The discovered product is included in one of the listed entitlements.

Installed Quantity: The number of installations of the product in the Management Zone. Click the quantity number to display the list of devices that have the product installed.

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

Standards Category: The category for the product.

Filtering the Discovered Products List

By default, the Discovered Products list displays only the discovered products that are 1) installed on a device in your Management Zone and 2) are not excluded from compliance calculations. You can modify the Search criteria to change which discovered products are displayed.

For example, you can display only the discovered products from a specific manufacturer, or you can display only the discovered products that are associated with licensed products.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 In the Search panel (located next to the Discovered Products panel), specify the criteria to use for filtering the list. A product must match all defined criteria to be displayed.

Name: Specify the text that the discovered product name (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a discovered product name, the product matches the criteria.

Manufacturer: Select a specific manufacturer, or select **Any** to match any manufacturers.

Current Manufacturer: Select a specific manufacturer, or select **Any** to match any manufacturers.

Platform: Select the platform (**Windows** or **Mac**) to match.

Exclude Status: Select one of the following to match:

- ◆ **Any:** Ignore the exclude status. Match all discovered products.
- ◆ **Excluded:** Match only the discovered products that are excluded from compliance calculations. An excluded product cannot be associated with a licensed product.
- ◆ **Not Excluded:** Match discovered products that are not excluded from compliance calculations.

Install Status: Select one of the following to match:

- ◆ **Any:** Ignore the install status. Match all discovered products.
- ◆ **Installed:** Match only the discovered products that are installed in your Management Zone.
- ◆ **Not Installed:** Match any discovered products that are included in the Knowledgebase but are not installed in your Management Zone.
- ◆ **Reconciled:** Match only the reconciled discovered products.

Usage Status: Select one of the following to match:

- ◆ **Any:** Ignore the usage status. Match any discovered products.
- ◆ **With Usage:** Match discovered products for which active usage is recorded.
- ◆ **Without Usage:** Match discovered products for which no active usage is recorded.

Reconciliation Status: Select one of the following to match:

- ◆ **Any:** Ignore the reconciliation status. Match any discovered products.
- ◆ **Reconciled:** Match discovered products that are associated with licensed products.
- ◆ **Unreconciled:** Match discovered products that are not associated with licensed products.

Standards Category: Select a standards category, or select **Any** to match any category.

Source: Select one of the following to match the discovered products:

- ◆ **Any:** Ignore the source. Match all discovered products.
- ◆ **Add Remove Programs:** Match discovered products collected from the Add Remove Program panel.
- ◆ **Fingerprinted Products:** Match discovered products collected from the fingerprinted products.
- ◆ **Local Software Products:** Match discovered products collected from the Local Software Products.

4 Click **Search** to apply the search criteria and filter the list.

Excluding Discovered Products from Compliance Calculations

If there are discovered products that you don't want associated with licensed products, you can exclude them. Excluded discovered products cannot be associated with licensed products and they do not appear in the Discovered Products list unless you change the default Search filter. Also, when you run the Auto-Reconcile Wizard to create licensed products from discovered products, excluded discovered products are not available.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Select the product you want to exclude.
- 4 Click **Action > Exclude**.

Adding Discovered Products to Licensed Products

To associate product installations with a licensed product, you add discovered products to the licensed product's entitlements.

Discovered products can only be added to Inventory entitlements. Manual entitlements do not use discovered products.

There are two ways to add a discovered product to an entitlement:


- ♦ [“Editing an Entitlement to Add Discovered Products” on page 68](#)
- ♦ [“Using the Discovered Products List to Add Discovered Products” on page 69](#)

Editing an Entitlement to Add Discovered Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements panel, click the entitlement to which you want to add discovered products.
- 6 Click the **Coverage** tab.
- 7 In the Discovered Product Versions Covered panel, click **Add > Installed Discovered Products** if you only want to choose from discovered products that are installed in your Management Zone.
or
Click **Add > Any Discovered Product** to see all discovered products contained in the ZENworks Knowledgebase.
- 8 Select the desired discovered products, then click **OK** to add them to the Discovered Product Versions Covered panel.

Using the Discovered Products List to Add Discovered Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Select the discovered products that you want to add to an entitlement.
- 4 Click **Action > Add to Licensed Product** to launch the Add Discovered Products to Licensed Product Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
Licensed Product	Click  to browse for and select the licensed product that contains the entitlement to which you want to add the discovered products.
License Entitlement	Select the entitlement to which you want to add the discovered products,
Summary	Review the data.

- 5 If you have not already done so, click **Finish** to add the discovered products to the entitlement.
In the Discovered Products list, the discovered product displays the licensed product with which it is now associated.

Adding Discovered Products to Software Collections

You can add discovered products to software collections. After the discovered products are added to the software collection, they no longer appear as separate products in the Discovered Products list. Instead, the software collection appears in the list.

The following steps assume that you are adding discovered products to an existing software collection. If you need to create a software collection, see [Chapter 11, “Working with Software Collections,”](#) on page 97.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Select the discovered products that you want to add to a software collection.
- 4 Click **Action > Add to Software Collection**.

Viewing a Discovered Product’s Installations

Each discovered product includes a list of the devices where it is installed. To view this list:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Click the discovered product whose installations you want to view.
- 4 Click the **Installations/Consumption** tab to display the list of installations.

Adjusting a Discovered Product's Installation Count

A discovered product provides a count of the total number of installations for the product. If necessary, you can manually adjust this count by ignoring installations or adding to the installation count.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Click the discovered product whose installations you want to adjust.
- 4 Click the **Installations/Consumption** tab.

The Consumption panel displays the following information:

Ignored Installations: The number of installations excluded from the total installation count (also referred to as the net consumption). You manually mark the installations you want ignored. See [Step 5](#) for instructions.

Recognized Installations: The number of installations included in the total installation count.

Additional Consumption: The number of additional installations you want to add to the recognized installations. See [Step 6](#) for instructions.

Net Consumption: The total number of installations included in the discovered product's installation count. This is equal to **(Recognized Installations + Additional Consumption) - Ignored Installations**.

- 5 To ignore an installation, select the installation in the Installations panel by clicking the check box next to the installation, then click **Action > Ignore Installation**.
- 6 To add installations to the count, use the **Additional Consumption** field in the Consumption panel to select the number of additional installations.
- 7 Click **Apply** to save your changes.

Assigning a Standards Category

If your organization has policies and standards to which installed software products must conform, or if you simply want another categorization to help you organize your discovered products, you can assign standards categories to your discovered products.

For example, you might create Standard, Non-Standard, and Standard Violation categories to track standards compliance across all discovered products. Or, you might make the categories more specific, such as Standard Desktop, Non-Standard Desktop, Standard Desktop Violation, Standard Server, Non-Standard Server, and Standard Server Violation.

The Discovered Products list includes a column to show each discovered product's standards category. In addition, you can generate a Software Standards report that includes the standards category for every product (see [Chapter 36, "Working with Standard Reports," on page 189](#)).

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Click the discovered product to which you want to assign a standards category.
- 4 In the **Standards Category** field, select an existing category or type in a new one.

You can select an existing standards category only if you've already created one for another discovered product. Otherwise, no list is available and you must define the standards category by typing it in the field.

- 5 Click **Apply**.

Manually Reconciling Duplicate Products


During an Inventory scan, when the collector collects information about the software products installed on the device, the same set of software products might be reported from the ZENworks Knowledgebase and from the Add or Remove Programs. The collector reconciles such duplicate entries automatically.

However, if duplicate entries are still displayed in the list of discovered products, you need to manually reconcile them to ensure that entries are reported only once.

Example 8-1 Example:

If Product A (from the Fingerprint) and Product B (from Add or Remove Programs) appear in the list of discovered products and they are actually the same product, you can manually reconcile Product A and B. After manual reconciliation, Product B does not appear in the list of discovered products.

Manually Reconciling Discovered Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Select the product (primary) that you want to reconcile.
- 4 Click **Action > Reconcile Products**.
- 5 Click **OK** to continue
- 6 In the Selection dialog box, click  to display search results.
- 7 Select the relevant discovered product (secondary) that needs to be reconciled with the product selected in [Step 3](#).
- 8 Click **OK**.

NOTE: Use the **Reconcile** option with caution, because after the manual reconciliation, all references to the secondary discovered product are removed from the ZENworks Asset Management database.

Undoing Manual Reconciliation

If you have reconciled Product X with Product Y, and later realize that Product Y is not the same as Product X, you can undo the manual reconciliation.

- 1 In the search panel on the Discovered Products page, locate Product Y by filtering the install status (reconciled).
- 2 Select Product Y and click **Action > Reconcile Product**
- 3 Click **OK**.

NOTE: To completely restore product Y to a state prior to the reconciliation, you need to do a full inventory scan from all the devices in the Management Zone.

Viewing the Inventory Products Included in a Discovered Product

Each discovered product provides a list of the Inventory products that have been consolidated into the discovered product (see [“How Installed Software Products Become Discovered Products”](#) on page 65). To view this list:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Click the discovered product whose Inventory products you want to view.
The Inventory Products panel on the **Details** tab lists each of the Inventory products.

Refreshing Compliance Status

Refreshing compliance data recalculates all discovered product installation counts and recalculates compliance status for all licensed products. The following sections explain when automatic refreshes occur, how to manually trigger a refresh, and how to find out when the last scheduled refresh occurred.

- ♦ [“Automatically Refreshing Status”](#) on page 72
- ♦ [“Manually Triggering a Refresh”](#) on page 73
- ♦ [“Viewing Refresh Details”](#) on page 73

Automatically Refreshing Status

The compliance status for all licensed products is automatically refreshed at the following times:

- ♦ When you import purchase records. This ensures that a product’s compliance status immediately reflects any newly purchased licenses.
- ♦ Each day at the time specified for the compliance engine’s refresh schedule (see [Chapter 3, “Configuring Compliance Settings,”](#) on page 29). This ensures that a product’s compliance status reflects any changes to the installation count for its discovered products.

In addition, the compliance status for an individual product is automatically refreshed when the following actions occur:

- ♦ Creating or deleting an entitlement.
- ♦ Adding, modifying, or deleting any entitlement entry that affects license quantity or installation quantity. This includes purchase records, purchase record summaries, catalog products, discovered products, and software collections.
- ♦ Adjusting the installation count (net consumption) for a discovered product.

Manually Triggering a Refresh

You can manually trigger a refresh of the compliance status for all licensed products. You cannot manually trigger a refresh of an individual licensed product.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** to display the License Management page.
- 2 Click **Discovered Products** to display the Discovered Products page.
A compliance refresh can also be triggered from the Licensed Products page.
- 3 In the Discovered Products panel, click **Actions** > **Refresh Compliance Status**.

Viewing Refresh Details

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

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

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

9 Working with Purchase Records

Purchase records provide details about the number of licenses purchased for your software products.

For example, Purchase Record 1 includes two purchase details: 10 units of *Product A (Single License Pack)* and 3 units of *Product B (10-License Pack)*. Purchase Record 2 includes a purchase detail for 4 additional units of *Product B (10-License Pack)*.

Catalog products consume the purchased license quantities from their associated purchase details. For example, the *Product B (10-License Pack)* catalog product consumes a total of 70 licenses. Purchase Record 1 provides 30 licenses from 3 units of *Product B (10-License Pack)*. Purchase Record 2 provides 40 licenses from 4 units of *Product B (10-License Pack)*.

The following sections explain the tasks associated with managing purchase records:

- ♦ [“Viewing the Purchase Records List” on page 75](#)
- ♦ [“Filtering the Purchase Records List” on page 76](#)
- ♦ [“Creating a Purchase Record Folder” on page 76](#)
- ♦ [“Creating Purchase Records” on page 77](#)
- ♦ [“Viewing a Purchase Record’s Details” on page 79](#)
- ♦ [“Changing a Purchase Record’s General Information” on page 79](#)
- ♦ [“Deleting a Purchase Record” on page 80](#)
- ♦ [“Moving a Purchase Record” on page 80](#)
- ♦ [“Working with Import Files” on page 80](#)

Viewing the Purchase Records List

You can view a list of all of your purchase records. The list provides general information about each purchase record, such as its purchase order number and date.

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

The list provides the following information for each purchase record:

PO#: The purchase order number associated with the record.

Order Date: The date of the purchase order.

Reseller: The reseller from which the purchase was made.

Filtering the Purchase Records List

You can filter the Purchase Records list to display only the purchase records that meet certain criteria.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 In the Search panel (located next to the Purchase Records list), enter the criteria to use for the filter. A product must match all criteria to be displayed.

PO Number: Specify the text that the purchase order number (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a purchase order number, the record matches the criteria.

Type: Select whether you want to match folders, purchase records, or both.

Reseller: Select a specific reseller, or select **Any** to match any reseller.

Order Date: Select one of the following to match:

- ♦ **Any:** Ignore the order date. Match any purchase record.
- ♦ **On:** Match purchase records whose order date is on the specified date. Click to specify the date.
- ♦ **Before:** Match purchase records whose order date is before the specified date. Click to specify the date.
- ♦ **After:** Match purchase records whose order date is after the specified date. Click to specify the date.

Include Subfolders: Select this option to search the current folder and its subfolders.

- 4 Click **Search** to apply the search criteria and filter the list.

Creating a Purchase Record Folder

You can create folders in the Purchase Records list to better organize your purchase records. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management > License Management > Purchase Records** to display the **Purchase Records** page.
- 2 Click **New > Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and purchase records at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.
 - Description:** Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Creating Purchase Records

The easiest way to create purchase records is to import them from files supplied by resellers. Asset Management can import purchase records from CompuCom, Insight, KMD/SAP, SHI, and Softchoice. In addition, there is generic import format that you can use (see [“Working with Import Files” on page 80](#)).

If you are unable to import data from a supported import file, you must manually create purchase records.

- ♦ [“Importing Purchase Records” on page 77](#)
- ♦ [“Manually Creating Purchase Records” on page 77](#)

Importing Purchase Records

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 Click **Action > Start Import** to display the Import Purchase Records dialog box.
- 4 In the **File Name** field, click **Browse** to locate and select the import file.
- 5 Click **OK** to start the import.

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

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

- 6 Click a purchase record to display its information.

The General page displays information about the reseller, purchaser, and purchase date.

- 7 Click the **Purchase Details** tab.

On the Purchase Details page, each software product purchase (included in the purchase record) is associated with a catalog product. If necessary, Asset Management creates a catalog product for any new software products included in the purchase record.

You can view all catalog products by clicking the **License Management** tab > **Catalog Products**.

Manually Creating Purchase Records

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 In the Purchase Records panel, click **New > Purchase Record** to launch the Create New Purchase Record Wizard.
- 4 On the General Information page, fill in at least one of the following fields. The other fields are optional.

PO Number: The purchase order number. The purchase record object uses the PO number for its name. If you don't supply a PO number, the name of the purchase record object defaults to Unknown (MM_DD_YY), where MM_DD_YY is the current date in the appropriate locale format.

Order Date: The date the product was ordered. To select a date, click , select a date, then click **OK**. If you provide a PO number but not a date, this field defaults to the current date.

- 5 Click **Next** to display the New Purchase Record Summary page.
- 6 Select **Define Additional Properties**, then click Finish to create the purchase record and display the Purchase Details page.

You use the Purchase Details page to enter the details for each software product purchase included in the purchase record.

Each purchase detail must be associated with a catalog product. For example, if your purchase record includes a purchase of *Product B (10-License Pack)*, a *Product B (10-License Pack)* catalog product must exist before you create the purchase detail. The Purchase Details page lets you create catalog products if necessary.

- 7 If the catalog product already exists, click **New > Purchase Detail** to display the Add Purchase Detail dialog box. Otherwise, skip to [Step 8](#).

7a Fill in the following fields (the other fields are optional):

Product: Click to browse for and select the catalog product to associate with the purchase detail. The catalog product inherits the purchases licenses.

Purchase Quantity: Specify the number of units of the product that were purchased. This number does not always correspond to the number of licenses for the product. For example, you might purchase 5 units of *Product A (Single License Pack)* or 10 units of *Product B (10-License Pack)*.

Unit MSRP: The Manufacturer's suggested retail price (MSRP) for a single unit.

Unit Price: The price you paid for a single unit.

Extended Price: The standard calculation for this field is the Unit Price multiplied by the Purchase Quantity (for example, \$200.00 x 5). If you leave the field empty, the calculation is performed automatically when the purchase detail is created. If the standard calculation is not correct, specify the correct extended price.

7b Click **OK** to add the purchase detail to the list.

7c Repeat the steps to create additional purchase details.

- 8 If the catalog product does not exist, click **New > Catalog Product** to launch the Create New Catalog Product Wizard.

8a On the General Information page, fill in the following fields. The other fields are optional, but you should enter as much information as possible to identify the catalog product.

Product: Specify the name of the product as indicated in your purchase record. This should be as specific as possible. For example, if the product is *Product B (10-License Pack)*, enter that name rather than *Product B*.

Licenses Per Package: Specify the number of licenses that come in the package.

8b Click **Next** to display the New Purchase Detail page, then fill in the following fields to create the purchase detail (the other fields are optional):

Purchase Quantity: Specify the number of units of the product that were purchased. This number does not necessarily correspond to the number of licenses for the product. For example, you might purchase 5 units of *Product A (Single License Pack)* or 10 units of *Product B (10-License Pack)*.

Unit MSRP: The Manufacturer's suggested retail price (MSRP) for a single unit.

Unit Price: The price you paid for a single unit.

Extended Price: The standard calculation for this field is the Unit Price multiplied by the Purchase Quantity (for example, \$200.00 x 5). If you leave the field empty, the calculation is performed automatically when the purchase detail is created. If the standard calculation is not correct, enter the correct extended price.

- 8c** Click **Next**, review the information, then click **Finish** to create the purchase detail and catalog product.
- 8d** Repeat the steps to create additional catalog products and purchase details.

Viewing a Purchase Record's Details

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 Click a purchase record to display its information.

The General page displays information about the reseller, purchaser, and purchase date.

- 4 Click the **Purchase Details** tab.

On the Purchase Details page, each software product purchase (included in the purchase record) is associated with a catalog product. That catalog product consumes the licenses included in the purchase.

You can view all catalog products by clicking the **License Management** tab > **Catalog Products**.

Changing a Purchase Record's General Information

A purchase record includes general information such as its purchase order number, recipient name and address, order date, and reseller. You can modify this information as necessary.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Purchase Records** to display the Purchase Records page.
- 2 In the Purchase Records panel, click the purchase record whose general information you want to edit.
- 3 Modify the fields as needed:

PO Number: Specify the number assigned to the purchase order.

Recipient - Country: Use these fields to provide information about the order recipient. For each field, select a value from the list or enter a new value.

Notes: Add any information you want to retain with the purchase order.

Order Date: Click to select the purchase date.

Reseller: Select the reseller from the list or enter a new reseller.

- 4 Click **Apply** to save the changes.

Deleting a Purchase Record

You can remove a purchase record from the Purchase Records list by deleting it. Both the purchase record and its details are deleted.

Deleting a purchase record reduces the license quantity of any catalog products that consume purchased licenses from the purchase record's details.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Purchased Records** to display the **Purchased Records** page.
- 2 In the Purchased Records panel, select the purchase record you want to delete.
- 3 Click **Delete**, then click **OK** to confirm the deletion.






Moving a Purchase Record

You can move a purchase record from one folder to another in the Purchase Records list.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Purchase Records** to display the Purchase Records page.
- 2 In the Purchase Records panel, select the purchase record you want to move.
- 3 Click **Move** to display the Move Purchase Record(s) dialog box.
- 4 Browse for and select the target folder, then click **OK**.

Working with Import Files

ZENworks Asset Management can import purchase records from a standard Asset Management import file or from any of the following reseller import files:

- ◆  CompuCom Software Compliance Report
- ◆  Softchoice Product History Report
- ◆  ZENworks Asset Management Reseller Connector Report
- ◆  SHI License Compliance Report
- ◆  KMD Asset Report: Automatic import from SAP with relevant data for asset management

The following information is provided if you need to modify a reseller import file or if you want to create a standard Asset Management import file:

- ◆ [“Format” on page 81](#)
- ◆ [“Fields” on page 81](#)

Format

Import files are tab-delimited ASCII text files. The first row contains the column headers. Each additional row is a data row that identifies a specific product's line item (or detail) in a purchase record. The following example includes the first few rows of a file; only the first six column headers are displayed.

PO#	OrderDate	Reseller	Recipient	CompanyName	ShippingAddress1
1234	12/16/2009	CheapSoft	Jen Adams	Novell	1800 S. Novell Pl.
87654	12/18/2009	Soft-R-Us	Nigel Ray	Novell	404 Wyman Street

The order of the columns is not important. For example, you can reverse the PO# and OrderDate columns or remove any columns that contain unwanted information.

Fields

The table shown below lists the fields used in each reseller import file.

The table's first column covers standard, Insight, CompuCom, SHI, and KMD import files because they use the same field names. The one exception is that KMD uses PO_NUMBER rather than PO#. The table's second column covers the Softchoice import file.

Fields 1–13 identify the purchase record. Fields 14–30 identify a product's line item (or detail) included in the purchase record. For two products to be included in the same purchase record, the information in fields 1–13 must match.

When working with an import file, the following rules apply:

- ◆ Use only the fields intended for that import file. For example, when editing a Softchoice import file, include only the fields listed in the Softchoice Fields column. Any invalid fields cause the import to fail.
- ◆ The following fields are required: (PO# | PO_NUMBER | PURCHASEORDER), (OrderDate | ORDERDATE), (ProductName | ITEMDESC), and (PurchaseQty | QTYORD). Removing these fields causes the import to fail.
- ◆ The LicensesPerPackage field is also required; however, if it is missing the importer assigns a default value of 1.
- ◆ All non-required fields can be removed if desired. When doing so, remove both the field column header and the field text in each subsequent row.

Table 9-1 Import File Fields

	Standard, KMD, Insight, CompuCom, and SHI Fields	Softchoice Fields	Description
1	PO# (standard, Insight, CompuCom, SHI) PO_NUMBER (KMD)	PURCHASEORDER	<p>The purchase order number.</p> <p>Either this field or the OrderDate field must be included in the record. If neither field contains data, the record is not imported.</p> <p>The ZENworks purchase record object (created during import) uses the PO number for its name. If you don't supply a PO number, the name of the purchase record object defaults to Unknown (MM_DD_YY), where MM_DD_YY is the current date in the appropriate locale format.</p> <p>The maximum field length is 32 characters.</p>
2	OrderDate	ORDERDATE	<p>The date the product was ordered.</p> <p>Either this field or the PO# field must be included in the record. If neither field contains data, the record is not imported.</p> <p>If you provide a PO number but not a date, the OrderDate field defaults to the import date.</p> <p>For a standard, Insight, CompuCom, or SHI import file, the OrderDate field requires the short date format determined by the ZENworks Control Center's server locale. For example, if the server locale is US-English, the correct date format is m/d/yyyy (12/16/2009 or 5/3/2010).</p> <p>For a KMD import file, the OrderDate field requires the d/M/yy format (for example, 28/1/09).</p> <p>For a Softchoice import file, the ORDERDATE field requires the dd-MMM-yyyy format (for example, 18-JUL-2010).</p>
3	Reseller		<p>The reseller from whom the products in this order were purchased.</p> <p>The maximum field length is 64 characters.</p>
4	Recipient	SHIPCONTACTNAME	<p>The individual to whom the products in this order were shipped.</p> <p>The maximum field length is 32 characters.</p>
5	CompanyName	COMPANYNAME	<p>The name of the company or entity that executed the order.</p> <p>The maximum field length is 32 characters.</p>

Standard, KMD, Insight, CompuCom, and SHI Fields	Softchoice Fields	Description
6 ShippingAddress1	SHIPADDR	The first line of the shipping address. The maximum field length is 64 characters.
7 ShippingAddress2	SHIPCITYSTZIP	The second line of the shipping address. The maximum field length is 64 characters.
8 ShippingAddress3		The third line of the shipping address. The maximum field length is 64 characters.
9 City		The city where the order was shipped. The maximum field length is 32 characters.
10 State		The state where the order was shipped. The maximum field length is 32 characters.
11 Zip		The ZIP code or mail code of the shipping destination. The maximum field length is 16 characters.
12 Country		The country where the order was shipped. The maximum field length is 32 characters.
13 Notes		A text field for general notes about the purchase record. The maximum field length is 255 characters.
14 Manufacturer	PUBLISHER	The manufacturer of the purchased product. The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product. The maximum field length is 64 characters.
15 ProductName	ITEMDESC	The name or description of the purchased product. This field is required. The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product. The maximum field length is 255 characters.

Standard, KMD, Insight, CompuCom, and SHI Fields	Softchoice Fields	Description	
16	Version	<p>The version of the purchased product.</p> <p>The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.</p> <p>The maximum field length is 32 characters.</p>	
17	ProductType	<p>The type of purchased product. This field helps establish what the product represents, such as full license, upgrade, or media.</p> <p>The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.</p> <p>The maximum field length is 32 characters.</p>	
18	LicensesPerPackage	<p>The number of licenses included in each purchased product unit.</p> <p>For example, if the product is a 5-pack, this value is 5. The default is 1. Range values (for example, 1-25) are not supported and cause the line item to be skipped during import.</p> <p>The Manufacturer, ProductName, Version, ProductType, and LicensesPerPackage fields are used to determine the existence of a unique product.</p>	
19	ResellerSKU	SKU	<p>The SKU number assigned by the reseller. This value might be important when communicating with a particular reseller.</p> <p>The maximum field length is 32 characters.</p>
20	MfrPart#	MFGSKU	<p>The part number assigned by the manufacturer. If available, this value can often be used to distinguish one product from another.</p> <p>The maximum field length is 32 characters.</p>
21	PurchaseQty	QTYORD	<p>The number of product units purchased in the order.</p> <p>This must be a single value. Range values (for example, 1-25) are not supported and cause the record to be skipped during import.</p> <p>The value must be between -1000000 and 1000000.</p>

Standard, KMD, Insight, CompuCom, and SHI Fields	Softchoice Fields	Description
22 Serial#		<p>The software serial number associated with the ordered product</p> <p>The maximum field length is 40 characters.</p>
23 Site ¹		<p>The Site, Department, and CostCenter fields are used for tracking demographics. You can</p>
24 Department ¹		<p>associate a line item with a value in any or all of these columns so that license quantities can be</p>
25 CostCenter ¹		<p>summarized within a particular demographic. For these values to be meaningful, corresponding demographics must be associated with devices in the ZENworks Asset Management inventory.</p> <p>The maximum field length is 32 characters.</p>
26 Comment	COMMENTS	<p>A text field for general comments about the purchased product.</p> <p>The maximum field length is 128 characters.</p>
27 Invoice#	INVOICE	<p>The invoice number of the purchased product.</p> <p>Multiple invoices can be associated with the same purchase order number.</p>
28 UnitMSRP		<p>The UnitMSRP is the manufacturer's suggested price for one product unit.</p>
29 UnitPrice		<p>The UnitPrice is the actual price paid for one product unit.</p>
30 ExtendedPrice		<p>The Extended Price is the cost for all the purchased product units. If no value exists in the ExtendedPrice field, a value is calculated based on the values of the PurchaseQty and UnitPrice fields. If a value exists, it is imported and is not checked to see if it matches a calculated value.</p> <p>If currency symbols and thousands separators appear in the fields, they are stripped out when the data is imported.</p> <p>The importer uses the locale of the server to determine what characters are used for thousands and monetary decimal separators. If your values contain a mixture of currencies, the imported cost values might be incorrect.</p> <p>Range values (for example, 25.00-39.99) are not supported and cause the record to be skipped during import.</p>

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

10 Working with Catalog Products

Catalog products are used to associate purchased licenses with licensed products. The following sections explain the tasks associated with managing catalog products:

- ♦ [“Viewing the Catalog Products List” on page 87](#)
- ♦ [“Filtering the Catalog Products List” on page 88](#)
- ♦ [“Excluding Catalog Products from Compliance Calculations” on page 89](#)
- ♦ [“Creating Catalog Products by Importing Purchase Records” on page 89](#)
- ♦ [“Creating Catalog Products Manually” on page 89](#)
- ♦ [“Adding Purchased Licenses to a Catalog Product” on page 90](#)
- ♦ [“Adding Catalog Products to a Licensed Product” on page 91](#)
- ♦ [“Creating a Catalog Product Folder” on page 92](#)
- ♦ [“Viewing a Catalog Product’s Purchases” on page 92](#)
- ♦ [“Changing a Catalog Product’s General Information” on page 92](#)
- ♦ [“Adding Custom Fields to Catalog Products” on page 93](#)
- ♦ [“Deleting a Catalog Product” on page 95](#)
- ♦ [“Moving a Catalog Product” on page 95](#)

Viewing the Catalog Products List

You can view a list of all of your catalog products. The list provides general information about each catalog product, such as the number of licenses included in one unit of the product catalog, the manufacture part number, and the licensed product with which it is associated.

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

The list provides the following information for each catalog product:

Name: The name of the catalog product. The name consists of five parts: *Manufacturer Product Version (Product Type) (Licenses Per Package)*. For example, with *Acme Product A 8.5 (Full License) (10)*, *Acme* is the manufacturer, *Product A* is the product, *8.5* is the version, *Full License* is the product type, and *10* is the number of licenses per product unit. Click the name to display the catalog product’s details.

Licenses Per Pkg: The number of licenses included in one unit of the catalog product. For example, if the catalog product is *Product B (10-License Pack)*, the number of licenses is 10.

Mfr. Part. #: The part number that the manufacturer assigned to the software product package represented by the catalog product.

Reseller SKU: The SKU (stock-keeping unit) that the reseller assigned to the software product package represented by the catalog product.

Excluded: Indicates whether or not the catalog product is excluded from compliance calculations. Excluded products cannot be added to a licensed product.

Purchase Quantity: The number of packages of the software product you have purchased. This number, multiplied by the Licenses Per Pkg number, provides the total licenses associated with the catalog product. Click the quantity number to display the list of purchases for the catalog product.

Licensed Product: The licensed product to which the catalog product is assigned. Click the licensed product to display its License Entitlements page.

License Entitlement: The specific license entitlement to which the catalog product is assigned. Click the entitlement to display the entitlement's Proof of Ownership page. You can use this page to manage (view, add, or remove) the catalog product's association with the entitlement.

Filtering the Catalog Products List

By default, the Catalog Products list displays all catalog products that are not excluded from compliance calculations. You can modify the Search criteria to change which catalog products are displayed.

For example, you can display only the catalog products from a specific manufacturer, or you can display only the catalog products that are assigned to licensed products.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 In the Search panel (located next to the Catalog Products panel), specify the criteria to use for filtering the list. A product must match all defined criteria to be displayed.

Name: Specify the text that the catalog product name (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of the name, the product matches the criteria.

Manufacturer: Select a specific manufacturer, or select **Any** to match any manufacturers.

Product Type: Select a specific product type, or select **Any** to match any product type.

Platform: Select the platform (**Windows** or **Mac**) to match.

Mfr. Part Number: Specify the text that the part number must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of the part number, the product matches the criteria.

Exclude Status: Select one of the following to match:

- ◆ **Any:** Ignore the exclude status. Match all catalog products.
- ◆ **Excluded:** Match only the catalog products that are excluded from compliance calculations. An excluded product cannot be associated with a licensed product.
- ◆ **Not Excluded:** Match catalog products that are not excluded from compliance calculations.

Reconciliation Status: Select one of the following to match:

- ◆ **Any:** Ignore the reconciliation status. Match all catalog products.
- ◆ **Reconciled:** Match catalog products that are assigned to licensed products.
- ◆ **Unreconciled:** Match catalog products that are not assigned to licensed products.

Include Subfolders: Select this option to search the current folder and its subfolders.

- 4 Click **Search** to apply the search criteria and filter the list.

Excluding Catalog Products from Compliance Calculations

If you have catalog products that you don't want associated with licensed products, you can exclude them. Excluded catalog products cannot be assigned to licensed products and they do not appear in the Catalog Products list unless you change the default Search filter. Also, when you run the Auto-Reconcile Wizard to create licensed products from discovered products, excluded catalog products are not available.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 Select the product you want to exclude.
- 4 Click **Action > Exclude**.

Creating Catalog Products by Importing Purchase Records

Asset Management allows you to import purchase records. When a purchase record contains a software product that is not already identified as an Asset Management catalog product, the import process creates the catalog product. When a purchase record contains a software product that is already identified as a catalog product, the import process adds the product's purchased licenses to the catalog product.

For instructions about how to import purchase records, see [“Importing Purchase Records” on page 77](#).

Creating Catalog Products Manually

You can manually create catalog products. The catalog product defines the software product but does not include any licenses. To include the software product's licenses in the catalog product, you must associate the catalog product with the purchase records that contain the license purchases.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 Click **New > Catalog Product** to launch 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	<p>Fill in the following fields:</p> <p>Manufacturer: Specify the manufacturer of the product.</p> <p>Product: Specify the name of the product as indicated in your purchase record. This should be as specific as possible. For example, if the product is <i>Product B (10-License Pack)</i>, enter that name rather than <i>Product B</i>.</p> <p>Product Type: Select a product type.</p> <p>Version: Specify the product version.</p> <p>Manufacturer Part Number: Specify the part number assigned to the product package.</p> <p>Reseller SKU: Specify the reseller's SKU.</p> <p>Licenses Per Package: Specify the number of licenses that come in the package.</p> <p>Notes: Add notes, if any.</p> <p>Excluded: Select Excluded to remove the product from compliance calculations. Excluded products cannot be associated with licensed products.</p>
New Catalog Product Summary	Review the data.

- 4 If you have not already done so, click **Finish** to create the catalog product.
- 5 To add licenses to the catalog product, see [“Adding Purchased Licenses to a Catalog Product” on page 90](#).

Adding Purchased Licenses to a Catalog Product

There are two ways to add purchased licenses to a catalog product:

- ◆ You can import a purchase record file that includes the purchased licenses. The purchase record is created and, if the software product name in the purchase record matches the catalog product name, the purchased licenses are associated with the catalog product. For instructions, see [“Importing Purchase Records” on page 77](#)
- ◆ You can manually create a new purchase record and add a purchase detail that is associated with the catalog product. The license quantity included in the purchase detail is added to the catalog product. For instructions, see [“Manually Creating Purchase Records” on page 77](#).

Adding Catalog Products to a Licensed Product

To populate a licensed product with the number of purchased licenses, you add catalog products to the licensed product's entitlements. There are two ways to add a catalog product to a licensed product's entitlement:

- ♦ [“Editing an Entitlement to Add Catalog Products” on page 91](#)
- ♦ [“Using the Catalog Products List to Add Catalog Products” on page 91](#)


Editing an Entitlement to Add Catalog Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product with the entitlement.
- 4 Click the **License Entitlements** tab.
- 5 In the Entitlements panel, click the entitlement to which you want to add catalog products.
- 6 Click the **Proof of Ownership** tab.
- 7 In the Catalog Products panel, click **Add**.
- 8 Select the desired catalog products, then click **OK** to add them to the Catalog Products panel.

The Catalog Products panel displays each catalog product's Purchase Quantity, which is the number of units of the catalog product that you've purchased (according to the purchase records). It also displays the License Quantity, which is the total number of licenses included in the purchased units.

Using the Catalog Products List to Add Catalog Products

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 Select the catalog products that you want to add to an entitlement.
- 4 Click **Action > Add to Licensed Product** to launch the Add Catalog Products to Licensed Product Wizard. Complete the wizard by using the information in the following table:

Wizard Page	Details
Licensed Product	Click  to browse for and select the licensed product that contains the entitlement to which you want to add the catalog products.
License Entitlement	Select the entitlement to which you want to add the catalog products,
Summary	Review the data.

- 5 If you have not already done so, click **Finish** to add the catalog products to the entitlement. In the Catalog Products list, each catalog product you added displays the licensed product and entitlement with which it is now associated.

Creating a Catalog Product Folder

You can create folders in the Catalog Products list to better organize your catalog products. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Catalog Products** to display the **Catalog Products** page.
- 2 Click **New** > **Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and catalog products at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.
 - Description:** Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Viewing a Catalog Product's Purchases

You can view a list of the purchase records from which the catalog product draws its purchased license quantity.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Catalog Products**.
- 3 Click a catalog product to display its Details page.
- 4 Click the **Purchases/Licenses** tab.
 - Each purchase record represents a purchase. The Quantity Purchased is the number of units of the catalog product that were purchased. The License Quantity is the total number of licenses included in the purchase.

Changing a Catalog Product's General Information

A catalog product includes general information such as its manufacturer, product name, version, and licenses per product package. You can modify this information as necessary.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Catalog Products** to display the Catalog Products page.
- 2 In the Catalog Products panel, click the catalog product whose general information you want to edit.
- 3 Modify the fields as needed:
 - Manufacturer:** Select the product's manufacturer from the list or enter a new manufacturer.
 - Product:** Select a name for the product from the list or enter a new name.
 - Product Type:** Select the product's type from the list or enter a new type.
 - Version:** Specify the product version.
 - Manufacturer Part Number:** Specify the part number that the manufacturer assigned to the software product package represented by the catalog product.

Reseller SKU: Specify the SKU (stock-keeping unit) that the reseller assigned to the software product package represented by the catalog product.

Licensed Product: Displays the licensed product with which the catalog product is associated.

License Entitlement: Displays the entitlement (from the licensed product) with which the catalog product is associated.

Licenses Per Package: Specify the number of licenses included in the software product package (unit) represented by the catalog product. Changing the licenses per package affects the total licenses assigned to the catalog product. For example, if three purchase records include purchases of the product and you change the licenses per package from 10 to 20, the total licenses for the catalog product increases from 30 to 60.

Notes: Add any information you want to retain with the product.

Excluded: Select this option to exclude the catalog product from compliance calculations. Excluded products cannot be added to a licensed product.

- 4 Click **Apply** to save the changes.

Adding Custom Fields to Catalog Products

A catalog product includes predefined fields for recording the product's manufacturer, name, and version. These fields are displayed on the catalog product's General page.

You can create custom fields to record additional information for catalog products. When you create a custom field, it is added to each catalog product's General page. It is also included in the Create New Catalog Product Wizard so that you can populate the field during creation of catalog products.

To create custom fields:

- 1 In ZENworks Control Center, click **Configuration**, then click the **Asset Management** tab.
- 2 In the Administrator-Defined Fields panel, click **Catalog Product** to display the Catalog Product Fields page.
- 3 Click **New** to launch 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	<p>Fill in the following fields:</p> <p>Type: Filled in by default depending on the type of field you selected.</p> <p>Name: Specify the field label. This field is required.</p> <p>Default Value: Specify the default value of the field. The default value must be valid for the field's data type. For example, the default cannot be A if the data type is Integer.</p> <p>Data Type: Select the type of data allowed in the field: Character, Integer, Decimal, or Date.</p> <p>Size: Specify the maximum number of alphanumeric characters allowed in the field. This applies only to character-type fields.</p> <p>Edit Type: Determines how you enter values into the field. There are three options you can select:</p> <ul style="list-style-type: none"> ◆ Edit: Allows you to enter a value or edit the default value. ◆ List: Allows you to select a value from a list of values. ◆ Combo: Allows you to select a value from a list of values or enter a new value. <p>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.</p>
Choice List Values	<p>This page appears if you chose List or Combo as the Edit Type.</p> <p>To create a list of choices:</p> <ol style="list-style-type: none"> 1. Specify a value in the Choice List Values field. 2. Click Add. Repeat for additional values. <p>Edit: Select a value and click Edit to change it.</p> <p>Remove: Select a value and click Remove to delete it.</p> <p>Import: Click Import to open the Import Choice List Values dialog box where you can specify a file to import.</p>
Field Summary	<p>Review the data. Use the Back button to go back to a previous page to edit any fields.</p>

- 4 Click **Finish** to create the new administrator-defined field.
The field is added to each catalog product's General page.

Deleting a Catalog Product

You can remove a catalog product from the Catalog Products list by deleting it. If the catalog product is assigned to a licensed product, it (and its license quantity) is removed from the licensed product.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Catalog Products** to display the Catalog Products page.
- 2 In the Catalog Products panel, select the catalog product you want to delete.
- 3 Click **Delete**, then click **OK** to confirm the deletion.

Moving a Catalog Product

You can move a catalog product from one folder to another in the Catalog Product list.

- 1 In ZENworks Control Center, click **Asset Management** > **License Management** > **Catalog Products** to display the Catalog Products page.
- 2 In the Catalog Products panel, select the catalog product you want to move.
- 3 Click **Move** to display the Move Catalog Product(s) dialog box.
- 4 Browse for and select the target folder, then click **OK**.

11 Working with Software Collections

In some cases, the ZENworks Knowledgebase might not include a discovered product for a software suite you own. There are various reasons for this, ranging from the suite not yet being defined in the current Knowledgebase to the suite installation not registering as a suite.

A software collection is an administrator-defined suite. You create the software collection and add discovered products as members of the collection. When all of the member products are discovered on a device, the installation count for the software collection is incremented rather than the count for the individual member products. You can assign the software collection to a licensed product just as you would assign an individual discovered product or a suite discovered product.

The following sections explain the tasks associated with managing purchase records:

- ♦ [“How Software Collection Installations are Counted” on page 97](#)
- ♦ [“Creating a Software Collection” on page 98](#)
- ♦ [“Adding Products to a Software Collection” on page 98](#)
- ♦ [“Deleting a Software Collection” on page 99](#)
- ♦ [“Creating a Software Collection Folder” on page 99](#)
- ♦ [“Moving a Software Collection” on page 99](#)

How Software Collection Installations are Counted

A software collection’s member products can be required or non-required. Required member products must be found on a device in order for the installation to qualify as a software collection installation. Non-required member products, if installed on the machine, are considered part of the software collection but are not required to be installed.

Consider the following example. SoftwareCollection includes three member products:

- ♦ ProdA (required)
- ♦ ProdB (required)
- ♦ ProdC (non-required).

The member products are installed as follows:

- ♦ Device1: ProdA, ProdC
- ♦ Device2: ProdA, ProdB
- ♦ Device3: ProdA, ProdB, ProdC
- ♦ Device4: ProdA

The Discovered Products list would show the following:

- ♦ SoftwareCollection: 2 installations (Device2, Device3)
- ♦ ProdA: 2 installations (Device1, Device4)

- ◆ ProdB: 0 installations
- ◆ ProdB: 1 installation (Device1)

Creating a Software Collection

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Software Collections**.
- 3 Click **New > Software Collection** to launch 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	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	Review the summary data. Click Back to make changes.

- 4 If you haven't already done so, click **Finish** to create the software collection.
- 5 Continue with the next section, [Adding Products to a Software Collection](#).

Adding Products to a Software Collection

- 1 In the Software Collections list, click the software collection to which you want to add products.
- 2 Click the **Member Products** tab.
- 3 Add discovered products as members of the collection:
 - 3a In the Discovered Products panel, click **Add > Installed Discovered Products** if you want to see only discovered products that are installed on devices in your Management Zone.
or
Click **Add > Any Discovered Product** to see all discovered products included in the Knowledgebase.
 - 3b Browse for and select the products you want to add, then click **OK** to add them to the Discovered Products list.
- 4 Mark the member products as required or non-required.
A software collection's member products can be required or non-required. By default, member products are set as **Required** when you add them to the list. Required member products must be present on a device in order for the installation to qualify as a software collection

installation. Non-required member products do not need to be present; however, if they are present, their installation is counted under the software collection installation rather than an individual discovered product installation.

- 4a** To change a required product to non-required, select the product by clicking the check box next to it, then click **Action > Clear Required**.
- 4b** To change a non-required product to required, select the product by clicking the check box next to it, then click **Action > Set Required**.

Deleting a Software Collection

You can remove a software collection from the Software Collections list by deleting it. If the software collection is assigned to a licensed product, it (and its installation quantity) is removed from the licensed product.

Deleting a software collection does not delete the discovered products that are members of the 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**.

Creating a Software Collection Folder

You can create folders in the Software Collections list to better organize your software collections. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management > License Management > Software Collections** to display the **Software Collections** page.
- 2 Click **New > Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and software collections at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.
 - Description:** Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Moving a Software Collection

You can move a software collection from one folder to another in the Software Collections list.

- 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**.

12 Configuring License Information Sources

ZENworks allows you to track license compliance for Micro Focus Software products. To track license compliance, first you should have information about the sources where each of these software products are installed. The License Information Sources panel in ZENworks Control Center enables you to configure License Information Sources for the following software products.

- ♦ GroupWise
- ♦ Open Enterprise Server (OES)
- ♦ ZENworks

The License Information Sources panel also allows you to add new configurations, and edit or delete the existing configurations for the Novell products listed above. To delete, select the existing source name check box and click **Delete**.

- ♦ [“Configuring New GroupWise Source” on page 101](#)
- ♦ [“Configuring New Open Enterprise Server Source” on page 103](#)
- ♦ [“Configuring the New ZENworks Source” on page 105](#)
- ♦ [“Viewing the Automatically Created Products” on page 106](#)
- ♦ [“Setting a Schedule for Collecting License Information” on page 107](#)
- ♦ [“Managing Covered License Information Sources” on page 107](#)

Configuring New GroupWise Source

To track license compliance status of the GroupWise software, first you should know the sources of GroupWise domains and then configure these sources.

- ♦ [“Editing GroupWise Source Configuration” on page 102](#)
- ♦ [“Renaming GroupWise Source Configuration” on page 103](#)

To configure a new source of GroupWise:

- 1 In ZENworks Control Center, click **Configuration > Asset Management**
- 2 In the Asset Management page, go to **License Information Sources** panel.
- 3 Click **New > GroupWise**. In the New GroupWise Source Configuration dialog, specify the following details:
 - 3a **Source Name:** For identification, provide a name for the new source of GroupWise for which you want to configure and track license compliance.
 - 3b **Server Address:** Specify the IP address of the remote GroupWise server for which you want to track license compliance.

For example:

IPv4: <server_IP>:<port_number>

IPv6: When you are configuring the GroupWise using IPv6 address, you must specify the DNS hostname instead of IP address. For more information, see [GroupWise IPv6 Support](#).

NOTE: The GroupWise version of the source should be GroupWise 2014 and above.

- 3c Domain Name:** Specify the domain from which you need to query license compliance information for that particular source of GroupWise.
- 3d Server Credentials:** You can either add a new GroupWise admin credential or browse and select an existing GroupWise admin credential. For details on adding a credential, see [“Adding a Credential”](#).
- 3e Verify Connection:** Click this button to verify that the connection to the specified remote GroupWise server is possible. When the connection is successful, the **Connected to remote server** message will be displayed. You are allowed to click **OK** and proceed only after verifying the connection.

The following messages are displayed when you click **Verify Connection** based on the availability of the remote GroupWise server:

- ◆ **Connected to remote server:** Displayed on successful connection to the remote GroupWise server.
- ◆ **Unable to connect with the server:** Displayed when the specified IP address of the remote GroupWise server is wrong, or when connection to the specified remote GroupWise server is not available.

When you verify the connection for the first time, the certificate information is displayed. To view the certificate, click the **View Certificate** link. Clicking this link is not mandatory for completing the configuration.

- 4** Select the **Create Catalog products, licensed products, and entitlements automatically** check box to automatically create the catalog products, licensed products and entitlements for the configured licensed information source.
- 5** Click **OK**.

The newly added GroupWise source will be listed under the License Information Sources panel with the following details:

- ◆ Server Address is the IP address of the GroupWise source.
- ◆ Last Connection Status is either failed, succeeded or unknown.

Editing GroupWise Source Configuration

The Edit GroupWise Source Configuration dialog enables you to edit the details of an existing GroupWise source.

- 1** Select the check box next to the GroupWise source that you want to edit.
- 2** Click the **Edit** drop-down.
- 3** Click **Configure Settings** to launch the Edit GroupWise Source Configuration dialog.
- 4** Modify one or all of the following details and then proceed:
 - ◆ **Source Name**
 - ◆ **Server Address**

- ◆ **Domain Name**
- ◆ **Server Credentials**

For details on these fields, see [Configuring New GroupWise Source](#).

Renaming GroupWise Source Configuration

The Rename Configuration dialog allows you to modify the name of the existing GroupWise source. Modify the name of the configured GroupWise source and click **OK**.

Configuring New Open Enterprise Server Source

To track license compliance status of Novell Open Enterprise Server, first you should know the sources of Open Enterprise Servers and then configure these sources.

- ◆ [“Editing Open Enterprise Server Source Configuration” on page 104](#)
- ◆ [“Renaming Open Enterprise Server Source Configuration” on page 104](#)

To configure a new source of Open Enterprise Server:

- 1 In ZENworks Control Center, click **Configuration >Asset Management**.
- 2 In the Asset Management page, go to **License Information Sources** panel.
- 3 Click **New > Open Enterprise Server**. In the New Open Enterprise Server Source Configuration dialog, specify the following details:
 - 3a **Source Name:** For identification, provide a name for the new eDirectory source of OES for which you want to configure and track license compliance.
 - 3b **Server Address:** Specify the IP address of the remote eDirectory source of OES for which you want to track license compliance.
 - 3c **Port :** Specify the port on which you need to query the OES user details. For example, 389 (for normal connection) and 636 (for secure connection).
 - 3d **Context :** Specify the eDirectory object or the LDAP object through which you need to query the OES user details.
 - 3e **Server Credentials:** You can either add a new eDirectory login credential, or browse and select an existing eDirectory login credential. For details on adding a credential, see [“Adding a Credential”](#).
 - 3f **Verify Connection:** Click this button to verify that the connection to the specified remote eDirectory source of OES is possible. When the connection is successful, the **Connected to remote server** message will be displayed. To click **OK** and proceed, you need to verify the connection.

The following messages are displayed when you click **Verify Connection** based on the availability of the remote eDirectory source of OES:

- ♦ **Connected to remote server:** Displayed on successful connection to the remote eDirectory source of OES.
- ♦ **Unable to connect with the server:** Displayed when the specified IP address of the remote eDirectory source of OES is wrong or when connection to the specified remote eDirectory source of OES is not available.

When you verify the connection for the first time, the certificate information is displayed. To view the certificate, click the **View Certificate** link. Clicking this link is not mandatory for completing the configuration.

- 4 Select the **Create Catalog products, licensed products, and entitlements automatically** check box to automatically create the catalog products, licensed products and entitlements for the configured licensed information source.
- 5 Click **OK**.

The newly added eDirectory source of OES will be listed under the License Information Sources panel with the following details:

- ♦ Server Address is the IP address of the eDirectory source of OES.
- ♦ Last Connection Status could either be failed, succeeded or unknown.

Editing Open Enterprise Server Source Configuration

The Edit Open Enterprise Server Source Configuration dialog enables you to edit the details of an existing OES source.

- 1 Select the check box next to the eDirectory source of OES that you want to edit.
- 2 Click the **Edit** drop-down.
- 3 Click **Configure Settings** to launch the Edit Open Enterprise Server Source Configuration dialog.
- 4 Modify one or all of the following details and then proceed:
 - ♦ **Source Name**
 - ♦ **Server Address**
 - ♦ **Port**
 - ♦ **Context**
 - ♦ **Server Credentials**

For details on these fields, see [Configuring New Open Enterprise Server Source](#).

Renaming Open Enterprise Server Source Configuration

The Rename Configuration dialog allows you to modify the name of the existing Open Enterprise Server source. Modify the name of the configured OES source and click **OK**.

Configuring the New ZENworks Source

Configure the new ZENworks source to track license compliance status of Novell ZENworks software. For this, you should know the sources of ZENworks domains and then configure the License Information Source (LIS).

IMPORTANT: The ZENworks compliance is a reference to the customer that provides information about the ZENworks license consumption in the zone.

You can configure an LIS for the local zone or a remote zone.

To configure the new source of ZENworks:

- 1 In ZENworks Control Center, click **Configuration > Asset Management**.
- 2 In the Asset Management page, go to License Information Sources panel.
- 3 Click **New > ZENworks**.

In the New ZENworks Source Configuration dialog, specify the following details to add an LIS for the remote ZENworks zone:

- ♦ **Source Name:** For identification, provide a name for the new source of ZENworks for which you want to configure and track license compliance.
- ♦ **Server Address:** Specify the IP address or DNS of the remote ZENworks server for which you want to track license compliance.

NOTE: The ZENworks version of the ZEN source should be ZENworks 11.4.1 and above.

- ♦ **Server Credentials:** You can either add the new ZENworks admin credentials or browse and select existing ZENworks admin credentials. For details on adding a credential, see [“Adding a Credential.”](#)
- ♦ **Verify Connection:** Click this button to verify whether the connection to the specified remote ZENworks server is successful. After successful connection, the **Connected to remote server** message is displayed, then click **OK**.

The **Unable to connect with the server** message is displayed, if connection is not successful.

When you verify the connection for the first time, the certificate information is displayed. Click the **View Certificate** link, to view the certificate details.

or

Select **Create a License Information Source** for the local zone to add an LIS for the local ZENworks zone.

- 4 Select the **Create Catalog products, licensed products, and entitlements automatically** check box to automatically create the catalog products, licensed products and entitlements for the configured licensed information source.
- 5 Click **OK**.

The configured ZENworks source will be listed under the License Information Sources panel.

Editing ZENworks Source Configuration

To edit the ZENworks source configuration:

- 1 Select the check box next to the ZENworks source that you want to edit.
- 2 Click the **Edit** drop-down.
- 3 Click **Configure Settings** to launch the Edit ZENworks Source Configuration dialog, then edit the required details.

For details on these fields, see [Configuring the New ZENworks Source](#).

Renaming ZENworks Source Configuration

The Rename Configuration dialog allows you to modify the name of the existing ZENworks source. Modify the name of the configured ZENworks source and click **OK**.

Viewing the Automatically Created Products

The Details of the Products Created wizard lets you view details of the catalog and the licensed products that are created automatically after configuring the new sources for products in the New Source Configuration dialog.

Catalog Products

For the new source that is configured, the catalog products are created automatically when you click **Ok in the New Source Configuration dialog**. The Details of the Products Created dialog lets you view details such as product name, manufacturer, and licenses per package. The configured source name is appended to the product name. After you click **Ok**, these details are listed in the **Catalog Products** list that is available under **Asset Management**.

- ◆ For OES, one catalog product is created.
- ◆ For GroupWise, four catalog products are created.
- ◆ For ZENworks, 16 catalog products are created.

The automatically created catalog products list helps you create a purchase order by specifying details of the purchased quantity of the product, without having to manually create catalog products.

Licensed Products

For the new source that is configured, the licensed product is created automatically when you click **OK** in the in the New Source Configuration dialog. The Details of the Products Created dialog lets you view details such as product name and manufacturer name. The configured source name is appended to the product name.

After you click **Ok**, the licensed product appears in the **Licensed Products** list that is available under **Asset Management**.

- ◆ For OES, one licensed product is created.

- ◆ For GroupWise, one licensed product is created.
- ◆ For ZENworks, one license product is created.

For ZENworks 16 entitlements are created eight entitlements for device based ZENworks license consumption and other eight for user based ZENworks license consumption.

For users' convince two sets of entitlements (device based and user based) are created. It is recommended to delete the entitlement that is not used.

For the automatically created licensed products, license entitlements are also created automatically. These license entitlements are mapped to the catalog products that are automatically created for the new source.

Setting a Schedule for Collecting License Information

In ZENworks you can configure a schedule for collecting the license information about the products for which the sources are configured in the New Source Configuration dialog.

- 1 In ZENworks Control Center, click **Configuration**.
- 2 In the Management Zone Settings page, click **Asset Management** > License Collection Schedule.
- 3 In the Product License Collection Schedule panel, select the time in hours and minutes.
- 4 Click **Apply** or **OK** to save your changes.

Managing Covered License Information Sources

The Coverage tab displays the LIS (license information source) products that are covered by the licensed product. Based on the coverage information, ZENworks Asset Management determines the compliance status of the LIS products.

For the configured license information source, the following information is displayed in the License Information Sources Configured panel:

- ◆ **Source Name:** The name of the configured license information source of the licensed product
- ◆ **Source Address:** Details such as the IP Address with port name, or host name with IP Address
- ◆ **Source Type:** Indicates the type of product associated with the source, such as GroupWise or Open Enterprise Server

The licensed products are not created automatically for the license information sources for which the following option is not selected:

Create catalog products, licensed products and entitlements automatically

However, you can manually add a new license information source by using the Coverage tab.

The following table lists the tasks you can perform to manage covered license information sources.

Tasks	Steps	Additional Details
Add a license information source	<ol style="list-style-type: none">1. Click Add.2. In the Select License Information Source dialog, select the license information source.3. Click OK.	In the Select License Information Source dialog, the license information sources that are not already linked to any of the licensed products are available for selection.
Remove a license information source	<ol style="list-style-type: none">1. Click the listed license information source.2. Click Remove.	

13 Asset Management Dashboard

The Asset Management Dashboard can be viewed by clicking Asset Management in the left pane of ZENWorks Control Center.

The Asset Management Dashboard includes:

- ♦ [“Compliance” on page 109](#)
- ♦ [“Licensed Products” on page 109](#)

Compliance

The Compliance tab displays the percent and quantity of under licensed, over licensed and compliant Licensed Products. This tab also lists down the top 10 under, over and compliant Licensed Products along with their Deficit, Surplus and Balanced license counts.

NOTE: Click any of the compliant products link to view detailed information about that product.





Licensed Products

The License Products tab lists the licensed products along with its compliance status and license quantity. Click any of the licensed products to view additional license-related information.



Creating a Licensed Product from the Dashboard

To create a license product:

- 1 In the **Asset Management Dashboard**, click **Licensed Products**.
- 2 Click **New**.
- 3 In the **Select the Discovered Product**, Click , browse and select the required discovered product.
- 4 Click **Next**.
- 5 In the **Select Entitlement** page, perform the following and click **Next**:
 - ◆ Enter the description on licensed product.
 - ◆ Select the required license model. For more information on license models, see [“License Models” on page 19](#).
 - ◆ You can either create a new or select an existing catalog product.
 - ◆ **To create a new catalog product:**
 1. Select **Create New Catalog Product**.
 2. Specify **License per package**, **Purchase Quantity** and **Reseller SKU**.
 3. Click **Next**.
 - ◆ **To select an existing catalog product**
 1. Select **Browse Catalog Product**.
 2. Click , **Select Product for License Entitlement** page is displayed.
 3. Browse and select the required product, and click **OK**.
- 6 In the **New Licensed Product Summary** page review the displayed information and click **Finish**.



License Allocation

Novell ZENworks Asset Management lets you allocate licenses within your organization to track ownership and distribution of the licenses.

- ♦ [Chapter 14, “License Allocation Concepts,” on page 113](#)
- ♦ [Chapter 15, “Preparing Demographic Data,” on page 115](#)
- ♦ [Chapter 16, “Allocating Licenses,” on page 119](#)
- ♦ [Chapter 17, “Working with License Allocations,” on page 125](#)
- ♦ [Chapter 18, “Generating Allocation Reports,” on page 127](#)
- ♦ [Chapter 19, “License Tracking,” on page 129](#)

14 License Allocation Concepts

Allocating licenses to devices, departments, sites, and cost centers lets you track and maintain license ownership within your organization.

The following sections introduce the concepts you should understand to effectively use Asset Management to allocate licenses:

- ♦ [“Allocation vs. Compliance” on page 113](#)
- ♦ [“Device Allocations and Demographic Allocations” on page 113](#)

Allocation vs. Compliance

License allocation is an accounting tool; it assigns licenses to devices, departments, sites, or cost centers to track license distribution and ownership. *License compliance* is an evaluation tool; it compares a product’s license quantities against its installation quantities to determine a compliance status.

With the exception that both are based on licensed products, license allocation and license compliance are independent of one another. Allocating licenses does not affect the number of purchased licenses or installations for a product, and therefore does not affect the license compliance status for the product.

For example, assume that DepartmentQ purchased 30 licenses of ProductA. However, DepartmentQ has 35 installations of the product, which means that the license compliance status for ProductA is undercompliant (too few licenses for the number of installations). You decide to allocate 35 licenses to DepartmentQ, which you can do even though you only have 30 purchased licenses. The compliance status remains undercompliant because the purchased licenses, not the allocated licenses, are used when calculating compliance.

In some instances, license allocations might help you resolve compliance problems. For example, you notice that Product A is undercompliant by four licenses. You check the license allocation information for Product A and see that 14 licenses are allocated to DepartmentQ and 14 devices associated with DepartmentQ have Product A installed. At the same time, you see that 12 licenses are allocated to DepartmentZ but 16 devices associated with DepartmentZ have Product A installed. You know that you need to work with DepartmentZ to resolve the compliance problem.

Device Allocations and Demographic Allocations

You can allocate licenses to devices and to demographics (sites, departments, or cost centers).

A *device allocation* is the assignment of a license to a specific device. The device can have the product installed or not installed. For example, you purchase 10 licenses of ProductA. You can allocate the licenses to the target devices before ProductA is even installed on the devices.

A *demographic allocation* is the assignment of one or more licenses to a site, department, or cost center. Any device that is assigned the demographic and has the product installed shows up as an installation associated with the allocation. For example, you purchase 15 licenses of ProductA and allocate them to DepartmentQ. There are 20 devices assigned to DepartmentQ. Of those 20 devices, 12 have ProductA installed. The result is that the DepartmentQ allocation shows 15 allocated licenses with 12 installations.

Effective implementation of demographic allocations requires that the devices in your Management Zone include the correct demographic data. This data is stored as part of the device's Inventory data; there are several ways to ensure that devices include the correct data. These methods are discussed in [Chapter 15, "Preparing Demographic Data," on page 115](#).

A single licensed product can include both types of allocations. For example, DepartmentQ purchases 15 ProductA licenses. At the same time, your IT organization purchases 10 ProductA licenses for miscellaneous use throughout the organization. You allocate 15 licenses to DepartmentQ and then allocate individual licenses (from your pool of 10 IT licenses) to the devices of any other users who request to install ProductA.

For information about creating allocations, see [Chapter 16, "Allocating Licenses," on page 119](#).

15 Preparing Demographic Data

Before you can allocate licenses based on demographic data (departments, sites, or cost centers), you need to ensure that your devices and purchase records contain the appropriate demographic data. The following sections provide information:

- ♦ [“Adding Demographic Data to Devices” on page 115](#)
- ♦ [“Adding Demographic Data to Purchase Records” on page 116](#)
- ♦ [“Adding Demographic Data to Purchase Record Import Files” on page 117](#)
- ♦ [“Making Demographic Data Consistent Between Devices and Purchase Records” on page 117](#)

If you plan to allocate licenses directly to devices, you can ignore demographic data and continue with [Chapter 16, “Allocating Licenses,” on page 119](#).

Adding Demographic Data to Devices

Each device’s Inventory data contains three demographic fields: **Site**, **Department**, and **Cost Center**. Adding this demographic data to devices does the following:

- ♦ Creates the list of demographics (for example, Site1, CostCenterA, or Department12) to which licenses can be allocated. When you allocate licenses, you can allocate them only to sites, departments, and cost centers that already exist in Inventory device data or purchase record data.
- ♦ Enables a device’s installations to be tracked against the license allocations. For example, you allocate 10 ProductA licenses to Site1. If Device1 is associated with Site1, Device1’s installation of ProductA is tracked against Site1’s allocations. Otherwise, it is not.
- ♦ Enables you to use the Initialize Allocations Wizard to create a licensed product’s initial allocations based on the devices’ demographic data. For example, assume that you are initializing license allocations for ProductA based on the Site demographic. Device1, Device2, and Device3 have ProductA installed. Device1 and Device2 are assigned to Site1 and Device3 is assigned to Site2. The wizard allocates two licenses to Site1 (for Device1 and Device2) and one license to Site2 (for Device3).

If all your license allocations will use the same demographic (Site, Department, or Cost Center), you can add only that demographic data to each device. For example, if all demographic allocations are going to be Department allocations, you only need to add a department to each device. If you will have a mixture of demographic allocations, you should add a site, department, and cost center to each device.

There are three ways you can add demographic data to a device:

- ♦ Use ZENworks Control Center to manually enter the data for each device. To do so, go to a device’s Inventory page, click the **Detailed Hardware/Software Inventory** link, click **Edit** (at the bottom of the page), then provide information in the **Site**, **Department**, and **Cost Center** fields.

- ♦ Distribute an electronic data collection form to individuals and have them supply the demographic data. For instructions, see “[Scanning Demographic Data](#)” in the *ZENworks Asset Inventory Reference*.
- ♦ Import demographic data from device objects in your LDAP directory. For instructions, see “[Importing Demographic Data](#)” in the *ZENworks Asset Inventory Reference*.

Adding Demographic Data to Purchase Records

Adding demographic data to purchase records is optional. You need to do so only if you want to do either of the following:

- ♦ Use the purchase record data to create the list of demographics (for example, Site1, CostCenterA, or Department12) to which licenses can be allocated. When you allocate licenses, you can only allocate them to sites, departments, and cost centers that already exist in device or purchase record data.
- ♦ Use the Initialize Allocations Wizard to create a licensed product’s initial demographic allocations based on the demographic data in the purchase records. For example, assume that you are initializing license allocations for ProductA based on the Department demographic. PurchaseRecord1 includes 10 ProductA licenses assigned to DepartmentQ. PurchaseRecord2 includes 20 ProductA licenses assigned to DepartmentZ. The wizard allocates 10 licenses to DepartmentQ and 20 licenses to DepartmentZ.

If all your license allocations will use the same demographic (Site, Department, or Cost Center), you can assign only that demographic data to each purchase record. For example, if all demographic allocations are going to be Department allocations, you only need to assign a department to each purchase record. If you will have a mixture of demographic allocations, you should assign a site, department, and cost center to each purchase record.

To add demographic data to an existing purchase record:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 Click the purchase record to which you want to add demographic data.
- 4 Click the **Purchase Details** tab.

You add the demographic data to the purchase detail associated with the product.

- 5 Select the check box next to the purchase record detail, then click **Edit**.
- 6 Edit the **Cost Center**, **Department**, and **Site** fields to supply the appropriate data.
For each field, you can select an existing value from the list or you can type a new value.
- 7 Click **OK** to save the changes.

Adding Demographic Data to Purchase Record Import Files

Adding demographic data to purchase record import files is optional. You need to do so only if you want to automatically update existing demographic allocation counts for a licensed product when you import a new purchase record containing the product or if you want to initialize allocations using purchase records.

For example, assume that ProductA has a DepartmentQ allocation of 20 licenses. You import another purchase record that includes 15 ProductA licenses for DepartmentQ. The additional 15 licenses are automatically reflected in the DepartmentQ allocation.

Each product line item (or detail) in an import file includes **Site**, **Department**, and **Cost Center** fields. These are the fields that must contain the appropriate information. For information about editing an import file, see [“Working with Import Files” on page 80](#).

Making Demographic Data Consistent Between Devices and Purchase Records

As demographic data is added to devices and purchase records, different values might be used to represent the same site, department, or cost center. For example, the same site might be represented by Site1 in the Inventory device data and SiteOne in purchase record data.

Inconsistent data can cause problems when Asset Management tries to match product installations to demographic allocations. For example, if you create a SiteOne allocation from the purchase record demographic data, any product installations on a device assigned to Site1 are not matched to the SiteOne allocation.

In order to synchronize your demographic data, you can replace your purchase records demographic values with values from your Inventory device data. For example, you could replace all occurrences of SiteOne in purchase records with Site1.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Purchase Records**.
- 3 In the Purchase Records list, click **Action**, then click **Replace Site Demographic**, **Replace Department Demographic**, or **Replace Cost Center Demographic**.
- 4 In the Demographic Value dialog box, fill in the following fields:
 - Demographic value from Purchase Records:** Select the value you want to replace in your purchase records. The list includes an empty value; if you select the empty value, all empty fields for the demographic (Site, Department, or Cost Center) are replaced.
 - Demographic value from Inventory:** Select the replacement value.
- 5 Click **OK**.

16 Allocating Licenses

There are two methods you can use to allocate a product’s licenses to devices or demographics (sites, departments, or cost centers). You can use the Initialize Allocations Wizard to automatically create allocations based on device and purchase record data available in your Asset Management system. Or, you can manually create the allocations. Instructions for both methods are included in the following sections:

- ♦ “Initializing Allocations” on page 119
- ♦ “Manually Adding Demographic Allocations” on page 121
- ♦ “Manually Adding Device Allocations” on page 123

Initializing Allocations

You can use the Initialize Allocations Wizard to create either device allocations or demographic allocations for a licensed product. After creating the initial allocations you can add additional allocations or modify the initial allocations.

If you plan to create demographic allocations, you should ensure that your devices and purchase records include the correct demographic data. For information, see [Chapter 15, “Preparing Demographic Data,” on page 115](#).

To initialize allocations for a licensed product:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products list, select the check box next to the licensed product whose allocations you want to initialize.

You can select multiple products. If you do so, all selected products are initialized with the same type of allocation (device or demographic) from the same data source (Inventory device data or purchase records).
- 4 Click **Action > Initialize Allocations**, then click **OK** to acknowledge that any existing allocations for the selected products will be removed.
- 5 Complete the Initialize Allocations Wizard by using information from the following table to fill in the fields.

Wizard Page	Details
Allocation Type	Select Device if you want to allocate a license to each device that has the product installed. Select Demographic , then select Site , Department , or Cost Center if you want to allocate licenses to sites, departments, or cost centers.

Wizard Page	Details
Allocation Data Source	<p>If you are creating device allocations, the Initialize from Inventory option is the only enabled option. The wizard searches the Inventory data to find devices that have the product installed and then allocates a license to each device.</p> <p>If you are creating demographic allocations, select the data source you want to use to create the license allocations:</p> <ul style="list-style-type: none"> ◆ Initialize from Purchase Records: Allocates licenses based on demographic data found in your purchase records. <p>For example, assume that you are initializing license allocations for ProductA based on the Department demographic. PurchaseRecord1 includes 10 ProductA licenses assigned to DepartmentQ. PurchaseRecord2 includes 20 ProductA licenses assigned to DepartmentZ. For ProductA, the wizard allocates 10 licenses to DepartmentQ and 20 licenses to DepartmentZ.</p> ◆ Initialize from Inventory: Allocates licenses based on demographic data associated with Inventory device data. <p>For example, assume that you are initializing license allocations for ProductA based on the Site demographic. Device1, Device2, and Device3 have ProductA installed. Device1 and Device2 are assigned to Site1 and Device3 is assigned to Site2. The wizard allocates two licenses to Site1 (for Device1 and Device2) and one license to Site 2 (for Device3).</p> ◆ Update License Allocations Based on Demographic Data in Future Purchase Record Imports: When importing future purchase records, updates the allocated license quantity if the purchase record contains the appropriate demographic data. <p>For example, assume that you import another purchase record that includes ProductA licenses that are assigned to DepartmentQ. The additional licenses are automatically reflected in the DepartmentQ demographic allocation.</p> <p>Also creates new allocations if necessary. For example, if a purchase record includes ProductA licenses that are assigned to a DepartmentZ (a new department not listed in ProductA's allocations), a new allocation for DepartmentZ is created.</p>
Initialize Allocations Summary	Review your data.

6 If you have not already done so, click **Finish** to create the license allocations.

7 To see the license allocations, locate the licensed product in the Licensed Products list and click the number in the **Allocated Quantity** column.

Demographic allocations created by the wizard are listed in the Demographic Allocations pane

The following information is provided for each demographic allocation:

- ◆ **Device Count:** The number of devices assigned to the demographic. Click the number to display a list of the devices.
- ◆ **Allocated Quantity:** The number of licenses allocated to the demographic. You can change this number to allocate more or fewer licenses.

- ♦ **Installed Quantity:** The number of product installations on devices assigned to the demographic.
- ♦ **Variance:** The difference between the number of allocated licenses and the number of product installations assigned to the demographic:

$$\text{Allocated Quantity} - \text{Installed Quantity} = \text{Variance}$$

A negative variance indicates more product installations than allocated licenses, and a positive variance indicates more allocated licenses than product installations.

Device allocations created by the wizard are listed in the Device Allocations panel.

The following information is provided for each device allocation:

- ♦ **Machine Name, Login Name, and IP Address:** Standard information about the device, including the login name of the user who was logged in at the time the device was inventoried.
- ♦ **Site, Department, Cost Center:** Demographic data about the device. If one or more of the fields is empty, the device's inventory data does not contain that information.
- ♦ **Installed Quantity:** The number of installations of the licensed product on the device. This should typically be 1.
- ♦ **Duplicate Allocation:** Includes a check mark if the device's installation is also included in a demographic allocation.
- ♦ **Installations with No Allocations:** Displays the number of installations that are not allocated a license either through a demographic allocation or a device allocation. Click the number to display the list of installations.

8 If necessary, add additional allocations or modify the existing allocations. Refer to the following sections for instructions:

- ♦ [“Manually Adding Demographic Allocations” on page 121](#)
- ♦ [“Adjusting the License Quantity for a Demographic Allocation” on page 125](#)
- ♦ [“Manually Adding Device Allocations” on page 123](#)
- ♦ [“Removing Allocations” on page 125](#)

If you find that adding additional demographic data to devices or purchase records might result in better initial allocations for the product, you can add the data and then run the Initialize Allocations Wizard again. Any existing allocations are removed before the new ones are added.

Manually Adding Demographic Allocations

You can allocate a product's licenses to sites, departments, or cost centers. The demographic value (for example, Site1, DepartmentQ, or Cost Center123) must already exist as a value in your Inventory device data or purchase records data.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products list, click the licensed product for which you want to allocate licenses.

4 By default, only device allocation is enabled to track ownership for product licenses. To allocate licenses to demographics a user has to perform the following steps to enable demographic allocation for the product:

4a Click the **General** tab.

4b In the License Allocation Settings panel, fill in the following fields:

Enable demographic allocations: Select this option.

Demographic allocation type: All demographic allocations for a single licensed product must be of the same type. Select the type (**Site**, **Department**, **Cost Center**) you want to use for this product.

Update license allocations with demographic data from future purchase record imports:

Select this option if, when importing future purchase records for the product, you want to automatically update the allocated license quantity based on the purchase record's demographic data.

For example, assume that the product is using Department allocations. You import a purchase record that includes licenses assigned to DepartmentQ. The licenses are added as a DepartmentQ demographic allocation.

Also creates new allocations if necessary. For example, if a purchase record includes ProductA licenses that are assigned to a DepartmentZ (a new department not listed in ProductA's allocations), a new allocation for DepartmentZ is created.

Allocated Quantity: Displays the total number of allocated licenses, either to devices or to demographics.

4c Click **Apply** to save any changes.

5 Click the **License Allocations** tab.

6 In the Demographic Allocations panel, click **Add**, then fill in the following fields:

Demographic: Select the desired demographic (site, department, or cost center) from the list.

Allocated Quantity: Specify the number of licenses to allocate to the demographic.

7 Click **OK** to add the allocation to the list.

The following information is provided for the allocation:

- ♦ **Device Count:** The number of devices assigned to the demographic. Click the number to display a list of the devices.
- ♦ **Allocated Quantity:** The number of licenses allocated to the demographic. You can change this number to allocate more or fewer licenses.
- ♦ **Installed Quantity:** The number of product installations on devices assigned to the demographic.
- ♦ **Variance:** The difference between the number of allocated licenses and the number of product installations assigned to the demographic:

$$\text{Allocated Quantity} - \text{Installed Quantity} = \text{Variance}$$

A negative variance indicates more product installations than allocated licenses, and a positive variance indicates more allocated licenses than product installations.

Manually Adding Device Allocations

You can allocate licenses to a specific devices. The devices can have the product installed or not installed. For example, you purchase 10 licenses of ProductA. You can allocate the licenses to the target devices before ProductA is even installed on the devices.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products list, click the licensed product for which you want to allocate licenses.
- 4 Click the **License Allocations** tab.
- 5 (Optional) To see which devices have the product installed but do not have an allocated license, click the **Installations with no allocations** number in the Device Allocations panel.
- 6 Click **Add > Devices with Product Installed** if the device you want to allocate a license to has the product installed.

or

Click **Add > Any Devices** if the device you want to allocate a license to does not have the product installed.

The Search for Device dialog box is displayed.

- 7 In the **Device Type** field, select whether you want to search **Managed Devices**, **Inventoried Devices**, **Managed or Inventoried Devices**, **ZAM Migrated Devices**, or **All**.
If you are not sure of the device type, select **All**.
- 8 To limit the search, use the filters to create the search criteria.
If you don't create filters, all devices (or all devices with the product installed) are displayed, up to the maximum display number.
- 9 Specify the maximum number of devices you want the search to display.
- 10 Select the columns you want displayed in the resulting search dialog box. Control-click to select multiple fields.
- 11 Click **Search** to display a Select Device dialog box that lists the search results.
- 12 Select the devices you want to allocate licenses to, then click **OK**.

The following information is provided for the allocation:

- ♦ **Machine Name, Login Name, and IP Address:** Standard information about the device, including the login name of the user who was logged in at the time the device was inventoried.
- ♦ **Site, Department, Cost Center:** Demographic data about the device. If one or more of the fields is empty, the device's inventory data does not contain that information.
- ♦ **Installed Quantity:** The number of installations of the licensed product on the device. This should typically be 1.
- ♦ **Duplicate Allocation:** Includes a check mark if the device's installation is also included in a demographic allocation.
- ♦ **Installations with No Allocations:** Displays the number of installations that are not allocated a license either through a demographic allocation or a device allocation. Click the number to display the list of installations.

17 Working with License Allocations

The following sections help you manage existing license allocations. For information about adding license allocations, see [Chapter 16, “Allocating Licenses,”](#) on page 119.

- ♦ [“Adjusting the License Quantity for a Demographic Allocation”](#) on page 125
- ♦ [“Removing Allocations”](#) on page 125

Adjusting the License Quantity for a Demographic Allocation

You can manually increase or decrease the number of licenses allocated to a site, department, or cost center.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products list, click the licensed product whose license allocations you want to adjust.
- 4 Click the **License Allocations** tab.
- 5 Locate the allocation in the Demographic Allocations panel, then change the number in the **Allocated Quantity** column.
- 6 Click **Apply** to save the changes.

Removing Allocations

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 In the Licensed Products list, click the licensed product from which you want to remove allocated licenses.
- 4 Click the **License Allocations** tab.
- 5 Select the check box next to the allocation you want to remove, then click **Remove**.

18 **Generating Allocation Reports**

ZENworks Asset Management includes a variety of reports that you can generate to view allocation and allocation-related data. In addition to viewing predefined reports, you can create custom reports and export reports to several file formats.

19 License Tracking

Using bundle license tracking, you can track the number of installations of the inventory products through a bundle. To enable license tracking, you must first associate an inventory product with the bundle.

To enable License Tracking:

- 1 Create a bundle.

For more information, see the [Creating Bundles](#) section in the [ZENworks Software Distribution Reference](#) guide.

- 2 Select the created bundle, and then click the **License** tab.

- 3 In the **Inventory Products** panel, click **Add**.

- 4 In the **Select Inventory Products** page, select the required inventory product, and then click **OK**.

- 5 After adding the inventory products, select the **Enable License Tracking** checkbox, and then click **Apply**.

Click **More Details** to get the total number of installations. The inventory quantity is sum of bundle installations and inventory installations.

When you deploy this bundle to the managed devices, based on the bundle status and number of installations, the installed quantity will be displayed in the **Inventory Products** panel.



Software Usage

Novell ZENworks Asset Management lets you track software usage on individual devices within your organization. Knowing the demand for particular applications can help you better manage the number of licenses you need.

- ♦ [Chapter 20, “Software Usage Concepts,” on page 133](#)
- ♦ [Chapter 21, “Configuring Usage Settings,” on page 135](#)
- ♦ [Chapter 22, “Setting Up Web Applications,” on page 137](#)
- ♦ [Chapter 23, “Monitoring Usage,” on page 141](#)
- ♦ [Chapter 24, “Tracking the Usage of Hybrid Workspaces Applications,” on page 143](#)
- ♦ [Chapter 25, “Generating Usage Reports,” on page 145](#)

20 Software Usage Concepts

Tracking application use in an organization can be useful yet challenging. Knowing the demand for an application can help you better predict how many licenses you really need. Does it make sense to order 10 new license for ProductA when four installations of the product are not being actively used? Or does it make more sense to reallocate licenses and order fewer new licenses?

ZENworks Asset Management helps you make better decisions by tracking software usage on devices throughout your Management Zone. You can view basic usage data directly in ZENworks Control Center or generate detailed reports for analysis.

The following sections introduce the concepts you should understand to effectively use Asset Management to monitor software usage:

- ♦ [“Software That is Tracked” on page 133](#)
- ♦ [“When Usage Data is Collected” on page 133](#)
- ♦ [“Basic Usage Data vs. Detailed Usage Data” on page 134](#)

Software That is Tracked

Asset Management tracks usage for the following software:

- ♦ **Installed Discovered Products:** Software products, defined in the ZENworks Knowledgebase, or in the Add or Remove Programs panel that are installed on devices in your Management Zone.
- ♦ **Local Software Products:** Installed software products that you define because they are not registered as discovered products in the ZENworks Knowledgebase. In essence, they are administrator-defined discovered products. When they are defined, they are displayed in the Discovered Products list.
- ♦ **Software Files:** Installed software files that are not included in the ZENworks Knowledgebase and for which no local software products have been created.
- ♦ **Web Applications:** Web applications or pages that are hosted on either internal or external Web sites. Web applications are not discovered automatically; you must create them.

Asset Management tracks executable (.exe) files to collect usage data. Therefore, it does not track thin-client applications launched from Citrix servers and Windows Terminal Servers. It tracks the thin-client usage itself, just not the applications run within the thin client.

When Usage Data is Collected

Usage data is collected from devices during software inventory scans. You can schedule regular software inventory scans to control how often usage data is collected. For instructions, see [“Scanning Managed Devices”](#) in the *ZENworks Asset Inventory Reference*.

Basic Usage Data vs. Detailed Usage Data

You can view basic usage data for a product, such as number of active installations and hours used, through various ZENworks Control Center pages (see [Chapter 23, “Monitoring Usage,”](#) on page 141).

NOTE: Occasionally, we have noticed a few irregularities in the software usage report. When two events were merged, the start time of the first event and the end time of the second event was considered as one event, which resulted in an incorrect total run time and the number of counts the application was run was reduced to 1. However, the merged events contained the correct active time.

For example, when you launch an application at 1 PM and close it at 1:10 PM, we recorded it as 1 start up with 10 minutes of runtime and 10 minutes of active time. When the same application is launched again at 2:30 PM and closed at 2:45 PM, we recorded this as another start up with 15 minutes of runtime and 15 minutes of active time. These two usage events are merged to produce 1 start up with 105 minutes of runtime (start at 1 PM and end at 2:45 PM) and 25 minutes of active time.

Now, the merging of software usage data for the same product path is disabled by default. This default behavior is configurable. You can enable it by setting the `MergeProductsPath` registry key value to “1” in the following paths:

- ♦ 32-bit Agent:
`HKEY_LOCAL_MACHINE\SOFTWARE\Novell\ZCM\Usage\MergeProductsPath`
- ♦ 64-bit Agent:
`HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Novell\ZCM\Usage\MergeProductsPath`

If the `MergeProductsPath` registry key does not exist, perform the following steps:

- ♦ If the subkey does not exist, you should create a subkey. Right-click **ZCM**, select **New > Key**, and enter the name “Usage”.
- ♦ Now create a DWORD. Select the newly created “Usage” subkey, right-click **ZCM**, select **New > Key**, and enter the name “MergeProductsPath”.

For detailed information, however, you must generate usage reports. Usage reports let you analyze usage data from multiple perspectives, such as the following:

- ♦ Usage by product type (local application, network server application, and Web application).
- ♦ Usage by product, user, or device.
- ♦ Usage over a specific time period.

For information about generating reports, see [Chapter 25, “Generating Usage Reports,”](#) on page 145.

21 Configuring Usage Settings

There are two ZENworks Management Zone settings related to software usage. One setting enables software usage to be collected and the other setting determines whether usage data is displayed in the ZENworks Control Center interface or only in software usage reports.

To configure the settings:

- 1 In the ZENworks Control Center, click the **Configuration** tab.
- 2 In the Management Zone Settings panel, click **Asset Management** to display the settings.
- 3 Click **Usage Monitoring**, make sure that the **Enable Usage Monitoring** option is selected, then click **OK**.

If this option is not enabled, no usage statistics are collected from devices.

- 4 Click **Usage Display**.

You can decide whether or not to show usage data on License Management pages in ZENworks Control Center. Displaying usage data can cause the pages to load more slowly while the usage data is retrieved. For information about where usage data is displayed, see [Chapter 23, "Monitoring Usage,"](#) on page 141.

- 5 If you want usage data displayed on the License Management pages in ZENworks Control Center, deselect the **Do not show usage on License Management pages** option.

or

If you only want usage data available by generating software usage reports, select the **Do not show usage on License Management pages** option.

- 6 Click **OK** to save your changes.

22 Setting Up Web Applications

ZENworks Asset Management lets you monitor the usage of Web-based applications or pages. You must define the Web applications before you can generate usage reports.

- 1 In ZENworks Control Center, click the **Configuration** tab.
- 2 Click the **Asset Management** tab to display the Web Applications panel.



- 3 In the Web Applications panel, click **New** to launch 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	<p>Fill in the following fields:</p> <p>Manufacturer: The manufacturer of the Web application.</p> <p>Application: The application name.</p> <p>Version: The version of the application.</p>
Application Recognition	<p>A Web application is recognized by the text that is displayed in the browser window's title bar, excluding the browser name, when viewing the application. You can specify one or more titles or URLs to associate with the Web application.</p> <p>A Web application is considered to be in use until all windows you have defined are closed.</p> <ol style="list-style-type: none"> In the Window Title(s) or URLs field, specify the title bar text that defines the application. <p>You can use * and ? wildcards in your window titles. The * wildcard represents any number of characters, The ? wildcard represents a single character.</p> <p>For example, you could create a single Web application for all Google pages with the window title *Google*, or you could create separate applications for Google Search and Google Maps with *Google Search* and *Google Maps*.</p> Click Add. Repeat for additional values. Use the Edit and Remove buttons to change or delete values.
Summary	Review your data. Use the Back button to edit the specified values.

4 Click **Finish** to add the application to the Web Applications list.

NOTE: The reporting for Web application usage and Windows application usage is not different.

You can monitor the usage of any application in two ways:

- ◆ If you keep an application open for a day, the application usage for it is reported during the next day's scan.
- ◆ If you open an application and close it on the same day, the application usage for that application is reported during the next scan which could either be on the same day or on the next day.

Web Application Usage in Browsers

Calculating the web application usage differs for Internet Explorer, EDGE, Chrome, and Firefox browsers. In Firefox and Chrome browsers, only the tab that is currently being viewed, or the tab that has input focus is monitored for the usage. However, in the Internet Explorer and EDGE browsers, the run-time usage is calculated for all open tabs, whether they are in active usage or not.

ZENworks offers only experimental support for Chrome and Edge browsers.

By default, web usage tracking is enabled on Internet Explorer and Mozilla Firefox, and disabled on Chrome and Edge. To enable the web usage tracking on Chrome and Edge, add the following registry keys in the `HKLM\Software\Novell\ZCM\` path. For more information, see [ZENworks Registry Keys Reference](#)

- ◆ `WEBUSAGE_IE`
- ◆ `WEBUSAGE_FIREFOX`
- ◆ `WEBUSAGE_EDGE`
- ◆ `WEBUSAGE_CHROME`

NOTE: Web application usage is also calculated for the Private or Incognito mode of browsing.

23 Monitoring Usage

There are several locations in ZENworks Control Center where you can view basic usage data for products. The following sections cover these locations:

- ♦ [“Discovered Products List” on page 141](#)
- ♦ [“Licensed Product’s Compliance Status Page” on page 141](#)
- ♦ [“Discovered Product’s Installation/Consumption Page” on page 142](#)

Discovered Products List

The Active Usage column in the Discovered Products list displays the number of installations of a product that have been used during the current usage period.

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

You can do the following to manipulate the data in the list:

- ♦ The **Usage Period** field, displayed above the list, determines the time period for the usage data. To change the time period, click **Action > Update Usage Time Period**, select a new usage period, then click **OK**.
- ♦ Filter the list to display only the products that have been used. In the Search panel, set the **Usage Status** field to **With Usage**, then click **Search**.

If you want to see the usage hours for each installation, you can drill down into the discovered product. See [“Discovered Product’s Installation/Consumption Page” on page 142](#).

Licensed Product’s Compliance Status Page

A licensed product’s Compliance Status page shows the same usage data as the Discovered Products list. The difference is that the Compliance Status page displays only the discovered products assigned to the licensed product.

To access a licensed product’s Compliance Status page:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Licensed Products**.
- 3 Click the licensed product’s status icon (■., ■, or ■) to display the product’s Compliance Status page.

The **Active Usage** column in the License Consumption (Consumption Data Source: Inventory) panel displays the number of installations of a product that have been used during the current usage period.

The **Usage Period** field, displayed above the License Consumption panel, determines the time period for the usage data. To change the time period, click **Action > Update Usage Time Period**, select a new usage period, then click **OK**.

Discovered Product's Installation/Consumption Page

A discovered product's Installation/Consumption page shows the number of usage hours for each installation.

To access a discovered product's Installation/Consumption page:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 In the License Management page, click **Discovered Products**.
- 3 Click the discovered product's **Installed Quantity** number to display the product's Installation/Consumption page.

In the Installations panel, the **Hours Active** column indicates the number of hours the product has been used on the device during the current usage period.

The **Usage Period** field, displayed above the list, determines the time period for the usage data. To change the time period, click **Action > Update Usage Time Period**, select a new usage period, then click **OK**.

You can also filter the list to display only the products that have been used. In the Search panel, set the **Usage Status** field to **With Usage**, then click **Search**.

24 Tracking the Usage of Hybrid Workspaces Applications

You can track the usage of Hybrid Workspaces (HW) applications by integrating HW with ZENworks Asset Management (ZAM). The administrator can track the usage of any software application that is streamed using HW and then view this information as part of ZENworks Asset Management Usage Reports.


To track the usage of HW applications:

- 1 Integrate a ZENworks server with the Hybrid Workspaces server.
- 2 Log in to any Windows agent device and stream some applications from the HW server.

After the applications are streamed and closed, the usage data is captured and reported in the Usage Reports section of Asset Management.

You can view the device (HW device) information in ZENworks Control Center by navigating to **Devices > Inventoried > Servers** or **Workstations**

NOTE:

- ♦ All HW devices are represented with the  icon to differentiate them from other devices (Inventory-Only Agents (IOA)/Managed).
- ♦ All the usage information from the HW device will be displayed with **Hybrid Workspaces** as the manufacturer name.
- ♦ HW usage and the normal usage are not unified. The normal usage will be shown with the respective manufacturer names, and the HW usage will be displayed with **Hybrid Workspaces** as the manufacturer name. This is particularly done to differentiate the HW usage from the normal usage.

For more information, see the [Hybrid Workspaces Server Guide](#).

Hybrid Device (HW) Device Reconciliation

On a HW only device (a device on which only the HW plug-in is installed) a user can install either a Managed Device or an Inventory Only Agent, and based this it will get reconciled to either the Managed Device or the Inventory Only Agent.

A user can stream HW applications on an Inventory Only Device or Managed Device as well. Based on this, the device usage will be displayed in the usage reports.

After the HW Only Device is reconciled, then the device will no longer be represented with the HW icon, it will be represented with the Managed or IO Device icon.

25 Generating Usage Reports

ZENworks Asset Management includes a variety of reports that you can generate to view usage data. In addition to viewing predefined reports, you can create custom reports and export reports to several file formats.

The compliance report information is combined with the license management and contract management report information in [Part VI, “Reports,” on page 177](#). The following list provides direct links to usage report sections:

- ◆ Descriptions for all standard and custom reports: [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#).
- ◆ How to run standard reports: [Chapter 36, “Working with Standard Reports,” on page 189](#).
- ◆ How to create and generate custom reports: [Chapter 37, “Working with Custom Reports,” on page 193](#)

IV Contracts

Novell ZENworks Asset Management lets you manage contracts for your organization's assets.

- ♦ [Chapter 26, "Creating New Contracts," on page 149](#)
- ♦ [Chapter 27, "Working with Existing Contracts," on page 153](#)
- ♦ [Chapter 28, "Working with Date Notifications," on page 157](#)
- ♦ [Chapter 29, "Working with Import Files," on page 163](#)
- ♦ [Chapter 30, "Generating Contract Reports," on page 167](#)

26 Creating New Contracts

ZENworks Asset Management lets you create contract records (typically referred to simply as *contracts*) for your organization's assets. You can then monitor the status of the contracts and generate reports showing various contract details.

To create a 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 launch 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	<p>Fill in the following fields:</p> <p>Contract ID: Specify a unique identifier for the contract. Required.</p> <p>Name: Specify a descriptive name for the contract. Required.</p> <p>Description: Provide any additional text to identify the contract.</p> <p>Total Cost: Specify the total cost of the contract from start date to current end date. This field forms the basis for the contract's financial information, including annualized cost and cost per association (asset, user, department, and so forth).</p> <p>Parent Contract: If this contract has a child relationship to another contract, click the Browse button to find and select the parent contract, then click OK.</p> <p>Terms and Conditions: Specify any terms and conditions.</p> <p>Contract Type: Select one of the fourteen predefined contract types or type a custom one of your own.</p> <p>Status: Select Pending, Active, or Expired. You can also type a custom status of your own.</p> <p>Original Start Date: Click <input type="text"/> to select the beginning date for the contract. This date and the end date are required for annualized financial information.</p> <p>Current End Date: Click <input type="text"/> to select the current end date for the contract. If the contract never ends, select the Evergreen option. This date and the start date are required for annualized financial information.</p> <p>Renewal Option: Select Yes if the contract includes an option to renew. Otherwise, select No.</p> <p>Renewal Provision: Specify any renewal provision.</p> <p>Notice Date: If the contract includes a notice, click <input type="text"/> to select the notice date.</p> <p>Notice Description: Specify a description for the notice.</p>
Vendor Information	Specify the vendor information in the fields. For each field, select an existing value or type a new value.
Lease	This page is displayed only for Lease contracts. Specify the lease information for the contract.
New Contract Summary	Review the information you entered. Use the Back button to go back.

- On the New Contract Summary page, select **Define Additional Properties**, then click **Finish**. The contract is created and displayed.
- Add the desired contract information by clicking a tab and filling in the fields. Each tab is described below.

General: Add basic information for the contract. In addition to modifying the information provided when the contract was created, you can set up e-mail notifications for the start, end, and notice dates. For instructions, see [Chapter 28, “Working with Date Notifications,” on page 157](#).

Vendor: Add vendor information for the contract. You can modify the fields if necessary.

Financial: This is a non-editable page that displays the contract’s financial data. The data is calculated from information provided on the other pages.

- ◆ **Total Cost:** This data requires that the Total Cost be defined on the General page.
- ◆ **Total Cost per *Item*:** This is displayed when the *Item* is included on the Relationships page. For example, if you have associated the contract with license entitlements on the Relationships page, the **Per Licensed Product** field displays the total cost per licensed product.
- ◆ **Annualized Cost:** This data requires that an **Original Start Date** and **Current End Date** be defined on the General page.
- ◆ **Annualized Cost per *Item*:** This is displayed if the *Item* is included on the Relationships page. For example, if you have associated the contract with license entitlements on the Relationships page, the **Per Licensed Product** field displays the annualized cost per licensed product.

SLA: Add Service Level Agreements for the contract. For each SLA you add, you can include the service level metric, actual service level, start date, and end date. You can also configure e-mail notifications for the start and end dates. For instructions, see [Chapter 28, “Working with Date Notifications,” on page 157](#).

Lease: Add lease information for the contract. For each of the date fields, you can configure e-mail notifications. For instructions, see [Chapter 28, “Working with Date Notifications,” on page 157](#).

Documents: Attach documents to the contract. This could be an electronic copy of the contract or other supporting documents. The document must already have been added to the Asset Management system. For more information about adding documents, see [“Adding Documents to Contracts” on page 155](#).

Renewals: Renew the contract by adding the renewal date and new end date. Each renewal record is added to the Renewal History list.

Relationships: Associate the contract with devices, users, licensed products, and demographics (sites, departments, and cost centers).

27 Working with Existing Contracts

The following sections explain the tasks associated with managing existing contracts. For information about creating new contracts, see [Chapter 26, “Creating New Contracts,”](#) on page 149.

- ♦ [“Viewing the Contracts List”](#) on page 153
- ♦ [“Filtering the Contracts List”](#) on page 153
- ♦ [“Creating a Contracts Folder”](#) on page 154
- ♦ [“Copying an Existing Contract”](#) on page 155
- ♦ [“Adding Documents to Contracts”](#) on page 155

Viewing the Contracts List

You can view a list of all of your contracts. The list provides general information about each contract, such as its status, start date, and end date.

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

The list provides the following information for each contract:

Contract ID: The identification number given to the contract. You can click the contract ID to display the contract’s details.

Name: The descriptive name given to the contract.

Type: The type of contract (for example, **Lease**, **SLA**, or **Technical Support**).

Status: The status of the contract. The status changes automatically depending on the current date and the contract’s start and end dates.

- ♦ **Pending:** The current date is before the start date.
- ♦ **Active:** The current date falls between the start and end dates.
- ♦ **Expired:** The current date is after the end date.

Start Date: The first effective date for the contract.

End Date: The last effective date for the contract.

Parent Contract ID: If the contract has been assigned a child relationship with another contract, this is the ID of the parent contract.

Filtering the Contracts List

You can filter the Contracts list to display only the contracts that meet certain criteria.

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

- 3 In the Search panel (located next to the Contracts panel), specify the criteria to use for the filter. A contract must match all criteria to be displayed.

Contract ID: Specify the text that the contract ID (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a contract ID, the contract matches the criteria.

Type: Select whether you want to match folders, contracts, or both.

Contract Type: Select a specific contract type, or select **Any** to match any contract type.

Contract Status: Select one of the following to match:

- ◆ **Any:** Ignore the contract status. Match any contract.
- ◆ **Active:** Match contracts that are currently within their start date and end date.
- ◆ **Expired:** Match contracts that have passed their end date.
- ◆ **Pending:** Match contracts whose start date is in the future.

Expiration Status: Select one of the following to match:

- ◆ **Any:** Ignore the expiration status. Match any contract.
- ◆ **Expired:** Match contracts that have passed their end date.
- ◆ **Expiring within 60 Days:** Match contracts with end dates that are within 60 days of the current date.
- ◆ **Not Expiring within 60 Days:** Match contracts with end dates that are beyond 60 days of the current date.

Program Name: Select a specific vendor program name, or select **Any** to match any program name.

Current End Date: Select one of the following to match:

- ◆ **Any:** Ignore the end date. Match any contract.
- ◆ **On:** Match contracts with end dates that are the same as the date you select. Click to select the date.
- ◆ **Before:** Match contracts with end dates that are before the date you select. Click to select the date.
- ◆ **After:** Match contracts with end dates that are after the date you select. Click to select the date.

Contract Field: Select one of the listed fields and specify a value, or select **Any** to ignore the criteria.

Include Subfolders: Select this option to search the current folder and its subfolders.

- 4 Click **Search** to apply the search criteria and filter the list.

Creating a Contracts Folder

You can create folders in the Contracts list to better organize your contracts. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management** > **Contract Management** > **Contracts** to display the Contracts page.
- 2 Click **New** > **Folder** to display the New Folder dialog box.

- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and contracts at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.
 - Description:** Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Copying an Existing Contract

You can copy an existing contract to create a new contract. When you do so, the copy retains the general information, vendor information, lease information, and documents. All date information is removed.

- 1 In ZENworks Control Center, click **Asset Management** > **Contract Management** > **Contracts** to display the Contracts page.
- 2 In the Contracts panel, select the check box next to the contract you want to copy, then click **Copy** to display the Copy Contract dialog box.
- 3 Fill in the following fields:
 - Contract ID:** Specify a new identifier for the contract. The contract ID cannot be the same as any other contract ID in the folder.
 - Name:** Specify a new name for the contract
 - Parent Contract:** If you want to designate the source contract as this contract's parent, select **Source contract**. If you want to designate the source contract's parent as this contract's parent, select **Same parent as source**. Otherwise, select **No parent**.

If you need to designate some other contract as the parent, you can create the contract and then edit it. At that point, you can select any existing contract.
- 4 Click **OK** to create the new contract and add it to the **Contracts** list.

Adding Documents to Contracts

Many physical contracts have physical documents associated with them. To retain the physical documents with the contract in your Asset Management system, you can add electronic versions of the documents to the contract.

The following instructions assume that you have already uploaded the electronic documents to your Asset Management system. If not, see [Part V, "Documents," on page 169](#).

To add documents to a contract:

- 1 In ZENworks Control Center, click **Asset Management** > **Contract Management** > **Contracts** to display the Contracts page.
- 2 Click the contract.
- 3 Click the **Documents** tab.

- 4 In the Documents panel, click **Add**.
- 5 Browse for and select the documents you want to add, then click **OK** to add them to Documents list.

28 Working with Date Notifications

Contracts include many dates that can be important to track. For example, you might want to know when a contract is about to expire or when leased hardware is scheduled for delivery. To automate this tracking process, you can enable e-mail notifications for important dates.

The following sections provide information to help you create and manage date notifications:

- ◆ “Specifying an E-Mail Server” on page 157
- ◆ “Configuring Default Settings” on page 157
- ◆ “Adding Date Notifications to a Contract” on page 158
- ◆ “Viewing the Date Notifications List” on page 159
- ◆ “Filtering the Date Notifications List” on page 160
- ◆ “Creating Date Notification Folders” on page 160
- ◆ “Moving a Date Notification” on page 160
- ◆ “Deleting a Date Notification” on page 161

Specifying an E-Mail Server

For date notifications to be sent, your ZENworks system must have an SMTP server specified as its e-mail server. You configure the e-mail server on the **Configuration > Management Zone Settings > Event and Messaging > SMTP Settings** page.

Configuring Default Settings

Before you can create a notification for a contract date, you must configure the default date notification settings. When you create a date notification, the notification is populated with the default settings. You can then customize the settings as necessary.

- 1 In ZENworks Control Center, click **Asset Management > Contract Management > Date Notifications**.
- 2 Click **Action > Default Date Notification Settings**.
- 3 Set the defaults for the following fields:

Number of days before date to send notification: Specify the lead time for the notification.

Repeat Notification: Select this option to repeat the notification, then select the frequency (**Monthly**, **Weekly**, or **Daily**) and the number of times. For example, if you specify a lead time of 90 days, you could repeat the notification monthly by setting the **Repeat Notification** field to **Monthly** and the **Number of times to repeat** field to **3**.

Delete date notification record when complete: Select this option to delete the notification after all instances of the notification have been sent.

From: Specify the e-mail address you want to appear in the From field of the e-mail notification.

Recipients: You must add at least one default recipient. To do so, you can use this field or the **Additional Recipients** field.

If the Contacts list contains addresses, select an address and move it to the To list. The Contacts list contains e-mail addresses only if they have been imported from the Inventory data (see “[Configuring E-mail Addresses](#)” in the *ZENworks Asset Inventory Reference*).

Additional Recipients: You must add at least one default recipient. To do so, you can use this field or the **Recipients** field. To use this field, specify at least one address (for example, pjohnes@novell.com). Separate addresses with commas.

4 Click **OK**.

Adding Date Notifications to a Contract

A contract includes the following date fields for which you can configure notifications:

- ♦ **General page:** Original Start Date, Current End Date, Notice Date
- ♦ **SLA page:** Start Date, End Date
- ♦ **Lease page:** Order Date, Ship Date, Delivery Date, Signature Date, Inspection Date, Acceptance Date

To add a date notification to a date field:

- 1 Locate the date field for which you want to add a notification.
- 2 Click the check box next to **Date Notification** to display the New Date Notification dialog box.
- 3 Modify any of the default settings:

Notification Name: Date notifications are added to the Date Notification list. This is the name that identifies the notification in that list. By default, the name includes the contract ID and date fields. If desired, specify a different name.

Source Contract: The contract ID of the source contract.

Date Field: The date field to which the notification applies.

Number of days before date to send notification: Specify the lead time for the notification.

Repeat Notification: Select this option to repeat the notification, then select the frequency (**Monthly**, **Weekly**, or **Daily**) and the number of times. For example, if you specify a lead time of 90 days, you could repeat the notification monthly by setting the **Repeat Notification** field to **Monthly** and the **Number of times to repeat** field to **3**.

Delete date notification record when complete: Select this option to delete the notification after all instances of the notification have been sent.

Message Subject: The default message subject includes the source contract and date field. If desired, specify a different subject.

Message Content: The default message content identifies the contract and the event. You can modify the message content as necessary.

From: Specify the e-mail address you want to appear in the From field of the e-mail notification.

Recipients: You must add at least one default recipient. To do so, you can use this field or the **Additional Recipients** field.

If the Contacts list contains addresses, select an address and move it to the To list. The Contacts list contains e-mail addresses only if they have been imported from the Inventory data (see “[Configuring E-mail Addresses](#)” in the *ZENworks Asset Inventory Reference*).

Additional Recipients: You must add at least one default recipient. To do so, you can use this field or the **Recipients** field. To use this field, specify at least one address (for example, pjones@novell.com). Separate addresses with commas.

- 4 Click **OK** to create the date notification.

The Date Notification check box is enabled. In addition, a date notification record is added to the Date Notifications list (**Configuration > Contract Management > Date Notifications**). For information about the list, see “[Viewing the Date Notifications List](#)” on page 159.

- 5 Click **Apply** to save the changes to the contract.

Viewing the Date Notifications List

You can view a list of all date notifications. The list provides general information about each notification, such as its status, number of times sent, and next scheduled send time.

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

The list provides the following information for each notification:

Name: The ID of the contract to which the date notification applies. You can click the contract ID to display the contract’s details.

Field: The date field to which the notification applies.

Status: The status of the date notification.

- ♦ **Pending:** The first notification message has not been sent yet.
- ♦ **In-Progress:** One or more notification messages have been sent and more are scheduled to be sent.
- ♦ **Completed:** All scheduled notification messages have been sent.
- ♦ **Disabled:** The date notification is no longer active.

Sent: The number of notification messages that have been sent.

Failures: The number of sent notification messages that failed. You should ensure that you have specified an e-mail server (**Configuration > Management Zone Settings > Event and Messaging > SMTP Settings**) and that the recipient is a valid.

Last: The date of the last notification message attempt.

Next: The date of the next notification message attempt.

Filtering the Date Notifications List

You can filter the Date Notifications list to display only the notifications that meet certain criteria.

- 1 In ZENworks Control Center, click the **Asset Management > Contract Management > Date Notifications**.
- 2 In the Search panel (located next to the Date Notifications panel), enter the criteria to use for the filter. A notification must match all criteria to be displayed.
Name: Specify the text that the notification name (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a name, the notification matches the criteria.
Type: Select whether you want to match folders, date notifications, or both.
Status: Select a status to match, or select **Any** to match any status.
Include Subfolders: Select this option to search the current folder and its subfolders.
- 3 Click **Search** to apply the search criteria and filter the list.

Creating Date Notification Folders

You can create folders in the Date Notifications list to better organize your notifications. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management > Contract Management > Date Notifications**.
- 2 In the Date Notifications list, click **New > Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
Name: Specify a name for the folder. The name must be unique among all other folders and notifications at the same level.
Folder: Browse for and select the folder in which to place the new folder.
Description: Specify any optional information to identify the folder.
- 4 Click **OK** to create the folder.

Moving a Date Notification

You can move a date notification from one folder to another in the Date Notifications list.

- 1 In ZENworks Control Center, click **Asset Management > Contract Management > Date Notifications**.
- 2 Select the notification to move.
- 3 Click **Move** to display the Move Date Notification(s) dialog box.
- 4 Browse for and select the target folder, then click **OK**.

Deleting a Date Notification

- 1 In ZENworks Control Center, click **Asset Management** > **Contract Management** > **Date Notifications**.
- 2 Select the check box next to the notification you want to delete.
- 3 Click **Delete**, then click **OK** to confirm the deletion.

You can also delete a date notification by deselecting the **Date Notification** check box associated with the appropriate date field. For example, you could delete the Current End Date notification by deselecting the **Date Notification** check box for the **Current End Date** field on the contract's General page.

29 Working with Import Files

ZENworks Asset Management can import contracts from a standard Asset Management import file.

- ♦ [“Format” on page 163](#)
- ♦ [“Fields” on page 163](#)
- ♦ [“Relationships” on page 165](#)
- ♦ [“Attaching Documents” on page 165](#)
- ♦ [“Rights” on page 166](#)
- ♦ [“Importing Administrator-Defined Fields” on page 166](#)
- ♦ [“Locale Support for Date Formats” on page 166](#)

Format

Import files are comma-separated files. The first row contains the column headers. Each additional row is a data row that identifies the contract.

The following example lists the fields included in the column header along with the corresponding data row that maps to the fields.

```
Admincontractid,Contractname,Totalcost,Site,Adf10  
Id1,Contract1,432.3,London|Paris,Microsoft
```

The first row contains the column headers, such as `Admincontractid`, `Contractname`, `Description`, `Totalcost` and `Programname`. The second row contains the sample data to be imported. The order of the rows is not important. You can reverse the `Admincontractid` and `Contractname` or remove any rows that are not mandatory or contain unwanted information.

Fields

The table shown below lists the fields used in a contract import file. The number in parentheses indicates the maximum character limit allowed.

Header	UI Field the Header Maps To
1 Admincontractid (64)	Contract ID This is a mandatory column. Select the General tab to locate the field.
2 Contractname (64)	Name This is a mandatory column.
3 Description (255)	Description

Header	UI Field the Header Maps To
4 Contracttype (32)	Contract Type
5 Contractstatus (32)	Status
6 Programname (255)	Program Name
7 Totalcost (Number)	Total Cost
8 Internalcontactname (64)	Internal Contact
9 Internalcontactphone (16)	Internal Phone Number
10 parentcontract	Parent Contract
11 Internalcontactemail (64)	Internal E-mail Address
12 Keyterms (255)	Terms and Conditions
13 Startdate (date)	Original Start Date
14 Enddate (date)	Current End Date
15 Noticedescription (255)	Notice Description
16 Noticedate (date)	Notice Date
17 renewaloption	Renewal Option
18 Renewalprovision (255)	Renewal Provision
19 IVendorname (64)	Vendor Name
20 Adminvendorid (64)	Vendor ID
21 Accountnumber(64)	Account Number
22 Pricontactname (64)	Primary Vendor Contact
23 Pricontactphone (32)	Phone Number
24 Pricontactemail (32)	E-mail Address
25 Seccontactname (64)	Secondary Vendor Contact
26 Seccontactemail (32)	Phone Number
27 Seccontactphone (32)	E-mail Address
28 Definedservicelevel (128)	Service Level Metric This is a mandatory column if SLA information is imported.
29 Actualservicelevel (128)	Actual Service Level
30 Servicestartdate (date)	Start Date
31 Serviceenddate (date)	End Date
32 Site (32)	Site
33 Department (32)	Department

Header	UI Field the Header Maps To
34 Costcenter (32)	Cost center
35 Userdocid	Document ID
36 Deliveryprocedures (255)	Delivery Procedures
37 Returnobligations (255)	Return Obligations
38 Rightstorelocate (255)	Rights to Relocate, Alter, Sub-lease
39 Defaultsandremedies (255)	Defaults and Remedies
40 Insuranceprovisions (255)	Insurance Provisions
41 Insuranceamount (Number)	Insurance Cost
42 Modificationprovisions (255)	Equipment Modification Provisions
43 Purchaseoption (255)	Purchase Option
44 Endofleaseprovisions (255)	End-of-Lease Provisions
45 Prevailinglaw (255)	Prevailing Law
46 Dateordered (date)	Order Date
47 Dateshipped (date)	Ship Date
48 Datedelivered (date)	Delivery Date
49 Datesignedfor(date)	Signature Date
50 Dateinspected (date)	Inspection Date
51 Dateaccepted (date)	Acceptance Date
52 Folder	Folder to which the contract will be imported. For example, test/test1 means import in to the test1 folder, which is inside the test folder.
53 Adf0-adf19	Import the administrator-defined fields for the contract.

Relationships

A contract can have multiple relationships with the `site`, `department`, and `costcenter` columns. Multivalued columns are specified with the pipe symbol (|) separating each value. For example, if the value for `site` is `Site1|Site2`, the contract is associated with both `Site1` and `Site2`.

Attaching Documents

A contract can have multiple documents attached to it. The `Userdocid` specifies the documents to be attached. The `Userdocid` can also have multiple values separated by the pipe symbol (|).

Rights

The user who imports the contract should have *Create/Delete Contract Management* rights for contracts.

Importing Administrator-Defined Fields

Importing the Administrator-Defined Fields (adf0 -adf19) for the contract is supported.

Locale Support for Date Formats

You can use different date formats. To support a date in a different locale, add a header `locale=yourlocale` and provide the locale in the header line. The locale can be in the `dd/mm/yy` or `en_US` format. If either the locale is not valid or the locale header is not present, the dates take the default locale. The default locale is the locale of the server you are importing the contracts from.

30 Generating Contract Reports

ZENworks Asset Management includes a variety of reports that you can generate to view contract data. In addition to viewing predefined reports, you can create custom reports and export reports to several file formats.

The contract report information is combined with the software usage and license management report information in [Part VI, “Reports,” on page 177](#). The following list provides direct links to compliance report sections:

- ◆ Descriptions for all standard and custom reports: [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#).
- ◆ How to run standard reports: [Chapter 36, “Working with Standard Reports,” on page 189](#)
- ◆ How to create and generate custom reports: [Chapter 37, “Working with Custom Reports,” on page 193](#).

V Documents

ZENworks Asset Management lets you upload document files and associate them with licensed products, contracts, and purchase summary records.

- ◆ [Chapter 31, “Uploading Documents,” on page 171](#)
- ◆ [Chapter 32, “Working with Documents,” on page 173](#)

31 Uploading Documents

Before you can add a document to a licensed product, contract, or purchase summary record, you must upload it to the Asset Management system. Uploaded documents are stored in the ZENworks database.

- 1 In ZENworks Control Center, click **Asset Management > Documents**.
- 2 In the Documents panel, click **New > Upload Document** to launch 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	Specify the file in the File Name field or click Browse to search.
Document File Information	Fill in the following fields: Document ID: Specify a file ID. Local Path: Displays the path of the file. Source Location: Specify the location of the source file. As-Of Date: Click the calendar icon to select a date. Description: Add a description, if needed.
New Document Summary	Review the data entered. Use the Back button to make corrections.

- 3 Click **Finish** to upload the document.

32 Working with Documents

The following sections explain the tasks associated with managing existing documents. For information about adding documents to your Asset Management system, see [Chapter 31, “Uploading Documents,”](#) on page 171.

- ♦ [“Viewing the Documents List”](#) on page 173
- ♦ [“Filtering the Documents List”](#) on page 173
- ♦ [“Creating a Documents Folder”](#) on page 174
- ♦ [“Attaching Documents to Licensed Products, Contracts, and Purchase Summary Records”](#) on page 175

Viewing the Documents List

You can view a list of all of your documents. The list provides general information about each document, such as its name, file type, upload date, and whether or not it is associated with a licensed product, contract, or purchase summary record.

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

The list provides the following information for each document:

Document ID: The identification number given to the document. You can click the document ID to display the document’s details.

File Name: The document’s filename.

File Type: The document’s file extension.

File Size (KB): The document’s file size in kilobytes.

As-Of Date: The document’s last edit date provided during the document upload.

Description: Any description text provided during the document upload.

Attached: Includes a check mark if the document is associated with a licensed product, contract, or purchase summary record.

Local Path: The document’s local path.

Source Location: The document’s source location provided during the document upload.

Date Uploaded: The date the document was uploaded.

Filtering the Documents List

You can filter the Documents list to display only the documents that meet certain criteria.

- 1 In ZENworks Control Center, click **Asset Management > Documents**.



- 2 In the Search panel (located next to the Documents panel), specify the criteria to use for the filter. A contract must match all criteria to be displayed.

Document ID: Specify the text that the document ID (or folder name) must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a document ID, the document matches the criteria.

File Name: Specify the text that the file name must include. This is a partial match field that is case-insensitive. If the text you enter is included in any part of a filename, the document matches the criteria.

Type: Select whether you want to match folders, documents, or both.

File Type: Select a specific file type, or select **Any** to match any file type.

Attachment Status: Select one of the following to match:

- ♦ **Any:** Ignore the attachment status. Match any document.
- ♦ **Attached:** Match documents that are associated with licensed products, contracts, or purchase summary records.
- ♦ **Not Attached:** Match documents that are not associated with licensed products, contracts, or purchase records.

Include Subfolders: Select this option to search the current folder and its subfolders.

- 3 Click **Search** to apply the search criteria and filter the list.

Creating a Documents Folder

You can create folders in the Documents list to better organize your documents. All folders are displayed at the top of the list.

- 1 In ZENworks Control Center, click **Asset Management** > **Documents**.
- 2 In the Documents panel, click **New** > **Folder** to display the New Folder dialog box.
- 3 Fill in the following fields:
 - Name:** Specify a name for the folder. The name must be unique among all other folders and documents at the same level.
 - Folder:** Browse for and select the folder in which to place the new folder.

Description: Specify any optional information to identify the folder.

- 4 Click **OK** to create the folder.

Attaching Documents to Licensed Products, Contracts, and Purchase Summary Records

- 1 In ZENworks Control Center, click **Asset Management > Documents**.
- 2 Click the document ID.
- 3 Click the **Relationships** tab.
- 4 In the Contracts, License Entitlements, or Purchase Summary Records panel, click **Add**. The documents to be added are filtered based on the document status, which can be either **Attached**, **Unattached** or **All**.

Figure shows the list of unattached documents in the contracts page. For example, to attach a document from the contracts page, select the document name, then click **OK**.



Figure shows the list of documents in the entitlements page, along with the status of each document.



5 Follow the remaining prompts to add the documents.

VI Reports

ZENworks Asset Management provides a variety of standard reports to help you analyze the data related to your assets. If a standard report does not include the information you need, you can create custom reports.

- ♦ [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#)
- ♦ [Chapter 34, “Configuring Report Rights,” on page 185](#)
- ♦ [Chapter 35, “Configuring Report Settings,” on page 187](#)
- ♦ [Chapter 36, “Working with Standard Reports,” on page 189](#)
- ♦ [Chapter 37, “Working with Custom Reports,” on page 193](#)
- ♦ [Chapter 38, “Working with ZENworks Reporting,” on page 201](#)

33

Standard and Custom Report Descriptions

ZENworks Control Center includes a variety of standard (predefined) and custom reports to help you analyze the Asset Management data in your Management Zone. The following sections describe the available reports.

- ◆ [“License Management Reports” on page 179](#)
- ◆ [“Software Usage Reports” on page 180](#)
- ◆ [“Contract Management Reports” on page 182](#)

License Management Reports

License Management reports help you analyze your license compliance and license allocation data.

- ◆ [“Standard Reports” on page 179](#)
- ◆ [“Sample Custom Reports” on page 180](#)

Standard Reports

Folder	Report	Description
Software Compliance	Compliance Report	Shows the compliance status for all licensed products. Includes general details such as the number of unreconciled catalog and discovered products. For each licensed product, includes details such as license quantity, installation quantity, active usage quantity, and unused installations.
Software Compliance	Status Summary	Summarizes the total number of licensed products, purchase records, catalog products, and discovered products.
Unreconciled Products	Catalog Products	Shows the catalog products that are not associated with licensed products.
Unreconciled Products	Discovered Products	Shows the discovered products that are not associated with licensed products.
Purchases	Purchase Summary	Shows purchases by product with basic information such as the number of purchases and average purchase price.
Purchases	Purchase Details	Shows purchases by purchase order/invoice with details such as reseller, product, version, number of purchases, and various purchase prices (Unit MSRP, Unit Price, and Extended Price).

Folder	Report	Description
Suites	Suites/Components	Shows discovered suites and their component products. Includes installation quantities associated with the suite and with individual component products.
Suites	Standalone Components	Shows suite components that are installed without the suite. Includes installation quantities and the licensed products with which the standalone components are associated.
Other Reports	Inventory Comparison	Shows all Inventory products (those products discovered by Inventory scans) with the discovered products to which they are mapped. Includes details such as installation quantity, the number of standalone installations and suite component installations, and whether or not the Inventory product is excluded from license compliance.
Other Reports	Software Standards	Shows all discovered products and their assigned standards category.

Sample Custom Reports

Folder	Report	Description
Software Compliance	Excluded Catalog Products	Shows the catalog products that are excluded from license compliance.
Software Compliance	Excluded Discovered Products	Shows the catalog products that are excluded from license compliance.
Software Compliance	Non-Compliant License Records	Shows the licensed products whose compliance is Unknown or Under (too few licenses).
Software Compliance	Unreconciled Discovered Products	Shows the discovered products that are not associated with licensed products and that are not excluded from license compliance.

Software Usage Reports

Software Usage reports help you analyze the usage of local applications, served applications, and Web applications on devices in your ZENworks Management Zone.

Applications running on Citrix or Windows Terminal Services (WTS) servers and applications started during a remote session using the MSTSC command are considered as Served Applications.

- ◆ [“Standard Reports” on page 181](#)
- ◆ [“Sample Custom Reports” on page 182](#)

Standard Reports

Folder	Report	Description
Application Usage	Total Application Usage by Product	Shows the total local and served application usage grouped by product.
Application Usage	Total Application Usage by User	Shows the total local and served application usage grouped by user.
Application Usage	Total Application Usage by Device	Shows the total local and served application usage grouped by device.
Application Usage	Local Application Usage by User	Shows the local application usage grouped by user.
Application Usage	Local Application Usage by Device	Shows the local and application usage grouped by device.
Application Usage	Served Application Usage by Product	Shows served application usage grouped by product.
Application Usage	Served Application Usage by Server	Shows served application usage grouped by server.
Application Usage	Served Application Usage by User	Shows served application usage grouped by user.
Application Usage	Served Application Usage by Device	Shows served application usage grouped by device.
Application Usage	Usage Collection History	Shows a history of data collection.
Web Application Usage	Web Application Usage by Application	Shows Web application usage grouped by application.
Web Application Usage	Web Application Usage by User	Shows Web application usage grouped by user.
Web Application Usage	Web Application Usage by Device	Shows Web application usage grouped by device.
Software File Usage	Software File Usage by Category	Software files represent products not recognized by the ZENworks Knowledgebase and therefore not mapped to discovered products. Shows a count of software files grouped by category (All , Other , Ancillary), with links to lists of the files.
Software File Usage	Software File Usage by Manufacture	Shows a count of software files grouped by manufacturer, with links to lists of the files.
Software File Usage	Software File Usage by Device	Shows a count of software files grouped by device, with links to lists of the files.
Network Software Usage	Network Software Usage by Product	Shows network software usage grouped by product.

Folder	Report	Description
Network Software Usage	Network Software Usage by Server	Shows network software usage grouped by server.
Network Software Usage	Network Software Usage by User	Shows network software usage grouped by user.
Network Software Usage	Network Software Usage by Device	Usage reports focusing on software launched from a network drive.
All Usage	All Usage by User	Shows all usage grouped by user.
All Usage	All Usage by Device	Shows all usage grouped by device.

Usage information from devices on which the Hybrid Workspaces plug-in is installed is also calculated as part of the network software usage report. The report includes details about the applications that are streamed from the HW devices. Usage information from HW devices displays the manufacturer name as Hybrid Workspaces.

NOTE: The total active usage of an application displayed in the software usage report is the accumulated value of active usage of that application. This value should be more than or equal to one hour to be reported in the software usage report. If the value is less than one hour, then it is reported as zero.

Sample Custom Reports

Folder	Report	Description
Software Application Usage	Software Applications Not Used in 90 Days	Shows the applications that haven't been used in the previous 90 days.
Software Application Usage	Software Usage on Virtual Machines	Shows software usage on virtual machines.
Software Application Usage	Workstations with Suspicious Software Used Within 7 Days	Shows the workstations with suspicious software (malware) that has been used in the previous 7 days.

Contract Management Reports

Contract Management reports help you analyze your contract data from perspectives such as key financial information, service level agreements, and renewal dates.

- ◆ [“Standard Reports” on page 183](#)
- ◆ [“Sample Custom Reports” on page 183](#)

Standard Reports

Folder	Report	Description
Contract Management Reports	General Contracts	Shows a list of contracts with general contract information such as status (active or expired), contract period, total cost, and vendor.
Contract Management Reports	Date Details	Shows a list of contracts with date information such as the contract start and end dates, the time remaining, and whether or not the contract has a renewal option.
Contract Management Reports	Vendor Details	Shows a list of contracts with vendor information such as name, account number, and contact.
Contract Management Reports	Financial Details	Shows a list of contracts with financial information such as total overall cost and total cost per demographic (department, site, and cost center). Also shows annual costs.
Contract Management Reports	SLA Details	Shows a list of contracts with service level agreement information such as agreement period and metrics.
Contract Management Reports	Lease Details	Shows a list of contracts with key lease information such as order date, insurance provisions, and end-of-lease provisions.
Contract Management Reports	Document Details	Shows a list of contracts with their associated documents.
Contract Management Reports	Renewal Details	Shows the renewal history for all contracts.
Contract Management Reports	Association Details	Shows a list of contracts with their associated devices, users, cost centers, departments, sites, and license entitlements.
Contract Management Reports	Parent/Child Details	Shows a hierarchical list of contracts and indicates parent/child relationships.

Sample Custom Reports

Folder	Report	Description
Contract Management	Active Contracts with No Associated Assets	Shows active contracts that have no associated assets; that is, no workstation or network devices.
Contract Management	Active Software Maintenance Contracts	Shows the active contracts whose type is software maintenance.
Contract Management	Contracts with Evergreen Provision	Shows all active contracts with an Evergreen provision (no contract end date).

Folder	Report	Description
Contract Management	Contracts with No Attached Documents	Shows all contracts with no attached documents.
Contract Management	Contracts Ending within 90 Days (No Renewal Option)	Shows all non-renewable contracts with end dates within 90 days after the run date.
Contract Management	Contracts Ending within 90 Days (Renewal Option)	Shows all renewable contracts with end dates within 90 days after the run date.
Contract Management	Contracts Renewed in Last 90 Days	Shows contracts that have been renewed in the last 90 days.
Contract Management	Expired Contracts	Shows all expired contracts.
Contract Management	Lease Schedules Ending within 60 Days	Shows contracts with a lease schedule and a current end date within 60 days of the report run date.
Contract Management	Pending Contracts	Shows all the pending contracts.

34 Configuring Report Rights

ZENworks Asset Management lets you manage administrator rights to each report folder. The rights associated with each folder govern all the reports within that folder. For example, if you have full rights to a folder, you can edit reports within the folder; but with view/execute rights, you can only see the folder's reports and run them.

To configure the Asset Management report rights:

- 1 In ZENworks Control Center, click **Configuration**.
- 2 In the **Administrators** panel, click an administrator.
- 3 In the Administrator Tasks panel (located in the left navigation panel), click **Asset Management Report Rights**.
- 4 Select the folders you want to change the rights to.
- 5 Click **Edit**, then click one of the following:
 - ◆ **Remove All Rights**: Removes all rights to the folder, so the administrator cannot see it.
 - ◆ **Assign View/Execute Rights**: Allows the administrator to view and execute a report in the specified folder, but not to edit, move, or delete a report in the folder.
 - ◆ **Assign Full Rights**: Gives the 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.

The change is reflected in the **Rights** column.

35 Configuring Report Settings

There are two ZENworks Management Zone settings related to Asset Management reports. One setting determines how a report is initiated and the other setting determines whether or not software usage is displayed in all reports.

To configure the settings:

- 1 In ZENworks Control Center, click **Configuration**.
- 2 In the Management Zone Settings panel, click **Asset Management**, then click **Reports**.
- 3 Configure the following options:
 - Wait to run reports until search is pressed:** By default, a report runs when you click it. Select this option to display the search criteria before running the report; the report runs only after you click the **Search** button.
 - Do not show usage on License Management reports:** Many of the License Management (license compliance and license allocation) reports include software usage data. Collecting the software usage data typically increases the time required to generate the report. If you want to decrease the generation time and you don't need the usage data in the reports, select this option.
- 4 Click **OK** to save the changes.

Administrator Rights

Administrators now have access to change or assign the report rights. The Asset Management Report Rights page allows you to configure the default right settings that you can assign to a user. By default, a user has the **View/Execute Rights** enabled. Changing this setting does not affect existing users whose default rights were already modified.

You can choose to use any one of the following as the default right setting:

- ◆ No Rights
- ◆ View/Execute Rights

36 Working with Standard Reports

ZENworks Control Center includes a variety of predefined Asset Management reports. [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#) describes each of the standard reports. The following sections explain how to use the reports.



- ♦ [“Running a Report” on page 189](#)
- ♦ [“Exporting a Report” on page 190](#)
- ♦ [“Viewing a Report as a Graph” on page 190](#)
- ♦ [“Changing the Report Period” on page 190](#)
- ♦ [“Changing the Filter Criteria” on page 191](#)

NOTE: An attempt to run standard reports in ZENworks Control Center might fail or time out due to large amount of Inventory data that is not pruned in the database. Examples of such reports are Hot Fix Details, Software Files By Manufacturer, Software Files By Device, and Hardware Components By Category. It is recommended to prune unwanted Inventory data in the database before running such complex reports. For more details on purging, see [“Purge Inventory History” in *ZENworks Asset Inventory Reference*](#).

Running a Report

Many of the Asset Management standard reports include usage data associated with the software product. If you are not interested in this data, you can exclude the data to generate the report more quickly. For information, see [Section 35, “Configuring Report Settings,” on page 187](#).

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.
or
For software usage reports, click the **Software Usage** tab.
or
For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.
- 3 In the Standards Reports panel, locate the report you want to run.
In some cases, you might need to open a folder to see the report you want. Within a folder, reports are listed by name and description. For a list of reports and descriptions, see [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#).
- 4 If you are generating a software usage report, you can limit the scope of the report data by selecting one of the following Grouping Criteria:
 - ♦ **Zone:** Displays data from the entire Management Zone.

- ♦ **Folder:** Displays data for devices in a specific folder. Select **Folder**, then click  to browse for and select the folder.
- ♦ **Group:** Displays data for devices in a specific group. Select **Group**, then click  to browse for and select the group.
- ♦ **Demographic:** Displays data for a specific demographic. Select **Demographic**, then select **Department, Site, or Cost Center**.

5 Click the report to run it.

Many of the reports contained linked items. You can click a linked item to display more detailed information about the item.

Exporting a Report

You can export report data to three formats: Excel, CSV, and PDF.

- 1 Run the report. For instructions, see [“Running a Report” on page 189](#).
- 2 Export the report to by clicking one of the three options (**Excel**, **CSV**, or **PDF**) at the bottom of the report.

If the report includes more items than are listed in the current display (for example, *1 to 100 of 226 products*), three additional options are added: **Excel (All)**, **CSV (All)**, and **PDF (All)**. The **Excel**, **CSV**, and **PDF** options export only the items in the current display. The **Excel (All)**, **CSV (All)**, and **PDF (All)** options export all items.

Viewing a Report as a Graph

Many reports can be viewed as a graph. If this feature is available, **Graph** appears at the bottom of the report.

A report is generated as three different graphs: bar graph, pie chart, and line graph. You can save the graphs as a PDF file.

Graphs work best for small data sets; if you include many values, the graphs might become hard to read. Use the filter and grouping criteria to limit the amount of data shown.

- 1 Run the report. For instructions, see [“Running a Report” on page 189](#).
- 2 Click **Graph** at the bottom of the report.

If the report includes more items than are listed in the current display (for example, *1 to 100 of 226 products*), a **Graph (All)** option is added. The **Graph** options graphs only the items in the current display. The **Graph (All)** option graphs all items.

Changing the Report Period

For greater flexibility, you can change the time period of some reports. If this feature is available, **Change Time Period** (or **Change Time Period/Filter**) 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 Run the report. For instructions, see [“Running a Report” on page 189](#).
- 2 Click **Change Time Period**.
- 3 Select an interval in the **New Time Period** field.
- 4 Click **Apply**.

The report runs again and the new time period is shown at the top left of the report.

Changing the Filter Criteria

Many reports allow you to change the report filter criteria. In some reports, the filter criteria are displayed in a navigation pane to the left of the report. In other reports, criteria are accessed through a **Change Filter** (or **Change Time Period/Filter**) option at the bottom of the report.

- 1 Run the report. For instructions, see [“Running a Report” on page 189](#).
- 2 If the filter criteria are displayed in the left navigation pane, modify the criteria, then click **Search**.

or

Click **Change Filter** at the bottom of the report, select one of the filters, then click **Apply**.

37 Working with Custom Reports

ZENworks Control Center lets you create and run custom Asset Management reports to analyze data not included in the standard reports. [Chapter 33, “Standard and Custom Report Descriptions,” on page 179](#) includes sample custom reports that demonstrate the different types of reports that you can create.

The following sections explain how to use custom reports:

- ♦ [“Creating a Custom Report” on page 193](#)
- ♦ [“Running a Custom Report” on page 194](#)
- ♦ [“Scheduling a Custom Report” on page 195](#)
- ♦ [“Viewing a Scheduled Custom Report” on page 196](#)
- ♦ [“Editing a Custom Report” on page 196](#)
- ♦ [“Creating a Custom Report Folder” on page 197](#)
- ♦ [“Deleting a Custom Report Folder” on page 198](#)
- ♦ [“Moving a Custom Report” on page 198](#)
- ♦ [“Deleting a Custom Report” on page 198](#)
- ♦ [“Importing New Report Definitions” on page 199](#)

Creating a Custom Report

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.
or
For software usage reports, click the **Software Usage** tab.
or
For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.
- 3 In the Custom Reports panel, open the folder where you want to create the report.
- 4 Click **New** to display the Custom Report Definition - Step 1 of 2 page.
- 5 Fill in the following fields:
 - Name:** Specify a name for the report. The name must be unique within the folder where it is being created.
 - Type:** For License Management and Contract reports, this field is preset. For Software Usage reports, select the type of report you want to create. The type determines which Focus options are displayed.

Focus: Select a focus for the report. The focus determines which fields are available to include in the report. For example, if you are creating a License Management type report and you select Purchase Records as the focus, only the fields related to purchase records are available.

6 Click **Continue** to display the Custom Report Definition - Step 2 of 2 page

7 Fill in the following fields:

Name: Displays the name you entered in [Step 5](#). You can change it if necessary.

Folder: Displays the folder you selected in [Step 3](#). You can change it if necessary.

Description: Specify a description for your report. This is optional

Type: Displays the report type you selected in [Step 5](#).

Columns: From the list on the left, select the fields you want to include in your report. Use the arrow icons to move the selected fields to the list on the right. Use Ctrl+click to select more than one field at a time. Use the up and down icons to order the field display.

Criteria: Lets you include or exclude entries based on the value of a field in the database. For example, if you are creating a report with a Purchase Record focus and you don't include any criteria, all purchase records are displayed in the generated report. However, if you select *Purchase Reseller = CheapSoft* as the criteria, only purchase records with CheapSoft as the purchase reseller are displayed.

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

Summary Criteria: Lets you include or exclude entries based on a calculated value.

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**.

The report is added to the Custom Reports panel. However, it is not displayed until you refresh the page.

Running a Custom Report

If a custom reports include usage data associated with software products, and you are not interested in the usage data, you can exclude the data to make the reports generate more quickly. For information, see [Chapter 35, "Configuring Report Settings," on page 187](#).

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

2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.

or

For software usage reports, click the **Software Usage** tab.

or

For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.

3 In the Custom Reports panel, open the folder containing the report you want to run.

- 4 Click the report.

The report definition appears. For information on editing the report definition, see [“Editing a Custom Report” on page 196](#).

- 5 Click **Run** at the bottom of the report.

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.

Scheduling a Custom Report

You can schedule a report to run automatically and send out notifications to individuals when it is ready.

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

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.

or

For software usage reports, click the **Software Usage** tab.

or

For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.

- 3 In the Custom Reports panel, open the folder containing the report you want to run.
- 4 Click the report you want to schedule.
- 5 Click **Schedule/Notification**.
- 6 Fill in the following fields:


Start Date: Click to specify the first day that you want the report generated.

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

Output: Select what you want to happen when the report is generated. You can simply 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 the report includes data.

If you select **Send a Notification (E-mail)** or **Both**, you must configure the e-mail notification:

- ♦ **Delivery Format:** Send the report as an Microsoft Excel file or PDF file attached to the e-mail, or include a link to the report stored on your ZENworks server.
- ♦ **Sender:** Specify the name to be included in the From field of the e-mail.
- ♦ **Recipients:** The Contacts list includes the individuals whose e-mail addresses are listed in the Inventory database. If the list does not include the e-mail addresses you need, you can import the addresses or use the **Additional Recipients** field. For information about importing e-mail addresses, see [“Configuring E-mail Addresses”](#) in the *ZENworks Asset Inventory Reference*.

To add a recipient from the Contacts list, select the recipient, then click  to add the recipient to the To list.

- ◆ **Additional Recipients:** You must add at least one default recipient. To do so, you can use this field or the **Recipients** field. To use this field, specify at least one address (for example, pjohnes@novell.com). Separate addresses with commas.

Maximum Records: Specify the maximum number of records to include in the report.

- 7 Click **Submit**.

The report runs at the scheduled times.

Viewing a Scheduled Custom Report

Scheduled reports are stored in the ZENworks database. You can view these reports either by title or date. For information about scheduling reports, see [“Scheduling a Custom Report” on page 195](#).

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.

or

For software usage reports, click the **Software Usage** tab.

or

For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.

- 3 In the 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 displays and shows the reports grouped by date or title and a report count.

- 4 Click a grouping to open the **Scheduled Reports** page, then select a report to view it.

Editing a Custom Report

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.

or

For software usage reports, click the **Software Usage** tab.

or

For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.

- 3 In the Custom Reports panel, open the folder containing the report you want to edit.
- 4 Click the report.

5 Click **Edit** at the bottom of the report.

6 Edit the following fields:

Name: The name of the report. Any name you specify must be unique within the folder where the report resides.

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

Description: A description for the report. This field is optional.

Type: The report type.

Columns: From the list on the left, select the fields you want to include in your report. Use the arrow icons to move the selected fields to the list on the right. Use Ctrl+click to select more than one field at a time. Use the up and down icons to order the field display.

Criteria: Lets you include or exclude entries based on the value of a field in the database. For example, if you are creating a report with a Purchase Record focus and you don't include any criteria, all purchase records are displayed in the generated report. However, if you select *Purchase Reseller = CheapSoft* as the criteria, only purchase records with CheapSoft as the purchase reseller are displayed.

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

Summary Criteria: Lets you include or exclude entries based on a calculated value.

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**.

Creating a Custom Report Folder

You can create folders to organize your custom reports.

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

2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.

or

For software usage reports, click the **Software Usage** tab.

or

For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.

3 In the Custom Reports panel, click **New** to display the **New Folder** dialog box.

4 In the Name field, specify a name for the folder, then click **OK**.

The name must be unique within the Custom Reports list.

Deleting a Custom Report Folder

To delete a folder and all the reports in it:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.
or
For software usage reports, click the **Software Usage** tab.
or
For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.
- 3 In the Custom Reports panel, select the folder you want to delete.
- 4 Click **Delete**, then click **OK** to confirm the deletion.

Moving a Custom Report

You can move a custom report from one folder to another. The target folder must be of the same type (License Management, Software Usage, or Contract Management) as the source folder.

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.
or
For software usage reports, click the **Software Usage** tab.
or
For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.
- 3 In the Custom Reports panel, select the report you want to move, then click **Edit > Move**.
- 4 In the New Report Location list, select the target folder, then click **OK**.

Deleting a Custom Report

To delete a custom report:

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

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

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

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.

To import report definitions:

- 1 In ZENworks Control Center, click the **Asset Management** tab.
- 2 For license compliance and license allocation reports, click the **License Management** tab, then click **License Management Reports**.
or
For software usage reports, click the **Software Usage** tab.
or
For contract management reports, click the **Contract Management** tab, then click **Contract Management Reports**.
- 3 In the 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**.

38 Working with ZENworks Reporting

In addition to the software usage, license management, and contract management reports that you can create and generate from the **Asset Management** folder in ZENworks Reporting, and also you can create and generate additional reports.

The ZENworks Reporting is a powerful, flexible, and customizable reporting tool that is installed and configured separately from the ZENworks system. For information about ZENworks Reporting, see the [ZENworks Reporting Appliance Deployment and Administration Reference](#).

You can use the ZENworks Reporting to view additional predefined Asset Management reports and create Ad Hoc reports (custom reports). The following sections describe the predefined reports and how to view them.

- ♦ [“Viewing a Predefined Report” on page 201](#)
- ♦ [“Predefined Reports” on page 201](#)

For information about creating custom reports, see the [ZENworks Reporting System Reference](#).

Viewing a Predefined Report

ZENworks Reporting must be installed and configured to use the predefined reports.

- 1 Log in to ZENworks Reporting.
- 2 Navigate to the **View** > Repository > Folders > Organization > Reports > ZENworks > Predefined Reports > **Asset Management** > **License Management** folder.

The Asset Management reports are organized in four subfolders: **License Allocation**, **Purchases**, **Software Compliance**, and **Suites**. For a brief description of each report, see [“Predefined Reports” on page 201](#).

- 3 Open the folder that contains a report to view.
- 4 Double-click the report.

Predefined Reports

The predefined Asset Management reports are organized into four categories:

- ♦ [“License Allocation Reports” on page 202](#)
- ♦ [“Purchases Reports” on page 202](#)
- ♦ [“Software Compliance Reports” on page 203](#)
- ♦ [“Suites Reports” on page 203](#)
- ♦ [“Licensed Products And Entitlements Report” on page 203](#)

License Allocation Reports

Report Title	Description
Allocations vs. Installations	For each licensed product, shows the variance between allocated licenses and the total number of installations. For each licensed product, this report lists the total number of licenses, installed, allocated, over allocated, or under allocated.
Current Allocations	For each licensed product, this report lists the current number of licenses allocated and unallocated quantity.
Demographic Over-Allocation	Lists all licensed products whose number of demographically allocated licenses is more than the number of installations associated with the demographic.
Demographic Under-Allocation	Lists all licensed products whose number of demographically allocated licenses is less than the number of installations associated with the demographic.
Device Over-Allocation	Lists all licensed products whose number of device-allocated licenses is less than the number of installations associated with devices.
Duplicate Allocations	Lists all licensed products with device allocations that duplicate demographic allocations.
Installations with no Allocations	Lists all licensed products with installed licenses that are not covered by demographic or device allocations.
Licensed Products Allocations	Lists the demographic allocations and device allocations of the licensed product. Data can be filtered based on the department and the site.

Purchases Reports

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

Software Compliance Reports

Report Title	Description
Compliance Status	Provides the compliance status of the selected licensed product. It lists the license consumption details such as, installed quantity, calculated license quantity, consumed quantity and net consumption. It also lists details about any un-resolved installations.
Discovered Product Summary	Provides details of the discovered product that is reconciled with the licensed product.
Software Compliance	Provides the compliance data of the entire list of licensed products present. <ul style="list-style-type: none">◆ Compliance Report: Shows the compliance status for all licensed products. Includes general details such as the number of unreconciled catalog and discovered products. For each licensed product, includes details such as license quantity, installation quantity, active usage quantity, and unused installations.◆ Status Summary: Summarizes the total number of licensed products, purchase records, catalog products, and discovered products.

Suites Reports

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

Licensed Products And Entitlements Report

Report Title	Description
Licensed Products And Entitlements	Lists the licensed products and its associated entitlement details.
