Managing Assets with Novell ZENworks Asset Management Workbook

ZEN18

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SECTION 1 Importing Purchase Data

In this section of the workbook you learn how to do the following:

Exercise 1-1 Importing Purchase Data

In this task you'll import a file containing a set of software purchase records that will set things up for later exercises in the course. This file was created from the standard template discussed in this section.

- "Task I: Import Purchase Data" on page 6

Task I: Import Purchase Data

The most efficient option for getting purchase information into the database is to import it. This can be done by either importing a standard tab separated text file, or by obtaining purchase data from one of several resellers who provide data in the appropriate format.

Do the following:

1. From the ZENworks Control Center, select **Asset Management**. You'll arrive on the License Management tab.
2. Select the **Purchase Records** folder link.
3. From the Action menu select **Start Import**.

   The Import Purchase Records dialog is displayed. (Note the listings for software resellers who support reseller connectors for ZENworks Asset Management.)
4. Select **Browse**.
5. Browse to **C:\Lab Files**.
6. Select **Import.txt** and then select **Open**.
7. Select **OK** to start the import.
8. Select the **Import Status** tab as soon as you start the import. Here you should find a row tracking the status of your import. There's a refresh button on the far right; this is a small import file, so it may actually load faster than you can get here to watch it.

   Note the various statistics on the status report. There should be no errors and you should have a green Success light.
9. Select the **Purchase Records** tab. Here you will see new records with PO#s from 00000006-00000010. These are the records added by your import.

(End of Exercise)

SECTION 2 Managing Discovered Products

In this section of the workbook you learn how to do the following:

Exercise 2-1 Managing Discovered Products

In this exercise you'll work with discovered products, cleaning up the data provided, creating a software standard and building a software collection.

- "Task I: Excluding Discovered Products" on page 8
- "Task II: Create a Software Standard" on page 8
- "Task III: Create a Software Collection" on page 9

Task I: Excluding Discovered Products

The first step in configuring software compliance is to examine the list of discovered products and determine if there is anything that you do not need to track, or don't want to track initially.

Do the following:

1. In the ZENworks Control Center, select **Asset Management**.
2. From the License Management tab, select the **Discovered Products** folder.

TIP: When working with Asset Management it will help if you maximize your browser window so you can see all the rows, columns, and options available on each page.

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3. You're starting out with over 1,400 discovered products. A more reasonable starting point would be to narrow the list to a single manufacturer. In the **Search** box at the right of the browser window, set the **Manufacturer** to **Adobe**. Also, set the **Reconciliation Status** to **Not Reconciled**.
4. Select **Search**.

   The new list of Adobe products is far more manageable.
5. Scan the list – you should be able to spot at least two discovered products that are not licensed software. (AIR, Flash Player, and Reader are good candidates.) Select the **check box** next to each product.
6. Select **Action > Exclude**.

   Your remaining list will be shorter.

Task II: Create a Software Standard

Later in the course we'll describe a creative way to use software standards to help organize your Software Asset Management project. In this task, you'll create a software standard and assign several discovered products to it.

Do the following:

1. Start with the complete list of unreconciled discovered products. If your list is less than 1,400, select the **Reset** button at the bottom of the Search panel on the far right side of the page.

2. Pick 5 or 6 discovered products and mark them by selecting the **check box** next to each product. Pick any products you like, but stay away from the Adobe, DameWare, Intuit and Microsoft products; we'll need those in later exercises.
3. Select **Action > Set Standards Category**.

   The Set Standards Category dialog is displayed.

   NOTE: Occasionally, such as going to the Action menu in this exercise, you may find that the ZENworks Control Center suddenly fails to respond to a request for a menu item. This is annoying, but it happens some times. The best thing to do if this happens is to log out of the ZENworks Control Center, shut down your browser, and restart the ZENworks Control Center. Usually this will let you move ahead again. If not, repeat...

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4. Enter a new name for a standards category – **My Category**. Select **OK**.
5. The discovered products will be refreshed to show your category for the selected products. Scroll the list to verify the assignment.

Task III: Create a Software Collection

Sometimes ZENworks Asset Management won't identify a suite of software you purchased as a set. Software collections allow you to define a suite and identify the required elements of the suite.

Do the following:

1. In the ZENworks Control Center, select **Asset Management**.
2. From the **License Management** tab, select the **Software Collections** folder.
3. Select **New > Software Collection**.

   Step 1: General Information for a new software collection is displayed.

4. Enter the following information:
   - Manufacturer: **DameWare Development**
   - Product: **Toolkit**
   - Version: **5.5**
   - Platform: **Windows**
5. Select **Next**.
6. Select the **Define Additional Properties** check box and then select **Finish**.

   The wizard now moves to the Member Products tab of the software collection.

7. Select **Add > Installed Discovered Product**.
8. In the **Name Filter** box, enter ***DameWare*** and select the **Search** (magnifying class) button.

   You should have several DameWare discovered products in the search results, only two of which are unused; these are presented in blue underlined type. Note also that each includes a version number of 5.5.

9. Select each of the unused **DameWare Products**, which will move them into the Selected list to the right. Select **OK**.

Note in the new list of discovered products associated with the collection that both products are checked as "required" in the far right-hand column. This is correct for this collection. Were it necessary to change the status of one or more required products, you would select the product(s) with the check box to the left of each row and then use the **Action > Set Required** and **Clear Required** options to toggle the settings appropriately.

(End of Exercise)

SECTION 3 Creating a Simple Licensed Product

In this section of the workbook you learn how to do the following:

Exercise 3-1 Reconciling a Licensed Product with Manual Reconciliation

Licensed products may be created by either manual reconciliation or auto-reconciliation. In this exercise, we'll look at the manual process. The automated process is covered in the following exercise.

- "Task I: Manually Reconcile a Licensed Product" on page 12

Task I: Manually Reconcile a Licensed Product

With purchase and inventory data now in the database, the next step is to reconcile the data between Catalog Products and Discovered Products. In this task, you will create a Licensed Product and then manually associate the applicable products.

Do the following:

1. In the ZENworks Control Center select **Asset Management**.
2. From the License Management tab, select the **Licensed Products** folder.
3. For our exercise we will work with an Adobe product. Select the **Adobe folder** to create a new Licensed Product in the Adobe folder and keep our Licensed Products organized.
4. Select **New > Licensed Product**.
5. For the Manufacturer select **Adobe** from the choice list.
6. For the Licensed Product select **Adobe Acrobat** from the choice list.
7. For the version enter **6**.
8. Select **Next**.
9. Select the **Define Additional Properties** check box and then select **Finish**.

   This completes creation of the base licensed product record. The next step for the basic licensed product is to add and define an entitlement.
10. Under the **Entitlements (Consumption Data Source: Inventory)** panel select **New**.
11. At Step 1: **License Model** note that the License Model selected is Per-Installation and then select **Next**.
12. On Step 2: **Entitlement Type** the default is **Full License** which is what we want for the exercise; select **Next**.
13. For Step 3: **General Information** enter **Acrobat 6** in the Description field. Note the rest of the settings on the page and then select **Next**.
14. Select the **Define Additional Properties** check box and then select **Finish**.

    The basic entitlement is now created. The proof of ownership and coverage information must still be added for compliance calculations to take place.
15. At the top of the entitlement record select the **Proof of Ownership** tab.
16. Under the **Catalog Products** panel select **Add**.

17. Find and select the product **Adobe Systems Acrobat 6**. Clicking on the product moves it to the selected list. Then select **OK**.
18. Now at the top of the entitlement record select the **Coverage tab**.
19. Under the Discovered Product Versions Covered select **Add > Installed Discovered Product**.
20. Scroll down in the first set of records to find and select **Adobe Adobe Acrobat 6**. (The double-Adobe is correct – that's the way the product name comes through sometimes.) Then select **OK**.
21. At the top of the page, above the General – Proof of Ownership – Coverage tabs are a set of "bread crumbs" that show the path to your current location. You can backtrack to an intermediate point in the path without going all the way back to the starting point. In this case, select the **Adobe Adobe Acrobat 6** link in the path.
22. Back at the entitlement record, select the **Compliance Status tab**. Here you'll find the results of the compliance calculation based on the information entered in the new entitlement. Note in the compliance status panel at the far right that the Over/Under reads zero – perfect compliance balance.
23. In the bread crumbs, select the **License Management** link to return to the main License Compliance tab. Now we'll take a look at the Compliance Report.
24. Select the **License Management Reports** folder.
25. From the top group of **License Management Standard Report**, select the **Software Compliance** folder.
26. Select **Compliance Report**.

    The Compliance Report will open in a new tab in your browser. It may take a few moments for the report to display.
27. To the left of the report, select the **Manufacturer** radio button to reveal a list of manufacturer names. Select **Adobe** and then select the **Search** button below the manufacturer list.

    The updated report shows only Adobe products under license management.
28. Our new licensed product – **Adobe Acrobat 6** – is in the second row. Note the green status indicator for balanced compliance. Notice also that all the usage columns show zeros. That's due to an overly narrow report time window.
29. At the bottom of the report, select **Change Time Period**.
30. In the Report Time Period dialog, select **All History in Database** and then select **Apply**.

    You'll now see usage data in the compliance report.

    Leave the compliance report tab open. It will be useful in the upcoming exercises.

(End of Exercise)

SECTION 4 Upgrade Entitlements and Merging Licensed Products

In this section of the workbook you learn how to do the following:

Exercise 4-1 Upgrade Entitlements and Merging Licensed Products

This exercise works with the steps necessary to create a license upgrade entitlement as part of a Licensed Product. It begins with merging two Licensed Products that are both involved in the upgraded product.

- "Task I: Creating an Upgrade Entitlement" on page 16

Task I: Creating an Upgrade Entitlement

Starting with two existing Licensed Products, this task will first merge the Licensed Products to get ready for the upgrade. Then, you'll make modifications to the resultant Licensed Product to include the purchase of upgrade licenses. This will also require adjustments to the coverage for the Licensed Product.

Do the following:

1. In the ZENworks Control Center select **Asset Management**.
2. From the **License Management** tab, select the **Licensed Products** folder.
3. For our exercise we will work with an Adobe product. Select the **Adobe** folder.
4. This exercise will accommodate an upgrade from Adobe Acrobat 5 to Acrobat 6. At the same time, we'll pull together licensing for existing Acrobat 5 and 6 installations in a single Licensed Product. Our first step is the merge.

   Select the **check boxes** next to the **Acrobat 5** and **Acrobat 6** Licensed Products.
5. Select **Action > Merge Licensed Products...**.

   The Merge Licensed Products dialog is displayed.
6. Select **Adobe Acrobat 6** from the choice list, and then select **OK**. This is the record we'll keep going forward. The Acrobat 5 entitlement will be merged into this Licensed Product record.

   The merge is performed and the list of Adobe Licensed Products is updated with the single remaining License Product record.
7. Select the **Adobe Acrobat 6** record.
8. Since multiple versions will now be maintained within a single Licensed Product record, remove the version **6** shown on the General tab. Then select **Apply** to keep this change.
9. Select the **License Entitlements** tab. Note the two entitlements brought together from the two merged Licensed Product records.
10. Under the **Entitlements (Consumption Data Source: Inventory)** panel select **New**.
11. At Step 1: **License Model** note that the License Model selected is **Per-Installation** and then select **Next**.
12. On Step 2: **Entitlement Type** select **Version Upgrade**; then select **Next**.
13. In Step 3: **Entitlement Upgrade** select **Adobe Adobe Acrobat 5** – this is the version we're upgrading from. Then select **Next**.

14. For Step 4: **General Information** enter **Acrobat 5 > 6 Upgrade**; note the rest of the general settings and then select **Next**.
15. Select the **Define Additional Properties** check box on the summary page and then select **Finish**.

    The basic upgrade entitlement is now created, with proof of ownership and coverage information still to be added.
16. At the top of the entitlement record select the **Proof of Ownership** tab.
17. Under the Catalog Products panel select **Add**.
18. Find and select the product **Adobe Acrobat Standard 6.0 (Version Upgrade)**. Clicking on the product moves it to the selected list. Then select **OK**.
19. Now at the top of the entitlement record select the **Coverage** tab.
20. Under the Discovered Product Versions Covered select **Add > Installed Discovered Product**.
21. Scroll down in the first set of records to find and select **Adobe Adobe Acrobat 6**. Then scroll at bit further to find and select **Adobe Adobe Acrobat Standard 6.0**. Then select **OK**.
22. This completes configuration of the upgrade entitlement. Use the bread crumbs to return to the **Adobe Adobe Acrobat** Licensed Product, and then select the **License Entitlements** tab. Note the three entitlements and the various versions covered and upgrade-from versions.
23. Select the **Compliance Status** tab. Here you'll find the results of the compliance calculation based on the information entered in the new entitlement. When all is said and done, we have some extra licenses available.
24. Return to your **Compliance Report** and search for the manufacturer Adobe. Note the revised row for Adobe Acrobat and the over-licensed quantity.

(End of Exercise)

SECTION 5 Creating a Contract

In this section of the workbook you learn how to do the following:

Exercise 5-1 Creating a Contract

In this exercise you'll create a contract of your own design.

- "Task I: Create a Contract" on page 20

Task I: Create a Contract

In this free-form exercise, you'll create a contract. The exact nature of the contract is not important, but make sure you work with the following features of contract management:

- A **Total Cost** amount, allowing calculations on the Financial tab
- **Date Notifications** – edit the default and set up at least one notification as part of your contract
- Add a **Document**
- Add at least one item for each of the categories on the **Relationships** tab. After doing this, return to the Financial tab and make sure that all the calculated values make sense.

(End of Exercise)