Asset Management Guide

PRISM
ASSET MANAGER®

Version 13

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Additional Notes

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Table Of Contents

Overview of Asset Manager®

Prism Asset Manager is designed to help you maximize your investment in software and computer hardware by providing easy access to up-to-date information about computers and other assets in your enterprise. Use Asset Manager for managing license compliance and usage, migration planning, desktop standardization, software and hardware inventory, network discovery, and management of non-networked assets.

With Asset Manager you can:

- Ensure that you have enough licenses without overbuying.
- Track license usage and generate various license usage reports
- Plan upgrade rollouts and new operating system migrations.
- Implement and maintain company-wide usage policies for standardized and secure desktops.
- Monitor in-house or custom applications along with standard commercial software.
- Discover and manage network devices, such as routers and printers.
- Record and track other assets that are not on a network.

How Asset Manager Works

The following is a simplified explanation of how Asset Manager collects and uses data:

- The Client captures information about the hardware configuration, operating system, applications present on the managed computer, as well as information about the network.
- This information is passed to the Channel Server and stored in the database.
- Asset Manager compares information from the managed computers with its extensive database of information about applications and suites, matching the executable files on the computers with known license units for quick identification, and determines manufacturer and other properties of discovered devices.
- The administrator has immediate access to this data through the Console.
- The administrator decides how to handle unresolved files, records software licenses, tracks license usage, and reports on inventory through the Console.

Inventory of Software and Hardware

Overview of the Software and Hardware Inventory

Asset Manager provides a flexible inventory solution, by automatically inventorying all of your managed computers in the background, on a scheduled basis and letting you inventory a specific computer or group of computers on-demand. When it completes an inventory, Asset Manager identifies both software applications and hardware characteristics of managed computers. Software applications are matched to known license units, providing a way to monitor both applications in use and the status of license compliance. By providing detailed information about the hardware and system configuration, it helps you stay on top of all aspects of your installed base.

You have the option of customizing the inventory by adding file types or hardware configurations of interest. By default, the Asset Manager software inventory looks for application executables. To customize the software inventory, you can specify any file extension. As part of the hardware inventory, Asset Manager reports on a wide array of hardware, operating system, and system characteristics. The hardware inventory can also be customized by adding WMI variables.

How long does it take to run an inventory?

The inventory process typically takes from three to five minutes to complete on one machine. But when you inventory multiple machines at once, the length of time to complete the process does not increase exponentially - the processes run in parallel. This means that inventorying multiple machines simultaneously completes much more quickly than inventorying the machines one at a time.

A number of factors affect the length of time it takes to complete the inventory process, including:

- Client machine hardware (CPU speed, drive access times, and so on)
- The number of files and folders on the machine
- Speed of the SQL Server machine hosting the PSID (Prism Software Identification Database)
- How frequently the Client contacts the Channel

What inventory information is collected?

Asset Manager collects the following information from workstations and servers:

- **File information**: By default, Asset Manager searches for executable files. You also have the option of customizing the inventory to include any file extension. For the target files, Asset Manager collects detailed information including name, size, date, path, version, and more. Extended file information such as CRC (Cyclic Redundancy Checking) and data stored in the file header may also be collected.

> **Tip**: To inventory a specific file type see Configuring the Inventory.

- **Hardware configuration**: Asset Manager collects information about each computer's basic hardware information, such as computer name, CPU type and speed, memory, disk space, network card address, and so on.
- **Operating system**: Included in the hardware scan is detailed information about the operating system, version, and so on.
- **WMI (Windows Management Instrumentation)**: You can customize the hardware inventory by specifying WMI variables to capture an array of information.

How do I inventory my computers?

- **Automatic Scan**: Asset Manager can be configured to scan all of the managed computers on a scheduled basis. (See Setting the Scan Interval.)

  Depending on the type of information you need, you can find the results of these scans in the details pane on the Software tab and Hardware tab, and in the tree view on the License Units tab and Unresolved Files dialog. The inventory is also available through the default Asset Management reports. (See Viewing Asset Reports.)

- **Scan on Demand**: To scan a computer or group of computers at any time, see Inventory on Demand.

Setting the Scan Interval

Asset Manager keeps your inventory up-to-date automatically by scanning all managed computers at a fixed interval. You can adjust this interval through the Channel Properties | Asset Management tab.

1. Select **Asset Management | Settings**. This opens the Asset Management tab of the Channel Properties dialog.

2. Select **Automatically inventory licensed computers**.

3. Select the scanning frequency in the **Scheduled Inventory** section of the tab.

4. Set the **Auto Identify** options to determine how the most closely matched files in the Unresolved Files dialog are handled.

5. Click **OK** to save your changes.

Note: The scan interval applies only to computers directly on the network. If a laptop that connects to the network only occasionally misses the scheduled scan, it is scanned the next time it contacts the Channel Server.

Inventory on Demand

You have just made changes to hardware or software assets and want to view updated data in the Console before the next scheduled scan. At any time, you can complete an inventory of individual computers or groups of computers, directly from the Console. Within minutes, review the updated data online or generate reports.

Note: The inventory is completed the next time the Client contacts the Channel. If you have enabled the Request Poll functionality, the inventory will commence as a side-effect of the Request Poll.

Scan an Individual Computer or Group

To inventory an individual computer or group:

1. Go to the Managed tab or Configuration Groups tab in the tree view.

2. Select the computer or group in the tree view or details pane.

3. Do one of the following:

   - Press in the toolbar.
   - Right-click and select **Inventory Now** from the pop-up menu.

- Select **Inventory Now** from the Asset Management menu.

4. On the Choose Scan Configuration dialog, select a configuration from the drop-down list.

5. Click **OK** to start the inventory.

   When the inventory is complete, the results are available in the details pane on the Software tab or Hardware tab, and in the Asset Management reports. There may also be items listed on the License Units tab and Unresolved Files dialog.

Choose Scan Configuration dialog
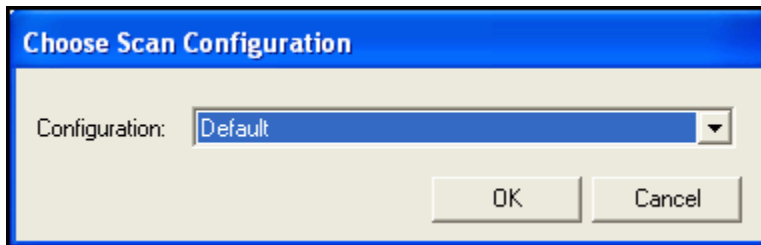
On this dialog, choose the configuration to use when scanning the computer(s).

This dialog opens when you select a computer or group and do one of the following:

- Press in the toolbar.
- Select **Inventory Now** from the Asset Management menu.
- Right-click and select **Inventory Now** from the pop-up menu.

Completing a Software Inventory

With the automatic scan turned on, Asset Manager identifies software on managed computers at a scheduled interval. View this information in the details pane on the Software tab, the License Units tab, or through the Asset Management reports.

Customize the Inventory

In addition to the executable files that Asset Manager identifies by default. You can also specify other file extensions to include in the inventory. See Configuring the Inventory.

Automatic Inventory

By default, Asset Manager automatically inventories the hardware and software on managed computers on a scheduled basis. Turn this option on or off through the Channel Properties | Asset Management tab.

Complete a Software Inventory On Demand

To complete an inventory at any time:

1. In the tree view, select a computer or group.

2. Do one of the following:

   - Click on the toolbar.

- Select **Inventory Now** from the Asset Management menu.
- Right-click and select **Inventory Now** from the pop-up menu.

3. On the Choose Scan Configuration dialog box, select a configuration from the drop-down list.

> **Note**: You can customize the software inventory by setting up a custom inventory configuration. See Configuring the Inventory.

4. Click **OK** to begin the inventory.

   The status bar at the bottom right of the window displays a message when the process is complete.

5. The results are available through several views and reports:

   - Software applications and suites for that specific computer or group that match known license units are displayed in the details pane on the Managed or Configuration Groups Software tab.

   - License Units are displayed in the tree view on the License Units tab.

   - Files that do not match known license units are displayed through the Unresolved Files dialog.

   - Asset Management reports cover a variety of aspects of the installed software.

Software tab (Managed Computers and Configuration Groups)
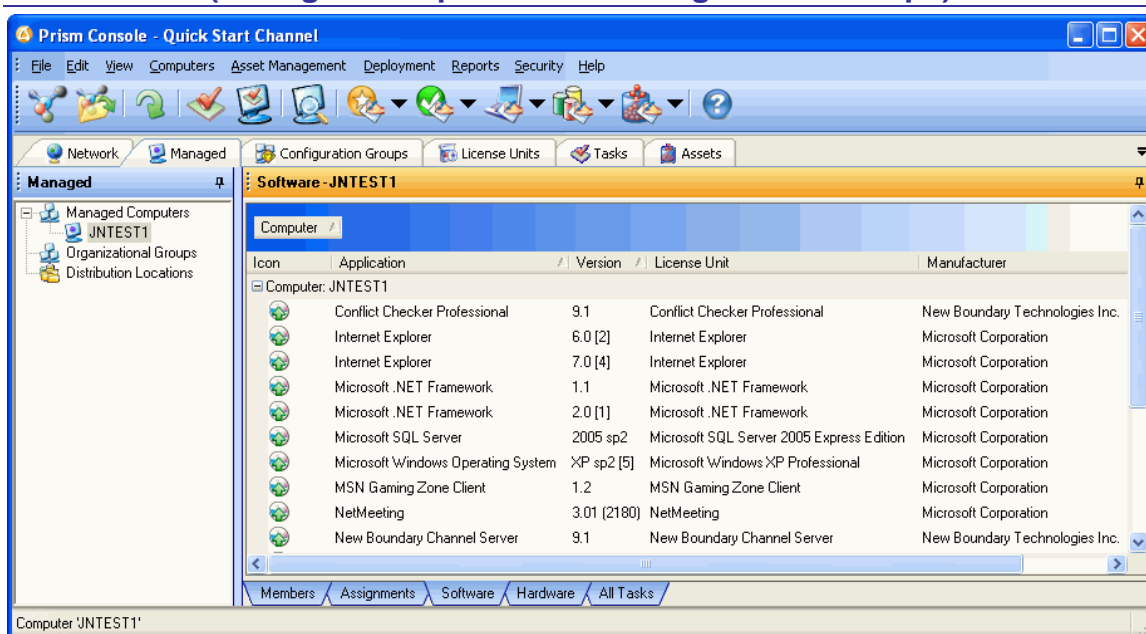
The software tab lists all of the applications currently installed and identified on the computer or group of computers highlighted in the tree view. This tab lets you focus on the software installed on your managed computers.

This tab is available in the details pane when you have the Managed tab or Configuration Groups tab selected in the tree view.

> **Note**: The computer may have applications installed that are not listed here. If you are just starting out or have recently installed an application, applications installed on the computer may still be unresolved. For a complete list, resolve the files through the Unresolved Files dialog, then view this Software tab. (See Resolving Unmatched Files.)

View Software Inventory

- **Individual Computer**: Highlight the name of the computer in the tree view. The Software tab in the details pane shows detailed information about applications installed on this computer.
- **Group**: Highlight the name of the group in the tree view. The Software tab in the details pane shows detailed information about the applications installed on all of the computers in this group.

Customize the Configuration Information

In addition to the default information available for each computer, you can customize the software inventory. To create a custom inventory configuration, select **Inventory Configurations** on the Asset Management menu. You can specify this custom configuration for the regularly scheduled inventory or for an inventory on-demand. (See Configuring the Inventory.)

Right Click Options

When you right-click on an application on the Software tab, these options are available:

- **Delete**: Remove the application from its license unit. This application is not deleted from the managed computer or from the Channel. The application executable is listed on the Unresolved Files | Members tab after it is deleted here.
- **Properties**: View properties for the highlighted application. See Application Properties | General tab.

Completing a Hardware Inventory

With the automatic scan turned on, the hardware, operating system, and other key information about managed computers is gathered at a scheduled interval. View this information in the details pane on the Hardware tab or through the Asset Management reports. For each managed computer, Asset Manager identifies these characteristics:

- Bios
- Model
- Manufacturer
- Operating system and version
- Time Zone
- and many more characteristics

Special Note on WMI

In order for the Client to collect complete hardware inventory information, WMI must be installed and enabled on managed computers. A computer that does not have WMI enabled will show no hardware data in the Console or reports, even after being inventoried.

Please see the support area of the New Boundary Technologies website (www.newboundary.com) for more information on installing or updating WMI.

Customize the Inventory

In addition to the extensive information that Asset Manager collects by default, you also have these options for customizing the inventory:

- **Hardware configuration**: Modify the default values included in the hardware scan.
- **WMI (Windows Management Instrumentation)**: Customize the inventory by specifying WMI variables to capture an array of information.

See Configuring the Inventory.

Automatic Inventory

Asset Manager can be configured to automatically inventory the hardware and software on managed computers on a scheduled basis. Turn this option on or off through the Channel Properties | Asset Management tab and the **Asset Management menu |Auto Identify Files** option.

Complete a Hardware Inventory On Demand

To complete an inventory at any time:

1. In the tree view, select a computer or group.

2. Do one of the following:

   - Press in the toolbar.
   - Select **Inventory Now** from the Asset Management menu.
   - Right-click and select **Inventory Now** from the pop-up menu.

3. On the Choose Scan Configuration dialog box, select a configuration from the drop-down list.

   > **Note**: You can customize the hardware inventory by setting up a custom inventory configuration. See Configuring the Inventory.

4. Click **OK** to begin the inventory.

   The inventory status is displayed in the Managed tab for each individual computer.

5. View the results on the Managed or Configuration Groups Hardware tab or through the asset management reports.

Hardware tab (Managed Computers and Configuration Groups)
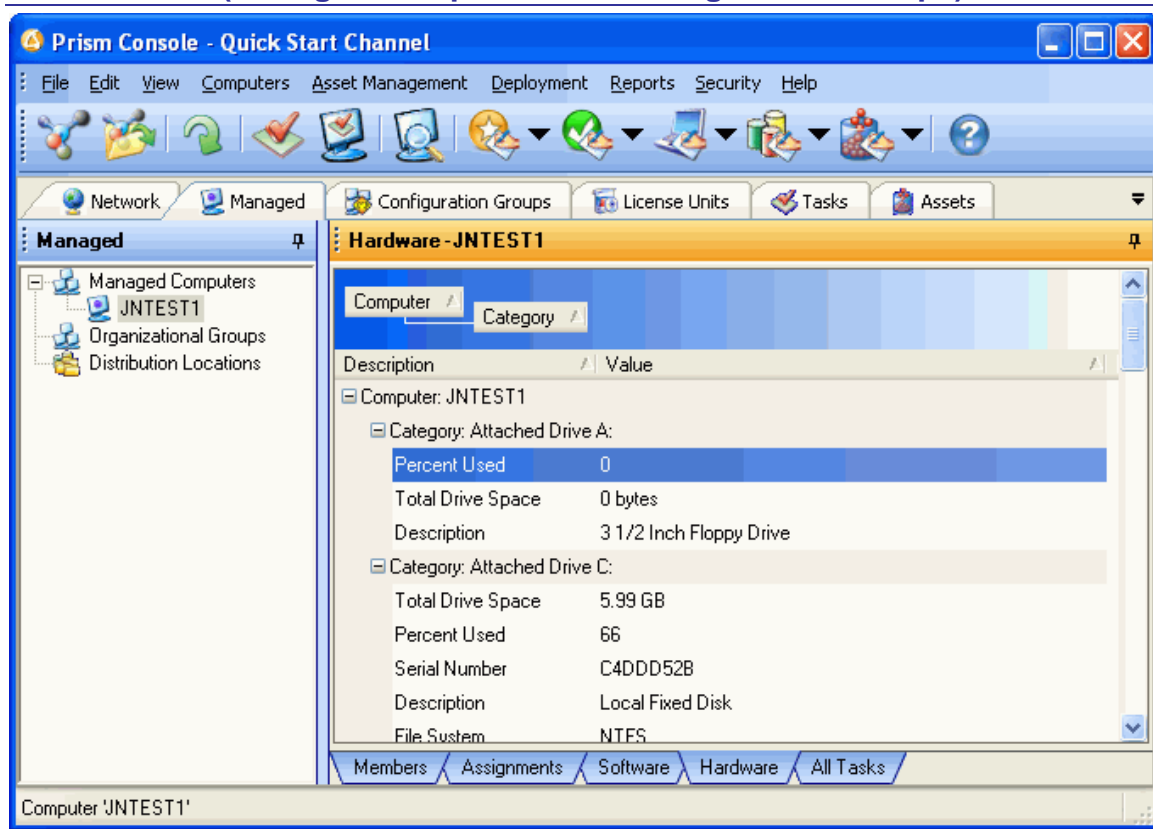
The Hardware tab lists information about the hardware and configuration of the highlighted computer or the computers in the highlighted group. For example, in the tree view, highlight the group corresponding to a branch office. The Hardware tab lists all of the hardware specifications for computers at that location.

This tab is available in the details pane when you have the Managed tab or Configuration Groups tab selected in the tree view.

To help you locate specific information more quickly, the information on this tab is grouped by computer and by category within a computer. These groupings can be collapsed or expanded by clicking the + next to a name or right-clicking in the shaded area near the top of the pane and selecting one of the expand or collapse options.

View Hardware Inventory

- **Individual Computer**: Highlight the name of the computer on the Managed tab or Configuration Groups tab in the tree view. The Hardware tab in the details pane shows detailed information about this computer.

- **Group**: Highlight the name of the group in the tree view. The Hardware tab in the details pane shows detailed information about the hardware for all of the computers in this group.

Customize the Configuration Information

In addition to the default information available for each computer, you can customize the hardware inventory. To create a custom inventory configuration, select **Asset Management | Inventory Configurations**. You can specify this custom configuration for the regularly scheduled inventory or for an inventory on-demand. (See Configuring the Inventory.)

Sort by Category

If you want to find all of the computers with a specific hardware configuration, you can customize the Hardware Inventory report.

Generate the Installed Hardware Summary report through the Reports menu or icon in the toolbar. On the report window, use filters and grouping to capture a specific subset of the information. (See Customizing a Report.)

Configuring the Inventory

By default, Asset Manager scans managed computers for application executables and a wide array of hardware characteristics. Before starting an inventory, you also have the option of selecting custom scan configurations.

Set up a Customized Inventory Configuration

To set up and save a customized configuration for the inventory:

1. Select **Asset Management | Inventory Configurations**.

2. On the Manage Inventory Configurations dialog, click the **Add** button to add a customized configuration that you can use for future inventories.

3. On the Inventory Configuration dialog, enter a name and description in the text boxes at the top.

4. On the Software tab, customize the software inventory.

    By specifying a file extension, you can add any type of file to include in the inventory. You can also specify locations to be excluded from the inventory.

5. Click the Hardware tab to customize the hardware inventory.

    In addition to the wide array of default options, you can customize the hardware inventory by specifying WMI variables. You can also extend the built-in categories (e.g., BIOS, Input Devices) by defining your own categories that can be used for sorting, grouping, and reporting..

6. Click the **Save** button to save your changes.

Complete a Customized Scan on Demand

To use the customized inventory configuration to scan a computer or group on demand:

1. Start an inventory by highlighting a computer or group, then doing <u>one</u> of the following:

    ▪   Press in the toolbar.

    ▪   Right-click and select **Inventory Now** from the pop-up menu.

    ▪   Select **Inventory Now** from the Asset Management menu.

2. On the Choose Scan Configuration dialog, select the custom configuration from the drop-down list.

3. When the scan is complete, the information is displayed in the details pane on the Software tab and Hardware tab; on the tree view on the License Units tab; and Unresolved Files dialog, and in the Asset Management reports.

Schedule a Customized Scan

To use the customized inventory configuration for the automatic, scheduled scan:

1. Select **Asset Management | Settings**. This opens the Asset Management tab of the Channel Properties dialog.

2. Select the name of your customized configuration in the Configuration field.

   > **Note**: The **Automatically Inventory Licensed Computers** option must also be selected on this dialog box.

3. Click **OK** to save the changes.

   This customized inventory configuration will be used for the next scheduled scan.

Manage Inventory Configurations dialog
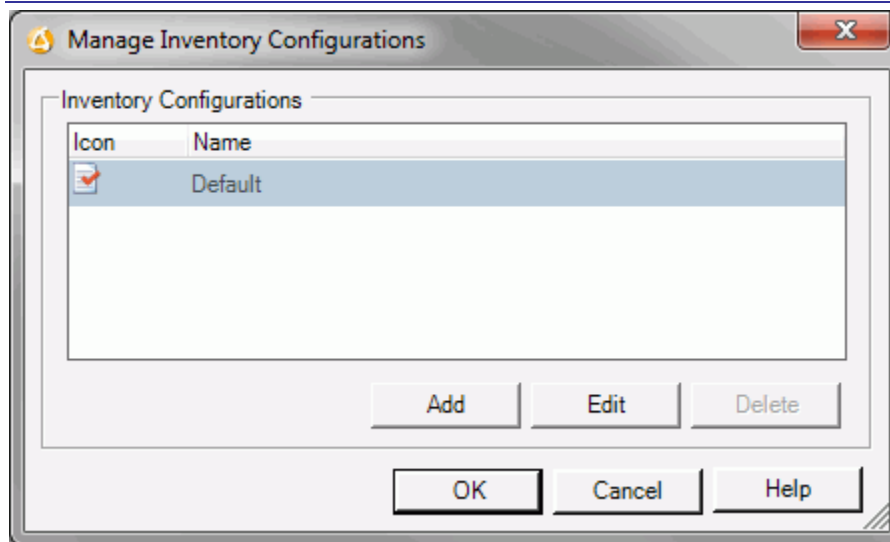
By default, Asset Manager identifies application executables and a range of hardware characteristics on managed computers during each inventory. From this dialog box, you can create a customized inventory configuration that can be used either for the schedule, Channel-wide inventory or for inventory on-demand for a specific computer or group. This dialog box lists the inventory configurations available and lets you add customized configurations.

This dialog box opens when you select **Asset Management | Inventory Configurations**.

Options on this dialog box include:

- **Add**: Add a custom inventory configuration. The Inventory Configuration dialog box opens.
- **Edit**: Make changes to the inventory configuration currently highlighted.
- **Delete**: Remove the highlighted inventory configuration.

Inventory Configuration dialog
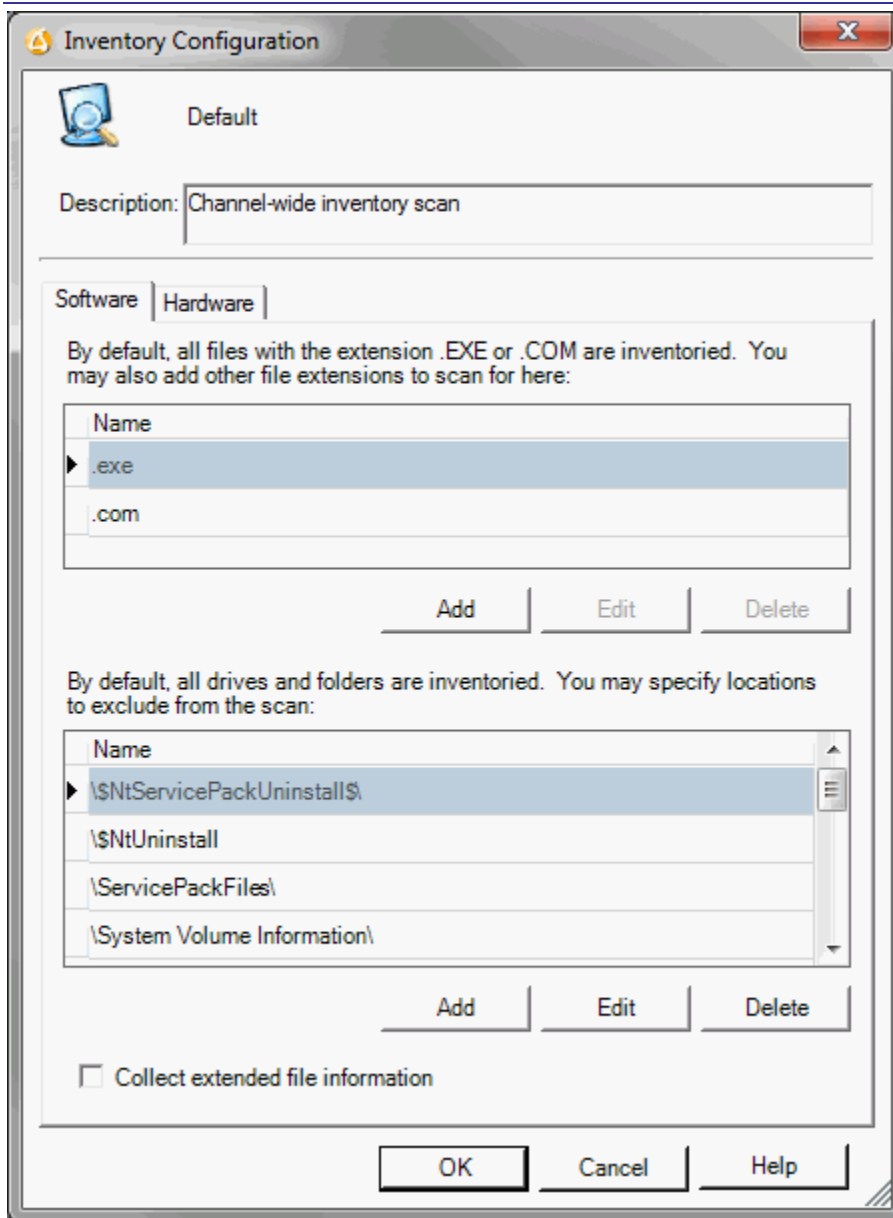
Use the Inventory Configuration dialog to specify the software and hardware characteristics identified by Asset Manager during an inventory. After setting up and naming your customized inventory configuration, you can use this configuration when inventorying computers on-demand or for the regular, scheduled scan.

This dialog opens when you click the **Add** button on the Manage Inventory Configurations dialog.

Options on this dialog include:

- **Name**: Type a descriptive name for this custom configuration. You will select the configuration by name on the Choose Scan Configuration dialog box and on the Channel Properties | Asset Management tab.

- **Description**: Type a brief description of this custom configuration.

- **Software** tab and **Hardware** tab: For information on the options available on each tab, see:

- Software tab
- Hardware tab

Software tab (Inventory Configuration dialog)
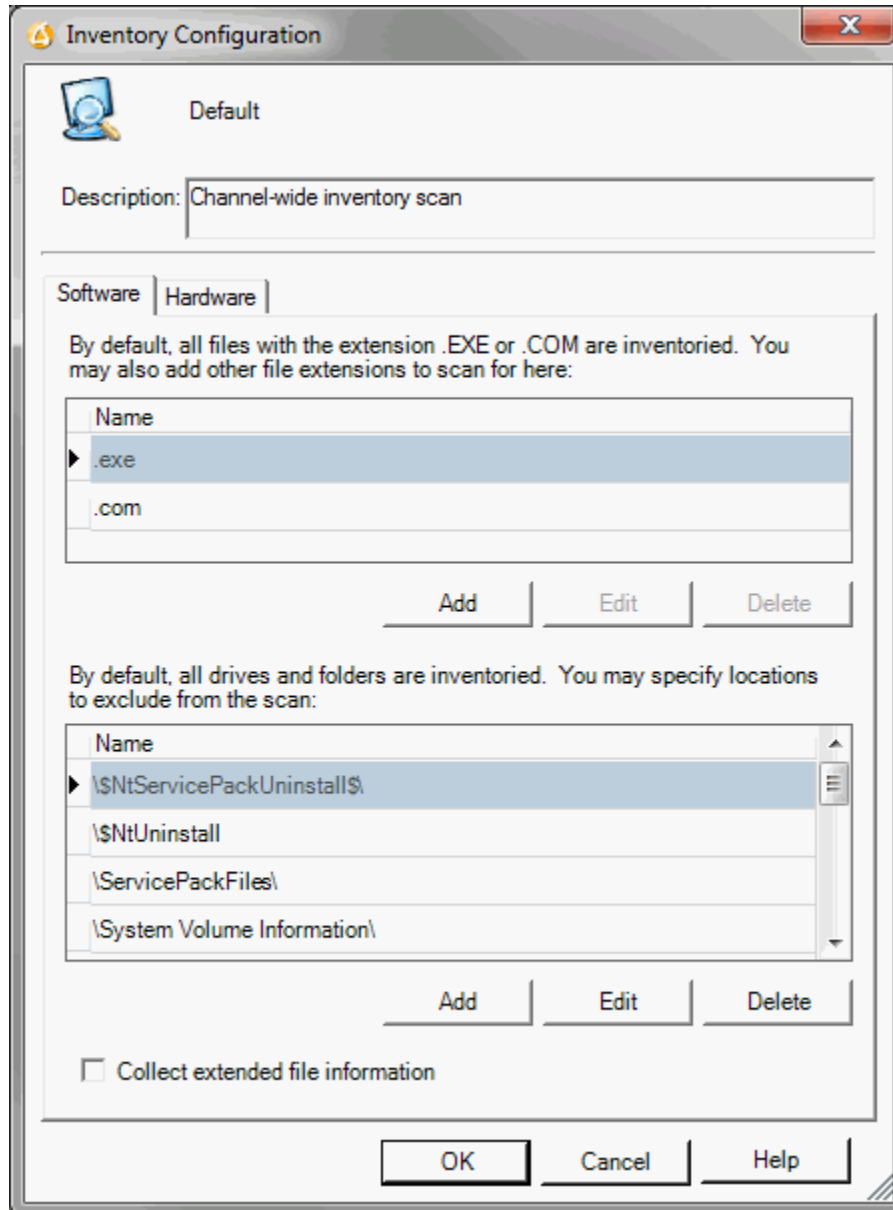
On the Software tab, identify the types of files to locate on managed computers and select options to customize the scan. By default, Asset Manager looks for application executables. If you specify other file extensions, the files will be listed in the Unresolved Files dialog.

This dialog opens when you click the **Add** button on the Manage Inventory Configurations dialog.

Options

- **Extensions**: Asset Manager searches managed computers for the file extensions listed here.

  - **Add**: Add a new file extension to the customized scan.

- **Edit**: Modify the highlighted file extension.

- **Delete**: Remove the highlighted file extension from the inventory configuration.

▪ **Exclusions**: Asset Manager excludes drives and folders listed here.

  ▪ **Add**: Add a drive or folder to exclude from the scan.

  ▪ **Edit**: Modify the highlighted drive or folder to exclude from the scan.

  ▪ **Delete**: Remove the highlighted drive or folder to exclude from the scan.

▪ **Extended File Information**:

☐ **Collect extended file information**: Select this option to capture more information than the default scan.
This additional information can be displayed in the details pane on the Software tab by right-clicking in the column heading area of the details pane and selecting **More Fields** from the pop-up menu.

☑ **Collect extended file information**: With this option cleared, only the default information is collected during the scan.

Add Extension dialog
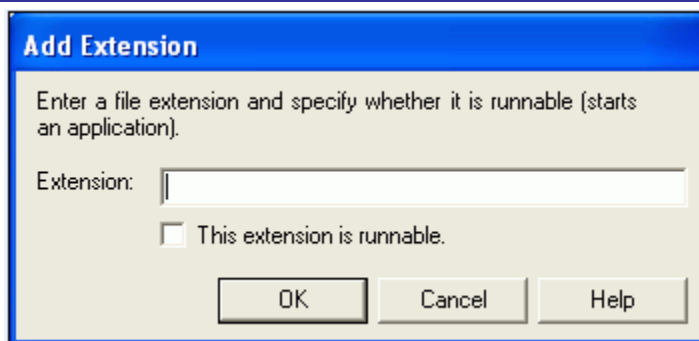
Specify the file extension that you want to include in the inventory scan.

This dialog box opens when you click the **Add** button on the Inventory Configuration | Software tab.

Options on this dialog include:

File Extension

▪ **Extension**: Type a file extension to be included in the scan of managed computers. Asset Manager finds all files with this extension on managed computers. When the inventory is complete, these files are available through the Unresolved Files dialog.

Runnable

☑ T**his extension is runnable**: Select this check box to indicate that this file type can be executed. If they are not identified as part of a license unit, you can search for files with this extension through the Unresolved Files dialog after the next inventory.

☐ T**his extension is runnable**: With this check box cleared, files with this extension are listed in the Unresolved Files dialog in the Nonrunnable group after the next inventory.

Hardware tab (Inventory Configuration dialog)
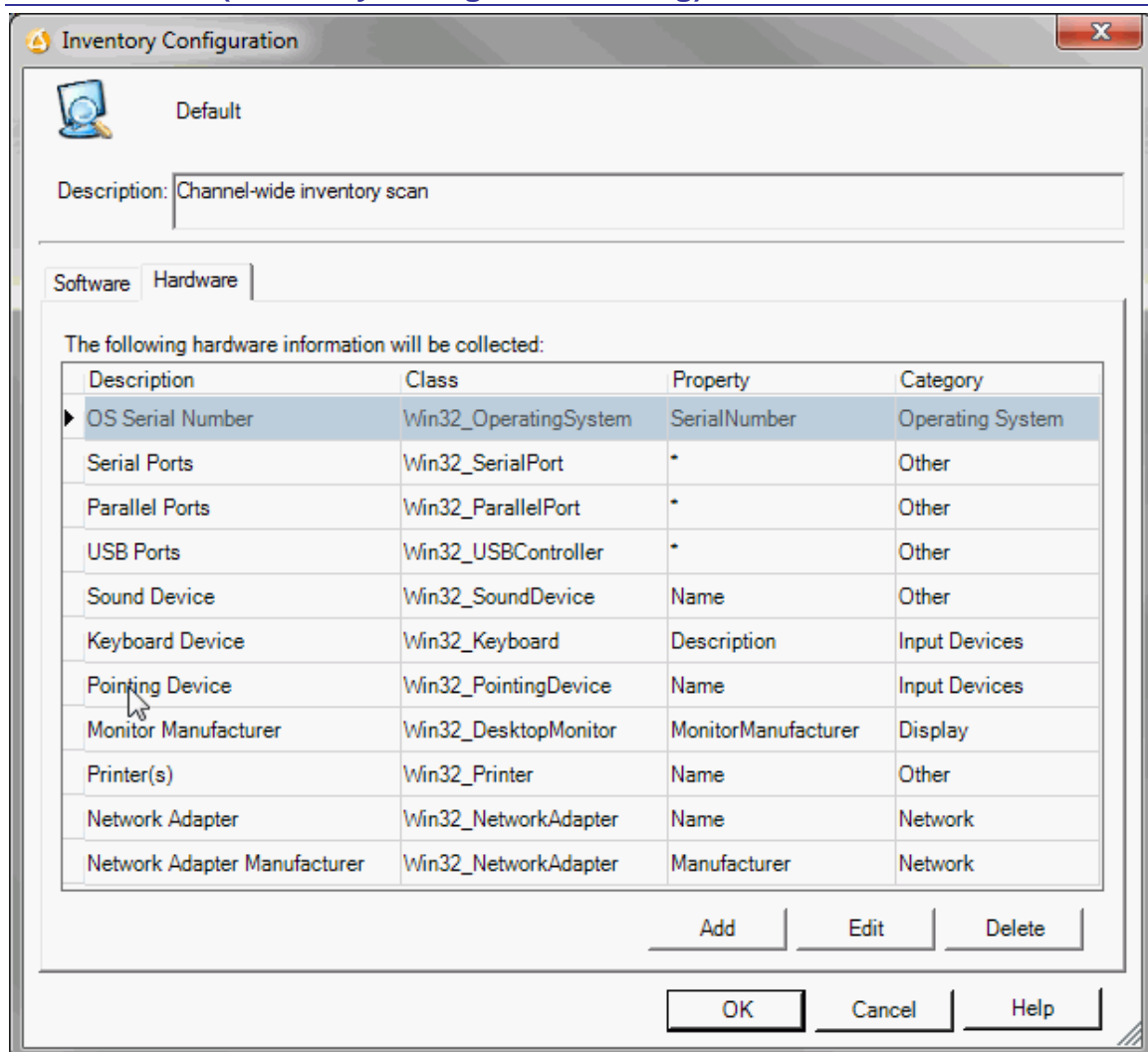
On the Hardware tab, customize the hardware inventory portion of the custom scan configuration. These options define the hardware characteristics that Asset Manager captures when completing an inventory using the named inventory configuration.

This dialog opens when you click the **Add** button on the Manage Inventory Configurations dialog and click on the Hardware tab.

Options

The Hardware tab lists the types of hardware that Asset Manager identifies by default. You can modify the scan configuration by adding, modifying, or deleting items.

- **Add**: Opens the Custom Inventory Request dialog where you define a new hardware configuration variable that will be added to the customized scan. New variables are added as WMI variables.

- **Edit**: Opens the Custom Inventory Request dialog where you can modify the highlighted variable.

- **Delete**: Remove the highlighted variable from the scan configuration.

Custom Inventory Request dialog

Asset Manager identifies hardware configuration characteristics based on WMI variables. In this dialog you can edit an existing variable or create a new one. This specification is saved as part of the inventory configuration.

The dialog opens when you click the **Add** button on the Inventory Configuration | Hardware tab. A WMI variable consists of the following fields:

- **Description**: Description of the variable.
- **WMI Class**: The name of the WMI class.
- **WMI Property**: The name of a specific property of the WMI class.
- **Where Clause**: A SQL "where" clause to restrict return values. See below for more information.
- **Category**: The category for the WMI Property value. Click the **Manage Categories** to open the Manage Categories dialog, where you can create additional categories or add the new WMI property to an existing category. In the example above, you would most likely want to add the memory's speed property to the existing Memory category.
- **Return multiple instances**: Check this to allow multiple return values. For example, a computer with multiple NICs would return multiple Network Adapter Manufacturer values.

Where Clause

The Where Clause syntax is defined by the Windows Management Instrumentation Query Langauge (WQL). Operators include:

- =
- <
- >
- <=
- >=
- !=, <> - either can be used for "not equal"
- IS, IS NOT - can only be used with the keyword "NULL"
- ISA
- LIKE - refer to MSDN documentation on the LIKE Operator for more information.

Notes

- A WMI variable is uniquely identified by its Class, Property, and Where Clause values. Therefore, it is not possible to create 2 WMI variables having the same Class, Property, and Where Clause values (and have, for example, different descriptions).

- WMI variables may be used in multiple Inventory Configurations. To add a WMI variable defined in an existing Inventory Configuration to a new Inventory Configuration, simply select **Add** and enter the existing WMI variable's Class, Property, and Where Clause, then press **OK**.

Manage Categories dialog
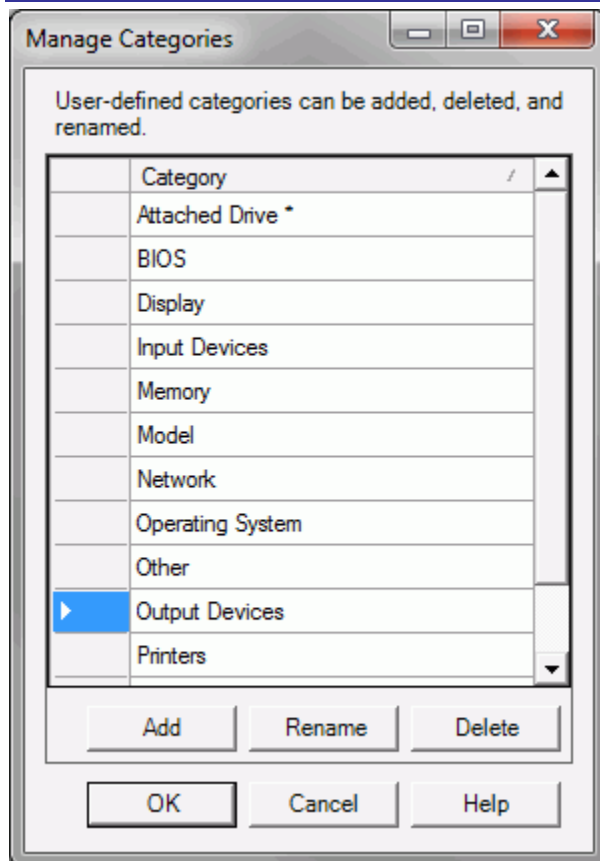
Use this dialog to manage hardware inventory categories, which is how hardware scan data is displayed on a managed computer's Hardware tab.

This dialog opens when you select **Asset Management | Manage Categories** from the main menu. It also opens when you click the **Manage Categories** link on the Custom Inventory Request dialog or right-click in the Hardware tab and select **Manage Categories**.

This dialog allows you to extend the set of built-in categories.

- **Add**: Adds a row to the list of categories. Enter the name of the new category.

- **Rename**: Allows you to rename a category. Built-in categories cannot be renamed.

- **Delete**: Deletes the selected category. Built-in categories cannot be deleted.

Viewing the Asset Management Reports

In addition to the information displayed through the Console, Asset Manager offers a number of reports designed specifically to capture the state of software, hardware, and license compliance throughout your enterprise. Asset Management reports are available through the Reports menu

or the ![icon] icon in the Console toolbar.

Most of these reports reflect the current status of your installed base. The *What's Changed* reports let you find changes to hardware and software of managed computers by comparing two sets of data. The *What's Changed* report relies on baselines for the comparison.

Baselines for Comparison

Establishing a Baseline for Comparison

In addition to reports that capture the most recent information on applications and configuration of managed computers, Asset Manager lets you establish baselines that can be used for comparisons that reflect changes over time.

A baseline, which captures the status of managed computers at a specific point in time, is used as a reference point when generating reports that reflect changes in the software and hardware inventory. The baseline data includes all of the hardware and software configuration information that is available through Asset Manager. By creating a baseline, you assign a descriptive name to the data gathered at a specific point in time. Later, use this baseline as the basis for the *What's Changed* reports that reflect the changes that have occurred over time. Asset Manager also lets you record multiple baselines and run reports that compare the current status to any or all of these baselines.

Creating a baseline does not replace existing data, it records a specific set of data for later comparisons. When the data in a baseline is no longer meaningful, the baseline can be deleted.

Create a Baseline

To create a reference point that can be used for later comparisons:

1. Select **Asset Management | Baselines**.
2. On the Manage Baselines dialog, click the **Add** button.
3. On the Add Baseline dialog, enter a name and description for the baseline data that you are capturing. Click **OK**.
4. Click **OK** on the Manage Baselines dialog to identify the most recent inventory information in the database with this baseline.
5. Use the baseline as a comparison when you run the *What's Changed* report.

Remove a Baseline

When a specific baseline is no longer useful, it can be removed from the list. To remove a baseline:

1. Select **Asset Management | Baseline**.
2. On the Manage Baselines dialog, highlight the baseline.
3. Click the **Delete** button to remove the baseline.

Manage Baselines dialog
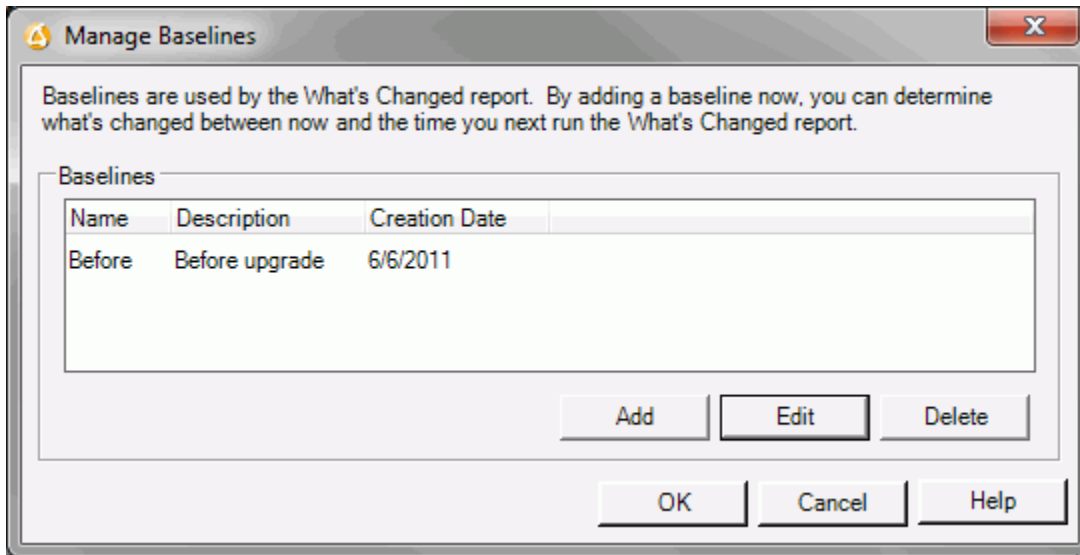
Use this dialog box to capture baseline inventory information that can later serve as a reference point for comparisons. Baselines are used in the *What's Changed* reports to reflect any changes that have occurred after the specified baseline was created.

This dialog box opens when you select **Baselines** from the **Asset Management** menu.

View the baselines

Existing baselines are listed in the main part of the dialog box.

Add a baseline

Add a baseline to capture the current status of the installed base. Click the **Add** button to open the Add Baseline dialog.

Change the name or description for a baseline

Click the **Edit** button to change the name or description of the highlighted baseline.

Remove a baseline

When it is no longer useful, click the **Delete** button to remove the highlighted baseline from the list.

Add Baseline dialog
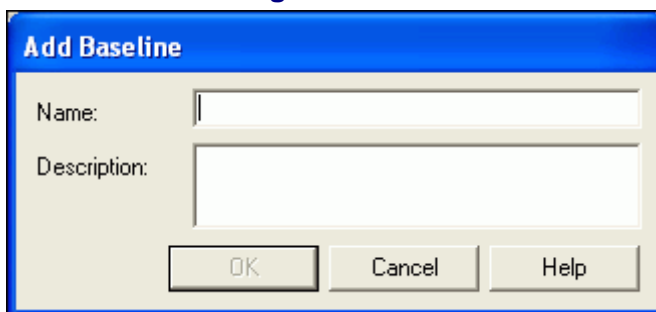
On this dialog, provide a descriptive name and optional description that help you quickly identify this baseline. For example, the name could be a simple date or reflect a major change you are about to make.

When you click **OK**, the baseline appears in the Manage Baselines dialog box and you can select it when you run a *What's Changed* report.

This dialog box opens when you click the **Add** button on the Manage Baselines dialog box.

Inventory Database

Overview of the Inventory Database

The Prism Software Identification Database (PSID) is a database of software information, containing information on thousands of software applications, suites, and tools. Asset Manager uses the information in this database to automatically identify license units discovered on managed computers. This database is updated regularly by New Boundary Technologies for the benefit of maintained customers.

The PSID cannot be modified, but you can add license units and applications, including in-house applications, based on the files found during the inventory processes. You cannot merge the PSID with databases or knowledgebases from other vendors.

Updating the Inventory Database

The PSID is used to identify application executable files as they are detected on managed computers. It records license units in your organization and contains identifying information for most commercial software applications. To keep your database up-to-date, you can download the latest version from the New Boundary Technologies website. Please contact technical support for more information.

To determine your current PSID version, open the Asset Management tab of the Channel Properties dialog.
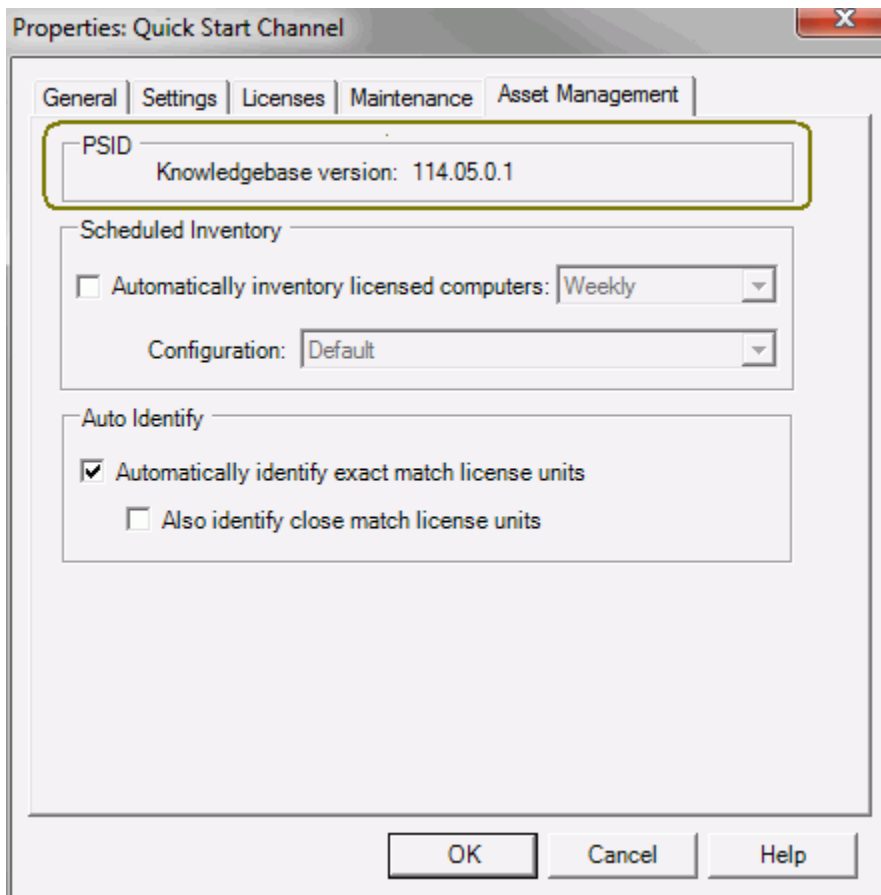
Managing Software & Licenses

Overview of License units

Asset Manager uses license units to group software files for easier management. As you use Asset Manager, you may find the term *license unit* used where you may expect to see the terms *application* or *suite*. Asset Manager groups applications and suites (which consist of two or more related applications), along with some support files, into license units to simplify management and tracking. This feature lets you view and manage a single unit even when there are multiple applications, versions, or files that are grouped under the same licensing agreement.

Here are some of the terms we use:

- **License unit**: A collection of one or more suites or applications that are present on machines throughout the company and are covered by a single license agreement. Typically, the applications or suites that make up a license unit differ only by version. A license unit may also include alternate executables or support files for an application.
- **Suite**: A collection of two or more applications that are sold as a bundle in several possible configurations (for example, Microsoft Office).
- **Application**: The main executables and related support files for a specific software product or tool. Separate versions of an application are generally placed in the same license unit, however you can create separate license units for each version.

Identifying License Units

License Units are created when Asset Manager surveys the managed computers and identifies executable files on managed computers. Here is a brief overview of the process:

1. Either complete an inventory on-demand or turn on the options for automatically scanning computers on a scheduled basis.

   Note: For Asset Manager to automatically scan all managed computers on a schedule basis and automatically match files to known license units, the automatic inventory options and the automatically identify files options must be turned on. If you prefer, you can complete the inventory on-demand and/or manually match executable files with license units. See Automatically Creating License Units.

2. Asset Manager identifies executable files on managed computers and matches these files to the extensive collection of known applications and suites recorded in the PSID.

3. License units are added to the License Units tab. The applications are also displayed in the details pane on the Software tab.

4. Files that Asset Manager did not match automatically are available through the Unresolved Files dialog. You can associate these files with license units, create new license units, or ignore the files.

   Note: Asset Manager does not identify or list executable files on computers that are not managed through the Console

5. Asset Management reports reflect the software in use across the enterprise.

License Units tab
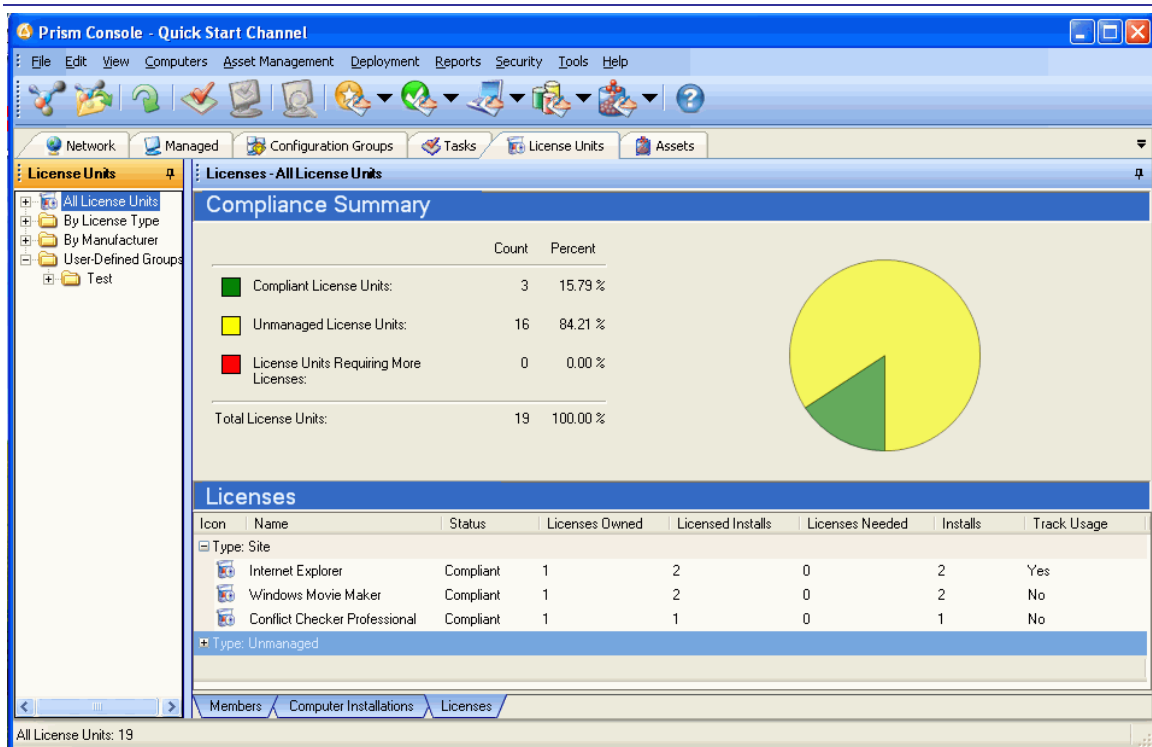
Use the License Units tab to quickly locate software applications and suites from your installed base and as the starting point for managing licenses. The License Units tab displays a list of license units grouped by license type, manufacturer, and custom license groups that you have created. Asset Manager automatically identifies license units installed on managed computers by comparing application files on the computers with known software in the PSID—Asset Manager's extensive database of known applications and suites.

In the tree view, Asset Manager groups license units into these categories:

- **All License Units**: Lists all license units (including suites and applications) that have been identified on managed computers.
- **By Type**: Groups licenses by type, including per seat, site, per processor, or unmanaged.
- **By Manufacturer**: Groups licenses by the company that manufactures or markets the licensed product. Each manufacturer is a subgroup, which may contain suites or applications licensed by that company.
- **Organizational groups**: You have the option of creating additional groups to categorize the licenses by type of tool, location, or other meaningful heading. See Grouping License Units.

Right-click Menu - License Unit

When you right-click on the name of a license unit on this tab, these options are available:

- **Add to Group**: Add the license unit to a License Unit group.
- **Reconfigure**: Selecting this option will delete (un-configure) the selected license units, and then automatically bring them back using the latest PSID entries (a recently updated Inventory Database). This menu option is enabled only if the Automatically Identify License Units option is *checked* (see the Channel Properties | Asset Management tab).
    - If Auto-identify close match license units is *checked* and the latest PSID does not have an exact match, the License Unit will again be close-matched.

- If Auto-identify close match license units is *unchecked* and the latest PSID does not have an exact match, the License Unit will not come back, and the files associated with it will be in the Unresolved Files dialog.

- If the License Unit was previously close matched but the latest PSID has an exact match, the License Unit will be exact matched.

- **Unconfigure**: Selecting this option will delete (un-configure) the selected license units. Their files will be left in the Unresolved Files dialog. To prevent them from ever being re-created, move the item to the Ignore folder in the Unresolved Files dialog. This menu option is enabled only if the Automatically Identify License Units option is *unchecked* (see the Channel Properties | Asset Management tab).

- **Hide**: Hides the license unit in the Channel. The license unit and its associated files will not be visible in the console or reports, and will not appear in the Unresolved Files dialog.

- **Reports**: Generate a report for the selected license unit.

- **Properties**: View properties for this license unit. See the License Unit properties | General tab.

Right-click Menu - Application

When you right-click on the name of an application within a license unit on this tab, these options are available:

- **Convert to new License Unit**: Convert this application to a new license unit. This puts the application into a new license unit whose name is the same as the name of the application. See Managing Applications for more information

- **Move to different License Unit**: This moves the application into a different license unit. See Managing Applications for more information.

- **Delete**: Remove the application from the license unit.

- **Properties**: View properties for this application. See the Application properties | General tab.

Right-click Menu - Suite

When you right-click on the name of a suite within a license unit on this tab, these options are available:

- **Delete**: Delete the suite from the Channel. The files associated with this license unit are added to the Unresolved Files dialog.

- **Properties**: View properties for this suite. See the Suite properties | General tab.

Right-click Menu - License Unit Group

When you right-click on the name of a license unit group - either By License Type groups, By Manufacturer groups, or User-Defined groups - on this tab, this option is available:

- **Reports**: Generate a report for the selected license unit group.

Compliance Summary and Details

With the License Units tab open, the details pane lists all the license units that fall under the currently selected folder. This pane provides the following information for each license unit: name, license type, number of licenses, date added, who last modified the license unit, and manufacturer.

Tabs in the Details Pane

Visit the various views by clicking these tabs on the bottom of the details pane. By default, the details pane is on the right.

- **Licenses tab**: The default or opening pane gives an overview of license use and compliance within your organization.
- **Members tab**: Lists individual license units.
- **Computer Installations tab**: Lists all computers that currently have at least one application installed that is associated with a license unit.

Licenses tab (License Units)

The information displayed on the Licenses tab depends on whether your selection in the tree view is an individual license unit (or application) or group node (e.g., All License Units).
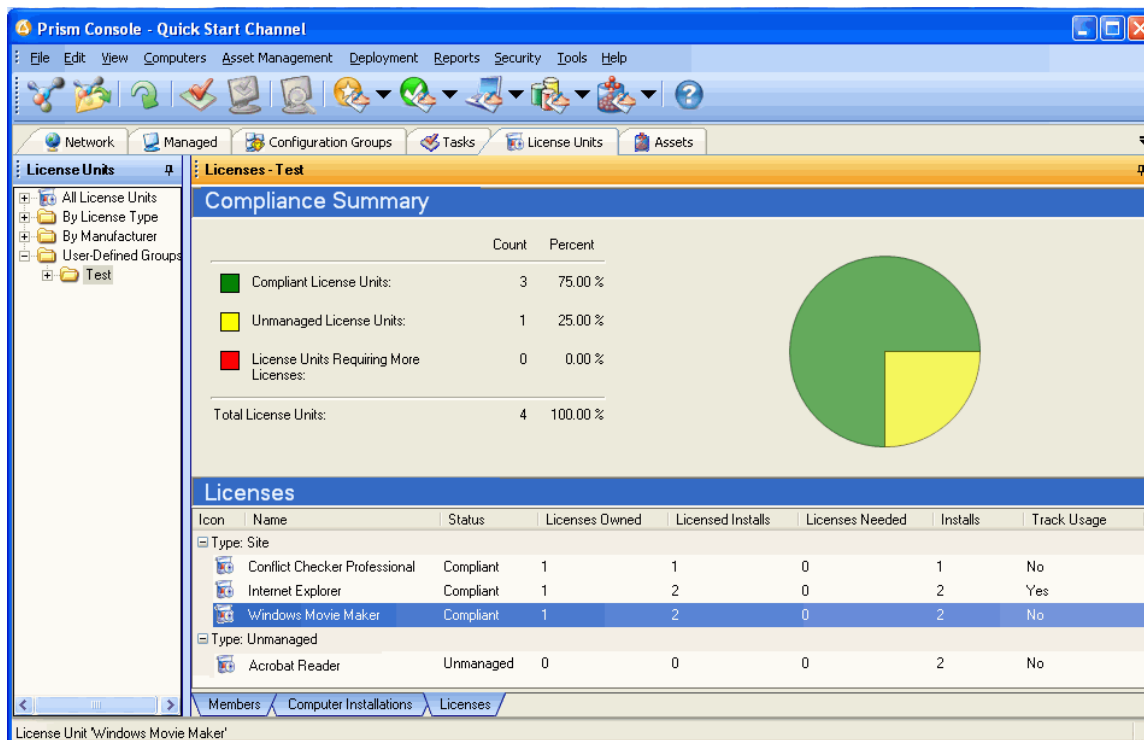
License Groups

Selecting a group node in the tree (see Grouping License Units for more information on License Unit groups) causes the Licenses tab to be split into two parts, a Compliance Summary panel on top, and a Licenses panel below. The Compliance Summary panel shows summary information about the level of compliance for the license units in that group, as well as a pie chart to illustrate the compliance level. The lower Licenses panel groups the licenses in that group according to their type (per seat, site, per processor, or unmanaged).

The available information in the lower panel includes the following default columns:

- **Name**: License unit name.
- **Status**: Current license compliance status.
- **Licenses Owned**: Number of licenses owned.
- **Licensed Installs**: Number of licensed installations in the Channel.
- **Licenses Needed**: Number of licenses needed to become compliant. This is the Installs (below) minus the Licensed Installs.

Columns available via **More Fields** (this menu item is accessed by right-clicking on a column heading) include:

- **Installs**: The total number of computers the license unit has been installed on. If this exceeds the Licensed Installs, the Status will be "Noncompliant".
- **Licenses Available**: The number of licenses currently available.
- **Track Usage**: This indicates whether the license unit's usage is currently being tracked. See Tracking License Usage for more information.
- **Usage**: This indicates the number of computers the license units is being used on. Note that this is not the total number of launches of the application, but rather the number of computers it has been launched on.
- **Usage Level**: This is the usage level of the application:
    - Not tracked - the license unit's usage is not being tracked.
    - Daily - the license unit is being used daily.
    - Weekly - the license unit is being used weekly.
    - Monthly - the license unit is being used monthly.
    - Occasionally - the license unit is being used more rarely than monthly.
    - Never - the license unit's usage is being tracked, but it has not been launched.

> **Note**   Usage levels are updated hourly or daily, as specified in the Channel Properties - Maintenance tab.

- **OS**: A value of Yes indicates the license unit is an operating system.
- **Manufacturer**: License unit vendor.
- **Suite**: A checkbox that indicates if the license unit is a suite.
- **Price**: Average price per license.
- **Version**: License unit version.

Individual License Units
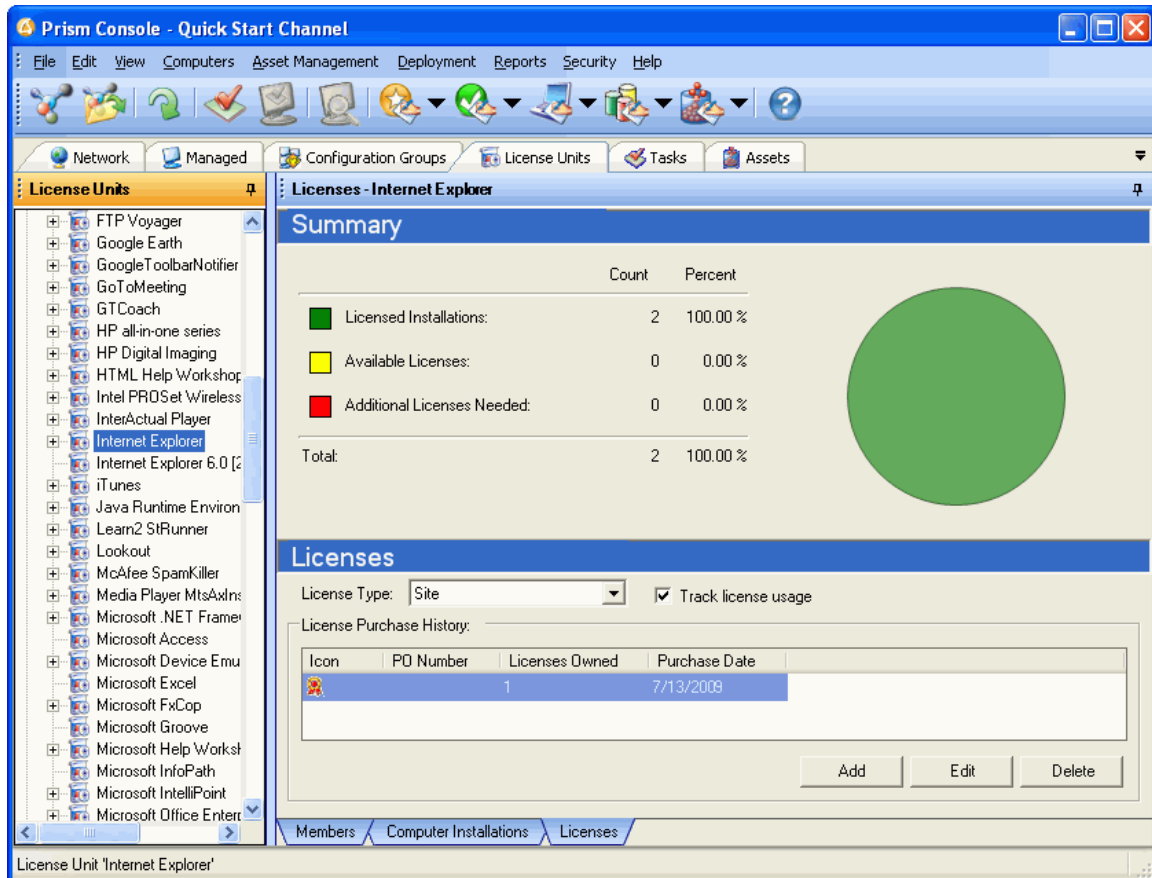
If you select an individual license unit (or application), the information displayed in the Licenses tab depends on whether you have selected a managed license unit or an unmanaged license unit.

- **Managed License Unit**: For managed license units, the upper part of this tab shows summary information about the level of compliance with software licenses for the application, as well as a pie chart to illustrate the compliance level. Use this view for a quick check on the number of licenses in use and the need to purchase more.

  The lower section lists a history of your license purchases and lets you record purchases.

- **Unmanaged License Unit**: For unmanaged license units, this tab displays only the purchase history for licenses associated with the application or suite. You can begin managing the current license unit or record licenses purchased.

  Note: If an unmanaged license unit is selected in the tree view, a drop-down list is displayed at the top of the details pane. In this case, when you select an option from the drop-down list at the top of this pane, it changes the status of the license unit. Use this feature to begin managing a license unit or change the license type.

By default, this tab displays in the details pane when you go to the License Units tab in the tree view.

Assign a License Type

In the drop-down list, select the type of license to assign to the highlighted license unit. You can also assign the license type through the License Unit Properties | Licenses tab.

Track License Usage

Check the **Track license usage** checkbox next to the License Type drop-down list to enable license tracking for that license unit. Asset Manager immediately begins tracking all launches of the applications associated with the license unit. See Tracking License Usage for more information.

View License Compliance Statistics

For an unmanaged license unit, select a license type from the drop-down list at the top of the details pane. The display in the upper part of this tab changes to reflect the current status of license compliance for the license unit.

Record a License Purchase

Click the **Add** button below the License Purchase History to record a license that your company purchased. On the Add License Purchase dialog, record detailed information, including the expiration date.

Change a Purchase Record

If you need to update the information about a purchase, highlight the purchase in the License Purchase History, then click the **Edit** button.

Remove a Purchase Record

When a purchase record is no longer needed, highlight the purchase in the License Purchase History, then click the **Delete** button.

Members tab (License Units)

The information displayed on the Members tab depends on whether your selection in the tree view is an individual license unit (or application) or group node (e.g., All License Units).
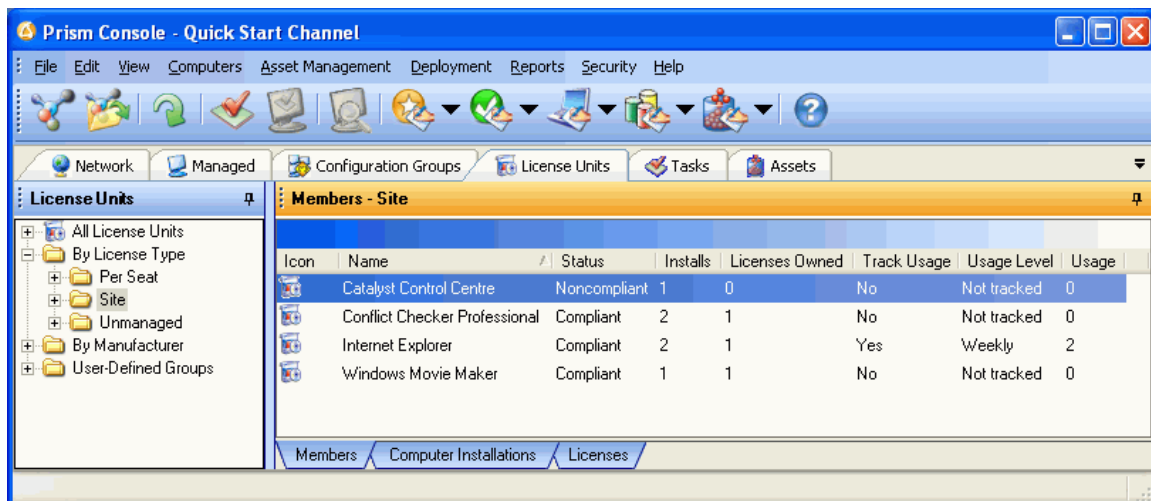
License Groups

Selecting a group node in the tree (see Grouping License Units for more information on License Unit groups) causes the detail pane on the Members tab to display information about all the License Units in that group.

The available information includes the following default columns:

- **Name**: License unit name.
- **Type**: License type (per seat, site, per-processor, unmanaged)

- **Status**: Current license compliance status.
- **Licenses Owned**: Number of licenses owned.
- **Track Usage**: This indicates whether the license unit's usage is currently being tracked. See Tracking License Usage for more information.
- **Usage**: This indicates the number of computers the license units is being used on. Note that this is not the total number of launches of the application, but the number of computers it has been launched on.
- **Usage Level**: This is the usage level of the application:
    - Not tracked - the license unit's usage is not being tracked.
    - Daily - the license unit is being used daily.
    - Weekly - the license unit is being used weekly.
    - Monthly - the license unit is being used monthly.
    - Occasionally - the license unit is being used more rarely than monthly.
    - Never - the license unit's usage is being tracked, but it has not been launched.

> **Note** Usage levels are updated hourly or daily, as specified in the Channel Properties - Maintenance tab.

Columns available via **More Fields** (this menu item is accessed by right-clicking on a column heading) include:

- **Licensed Installs**: Number of licensed installations in the Channel.
- **Licenses Needed**: Number of licenses needed to become compliant. This is the Installs (below) minus the Licensed Installs.
- **Installs**: The total number of computers the license unit has been installed on. If this exceeds the Licensed Installs, the Status will be "Noncompliant".
- **Licenses Available**: The number of licenses currently available.
- **OS**: A value of Yes indicates the license unit is an operating system.
- **Manufacturer**: License unit vendor.
- **Suite**: A checkbox that indicates if the license unit is a suite.
- **Price**: Average price per license.
- **Version**: License unit version.

Individual License Units
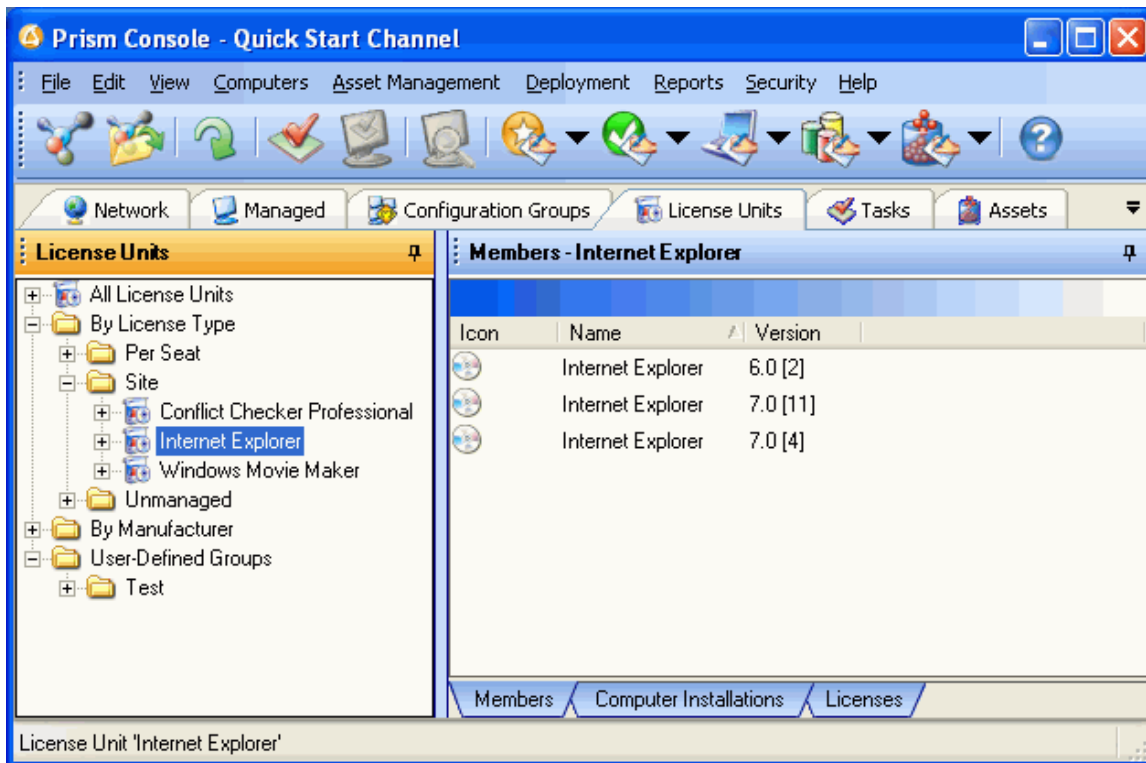
If you select an individual license unit (or application), the Members tab lists detailed information about the applications or application suites that are members of the highlighted license unit. This includes:

- **Name**: Name of the application.
- **Version**: Application version.

Columns available via **More Fields** (this menu item is accessed by right-clicking on a column heading) include:

- **Build Version**: Build version number.
- **Minor Version**: Minor version number.
- **Major Version**: Major version number.
- **Maintenance Version**: Maintenance version number.

Computer Installations tab (License Unit)
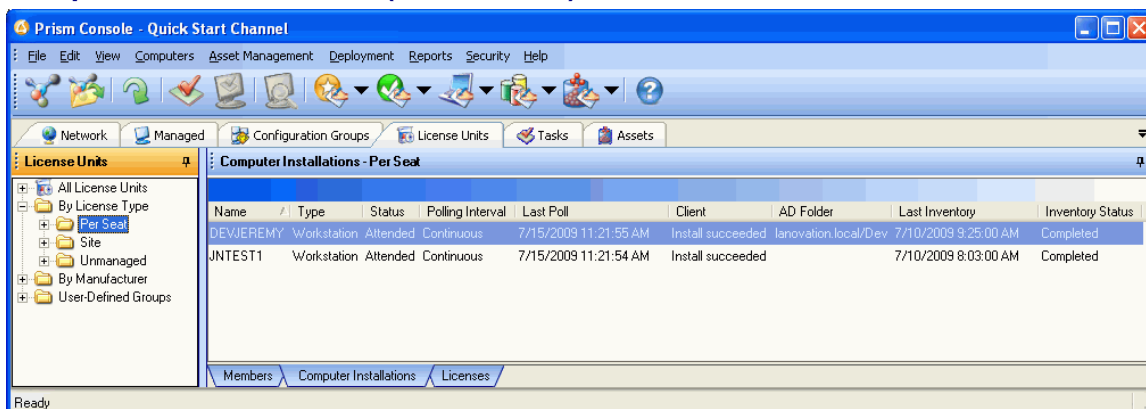
With the License Units tab selected in the tree view, the Computer Installations tab in the details pane lists detailed information about the computers where the applications within the license unit or license unit group are installed.

This tab displays when you select the License Units tab in the tree view and the Computer Installations tab in the details pane.

View the computer installations for a specific group or unit

To view the computer installations for a specific group or license unit, highlight its name on the License Units tab. The list of computers in the details pane is limited to those that match your selection.

Sort or group the data

As with the other detail panes in the Console, sort or group this data by clicking a column heading or dragging a column heading into the shaded area above.

Right-Click Options

If you select one or more computers in this pane and right-click, these menu options are available:

- **Assign Task**: Assign a Task to the selected computers (if Prism Deploy is installed and licensed).
- **Inventory Now**: Scan the highlighted computer to generate an inventory of its hardware characteristics and the applications installed on the computer.
- **Delete**: Delete the computer from the Channel.
- **Properties**: View the properties for the computer. (See Viewing the Computer General Properties.)

Automatically Creating License Units

Asset Manager works in the background, automatically detecting and categorizing application executable files found on managed computers. As these files are identified, Asset Manager compares each with information in the database about known applications and license units. Depending on how close a match there is between a file on a managed computer and the known license units, Asset Manager groups these files in the Unresolved Files dialog. To simplify the process of associating files with license units, Asset Manager offers the option of automatically assigning exact matches to the appropriate license units. If you prefer, turn this option off to match the files individually.

To configure Asset Manager to automatically match application files to the appropriate license unit:

1. Select **Asset Management | Settings**. This opens the Asset Management tab of the Channel Properties dialog.
2. Turn on the options for automatically identifying files.

The files in the Exact Match folder and/or the Close Match folder in the Unresolved Files dialog are automatically added to known license units and listed on the License Units tab. With this feature, you will rarely find files in the Exact Match and Close Match folders.

Managing License Units

As with computers, you have a choice of whether to manage a license unit or leave it unmanaged. Managing license units helps you monitor compliance with licensed applications on

your installed base. When a license unit is managed, the upper section of the License Units | Licenses tab displays a pie chart reflecting the current level of license compliance and lists a summary of the number of licenses purchased, number of licenses in use, and the number of computers out of compliance.

To manage a license unit, do <u>one</u> of the following:

- On the License Units | Licenses tab, select the license type from the drop-down list at the top of the details pane.

  Or

- Right-click on a license unit on the License Units tab and select **Properties** from the pop-up menu. On the License Unit Properties | Licenses tab, select the license type.

  Options include:

  - Unmanaged

  - Per Seat

  - Site

  - Per Processor

License Types

Per seat license

A software license based on the number of individual machines where the software is installed and used. Applications covered by this type of license can be used only on a machine where a licensed copy is installed.

Site license

A site license may be used by a company that uses many individual copies of an application. The site license provides use as needed on any machine at the site, for a fixed cost. The site license gives the administrator permission to copy and install the application on multiple machines. Generally, the site is defined as an individual company or location.

Per processor license

A software license based on the number of individual processors where the software is installed and used. Applications covered by this type of license can be used only on a machine where a licensed copy is installed, and the number of licenses owned must match the number of processors of the machines where the software is installed.

Recording Purchased Licenses

Asset Manager monitors how many computers have the application installed and the number of available licenses. When you purchase or receive licenses for software applications or tools used within your company, add them to the Channel for tracking. When a license is recorded and the license unit is managed, Asset Manager reports on the level of compliance based on the most recent inventory.

Record a License

To record a license purchase:

1. On the License Units | Licenses tab, click on the **Add** button.

2. Record the license purchase on the Add License Purchase dialog.

3. Click the **Add** button.

4. On the Add Serial Number dialog, record the serial number for the new license.

5. Click **OK** on each of the dialog boxes to save your changes.

Note: You can also record a license purchase through the License Unit properties | Licenses tab.

View the Status

You can view the current status of compliance with this license on the License Unit | Licenses tab if the license unit is managed. (See Managing License Units.)

Add License Purchase dialog

Record new software licenses so that they can be managed and tracked through Asset Manager. When a license is added, Asset Manager matches the number of licenses available with the

number of managed computers where the application or suite is installed. Identify licenses that are out of compliance on the License Units | Licenses tab.

This dialog box opens when you click the **Add** button on the License Units | Licenses tab or the License Unit properties | Licenses tab.

Purchase Information

- **Purchase date**: The date the license was purchased or became effective.
- **License count**: Indicate the number of individual licenses that were purchased at the time.
- **Total Cost**: The purchase price for these licenses.
- **PO Number**: The purchase order number used to purchase the licenses.
- **Vendor**: The name of the company or reseller where you purchased the licenses.
- **CALs**: The number of Client Access Licenses associated with the license unit. CALs give users the right to access the services of a server.
- **Notes**: Additional comments that you want to keep with this record. For example, you may want to indicate whether the license is part of a maintenance plan.

Maintenance Expires

☑ **Maintenance Expires**: Select this check box if the license is effective only for a specific period of time. With the check box selected, enter the expiration date for the license.

☐ **Maintenance Expires**: Clear this check box if the license is not subject to a time limit.

Serial Numbers

This text box lists all of the serial numbers added for the set of licenses purchased on the date entered above.

Options include:

- **Add**: Add a serial number to this record.
- **Edit**: Change the highlighted number.
- **Delete**: Remove the highlighted serial number.

Managing Applications

License units consist of applications or versions. Many license units will therefore consist of more than one application. However, if licenses are purchased per-application or per-version, licenses can be difficult to manage. In addition, an inventory may determine that an application or version belongs in one license unit, when in fact it belongs to a different license unit.

You can control to which license unit an application belongs in two ways.

Converting an application into a license unit

To convert an application into a license unit:

1. From the License Units tab, navigate to the application to be converted.
2. Right-click on the application and select **Convert to new License Unit**. The Properties dialog opens automatically for the new license unit.
3. In the Properties dialog, modify the license information as appropriate.

This creates a new License Unit with the same name as the application.

Moving an application into another license unit

To move an application from one license unit to another:

1. From the License Units tab, navigate to the application to be moved.

2. Right-click on the application and select **Move to different License Unit**.

3. In the dialog box, select the license unit into which the application should be moved.

The application now appears in the other license unit.

Checking License Compliance

For managed license units, the License Units | Licenses tab provides a quick view of the current level of compliance with existing licenses. For example, the summary area will indicate computers out of compliance if you have an application installed on four computers but currently have only two licenses for that product.

Note: For the graph and statistics to indicate the current level of license compliance, the license unit must be managed. See Managing License Units.

Adding a New Application to the Channel

In most cases, you do not need to manually add a new application to the Channel. If you have the Auto Identify option turned on, Asset Manager identifies most commercial software applications

and automatically associates them with known license units. When the next scan is complete, the application is displayed on the License Units tab.

Important: License units are used to help you manage the inventory and application licenses. Not all application files need to be in license groups, only those that you want to track. Files that you are not monitoring can be placed in the Ignore folder in the Unresolved Files dialog. See Ignoring Unresolved Files.

When you install a new application on a managed computer, the next step depends on whether Asset Manager identifies the file.

Recognized by Asset Manager

By default, Asset Manager automatically scans and categorizes or groups applications found on managed computers into license units. (See Automatically Creating License Units for more information on the options required.)

If the application matches a license unit in the PSID, it is listed on the License Units tab and the Managed | Software tab for computers where it is installed. The next step is to record the licenses purchased for this application. (See Recording Purchased Licenses.)

Not Recognized by Asset Manager

If the application is an in-house application or recently released, it may not be recorded in the PSID. In this case, you need to create a license unit based on the application executable, and record the licenses purchased for the application.

Note: If it is a new commercial application, it will be part of the next release of the PSID. If it is an in-house application, you can incorporate it into your own database. You can also ask New Boundary Technologies to incorporate your application into the next release of the PSID. In any case, use the following procedure to immediately identify the application as a license unit.

1. Highlight the folder in the Unresolved Files dialog that contains the application executable.

2. In the details pane, right click on the name of the file that you want to add to a license unit.

3. Select **Add as New License Unit** from the pop-up menu.

4. On the License Unit Properties | General tab, click **OK**.

   The new license unit is now listed on the License Units tab.

If you want to track license compliance for this application:

1. On the License Units tab, highlight the new license unit.

2. Go to the Licenses tab in the details pane.

3. In the drop-down at the top of the Licenses tab in the details pane, select a license type.

4. At the bottom of the Licenses tab, click the **Add** button.

5. On the Add License Purchase dialog, record the license information. Click **OK**.

   The upper part of the License Units | Licenses tab in the details pane now shows the level of compliance with the license.

Assigning Tasks to Software Inventory Results

You can assign Tasks directly to the results of a software inventory. For example, you could assign an uninstall or upgrade task to just those computers that have a particular application installed.

To assign a Task to the results of a software inventory:

1. Open the License Units tab.

2. Select the desired License Unit group, License Unit or Application in the tree.

3. Open the Computer Installations sub-tab to show the computers with the License Unit(s) or Application(s) installed.

    1. If you selected a License Unit group, the list includes computers that have any of the License Units installed.

4. Select one, some, or all of those computers.

5. Right-click (or open the Deployment menu) and select Assign Task to open the task assignment wizard.

Tracking License Usage

Tracking License Usage: Overview

Asset Manager's license usage feature allows you to track actual usage (launches) of applications. Through this, you can determine how often a license unit is actually being used, and where, and by whom. By tracking license usage, you may learn, for example, that an application has never run on a particular computer and so can be removed or moved to another computer. Several out-of-the-box usage reports are also provided to help you track license use.

Note   License usage tracking imposes a performance overhead. It is recommended that you enable usage tracking only where and when necessary,and then disable it.

To enable license usage, you must first run an inventory. Then, you can enable license usage for specific license units.

Enabling License Usage

When you enable license usage, Prism Asset Manager tracks all launches of the applications associated with that license unit.

1. Run a software inventory. Only inventoried license units can be tracked.

2. Click the **License Units** tab.

3. Navigate to the license unit you wish to track.

4. View the license unit's License Purchase History:

    1. Select the Licenses tab in the details pane; or

    2. Open the license unit's **Properties** dialog and select the Licenses tab.

5. Check the **Track license usage** checkbox next to the License Type.
    For unmanaged license units, this checkbox is at the top of the page. Otherwise, it is in the Licenses area below the Summary.

Asset Manager immediately begins tracking all launches of the applications associated with the license unit.

> **Note** License usage tracking imposes a performance overhead. It is recommended that you enable usage tracking only where and when necessary,and then disable it.

Viewing License Units Being Tracked

To see which license units are being tracked:

1. Click the **License Units** tab.
   The License Units fields display.

2. Select a License Unit group in the tree view.

3. Click the **Members** sub tab.

4. Click the **Track Usage** column heading to sort by Usage.

5. Use the scroll bar to see the license units whose Track Usage property is set to Yes.

Generating License Usage Reports

Asset Manager's License Tracking provides a wide variety of customizable reports that allow you to analyze usage from various perspectives.

The License Usage reports are available in the **Reports > Asset Management Reports > License Usage Reports** menu.
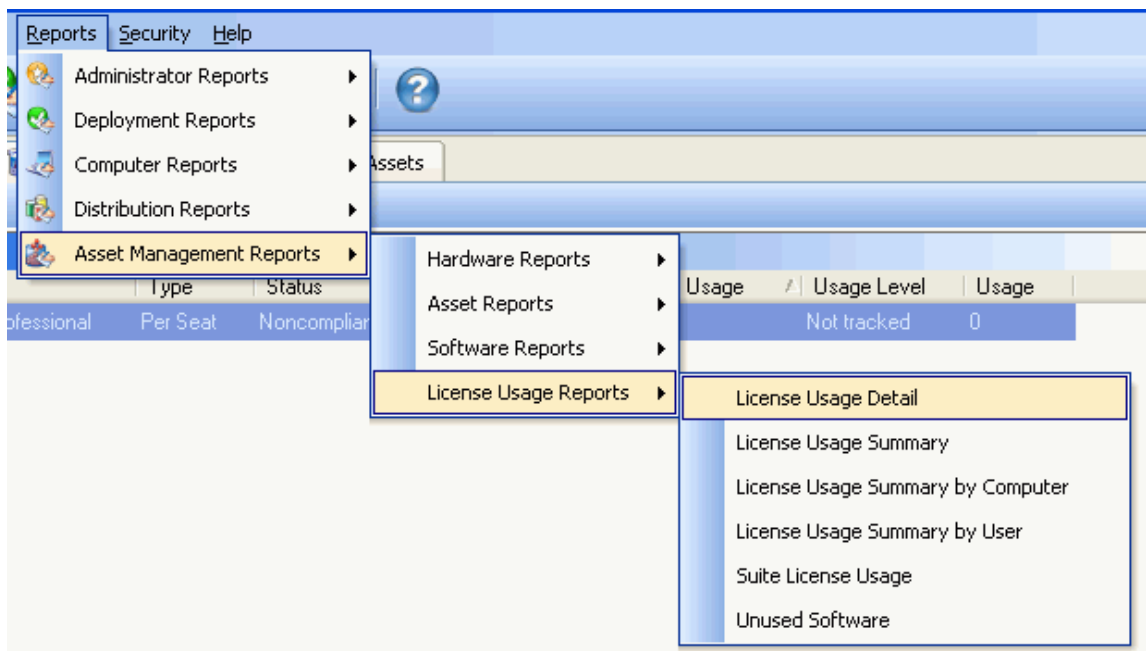
The available reports include:

- **License Usage Detail**: Shows each launch of each application. Each row shows the computer and license unit and user.

- **License Usage Summary**: Shows usage information summarized by License Unit. For each License Unit, it shows usage level and other information such as number of computers it has been installed on and used on.

- **License Usage Summary by Computer**: Shows usage information summarized by Computer. For each computer and license unit pair, it displays usage level, last run time, and other information.

- **License Usage Summary by User**: Shows usage information summarized by User. For each user and license unit pair, it displays usage level, last run time, and other information such as launch count.
- **Suite License Usage**: Shows usage summary by suite.
- **Unused Software**: Shows the cost of licenses that have been purchased but not used (including computers where the application was installed but never used as well as licenses that are not installed).

Modifying License Units

Designating Different Versions of an Application

By default, Asset Manager identifies the version of a software application based on the GUID. During a scan, an application that is simply a different version of a licensed application is identified by Asset Manager and placed in the appropriate license unit. If the file is not identified by Asset Manager, it is available through the Unresolved Files dialog.

If the auto-identify options are turned off, applications that are a different version of a known file are generally listed in the Unresolved Files | Close Match folder because only the creation date is different and not the file name. In most cases, you will want to include all of the versions of an application within the same license unit. If the versions are licensed separately, you can create a separate license unit for each version.

Add to an Existing License Unit

To add a file that is a different version to an existing license unit:

1. Highlight the folder in the Unresolved Files dialog that contains the application executable.

2. In the details pane, right-click on the file name and select **Add as Version** from the pop-up menu.

3. On the Add as New Version dialog box, highlight the license unit where the file should be placed.

4. Click **OK**.

    The file is added to the license unit you chose and it is displayed through the License Units tab.

Identifying Alternate Executables

An alternate executable is a file with an .EXE or .COM extension that can be used to launch the application contained in the license unit. In many cases, these files are automatically placed in the correct license unit during the inventory process. However, if you have the automatically identify option turned off or the file was not correctly identified, you can associate the file with the correct license unit.

Note: In many cases, an application can be identified by a single main executable with other executables categorized as support files. Specifying an alternate main executable is only required if the presence of an application cannot be determined by a single executable file.

To specify an alternate executable:

1. Highlight the folder in the Unresolved Files dialog that contains the application executable.

2. In the details pane, right click on the file that you want to identify as an alternate executable.

3. Choose **Select as Alternate Executable** from the pop-up menu.

4. On the Add Executable(s) dialog, select the license unit from the drop-down box.

5. Click **OK**.

    The file is added to the license unit you chose and it is displayed through the License Units tab.

Associating Support Files with a License Unit

Support files are executable files that are typically launched by the main executable for an application. Since support files are part of or associated with an application, they are included in the license unit for the main application rather than being licensed separately.

Within Asset Manager, support files are identified during a scan of managed computers. In many cases, these files are automatically placed in the correct license unit during the inventory process. However, if you have the automatically identify option turned off or the file was not correctly identified, it is best to associate support files with a license unit in order to keep the list of unresolved files more manageable.

To associate a support file with a license unit:

1. In the Unresolved Files dialog, highlight the folder that contains the support file or search for the file.

2. In the details pane, right click on the file that you want to identify as an alternate executable.

3. Select **Add as Support File** from the pop-up menu.

4. On the Add as Support File(s) dialog box, select the name of a license unit from the drop-down list.

5. Click **OK**.

    The file is added to the license unit you chose and it is displayed through the License Units tab.

Grouping License Units

Since the total number of license units may be large, use Asset Manager's predefined groups, along with custom groups to quickly navigate through this list.

Predefined Groups

As Asset Manager identifies license units, they are automatically placed in the following predefined groups on the License Units tab:

- **All license units**: Lists all of the license units, in alphabetical order.
- **By License Type**: Groups license units into subgroups for unmanaged licenses, per seat licenses, per processor licenses, and site licenses.

Note: The license type is set on the License Units | Licenses tab or the License Unit Properties | Licenses tab.

- **By manufacturer**: Groups license units by the companies that produce or sell the software product. This group is useful when you are ready to order licenses for several products from a single manufacturer.

Custom Groups

Custom groups on the License Units tab can help you manage your inventory by grouping licensed applications and suites into useful categories. For example, use a license group to provide a quick view of all accounting software or all security tools.

To create a custom group and assign a license unit to it:

1. Right-click on the **User Defined Groups** branch in the License Units tab.

2. Select **Create Group** from the pop-up menu.

3. On the New Group dialog, enter a descriptive name for the group.

   When you click **OK**, the group is added to the User Groups folder.

4. Click **OK** to create the group.

5. Click and drag a license unit from the list on the Members tab to your custom group.

   License units can be added to more than one group. They will always be listed in the All License Units folder.

Hiding a License Unit

If a license unit listed on the License Units tab is not needed, it can be hidden. To hide a license unit:

1. Go to the License Units tab in the tree view.

2. Right-click on the license unit that you want to remove.
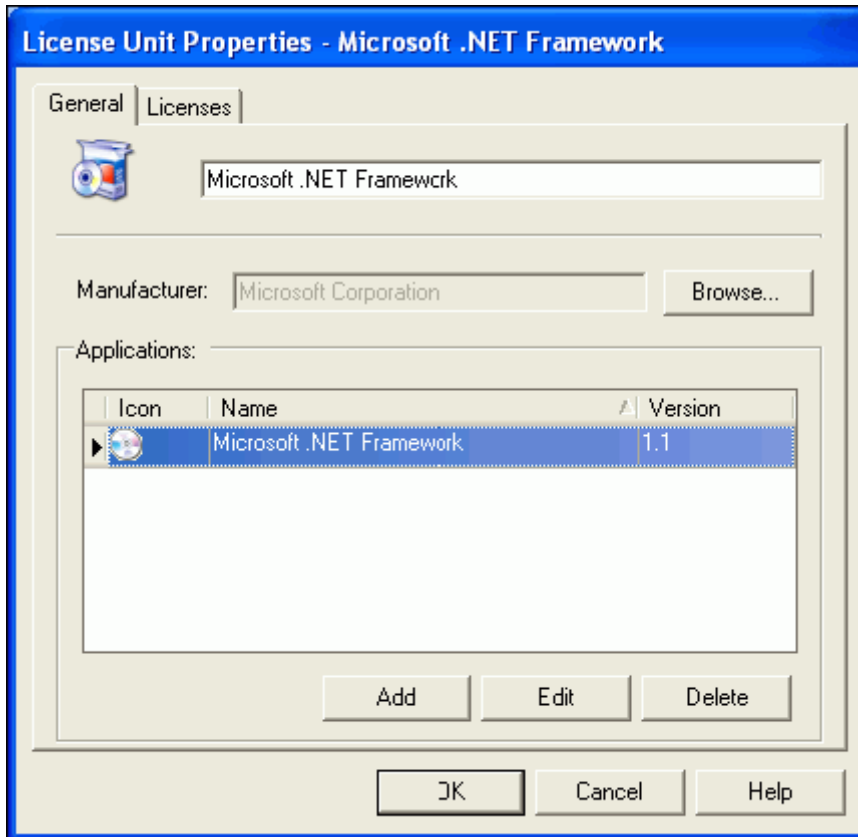
3. Select **Hide** from the pop-up menu.

Restoring Hidden License Units

Hidden license units can be restored so that they will be scanned during subsequent inventories. To restore hidden license units, select **Asset Management | Restore Hidden License Units**.

> **Note** This action will restore *all* hidden license units.

License Unit Properties
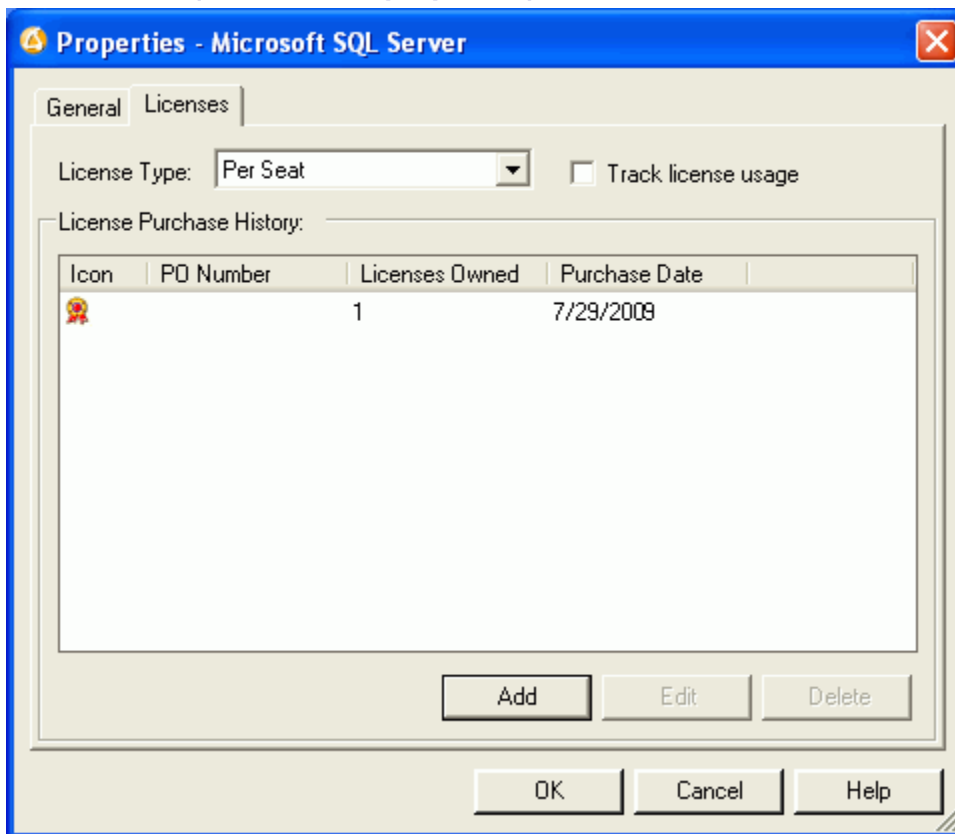
General tab (License Unit properties)

View or update information about the license unit currently selected on the License Units tab in the tree view. This dialog opens when you right-click on a license unit in the tree view or details pane and select **Properties** from the pop-up menu.

- **File name**: The text box at the top of the window shows the name of the license unit.

- **Manufacturer**: Identify the company or organization that produces or sells this application. If the manufacturer is unknown, click the **Browse** button to search through a list of known manufacturers. License units are grouped by manufacturer on the License Units tab.

- **Applications**: The file or files used to launch the application associated with the license unit. If the license unit represents a suite or if there is more than one executable that will launch the application, there may be two or more files listed.

  - **Add**: Add an application to the license unit. The Application Properties | General tab opens, where you can add application executables.

  - **Edit**: Change the information listed for the highlighted file.

  - **Delete**: Remove this file from the license unit. The file will be listed in the Unresolved Files dialog, where it can be changed to Ignore status or assigned to a different license unit.

Note: When you click the **Delete** button, the file is *not* deleted from the managed computer or from the Channel. It is deleted only from the license unit.

Licenses tab (License Unit properties)

Manage or view information about the license unit currently selected on the License Units tab in the tree view. This dialog opens when you right-click on a license unit in the tree view or details pane, select **Properties** from the pop-up menu, and then go to the Licenses tab.

License Type

Select an item from the drop-down list to change the status of this license. For example, if the license unit is currently unmanaged, assign a license type to begin managing and monitoring licenses for this application or suite.

- **Unmanaged**: Select Unmanaged to indicate that you are not keeping track of licenses for this application or suite.

- **Per seat, Site, Per processor**: Select the type of license that is used for the application or suite. Asset Manager compares the number of purchased licenses to the number of managed computers where this application or suite is installed. After selecting this option, click the **Add** button below to record the licenses.

Track license usage

- Check the **Track license usage** checkbox next to the License Type drop-down list to enable license tracking for that license unit. Asset Manager immediately begins tracking all launches of the applications associated with the license unit. See Tracking License Usage for more information.

License Purchase History

View, add, or update information about licenses purchased for this license unit. For managed licenses, Asset Manager tracks the number of licenses added and the number of managed computers where the application or suite is installed.

- **Add**: Record a license purchased for this application or suite. The Add License Purchase dialog opens.
- **Edit**: Update the information recorded for this application or suite. The Add License Purchase dialog opens.
- **Delete**: Remove the highlighted license record. Only the record of the license is removed. The license and the application files remain unchanged.

User-defined Fields tab (License Unit Properties)
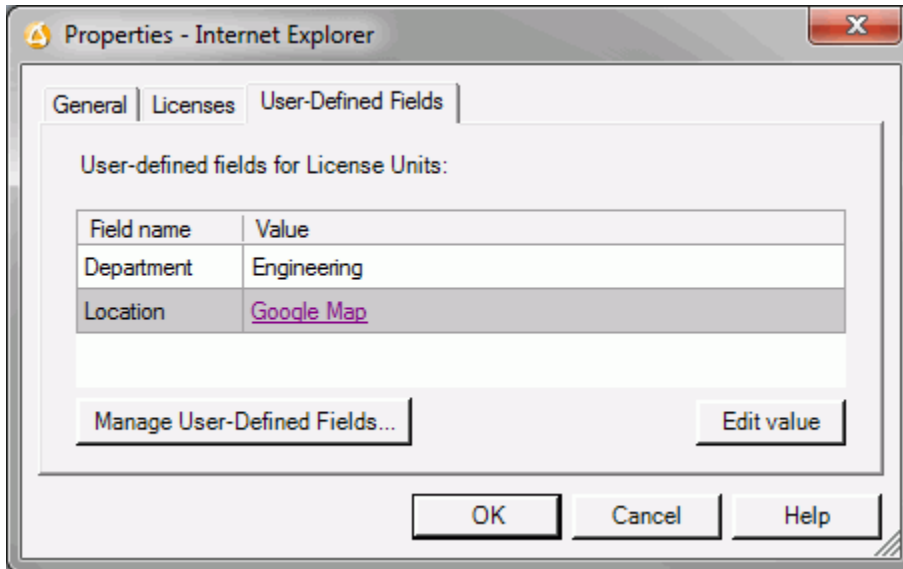
The License Unit Properties dialog box opens when you select a license unit and either choose **Properties** from the pop-up menu or from the **Edit** menu. Click the **User-Defined Fields** tab to view this tab.

The User-Defined Fields tab in the License Unit Properties dialog displays user-defined fields associated with License Units.

To edit the field's value, open the Edit User-defined Field Value dialog by selecting the row of the field you want to edit and doing one of the following:

1. Press the **Edit value** button;
2. Double-click in the Value cell;
3. Right-click in the Value cell and select **Edit value**.

In the Edit User-defined Field Value dialog you can set the field's value and optionally make it a hyperlink.

Press the Manage User-Defined Fields button to create and manage the available user-defined fields for license units.

> **Note** A value of "[multiple values]" indicates that the selected license units have different values for the property. Any changes you make in the cell will get saved for all selected license units, otherwise their values remain unchanged.

Application and Suite Properties

General tab (Application properties)
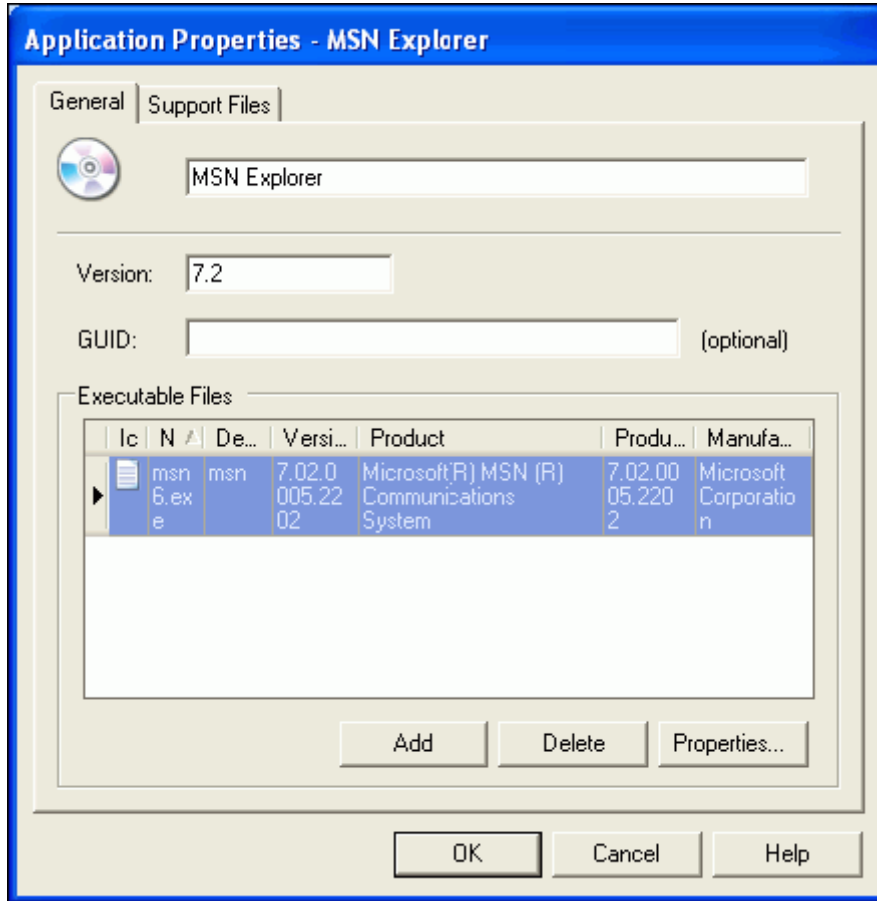
View or update information about the application currently selected on the License Units tab in the tree view. This dialog opens when you right-click on an individual application or file in the tree view or details pane and select **Properties** from the pop-up menu.

- **Application name**: The text box at the top of the window shows the name of the application.
- **Version**: Displays the exact version number for the application. A license unit may include one or more versions.
- **GUID**: Displays the GUID, a unique identification string that helps distinguish one version of an application from another.

  Note: If the GUID field is empty, leave it blank unless you are sure of the information to enter. Entering an invalid string in the GUID text box can cause the application to not be recognized properly.

- **Executable Files**: The file or files used to launch the application. If there is more than one executable that will launch the application, there may be two or more files listed.
  - **Add**: Add an alternate executable to the application. The Add Executable dialog box opens.

- **Delete**: Remove this alternate executable from the application's license unit. After you click **OK**, this file is listed on the Unresolved Files tab.
  The file is not removed from the managed computer or from the Channel.

- **Properties**: View the properties for the highlighted file.

Add Executable dialog

Complete the information on this dialog box to associate an alternate executable file with an existing application or suite contained in a license unit. After you click **OK**, this file is added to the list on the Application Properties | General tab.

This dialog box opens when you click the **Add** button on the Application Properties | General tab.

Application

The upper part of the dialog box shows the name and version of the executable file that has already been identified.

- **Application name**: The executable you add is associated with the application named here.

- **Version**: The executable you add is associated with this specific version of the application named here.

Executable to be Added

In the lower part of the dialog box, identify the executable file that you want to add.

- **Manually enter file information**: If you have detailed information about the file, type it directly in the text boxes. For example, you may choose this option for an in-house application that is not recorded in the PSID.

  - **File name**: Enter the name of the file used to launch the application.

  - **File size**: Enter the size of the executable file.

  - **File version**: Enter the version number for the executable file.

- **Search**: Click the **Search** button to search for the file by name, date, product, or manufacturer. The Unrecognized File Search dialog box opens.

Support Files tab (Application properties)
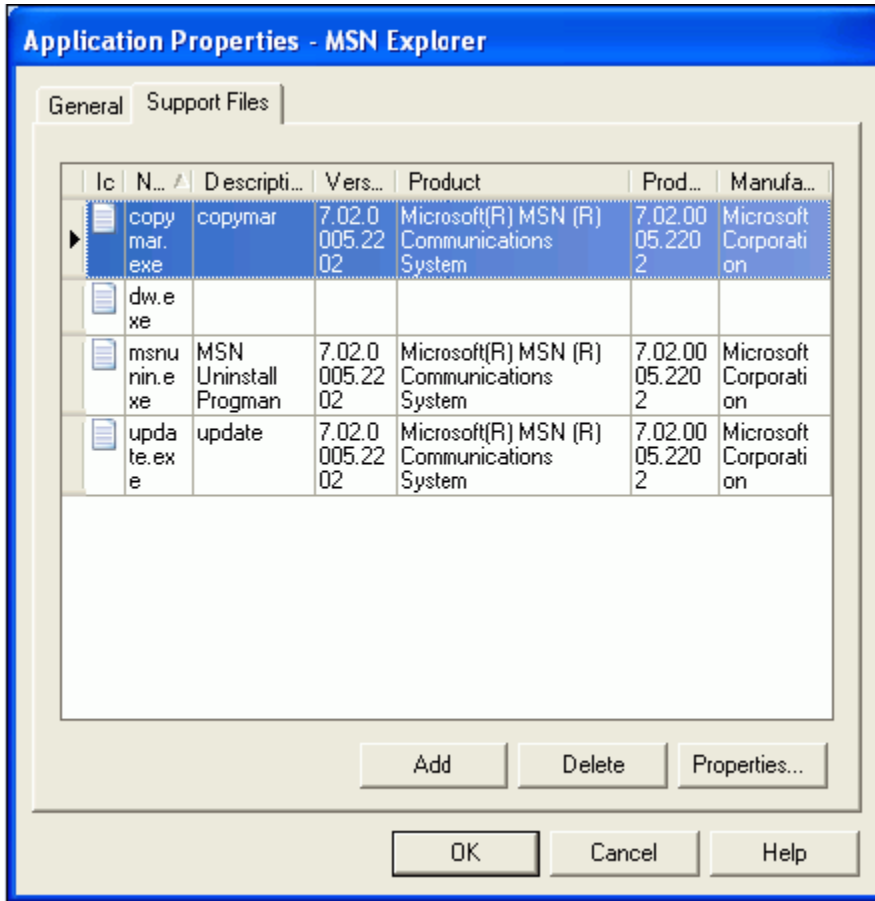
This tab lists support files associated with the application currently selected on the License Units tab in the tree view. This dialog opens when you right-click on an individual application within a license unit in the tree view or details pane, select **Properties** from the pop-up menu, and then go to the Support Files tab.

- **Details**: The main pane on this tab lists detailed information about the support files associated with the application.

- **Options**: Highlight a file listed on this tab, then select from these options:

    - **Add**: Associate a support file with the application. The Add Support File dialog box opens.

    - **Delete**: Remove this support file from the application. After you click **OK**, this file is listed in the Unresolved Files dialog.
      The file is not removed from the managed computer or from the Channel.

    - **Properties**: View the properties for the highlighted file.

Add Support File dialog

Use this dialog box to associate a support file with an application. Support files may be listed with other executable files in the Unresolved Files dialog.

This dialog box opens when you click the **Add** button on the Application Properties | Support Files tab.

Application

The upper part of the dialog box shows the name and version of the executable file that has already been identified.

- **Application name**: The support file you add is associated with the application named here.
- **Version**: The support file you add is associated with this specific version of the application named here.

Executable to be Added

In the lower part of the dialog box, identify the support file that you want to add.

- **Manually enter file information**: If you have detailed information about the file, type it directly in the text boxes.
  - **File name**: Enter the name of the support file.
  - **File size**: Enter the size of the support file.
  - **File version**: Enter the version number for the support file.
- **Search**: Click the **Search** button to search for the file by name, date, product, or manufacturer. The Unrecognized File Search dialog box opens.

General tab (Suite properties)

View or update information about the suite currently selected on the License Units tab in the tree view. This dialog opens when you right-click on a suite in the tree view or details pane and select **Properties** from the pop-up menu.

- **Suite name**: The text box at the top of the window shows the name of the suite.
- **Version**: Displays the exact version number for the suite. A license unit may include one or more versions.
- **GUID**: Enter the GUID, a unique identification string that helps distinguish one version of an application or suite from another.

Note: Leave the GUID option blank unless you are sure of the information to enter. Entering an invalid string in the GUID text box can cause the suite to not be recognized properly.

- **Executable Files**: The file or files used to launch the applications that are included in the suite.
  - **Add**: Add an alternate executable to the suite. The Add Executable dialog box opens.
  - **Edit**: Change the information listed for the highlighted file.
  - **Delete**: Remove this alternate executable from the application. After you click **OK**, this file is available through the Unresolved File dialog.

File Properties

General tab (File Properties)
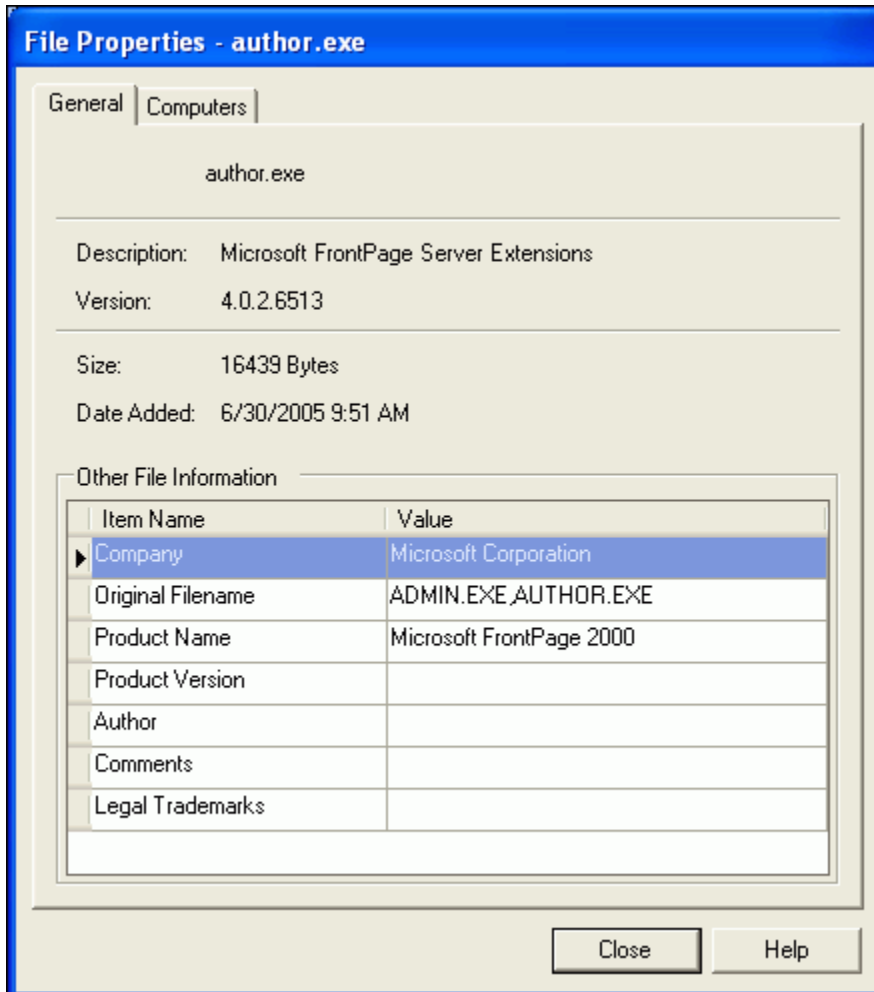
This tab lists detailed information about the file currently highlighted in the main window.

This dialog box opens when you do <u>one</u> of the following:

- Click the **Properties** button on the Application Properties | General tab.
- Click the **Properties** button on the Application Properties | Support Files tab.
- Go to the Unresolved Files dialog, right click on a file name in the details pane, and select **Properties** from the pop-up menu.

Computers tab (File Properties)
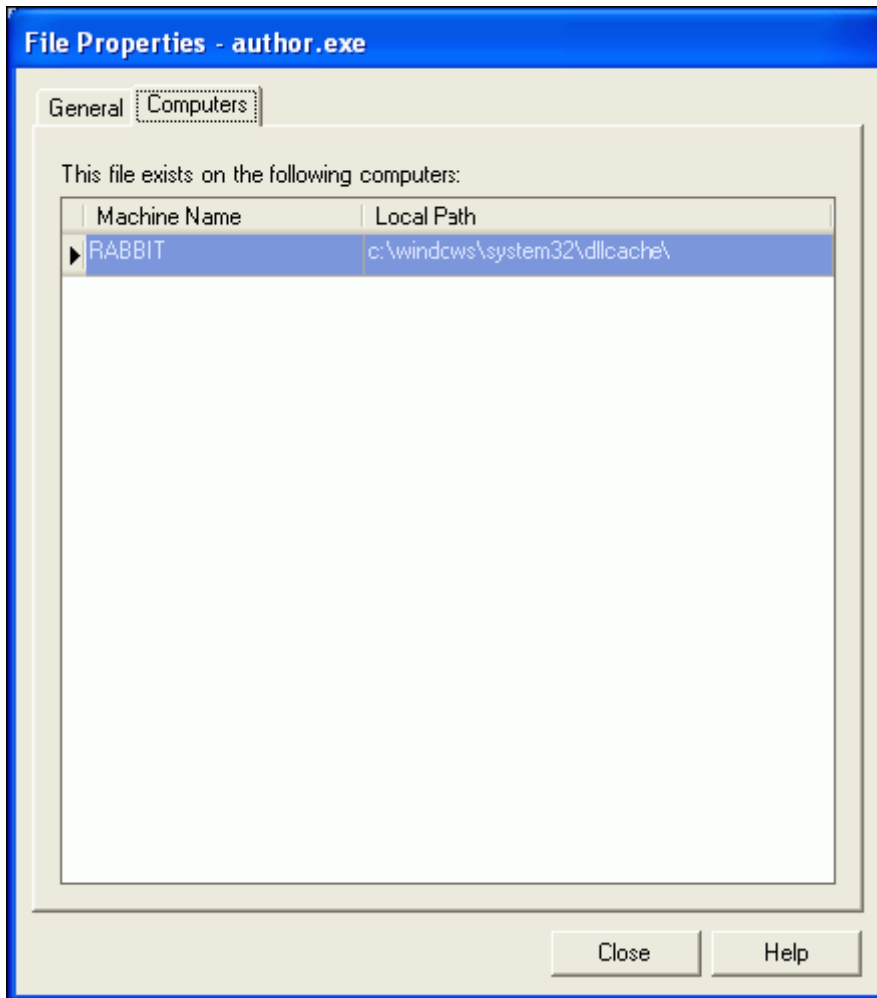
This tab lists the managed computers where the selected file is installed. This list does not include computers that are unmanaged (for example, that are not licensed for Asset Management).

This dialog box opens when you do <u>one</u> of the following:

- Click the **Properties** button on the Application Properties | General tab, then select the Computers tab.
- Go to the Unresolved Files view, right click on a file name in the details pane, choose **Properties** from the pop-up menu, and go to the Computers tab.

Unresolved Files

Resolving Unmatched Files

Asset Manager may identify a large number of files that do not match known license units. If there are specific files that you want to add to the list of license units, you can search by the file name, date, manufacturer, or other criteria. Once they have been identified, these files can be resolved by matching them to known License Units or moving them to the Ignore folder.

If you have the auto-identify options turned off, after customizing the scan configuration by adding file extensions to a scan, or after installing unrecognized applications, you will need to resolve the files through the Unresolved Files dialog.

Note: Right-click on the file name and choose **Properties** from the pop-up menu for information that may help you identify and place this file.

Resolve or Ignore an Unmatched File

To resolve or ignore an unmatched file:

1. Select **Asset Management | Unresolved Files** to open the Unresolved Files dialog.

2. Expand the Unresolved Files section in the tree view.

3. Enter your search criteria, specifying part of the file name, the manufacturer, date, or other identifying information.

4. Click **Search**.

5. In the details pane, right-click on the name of a file.

6. Select from these options:

    - **Automatically Identify**: Automatically place files into known license units when they are found in either the Exact Match folder or the Close Match folder.

    - **Add as New License Unit**: Add a new license unit based on this file. The new license unit is listed on the License Units tab.

    - **Add as Version**: Add this file to an existing license unit and designate it as a different version of the same licensed suite or application.

    - **Add as Alternate Executable**: Add this file to an existing license unit and designate it as an alternate executable. (See Alternate Executables.)

    - **Add as Support File**: Add this file to an existing license unit and designate it as a support file associated with the suite or application.

    - **Ignore this File**: Move this file to the Ignore folder in the Unresolved Files dialog. This file is not included in the license units and is left out of lists on other tabs. Use this option to move a file out of the other folders. A file cannot be deleted from the Channel, but ignoring it has the same effect.

    - **Properties**: View detailed information about the file and a list of computers where the file is installed. See File Properties | General tab.

Unresolved Files dialog
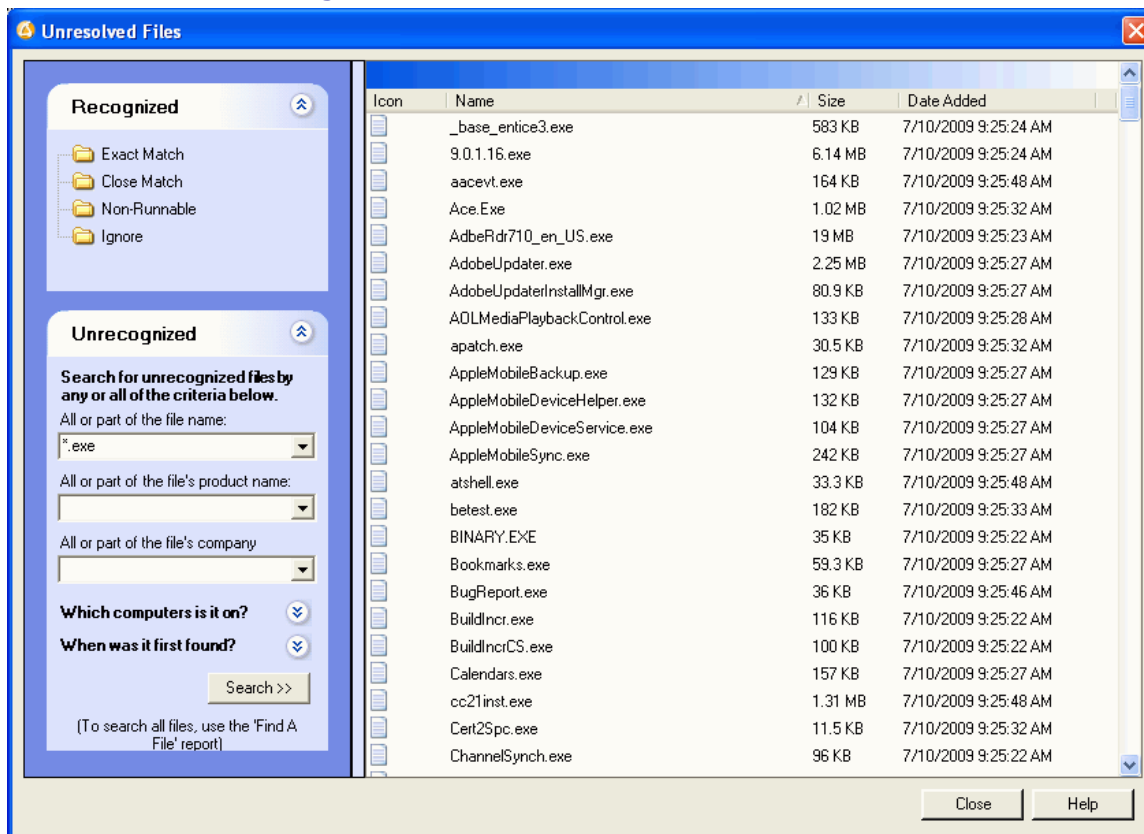
The Unresolved Files dialog provides access to the executable files found on the network that have not been identified as license units, along with non-executable files identified through a customized inventory configuration. From this dialog you can create license units based on these files, add them to existing license units, generate a report for additional research, or remove the files from view by moving them to the Ignore folder.

Note: By default, the files in the Exact match folder are automatically assigned to license units. This feature can save time. However, if you prefer to manually identify license units, clear these options on the Channel Properties | Asset Management tab to list Exact Matches and Close Matches in the Unresolved Files dialog, rather than automatically matching them to license units. With this option cleared, Asset Manager does not place close match or exact match files into license units.

Groups or Folders

Groups on this dialog include:

- **Exact match**: These files exactly match a file that is associated with a license unit. This file has the same file name and is exactly the same size as the matching file.

  If the auto-identify options are turned off, right-click on a file in this list to assign it to a license unit.

- **Close match**: These files closely match the main executables for licensed applications managed with Asset Manager. Files listed here closely match a license unit based on the name, size, date, and other categories in the details pane of the License Units | Members tab. For example, a file in this folder may represent a different version of an existing license unit.

If the auto identify options are turned off, you can convert the entire folder or specific files to license units by selecting the folder or the specific files, right-clicking on your selection, and selecting **Automatically Identify** from the pop-up menu.

- **Non-runnable files**: This group includes files that cannot be run. Files are placed in this group if they do not have an .EXE or .COM extension or if the file extension was flagged as non-runnable when configuring a custom inventory. These files cannot be configured into license units.

  Generally, this list is empty unless you specified additional file extensions to include in the inventory. For example, if you included MP3 files in the inventory, they are placed in this folder when the scan is complete. (File extensions can be specified on the Inventory Configuration | Software tab. See Configuring the Inventory for more information.)

- **Ignore**: Place files in this group that you do not want to manage or track. For example, this folder may contain unlicensed, internal applications. When a file is moved to this group, it is removed from one of the other folders on this dialog and it is excluded from the search, letting you maintain a shorter, more manageable list of unresolved files.

  To move a file to this group:
  - Click on the file name in the right pane and drag it onto the Ignore folder.
  - Right-click on the file name in the right pane and select **Ignore** from the pop-up menu.

> **Tip**: Make use of the Ignore list to limit the files you need to evaluate to only those newly inventoried.

Unrecognized

Asset Manager generally locates a large number of files that do not match any of the previously identified applications. For example, this folder may contain unlicensed shareware applications.

If you want to convert them into license units for management and tracking, use the search fields in the Unrecognized section of the tree view. Use the search fields to enter your search criteria. You can use wildcards or enter only part of a name. Asset Manager displays the matching files in the details pane. Use the right-click options to add a file to an existing license unit or to create a new license unit.

Resolving Files

In the details pane, right-click on the name of a file to select options for resolving a file. (See Resolving Unmatched Files.)

Auto-Identify Options for Unresolved Files

By default, Asset Manager automatically matches unresolved files in the Exact Match and Close Match folders with known license units. For these matches to occur automatically, these options must be turned on:

- **Auto Identify Files** selected on the Asset Management menu
- **Auto Identify** options selected on the Channel Properties | Asset Management tab

Details pane (Unresolved Files)
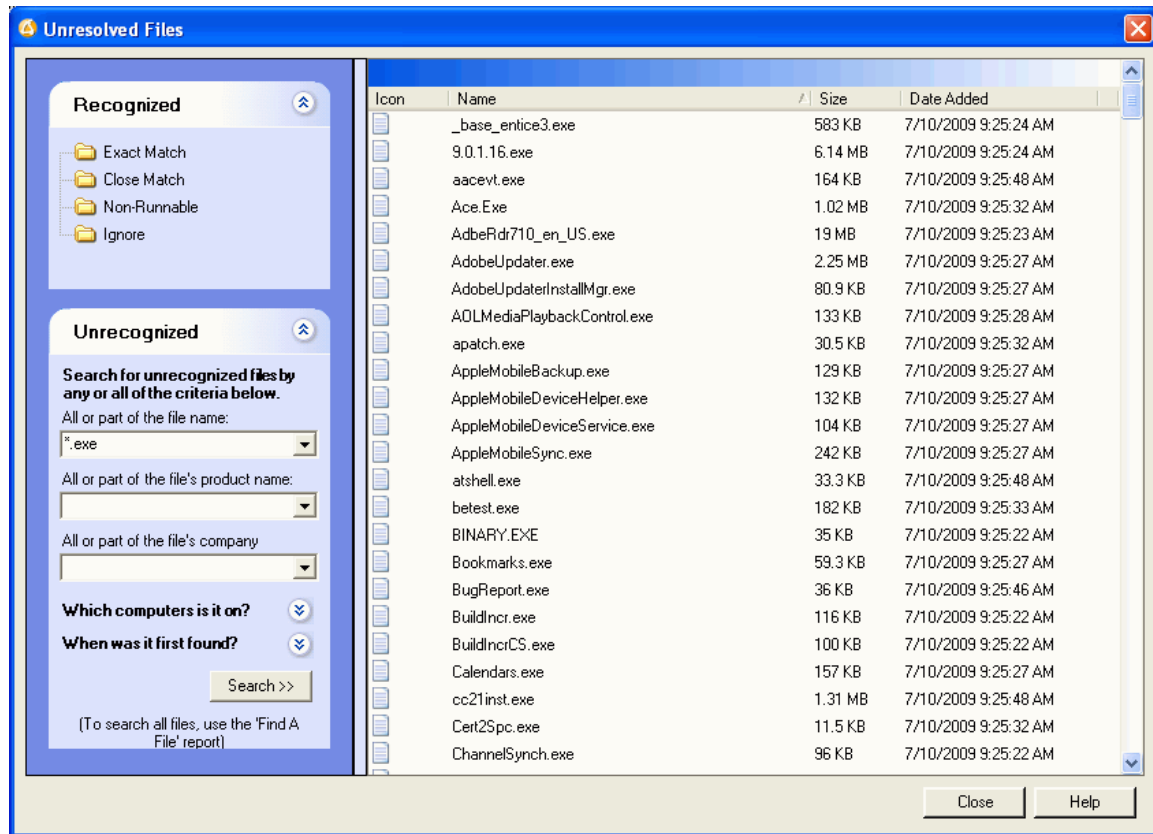
In the Unresolved Files dialog, the details pane on the right lists detailed information about the files in the highlighted folder or files that were identified as the result of your search. Use the right-click options to resolve or ignore these files.

Right-click options - File in the Details Pane

Right-click on a file name to assign it to a license group or ignore it. These options are available on the right-click menu:

- **Automatically Identify**: Automatically place this file in the Exact Match or Close Match folder into a known license group.
- **Add as New License Unit**: Add a new license unit based on this file. The new license unit is listed on the License Units tab.
- **Add as Version**: Add this file to an existing license unit and designate it as a different version of the same licensed suite or application.
- **Add as Alternate Executable**: Add this file to an existing license unit and designate it as an alternate executable. (See Alternate Executables.)
- **Add as Support File**: Add this file to an existing license unit and designate it as a support file associated with the suite or application.
- **Ignore this File**: Move this file to the Ignore folder on the Unresolved Files dialog. This file is not included in the license units and is left out of lists on other tabs. Use this option to move a file out of the other folders. A file cannot be deleted from the Channel, but ignoring it has the same effect.
- **Properties**: View detailed information about the file and a list of computers where the file is installed. See File Properties | General tab.

Sort or group the data

As with the other detail panes in the Console, sort or group this data by clicking a column heading or dragging a column heading into the shaded area above.

View properties for an individual file

Right-click on a file in this list to view general information and a list of computers where the file is installed. See File Properties | General tab and File Properties | Computers tab.

Add Executables dialog
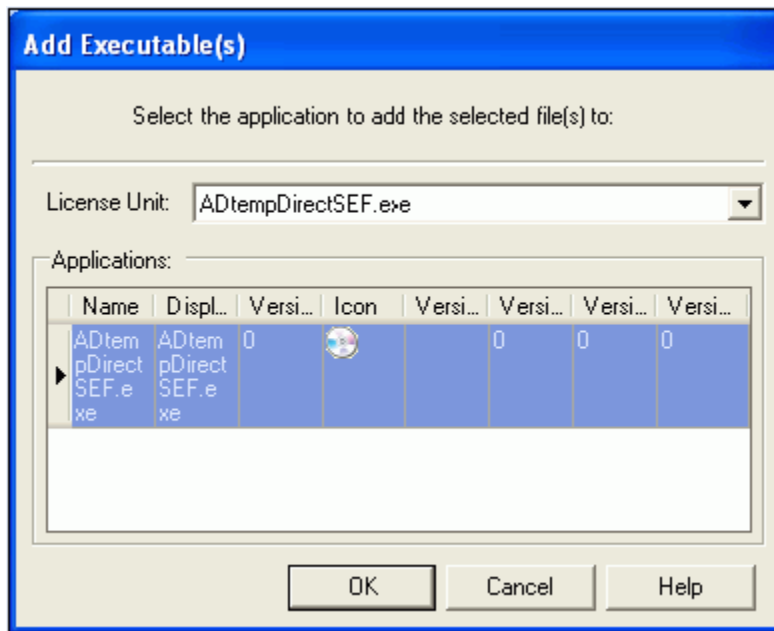
Add an alternate executable file to a license unit by completing the information on this dialog box.

This dialog box opens when you right-click on a file in the Unresolved Files dialog and select **Add as Alternate Executable** from the pop-up menu.

- ▪ **License Unit**: Select the name of a license unit from the drop-down list. When you click OK, this file is listed as an alternate executable for the application in the license unit.
- ▪ **Application**: This box lists the application(s) associated with the license unit selected above.

Add as New Version dialog
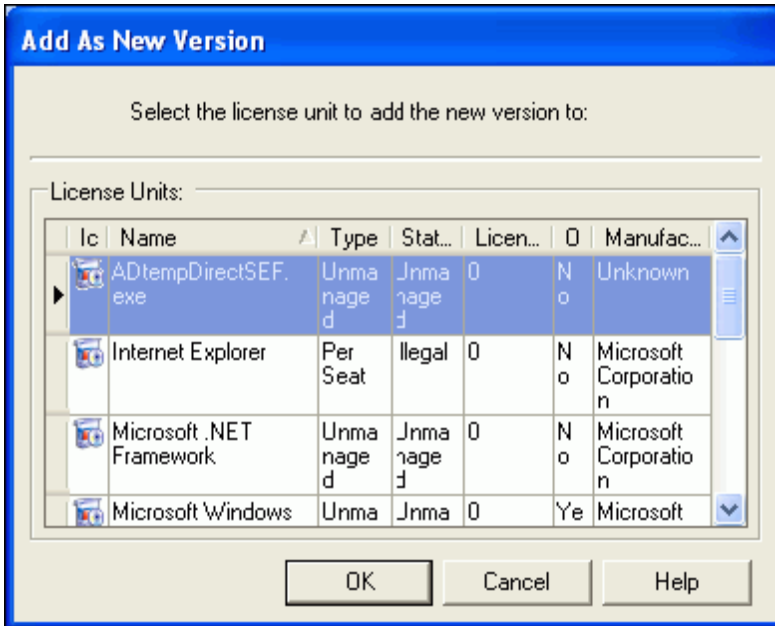
Highlight a license unit on this dialog box to add the current unresolved file as a new version to an existing license unit.

This dialog box opens when you right-click on a file in the Unresolved Files details pane and select **Add as Version** from the pop-up menu.

Add the File to a License Unit

Highlight the license unit where this new version belongs. When you click **OK**, this file is listed as an additional version of the application in the license unit.

Add Support Files dialog
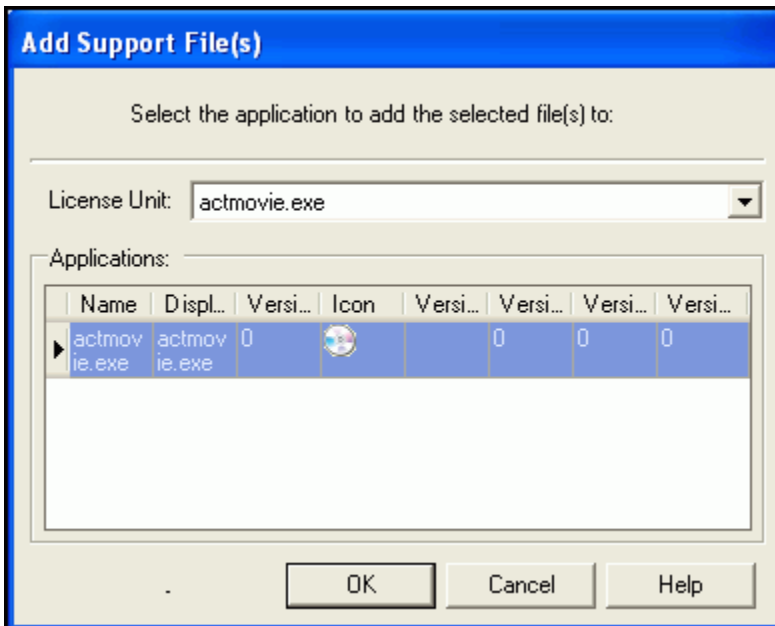
Use this dialog box to associate a file as a support file for a licensed application. Support files may be listed with other executable files in the Unresolved Files dialog details pane.

This dialog box opens when you right-click on a file in the Unresolved Files dialog details pane and select **Add as Support File** from the pop-up menu.

- **License Unit**: Select the name of a license unit from the drop-down list. When you click **OK**, this file is listed as a support file for the application in the license unit.
- **Application**: This box lists the application(s) in the license unit selected above.

Ignoring Unresolved Files

The Unresolved Files dialog may include files that you do not want to monitor or manage. These files cannot be removed from the Console, since they will be added back at the next scan. However, they can be hidden or removed from reports and inventory lists by moving them to the Ignore folder. Files in the Ignore folder are not included in the reports and are not listed on other tabs.

To move a file to the Ignore list:

1. Select **Asset Management | Unresolved Files** to open the Unresolved Files dialog.

2. Right-click on the name of a file either in the tree view or the details pane.

3. Select **Ignore** from the pop-up menu.

   The file is moved to the Ignore folder.

Note: You can also use drag-and-drop to move files into the Ignore folder from the details pane.

Removing Files from the Unresolved Files dialog

Asset Manager detects and reports on all executable files on managed computers in the Channel, along with any other file types that you specified for the inventory. Files identified during a scan and listed in the Unresolved Files dialog *cannot* be deleted or removed from the Channel. However, they can be moved to the Ignore folder so they will not be displayed in inventory reports or on other tabs. At any time, you can reverse this decision and associate an ignored file with a License Unit.

Files are also removed from the Unresolved Files dialog when they are assigned to a license unit.

Asset Management

Overview of Asset Management

The Asset Management capabilities in Asset Manager complement the hardware and software inventory and license tracking capabilities with network discovery and general purpose asset management features. While inventories and license tracking pertain to managed computers (Windows computers where the Client has been installed), Asset Management broadens the view of assets to include all types of network devices (e.g. routers, printers, non-Windows computers, etc.) and virtually any other type of trackable asset, whether networkable or not.

Assets are managed through the Assets tab. This tab allows you to manage two kinds of Assets:

- **Non-scannable Assets**: These are assets that are not (currently) connected to a network. Non-scannable Assets provide a means for administrators to record and track assets that are not scannable. These are assets that are not and may never be connected to the network. Such assets can be anything you need to track and manage: desks, cabinets, power strips, computers still in a box and not yet connected to the network, offices, cars - anything that needs to be managed in your environment. Non-scannable Assets can be created in several ways, including via data import.

- **Scanned Assets**: These are devices that have been detected on your network via Network Discovery. These devices are computers, routers, printers, firewalls, phones, etc. When Asset Manager detects a device on your network, it creates a **Scanned Asset**. This is the only way Scanned Assets are created.

Note Computers on your network will appear as Scanned Assets after a network scan. Some of these may be manageable, and some may already be managed (you may have installed the Client on them already). The Scanned Asset's Properties indicate whether the asset is managed and/or manageable.

All Assets, whether Non-scannable or Scanned, share some common features:

- all have a **type**, such as Router or Computer;
- all have **properties**;
- they can be **converted** - Non-scannable to Scanned and Scanned to Non-scannable;
- they can be **imported** from an external source.

Asset Types

All Assets have an Asset Type, such as Computer, Router, Printer, etc. In addition to some built-in types, you can add additional user-defined types. For example, you might add a type called "Electronic Supplies".

Organizing Assets

In addition to being able to create your own groups of Assets, Assets are automatically grouped into various collections:

- **Un-reviewed Assets**: All Assets that have not been reviewed, such as newly detected devices on the network.
- **By Asset Type**: Organizes Assets by their Asset Type.
- **By Manufacturer**: Organizes Assets by their manufacturer.

See Assets tab for more information on these automatic groupings.

Asset Properties

In addition to Asset Type, Assets have a variety of other properties:

- General Fields: All Assets have certain common properties, such as Name, Asset Type (Computer, Router, etc.), Purchase Date, Manufacturer, and Serial Number.
- User-defined Fields: All Assets have all the user-defined fields that have been defined for Assets. These fields can contain any kind of information you choose, such as Asset Tag or Owner or Building.
- Scanned Asset Fields: Scanned Assets also have some unique properties, such as IP Address and Domain.

Converting between Scanned and Non-scannable Assets

An Asset's lifecycle may involve periods of time when the Asset is connected to a network and other times when it not connected. For example, a newly purchased router may be in storage for a period of time before being brought into service. As a newly acquired corporate Asset, it can be created as a Non-scannable Asset. Property values such as Purchase Date, Asset Tag, Owner, and Notes might all be set while the router is still in its box.

When this router is added to the network, it will be detected by Network Discovery and will appear as a Scanned Asset. The network scan will detect the router's IP address, MAC address, possibly manufacturer and other properties. However, this single physical Asset now appears as two Assets in the Assets tab.

To resolve this, you can merge the two Assets into a single Asset. The property values set on the Non-scannable Asset - Purchase Date, Notes, Tag, and Owner - will all be merged into the Scanned Asset so that you do not have to reenter values. The Non-scannable Asset is then deleted, leaving just the Scanned Asset "version" of the router.

Later, this router may be taken off the network. However, the Asset may still need to be tracked. At that time, you can convert the Scanned Asset back into a Non-scannable Asset, which allows you to preserve its property values and continue tracking it.

Importing Assets

Data for Assets can be imported from spreadsheets for both kinds of Assets.

- **Non-scannable Assets**: New Non-scannable Assets can be directly imported from a spreadsheet. See Importing Non-scannable Assets for more information.
- **Scanned Assets**: Some property values and all user-defined field values can be imported into Scanned Assets. See Importing Data for Scanned Assets for more information.

Assets tab
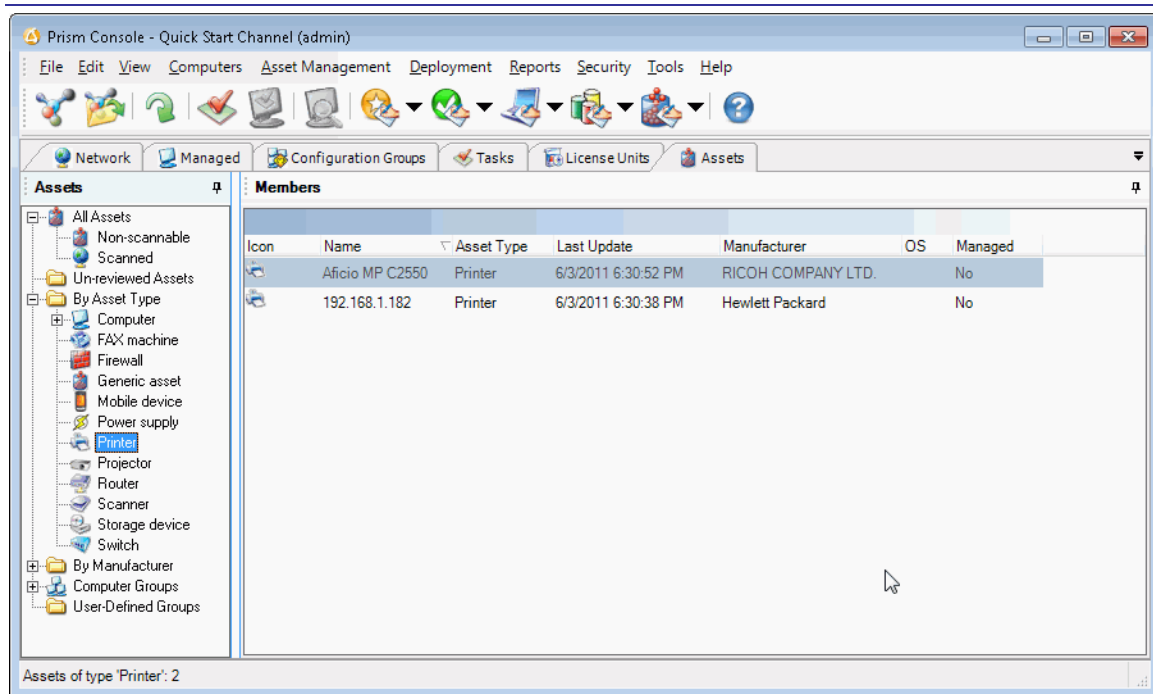
The Assets tab displays the Non-scannable and Scanned Assets in the Channel. In the tree view, Asset Manager groups Assets into these categories:

- **All Assets**: Detail panel shows all Assets in the Channel - both Non-scannable and Scanned.
    - **Non-scannable**: Detail panel shows only the Non-scannable Assets.
    - **Scanned**: Detail panel shows only the Scanned Assets. These are assets found during Network Discovery.
- **Un-reviewed Assets**: Detail panel shows all Assets that have not been reviewed, such as newly detected devices on the network.
- **By Asset Type**: This tree node contains one node for each Asset Type. The nodes are created and populated automatically and they cannot be deleted or edited. The Detail panel shows Assets that have the selected Asset Type.
    - **Computer**: This particular Asset type has subgroups, also populated automatically, that categorize computers into their current management state:
        - **Managed**: These are managed computers (i.e., computers that have a client installed).
        - **Unmanaged**: Computers that could be managed (assuming sufficient licenses exist) but are not currently managed.
        - **Not manageable**: Computers that have not been detected on the network and are not currently manageable.
- **By Manufacturer**: This tree node consists of one node for each detected Manufacturer. These nodes are created and populated automatically and cannot be deleted. The Detail panel shows Assets that have the selected Manufacturer.
- **Computer Groups**: This tree node reflects the Organizational Groups from the Managed tab. Each managed computer in the channel has a high likelihood of being detected as a Scanned Asset (unless, for example, it is a laptop that was removed from the network after the client was installed). A computer Asset detected through a network scan is

assessed to see if it corresponds to an existing managed computer. If it does it will automatically be placed in the appropriate groups in the **Computer Groups** node.

- **User-Defined Groups**: You have the option of creating additional Asset Groups to categorize the Assets. The detail panel shows information about the Assets in the selected group.

Grid Columns

The information displayed in columns are the property values for the Assets. The particular information displayed depends on which node selected in the tree. Columns can be added by right-clicking in the column headers and selecting **More Fields**. The available fields include any user-defined fields created for Assets.

Right-click Menu - Asset Tree Nodes

When you right-click on a node in the Assets tree, some or all of these options are available:

- **Create Asset**: Opens the Create Asset dialog in which new Non-scannable Assets can be created. Available on All Assets and Non-scannable nodes.
- **Configure Network Scan**: Opens the Network Scan Configuration dialog, which is where Network Discovery is configured. Available on All Assets and Non-scannable nodes.
- **Network Scan Configuration Report**: Opens the Network Scan Configuration report. Available on All Assets and Non-scannable nodes.
- **Request Complete Rescan**: This induces a complete rescan of the network. Available on All Assets and Non-scannable nodes.
- **Import Data**: Opens the Import Data wizard to import new Non-scannable Assets or to import values into Scanned Assets. Available on All Assets, Non-scannable, and Scanned nodes.
- **Mark All as Reviewed**: Marks all Assets as reviewed, after which the Un-reviewed Assets node will have no members. Available on Un-reviewed Assets node.
- **Manage Asset Types**: Opens the Asset Types dialog, in which Asset Types can be added, deleted, and modified. Available on By Asset Type node.
- **Create Group**: Create a new Asset group or subgroup. Available on user-defined groups.
- **Add to Group**: Opens the **Add Assets to Asset Group** dialog, from which you can select Assets to add to the group. Available on user-defined groups.
- **Delete**: Delete the group. This does not delete the individual Assets in the group. Available on user-defined groups.
- **Rename**: Rename the group. Available on user-defined groups.
- **External Tools Commands**: External Tools can be configured to operate on user-defined Asset groups. The specific commands are customizable.

Right-click Menu - Assets

When you right-click on an Asset, these options are available:

- **Mark as Reviewed**: Marks the selected Assets as reviewed.
- **Mark as Un-reviewed**: Marks the selected Assets as un-reviewed.
- **Merge into Scanned**: Merges the property values of a Non-Scannable Asset into a Scanned Asset, and deletes the Non-scannable Asset. This is enabled when the **All Assets** node is selected in the tree and you select one Non-scannable Asset and one Scanned Asset. See Merging Assets.
- **Convert to Non-scannable**: Converts a Scanned Asset into a Non-scannable Asset. This is only enabled for Scanned Assets. See Converting Assets.

- **Add to Group**: Adds the Asset to an Asset group.
- **Computer Commands**: This submenu appears for any Asset that has been determined to be a managed or potentially managed computer. It contains all the applicable computer menu options, including the ability to directly install the client (Manage Computer menu option), all of the External Tools commands defined for computers, and Computer Properties.
- **External Tools Commands**: External Tools can be configured to operate on scanned Assets. The specific commands are customizable.
    - **Browse**: This default command opens the default browser on the device's IP address. This can be useful for configuring devices, such as wireless access points and printers, that respond to HTTP requests. This command is defined as an External Tools command, so can be customized or deleted to suit your needs.
- **Properties**: Show the Asset Properties dialog.

Managing Assets

Creating Assets

Non-scannable Assets

Non-scannable Assets can be created in several ways:

- You can manually create them using the Create Asset dialog available via the Create Asset menu item.
- You can Import them in bulk from a spreadsheet using the Import Data capability.
- You can convert a Scanned Asset into a Non-scannable Asset (e.g., when a computer is taken offline).

When you create an Asset, you must specify its Asset Type. This is the only required field. You may wish to set its other properties - Model, Manufacturer, etc. - as well as enter values for its user-defined fields. For example, you could define a "Building" field to specify which building the asset is in.

To create a new Non-scannable Asset manually:

1. Select **Create Asset** from the **Asset Management** menu or by right-clicking on the **All Assets** or **Non-scannable Assets** nodes in the left pane.
The Create Asset dialog displays.

2. Enter values for the General Fields and User-defined Fields.
General fields include: Name, Asset Type, Model, Serial Number, Purchase Date, Manufacturer and Notes.

3. Press **Create**.

4. Create additional Assets as desired.

5. Press **Close**.

Scanned Assets

Scanned Assets are created only through the Network Discovery capability. That is, they must be detected by Asset Manager's network discovery feature, and cannot be created directly by the user.

Create Asset dialog

This dialog allows you to add new Non-scannable Assets to the Channel.

This dialog opens when you select **Create Asset** from the Asset Management menu or when you right- on click the Non-scannable or All Assets tree nodes in the Assets tab and select **Create Asset**.

To create a new Non-scannable Asset, simply fill in the desired values on the General Fields and User-defined Fields tabs, then press **Create**. Create as many Assets as you wish, then press **Close**.

- **Clear**: Clears all tabs of the dialog.

- **Create**: Creates a new non-scannable asset with the property values you have entered on the General Fields and User-defined Fields tabs.

- **Close**: Closes the dialog.

If you intend to add a large number of Non-scannable Assets, you may want to consider using the bulk Asset Data Import capability.

Managing Asset Types

Every Asset - whether Non-scannable or Scanned - must have an Asset Type. Asset Manager comes pre-configured with a variety of built-in Asset Types, including:

- Generic Asset
- Computer
- Printer
- Mobile Device
- Router
- Switch
- Firewall
- Storage device
- Projector
- Power supply
- FAX machine
- Scanner

Creating Asset Types

You can create additional asset types to augment the built-in types provided in the Asset Manager.

1. Select **Manage Asset Types** from the **Asset Management** menu.
   The Asset Types dialog displays.

2. Click **Add.**
   The New Asset Type dialog box displays.

3. In the **Name** field, enter the name of the new asset type you are creating.

4. Use the up and down arrows to scroll through and select an icon for the asset type.

5. Click **OK**.
   The Asset Type is added.

6. Repeat Steps 2-6 to add additional types.

7. Click **Close** when done.

Editing Asset Types

You can edit asset types you defined (pre-defined types cannot be edited):
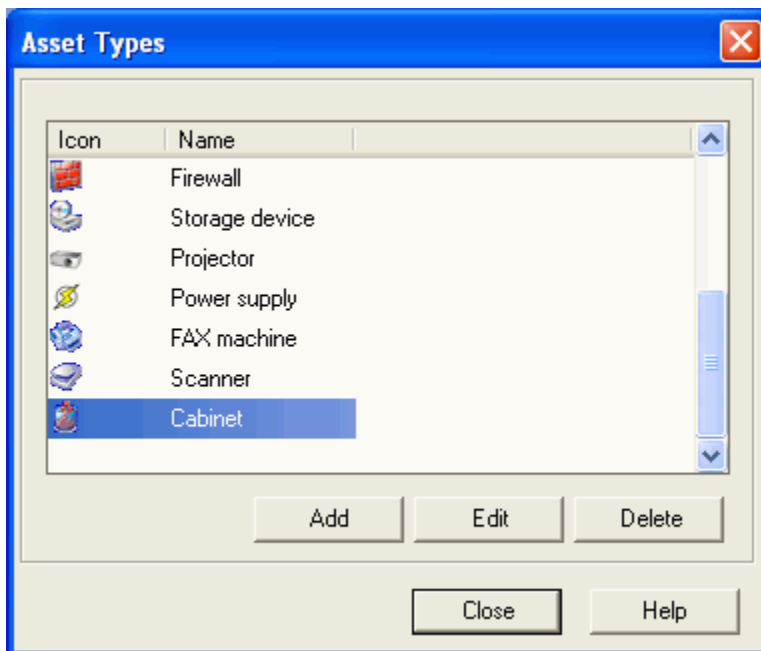
1. Select **Manage Asset Types** from the **Asset Management** menu.
   The Asset Types dialog displays.

2. Select an Asset Type to be edited

3. Click **Edit.**
   The Edit Asset Type dialog box displays.

4. In the **Name** field, enter the name of the new asset type you are creating.

5. Use the up and down arrows to scroll through and select an icon for the asset type.

6. Click **OK**.
   The Asset Type is changed.

7. Repeat Steps 2-6 to edit additional types.

8. Click **Close** when done.

Deleting Asset Types

You can delete asset types you defined (pre-defined types cannot be deleted):

1. Select **Manage Asset Types** from the **Asset Management** menu.
   The Asset Types dialog displays.

2. Select an Asset Type to be deleted

3. Click **Delete.**

4. If the Asset Type is in use, a warning will appear asking if you want to convert those Assets to the Generic Asset type. Press **Cancel** to abort the delete operation, or **OK** to change Types on those Assets.

5. Click **Close** when done.

Asset Types dialog

This dialog allows you to manage the Asset Types in the Channel. A wide variety of built-in types provided to which you can add new custom types as desired.
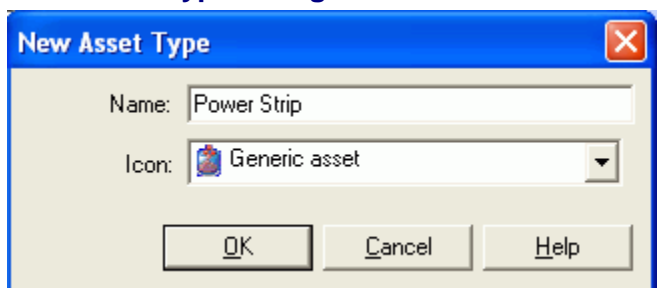
This dialog opens when you select **Asset Types** from the Asset Management menu, or when you click the **Configure Asset Types** link in the General Fields tab on the Asset Properties dialog.

The buttons on this dialog allow you to create, modify, and delete user-defined Asset Types:

- **Add**: Opens the New Asset Type dialog where you can create a new Asset Type.

- **Edit**: Opens the Edit Asset Type dialog where can change the name or type of the Asset Type.

- **Delete**: Deletes the selected Asset Type. If you attempt to delete a type that is in use, you will be given the option of converting those assets to the Generic Asset type.

Note   The built-in Asset Types (e.g., Computer, Firewall, etc.) cannot be modified.

New Asset Type dialog

This dialog allows you to define a new Asset Type. It opens when you press **Add** from the Asset Types dialog.

- **Name**: The name of the new Asset Type. This name must be unique.

- **Icon**: Select an icon for the new type..

Deleting Assets

To delete Scanned or Non-scannable Assets:

1. From the Prism Console, click the **Asset** tab.

2. Navigate to the Asset(s) you want to delete.

3. Click and highlight one or more asset you wish to delete. Hold the Shift key to select more than one.

4. Click the **Delete** key or right click and select **Delete**.
   A warning message displays.

5. Click **OK.**
   The asset is deleted.

> **Note** Although Scanned Assets can be deleted, if they remain connected to the network, Network Discovery may (depending on how it is configured) eventually re-scan the device and cause it to re-appear in the Scanned Assets list.

Reviewing Assets

All new Assets, whether created as a non-scannable Asset or detected on the network via Network Discovery, are considered "Un-reviewed." All un-reviewed Assets automatically appear in the **Un-reviewed Assets** node in the Assets tree. When marked as "Reviewed", they are removed from the **Un-reviewed Assets** list.

The **Un-reviewed Assets** node provides a way to quickly see all the newly created and discovered Assets so they can be assessed, edited, and grouped appropriately. Whenever there are un-reviewed Assets, the **Un-reviewed Assets** node will appear as 🔔 to provide a visual indication that there are Assets to be assessed.

To mark an Asset as reviewed, simply right-click it and select **Mark as Reviewed**. You can also set a reviewed Asset back to an Un-reviewed state by selecting **Mark as Un-reviewed**, after which it will return to the **Un-reviewed Assets** tree node. Alternately, open the Asset Properties dialog and check or un-check the **Reviewed** checkbox.

To mark all un-reviewed Assets as reviewed, right-click on the **Un-reviewed Assets** node and select **Mark All as Reviewed**.

When all Assets are reviewed, the **Un-reviewed Assets** node will have no members. In this case, the icon will appear as 📁 .

An Asset's reviewed status has no impact on the Asset itself.
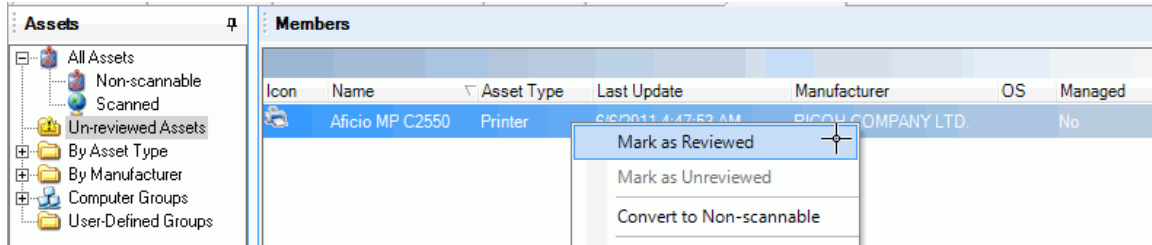
Converting Assets

Scanned Assets may, at times, need to be converted to Non-scannable Assets. For example, if you take a computer off the network but still want to track it as an asset, you could convert it to a non-scannable asset. This allows the properties defined on that Asset as well as its group memberships to be preserved.

To convert a Scanned Asset to a Non-scannable Asset:

1. Select the Scanned Asset to be converted.

2. Right-click and select **Convert to Non-scannable**. This creates a new Non-scannable Asset, and deletes the Scanned Asset.

The conversion preserves all the property values from the Scanned Asset, except for properties specific to Scanned Assets such as IP Address, which are discarded. All General Fields - including Name - and User-defined Fields are copied to the newly created Non-scannable Asset. In addition, all group memberships are preserved.

Merging Assets

A Scanned Asset and Non-scannable Asset can be merged into a single Scanned Asset. This supports the situation where a networkable asset must be tracked prior to being connected to the network.

For example, a printer may be purchased but stored for a period of time before being put online. Properties such as Asset Tag, Cost Center, and Owner may all be specified at the time the asset is acquired. Since the device is not yet connected, you can create a Non-scannable Asset for that printer and set its field values. When it is eventually connected to the network and is detected by Network Discovery, it will appear as a Scanned Asset. Rather than re-entering values, you can simply merge the Non-scannable "version" of the asset into its Scanned "version".

To merge a Non-scannable Asset into a Scanned Asset:

1. Select the **All Assets** node.

2. Holding the Ctrl key, select both the Non-scannable Asset and Scanned Asset that are to be merged into a single Asset. This may require sorting by different columns.

3. Right-click and select **Merge into Scanned**. This modifies the Scanned Asset and deletes the Non-scannable Asset.

The merge copies field values from the Non-scannable Asset into the Scanned Asset. Specifically, Purchase Date, Notes, and User-defined Field values will be copied from the Non-scannable Asset into the Scanned Asset. If both Assets have values set on any of these fields, a warning message will appear giving you the choice of overwriting the Scanned Asset's values or cancelling the merge operation.

Asset Groups

Asset Groups provide a way to organize your Assets. Asset Groups can contain a mixture of Non-scannable and Scanned Assets.

Creating an Asset Group

1. Select the **User-Defined Groups** node or any existing user-defined group on the Assets tab.

2. Right-click (or use the **Edit** menu) and select **Create Group**. The Add New Group dialog appears.

3. Enter the name of the new Asset Group.

4. Click **OK**. This creates a new Asset Group beneath the node selected in step 1.

Adding Members

There are several ways to add Assets to Asset Groups. You can just drag and drop Assets onto an Asset Group. Or you can use menus:

1. Select an Asset Group (or Asset)

2. Select **Add to Group** from the right-click menu or **Edit** menu. This opens the **Add Assets to Asset Group** dialog.

3. Select Assets to add to the group (or Asset Groups to which the Asset should be added).

4. Press OK.

Assets can belong to multiple groups.

Removing Members

1. Select the Asset Group containing the Asset to be removed

2. Select the Asset to be removed.

3. Select **Remove from Group** from the right-click menu or **Edit** menu.

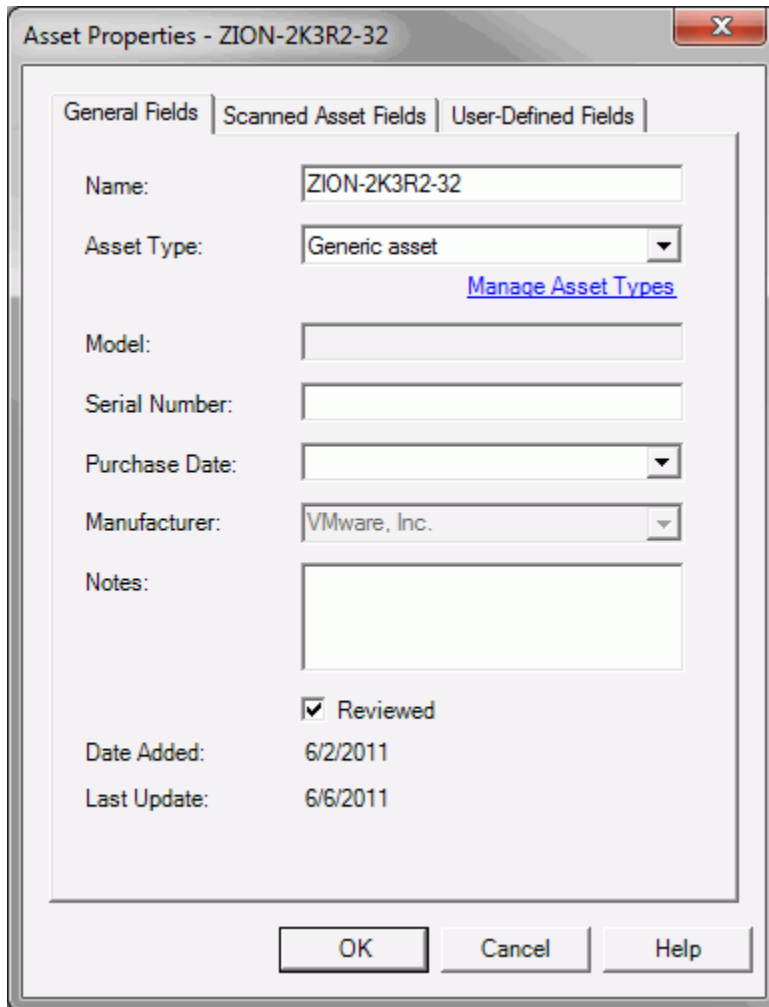This only removes the Asset from the Asset Group; it does not delete the Asset.

Deleting an Asset Group

1. Select the group you want to delete.

2. Right-click (or use the **Edit** menu) and select **Delete**.

Deleting an Asset Group does not delete the Assets in that group.

Asset Properties

General Fields tab (Asset Properties)

The General Fields tab displays properties common to both Scanned and Non-scannable Assets. It is visible in the both the Asset Properties dialog and the Create Asset dialog.

The Asset Properties dialog allows you to view and modify properties associated with one or more Assets. It opens when you select one or more Assets and either right-click or open the **Edit** menu and select **Properties.**

The Create Asset dialog opens when you select **Create Asset** from the Asset Management menu or by right-clicking on the All Assets or Non-scannable tree nodes on the Assets tab.

Properties on this tab include:

- **Name**: Name of the asset. Names need not be unique, and they can be empty.

- **Asset Type**: Type of the Asset - e.g., Computer, Power Supply, etc. To view and modify the available Asset Types, click the Configure Asset Types link under the dropdown list.

- **Model**: The model designation for the Asset. This is a read-only property for Scanned Assets, as the Model is determined as part of the scan.

- **Serial Number**: The serial number for the Asset. If multiple Assets are selected, this field is read-only and empty.

- **Purchase Date**: The date the Asset was purchased. If the Purchase Date has not been set previously, this value defaults to today's date.

- **Manufacturer**: The manufacturer of the Asset.

    - **Scanned Assets**: This is a read-only property for Scanned Assets, as the Manufacturer is specified by IEEE's Organizationally Unique Identifiers (OUI) standard based on the scanned information - in particular, the device's MAC address.

    - **Non-scannable Assets**: This field is editable. The dropdown list consists of all the manufacturers across all current Assets. Selecting the manufacturer from this list ensures that the Asset will appear in the correct group under the **By Manufacturer** tree node.

- **Notes**: This property is for storing arbitrary information about the Asset.

- **Reviewed**: This checkbox indicates whether or not the Asset has been reviewed. Un-reviewed Assets are shown when the **Un-reviewed Assets** node is selected in the tree.

- **Date Added**: A read-only property indicating when the Asset was first added to the Channel. This is not visible in the Create Asset dialog.

- **Last Update**: A read-only property indicating when the Asset was last modified. This is not visible in the Create Asset dialog.

Note If multiple Assets are selected, some values in the tab will display a value of "[multiple values]" indicating that the Assets selected have different values for the property.

Scanned Asset Fields tab (Asset Properties)
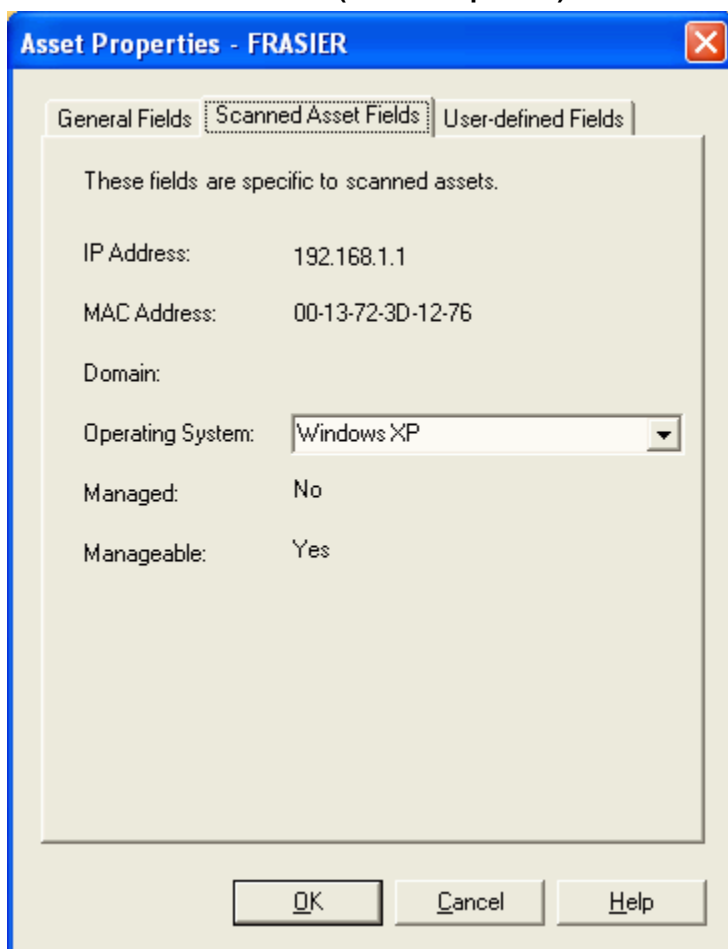
The Scanned Asset Fields tab in the Asset Properties dialog displays properties specific to Scanned Assets. This tab is not available for Non-scannable Assets.
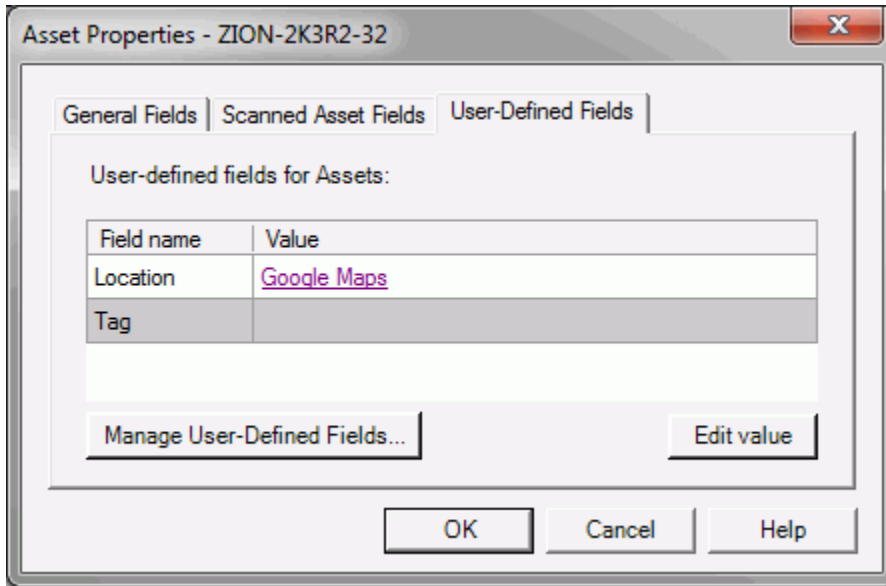
The Asset Properties dialog allows you to view and modify properties associated with one or more Assets. It opens when you select one or more Assets and either right-click or open the **Edit** menu and select **Properties.**

The Properties on this tab are read-only, except where noted. They include:

- **IP Address**: The IP address of the Scanned Asset.

- **MAC Address**: The MAC address of the Asset.

- **Domain**: The AD Domain of the Asset.

- **Operating System**: The Asset's operating system. This field is modifiable by the user.

- **Managed**: "Yes" means the Asset is a computer that is currently managed in the Channel. A Scanned Asset can be managed by using the Manage Computer menu option - available by right-clicking on a manageable Scanned Asset in the Assets tab -- or by any other means of client installation, such as direct install or subscription file.

- **Manageable**: "Yes" means the Asset is a computer that can be managed.

Note If multiple Assets are selected, some values in the tab will display a value of "[multiple values]" indicating that the Assets selected have different values for the property.

User-defined Fields tab (Asset Properties)

The Asset Properties dialog allows you to view and modify properties associated with one or more Assets. It opens when you select one or more Assets and either right-click or open the **Edit** menu and select **Properties.**

The User-defined Fields tab in the Asset Properties dialog displays user-defined fields associated with Assets.

To edit the field's value, open the Edit User-defined Field Value dialog by selecting the row of the field you want to edit and doing one of the following:

1. Press the **Edit value** button;

2. Double-click in the Value cell;

3. Right-click in the Value cell and select **Edit value**.

In the Edit User-defined Field Value dialog you can set the field's value and optionally make it a hyperlink.

Press the Manage User-Defined Fields button to create and manage the available user-defined fields for Assets.

Note A value of "[multiple values]" indicates that the selected Assets have different values for the property. Any changes you make in the cell will get saved for all selected Assets, otherwise their values remain unchanged.

Network Discovery

Network Discovery: Overview

With Asset Manager's Network Discovery feature, administrators can scan their networks and discover all connected devices such as computers, printers, and scanners connected to their network. Network Discovery obtains information about these devices, including IP address, MAC address, manufacturer, and type. It also saves the last contact time, which allows administrators to determine which devices entered or left the network over a period of time.

Network scanning is performed by *Scan Agents*. Scan agents are simply existing Clients designated to collect information from the network. Each Scan Agent scans a specific set or range of IP addresses. The network scan is passive, and imposes a very low overhead on system resources. It is usually configured to run periodically, with scan results being updated in the Channel with information as devices enter and leave the network. The discovered devices appear in Assets tab as **Scanned Assets**.

To initiate network discovery, simply configure the scan. This is done using the **Network Scan Configuration** dialog, which you can open by selecting the **Asset Management | Configure Network Scan** menu item. The dialog allows you to configure the scan agents, each of which is given a range of IP addresses to scan, the credentials needed (if any) to enable the scan, and scheduling parameters.

Each Scanned Asset has a variety of properties that you can view and, in some cases, modify:

Editable Fields
- **Name**: Name of the device. Names may not be unique, and may be empty if the scan cannot extract the device's name.
- **Asset Type**: Type of the device - e.g., Computer, Power Supply, Printer, etc.
- **Serial Number**
- **Purchase Date**
- **Notes**
- **Reviewed**
- **Operating System**
- **User-defined Fields:** These fields can contain any kind of information you choose, such as Asset Tag or Owner or Building.

Read-only Fields
- **Model**
- **Manufacturer**: The device manufacturer, as specified by IEEE's Organizationally Unique Identifiers (OUI) standard.
- **Date Added**: Date when the device was first detected.
- **Last Update**: Date when the device's information was last modified.
- **IP Address**
- **MAC Address**
- **Domain**
- **Managed**: "Yes" means the Asset is a computer that is currently managed in the Channel.
- **Manageable**: "Yes" means the Asset is a computer that can be managed.
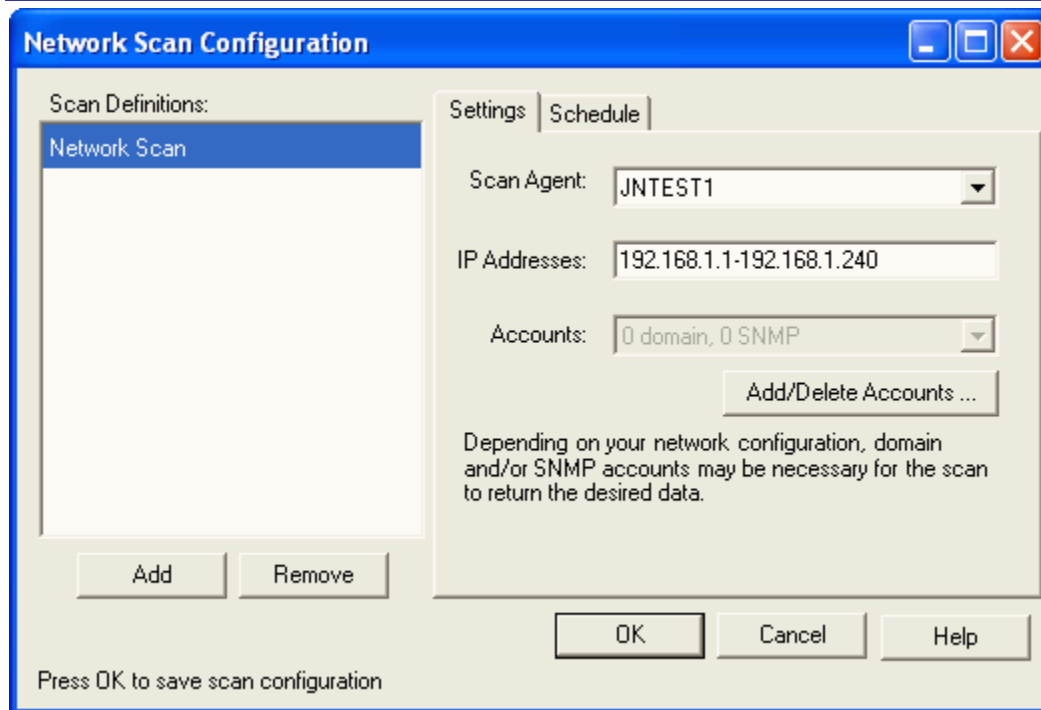
Configuring a Network Scan

The network scan configuration is specified through the Network Scan Configuration dialog. In this dialog, you define one or more **Scan Definitions**, each of which defines a set of IP addresses to scan and identifies a Client (Scan Agent) to do the scan.

1. Open the Network Scan Configuration dialog. This can be done by selecting **Configure Network Scan** from the **Asset Management** menu or by right-clicking on the **Scanned Assets** node in the Assets tab.

2. Click **Add** to add a new Scan Definition. The new Scan Definition, with a default name, appears in the list and is highlighted. Modify the name as desired.

3. Select the **Settings** tab.

4. In the **Scan Agent** drop-down list, select a Client. This Client (Scan Agent) will scan the IP addresses specified in the next step.

5. Enter the **IP Addresses** that the Scan Agent should probe. For example, 192.168.1.1-192.168.1.200. You can specify a range or use wildcards.

6. In the **Accounts** drop-down list, check the accounts this Scan Agent should use when performing the scan of the IP addresses. Press the **Add/Delete Accounts** button to open the Accounts dialog where you can enter both Domain and SNMP account information.

7. Select the **Schedule** tab.

8. Set the **Rescan**, **Verify data**, and **Reset scan** frequencies (see Network Scan Configuration for more information). The scanning functionality imposes very little overhead on the system, so the default settings may suffice even in a production environment.

9. Repeat steps 2-8 to create additional **Scan Definitions** as needed for your network.

10. Press **OK**. The Scan Agents will immediately begin scanning the network according to your settings.

As devices are scanned, results from the Scan Agents appear in the Assets tab.

Network Scan Configuration dialog

Use the **Network Scan Configuration** dialog to configure a network scan. Configuring a network scan involves specifying one or more **Scan Definitions**.

This dialog opens when you select **Configure Network Scan** from either the **Asset Management** menu or by right-clicking on the **Scanned Assets** tree node.

Scan Definition

A **Scan Definition** defines a set of IP addresses to be scanned, typically a subnet. The structure of your network will define how many Scan Definitions are required to scan your entire network. Each scan definition specifies the following information:

- **Name**: This identifies the Scan Definition. It is a name of your choosing, used for convenience only.
- **Scan Agent**: The Client that will execute the defined scan.
- **IP range**: The range of IP address the agent should scan.
- **Credentials**: The Windows and SNMP credentials required to do the scan.
- **Schedule**: Settings that define how often the Agent should scan the IP range.

You define a Scan Definition through the **Settings** and **Schedule** tabs. The **Scan Definitions** list box displays the current Scan Definitions. Select a Scan Definition to see its Settings and Schedule. The **Add** and **Remove** buttons are used to create and delete Scan Definitions, respectively:

- **Add**: Add a new Scan Definition. By default, scan definitions are named "Network Scan", "Network Scan 1", etc. To rename a Scan Definition, simply select it in the list and enter a new name.
- **Remove**: Removes the selected Scan Definition from the Scan Configuration. The Scan Agent that had been associated with the Scan Definition will no longer perform the scan.

Settings Tab

The **Settings** tab specifies the Scan Agent, the IP range, and the permissions used for the currently selected Scan Definition:

- **Scan Agent**: The Client that will scan a specified set of IP addresses. Hence this client will normally be a computer within that IP address range.

- **IP Addresses**: The range of IP addresses the Scan Agent should scan. This can be expressed as:

  - Single IP address: 192.168.1.45
  - Comma separated list of IP addresses: 192.168.1.3, 192.168.1.76
  - A range of IP addresses, separated by a dash ('-'): 192.168.1.3-192.168.1.76
  - A set of IP address using the wildcard character '*': 192.168.1.*
  - A combination of the above: 192.168.1.3-192.168.1.76, 192.168.1.234

- **Accounts**: Open the drop-down list and check the specific accounts needed (zero, one, or more) for the Scan Agent to perform the scan against the specified set of IP addresses. The text area shows the number of Domain and SNMP accounts used by the Scan Agent.

- **Add/Delete Accounts**: Press this button to open the Accounts dialog. In this dialog, you establish Domain and SNMP credentials that can be used by Scan Agents to enable them to perform the scan. The accounts defined in this dialog are available to all Scan Definitions via the **Accounts** drop-down list.

Schedule Tab

The **Schedule** tab specifies the scheduling parameters for the currently selected Scan Definition.

☑**Rescan**: This defines how often the address range should be scanned. The results returned depend on whether the device had been seen previously:

> **Devices detected previously**: No interrogation; only the "last contact time" is updated.

> **New devices**: A full interrogation is performed.

☑**Verify data**: This setting defines how frequently "fresh" data should be retrieved:

> **Devices detected previously**: A full interrogation is performed (and results returned only if different than previous scan)

> **New devices**: A full interrogation is performed.

☑**Reset Scan**: All detection information is reset and a network scan is performed as if for the first time. This can also be initiated on-demand.

For each type of schedule, you can select the frequency with which it runs.

Note   The "continuously" setting should only be used for testing.

Saving and Cancelling

After you have completed configuring network discovery by creating and modifying Scan Definitions, scanning can be initiated by pressing the **OK** button:

- **OK**: Pressing the **OK** button saves the current Scan Configuration - that is, all the Scan Definitions. If the list is empty, network scanning will stop. Otherwise, pressing OK will initiate a network scan. All scan agents will begin scanning their defined IP ranges.

- **Cancel**: Pressing Cancel closes the dialog without saving changes. Pressing Cancel will not stop network discovery; it only closes the dialog without saving changes.

Accounts dialog
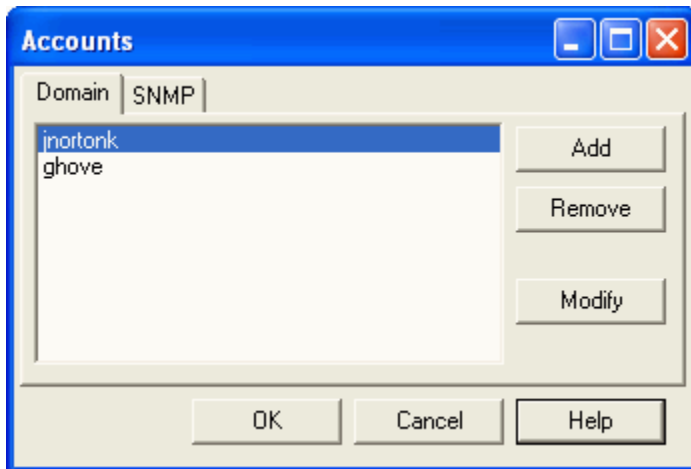
The Accounts dialog is where you specify the accounts that can be used by Scan Agents to perform network scans. Depending on your network configuration, zero, one, or more Domain and/or SNMP accounts may be required to obtain full information about devices during a scan. The accounts configured in this dialog can be used by any or all Scan Agents.

This dialog opens when you press the **Add/Delete Accounts** button on the Network Scan Configuration dialog.

- **Add**: Opens the **Set Credentials** dialog.
    - For the Domain tab: Enter the user's name and password.
    - For the SNMP tab: Enter a label and the community string. The label identifies the community string in the SNMP tab. The community string is the client access control password required to access SNMP information in your network.
- **Remove**: Removes the selected account.
- **Modify**: Opens the **Set Credentials** dialog for the selected account for modification.

Starting and Stopping a Network Scan

Network Discovery is a continuous, background activity. Therefore, once configured, it will run continuously.

Starting Network Discovery

Start network scanning by configuring it:

1. Open the Network Scan Configuration dialog from either the **Asset Management** menu or by right-clicking on the **Scanned Assets** node in the Assets tab.
2. Configure one or more Scan Definitions.
3. Press **OK**.

The network scan begins immediately after pressing the **OK** button, assuming one or more Scan Definitions have been created. The individual Scan Agents continue scanning per each Scan Definition's schedule. By default, they rescan hourly.

Stopping Network Discovery

Scanning ceases when all Scan Definitions have been deleted.

1. Open the Network Scan Configuration dialog from either the **Asset Management** menu or by right-clicking on the **Scanned Assets** node in the Assets tab.

2. Remove all Scan Definitions.

3. Press **OK**.

Forcing a Rescan

At times, it may be convenient to force an on-demand, full re-scan, separate from any rescan specified per the Scan Definition schedules. To do this, select **Request Complete Rescan** from the **Asset Management** menu or by right-clicking on the **Scanned Asset** node on the Assets tab. This tells each Scan Agent to initiate a fresh scan, independent of the schedule.

Viewing Network Scan Configuration Report

The Network Scan Configuration report displays the status of all the Scan Agents - their configuration, last scan, etc.

To view the Network Scan Configuration Report:

1. Click the **Assets** tab.

2. Right-click on the **Scanned Assets** tree node in the left pane and then select **Network Scan Configuration Report**.
   The Network Scan Configuration Report window displays.

Customizing with User-Defined Fields

User-defined Fields

User-defined fields are string-valued properties you can define and use to extend and customize Asset Manager. For example, a user-defined field called "Location" could be created for inventoried hardware to store the location of each hardware item.
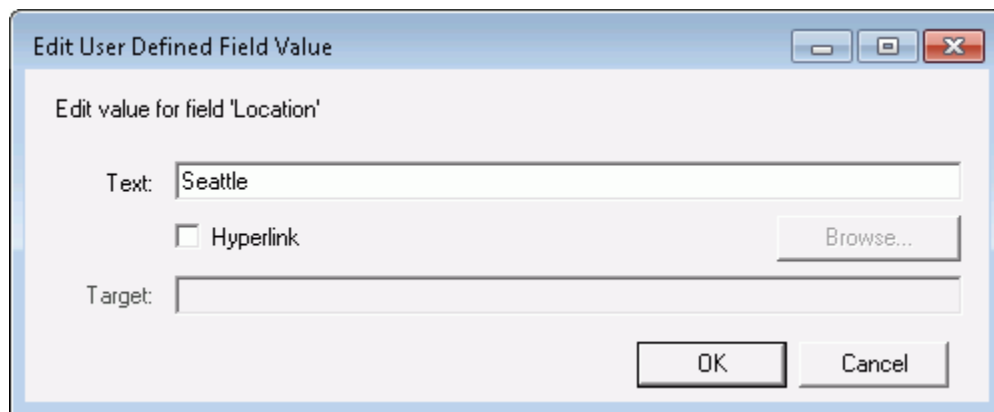
User-defined fields can be associated with:

- Computers: Inventoried hardware - the managed computers that have had a hardware inventory performed.
- License units: Inventoried software - the license units that have been identified through a software inventory.
- Assets:
    - Non-scannable Assets - Assets that are not on a network.
    - Scanned Assets - Devices that have been detected on your network.

A *user-defined field* consists of a name and an optional description. They are defined in the User-defined Fields dialog. User-defined fields are defined separately for inventoried hardware (computers), inventoried software (license units), and Assets (non-scannable and scanned Assets share the same set of user-defined fields).
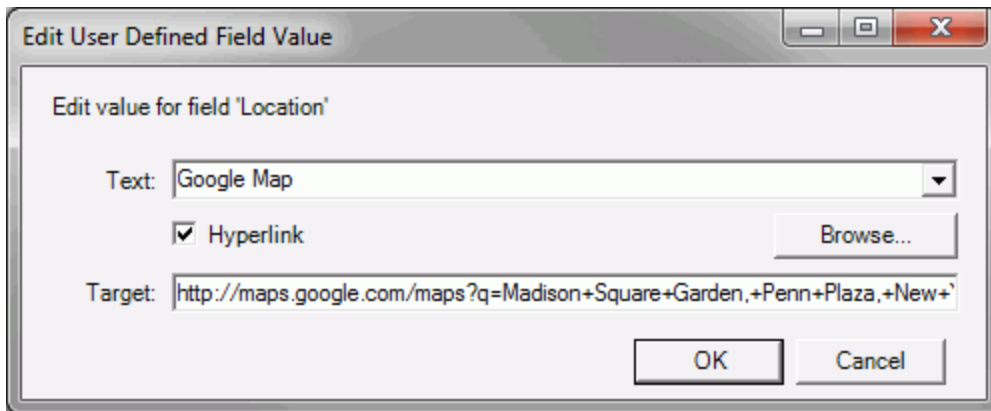
User-defined Field Values

User-defined field values are string-valued. User-defined field *values* can be viewed in the detail panes in the console, and can be used in reports. Values for user-defined fields may also be imported from an external source such as a spreadsheet.

User-defined field values are set using the Edit User-defined Field Value dialog, which opens when you double-click a UDF value cell or select **Edit value** through the right-click menu in the cell.


Each value can optionally be a hyperlink, with a display value separate from a target (e.g., URL). For example, the Support Site field associated with an inventoried Dell computer could have a display value of "Dell Support" and a URL of "http://www.dell.com/support".

The hyperlink values appear as hyperlinks in the console and property dialogs. Simply click the link to open the target.

> **Note** If sorting by user-defined field values is desired, the syntax for values entered must be carefully specified. For example, date information should be entered as YYYYMMDD.

Add User-defined Fields Dialog
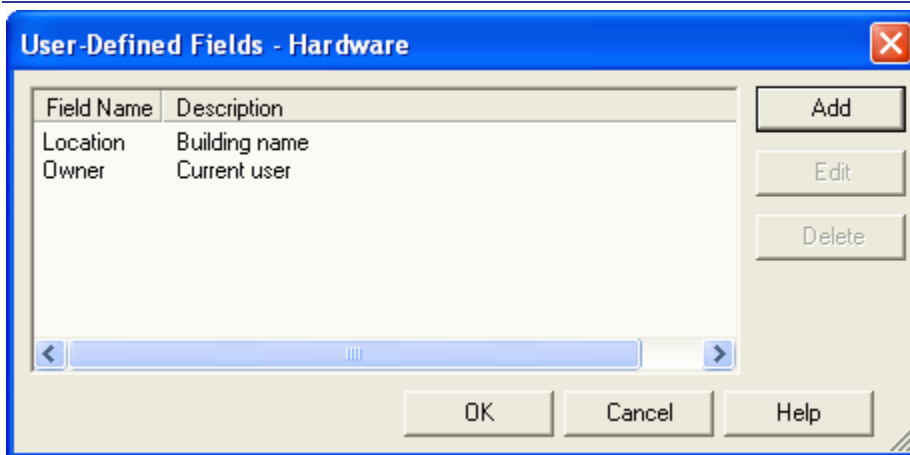
In this dialog box, you can manage user-defined fields for hardware, license units, or Assets. A user-defined field consists of a name and an optional description. This dialog allows the administrator to create, modify, and delete user-defined fields.

To open this dialog, do any of the following:

1. For user-defined fields for Assets:

    - Select the **Asset Management | User-defined Fields | Assets** menu item;

    - Press the **User-Defined Fields** button in the **Asset Properties** dialog (User-defined Fields tab).

    - **Computer Properties** dialog (User-defined Fields tab).

    - **License Unit Properties** dialog (User-defined Fields tab).

2. For user-defined fields for License Units:

    - Select the **Asset Management | User-defined Fields | License Units** menu item;

- Press the **User-Defined Fields** button in the **License Unit Properties** dialog (User-defined Fields tab).

3. For user-defined fields for Hardware:

- Select the **Asset Management | User-defined Fields | Hardware** menu item;

- Right-click within the Hardware tab;

- Press the **User-Defined Fields** button in the **Computer Properties** dialog (User-defined Fields tab).

View user-defined fields

Existing user-defined fields are listed in the list box. These are specific to either Hardware, License Units, or Assets, as indicated in the title bar.

Add a user-defined field

Click the **Add** button to open the Add User-defined Field dialog. Enter the name of the field and an optional description, and then press OK.

Change the name or description of a user-defined field

Click the **Edit** button to change the name or description of a user-defined field.

Delete a user-defined field

When it is no longer useful, click the **Delete** button to remove a user-defined field.

Note: Deleting a user-defined field permanently removes the field and all associated data.

Edit User-defined Field Value dialog
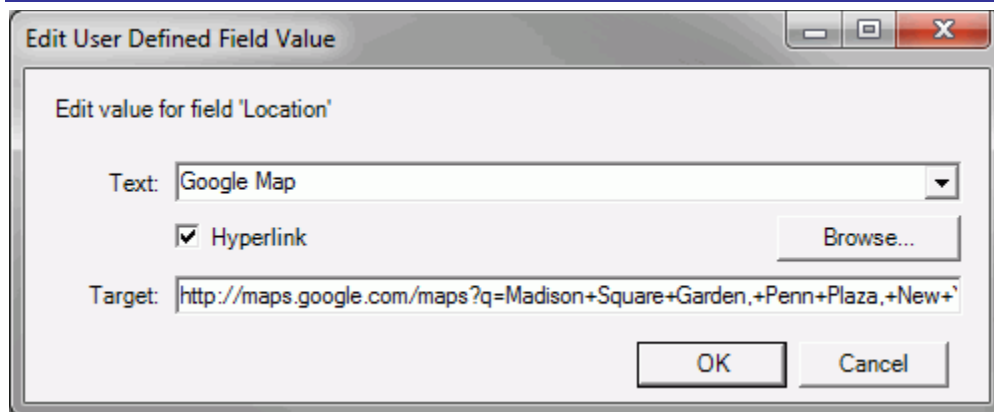
User-defined field values are set using the Edit User-defined Field Value dialog. The value has a display portion and an optional hyperlink.

This dialog appears when you press **Edit value** in a properties dialog (or double-click a user-defined field value cell or right-click in the cell and select "Edit value").

Text

Enter the text to be displayed in the **Text** field. Optionally, you can select from the dropdown list, which contains all values that have been used for the specific user-defined field.

> **Note:** The field's value will appear as "[multiple values]" if the selected items had different values for the fields. Modifying this value will modify the value for all selected items; otherwise, their values will remain unchanged.

Target

To make it a hyperlink, check the **Hyperlink** checkbox and enter the target. You can click **Browse** to link to a local target, such as a local PDF file. Or simply enter a URL: for example, "http://www.google.com".

> **Note:** If the field's value is a hyperlink, when editing the value be sure not to double-click the link itself (or the target will be opened).

User-defined Fields for Hardware

User-defined fields for hardware allow the administrator to associate additional information with each computer, beyond what is collected automatically. For example, a room number could be associated with each computer.

Managing User-defined Fields

To create, edit, and delete user-defined fields for inventoried computers:

1. Select **Asset Management | User-defined Fields | Hardware** to open the User-defined Fields - Hardware dialog. This dialog may also be opened by right-clicking within the Hardware tab. To do this, a computer or group with inventory results must first be selected.

2. Then:

   - **To Add**: Press **Add** to add a new user-defined field. The **Add User-Defined Field** dialog opens. Enter the field name and, optionally, its description. Then press **OK**.

   - **To Edit**: Select a user-defined field and press **Edit** to edit its name and description in the **Edit User-Defined Field** dialog. Then press **OK**.

   - **To Delete**: Select a user-defined field and press **Delete** to delete a user-defined field. Deleting a field will remove all of its values.

3. Press **OK** to close the dialog.

Editing Values

Editing values for a computer's user-defined fields is done in the Computer properties dialog:

1. Select one or more computers for which you wish to set user-defined field values.

2. Right-click and select **Properties** (or select **Properties** from the **Edit** menu).

3. Select the User-Defined Fields tab.

4. Open the Edit User-defined Field Value dialog by selecting the row of the field you want to edit and doing one of the following:

   1. Press the **Edit value** button;

   2. Double-click in the Value cell;

   3. Right-click in the Value cell and select **Edit value**.

5. In the Edit User-defined Field Value dialog, edit the value and optionally make the value into a hyperlink. Note the following:

1. If multiple Computers are selected and they have different values for a given field, the field's value will appear as "[multiple values]". Modifying this value will modify the value for all selected Computers.

2. If the field's value is a hyperlink, to edit the value be sure not to double-click the link itself (or the target will be opened).

6. Repeat the previous step for each field to be edited.

7. Press **OK**.

Importing Values

Values for hardware user-defined fields can be imported from an external source, such as a .csv file or Excel spreadsheet. This is done using the Import Asset Management Data wizard, which is accessed through the **Asset Management | Import Data** menu option.

Generating Reports

Hardware reports can include user-defined fields.

1. Hardware - All Details: User-defined fields are listed along with other attributes within the category named **User-defined**.

2. Hardware Summary: User-defined fields are added simply by using the **More Fields** dialog within the report window.

User-defined Fields for Software

User-defined fields for license units allow the administrator to associate additional information with each license unit beyond what is collected automatically. For example, an organizational entity could be associated with each license unit.

Managing User-defined Fields

To create, edit, and delete user-defined fields for license units:

1. Select **Asset Management | User-defined Fields | License Units** to open the User-defined Field - License Units dialog.

2. Then:
   - **To Add**: Press **Add** to add a new user-defined field. The **Add User-Defined Field** dialog opens. Enter the field name and, optionally, its description. Then press **OK**.
   - **To Edit**: Select a user-defined field and press **Edit** to edit its name and description in the **Edit User-Defined Field** dialog. Then press **OK**.
   - **To Delete**: Select a user-defined field and press **Delete** to delete a user-defined field. Deleting a field will remove all of its values.

3. Press **OK** to close the dialog.

Editing Values

Editing values for a license unit's user-defined fields is done through the License Unit properties dialog:

1. Select the License Units tab.

2. Select the desired License Unit(s) for which you wish to set user-defined field values:
   1. Single: Select the license unit in the tree, Members tab, or Licenses tab.
   2. Multiple: In the **Members** tab (or **Licenses** tab) multi-select the license units.

3. Right-click and select **Properties** (or select **Properties** from the **Edit** menu).

4. Select the User-Defined Fields tab.

5. Open the Edit User-defined Field Value dialog by selecting the row of the field you want to edit and doing one of the following:

    1. Press the **Edit value** button;

    2. Double-click in the Value cell;

    3. Right-click in the Value cell and select **Edit value**.

6. In the Edit User-defined Field Value dialog, edit the value and optionally make the value into a hyperlink.

7. Repeat the previous step for each field to be edited.

8. Press **OK**.

Importing Values

Values for software user-defined fields can be imported from an external source, such as a .csv file or Excel spreadsheet. This is done using the Import Asset Management Data wizard, which is accessed through the **Asset Management | Import Data** menu option.

Generating Reports

The following License Unit reports can include user-defined fields

1. Purchased Software Summary: User-defined fields are added by using the **More Fields** dialog within the report window.

2. Software License Compliance: User-defined fields are added by using the **More Fields** dialog within the report window.

User-defined Fields for Assets

Asset user-defined fields allow the administrator to associate additional information with each Asset beyond the built in properties such as Purchase Date and Model. For example, you can define an "Asset Tag" field to hold an Asset's tag. All Scanned and Non-scannable Assets would then have this field, which is visible in the Asset's properties.

Managing User-defined Fields

To create, edit, and delete user-defined fields for Assets:

1. Select **Asset Management | User-defined Fields | Assets** to open the User-defined Field - Assets dialog.

2. Then:

    ▪ **To Add**: Press **Add** to add a new user-defined field. The **Add User-Defined Field** dialog opens. Enter the field name and, optionally, its description. Then press **OK**.

    ▪ **To Edit**: Select a user-defined field and press **Edit** to edit its name and description in the **Edit User-Defined Field** dialog. Then press **OK**.

    ▪ **To Delete**: Select a user-defined field and press **Delete** to delete a user-defined field. Deleting a field will remove all of its values.

3. Press **OK** to close the dialog.

Editing Values

To set the value for an existing user-defined field for a specific Asset, follow these steps:

1. From the Assets tab, select one or more Assets.

2. Right-click and select **Properties** to open the Asset Properties dialog.

3. Select the User-defined Fields tab.

4. Open the Edit User-defined Field Value dialog by selecting the row of the field you want to edit and doing one of the following:

   1. Press the **Edit value** button;

   2. Double-click in the Value cell;

   3. Right-click in the Value cell and select **Edit value**.

5. In the Edit User-defined Field Value dialog, edit the value and optionally make the value into a hyperlink.

6. Repeat the previous step for each field to be edited.

7. Press **OK**.

Viewing Values

Values for user-defined fields are available as columns under the Assets tab. Right-click in the column header and select **More Fields**. All Asset user-defined fields are available in this list.

Importing Values

Values for Asset user-defined fields can be imported from an external source, such as a .csv file or Excel spreadsheet. This is done using the Import Asset Management Data wizard, which is accessed through the **Asset Management | Import Data** menu option or by right-clicking on a tree node and selecting **Import Data**.

Importing Data

Importing Asset Management Data

User-defined fields and other data associated with inventoried hardware and license units as well as Non-scannable and Scanned Assets can be imported into Asset Manager from an external source, such as a text file (.csv) or Excel spreadsheet. Asset data import is done using the Import Data Wizard, which opens when you select **Asset Management | Import Data** (or **File | Import | Asset Data**).

For example, you may have created some user-defined fields for you inventoried hardware - say, building number and cost center. You also have a spreadsheet with 3 columns of data: computer name, building number, and cost center, with one row per computer. Using the Import Data capability, you import the building number and cost center for each computer in your channel.

There are four types of targets for which you can import data:

1. Inventoried Hardware: These are managed computers for which a Hardware Inventory has been run.

2. License Units: These are license units that have been detected through a Software Inventory on your managed computers.

3. Non-scannable Assets: New Non-scannable Assets you want to add.

4. Scanned Assets: Assets that have been scanned via the Network Discovery feature.

Import Dialog Wizard

Select Data Type dialog (Import Data)

In this dialog you specify the type of target for which you wish to import data: Inventoried Hardware, License Units, Non-scannable Assets, or Scanned Assets.

This dialog is part of the Importing Asset Data wizard, which opens when you select **Asset Management | Import Data**.

Options

- Inventoried Hardware: These are managed computers for which a Hardware Inventory has been run. You can import data for the user-defined fields associated with Hardware.
- License Units: These are license units that have been detected through a Software Inventory on your managed computers. You can import data for user-defined fields associated with License Units, as well as purchase order data and serial number data.
- Non-scannable Assets: These are new Non-scannable Assets you want to add to your Channel. Each row in the input file corresponds to a new Non-scannable Asset that will be created. You can import user-defined fields associated with Assets as well as other properties such as Purchase Date and Model.
- Scanned Assets: Assets that have been scanned via the Network Discovery feature. You can import data for user-defined fields associated with Assets as well as other properties such as Asset Type and Purchase Date.

Press **Next** after you select the desired file to advance to the Select File dialog.

Press **Cancel** to end the wizard without importing any data.

Select File dialog (Import Data)

In this dialog you specify the file from which you wish to import values for the type of data designated in the title bar (Inventoried Hardware, License Units, Non-scannable Assets, or Scanned Assets).

This dialog is part of the Importing Asset Data wizard, which opens when you select **Asset Management | Import Data**. This dialog also opens when you select **Import Data** by right-clicking on the Non-scannable Assets node or Scanned Assets node.

Options

- **Type of File to Import**: Select the type of file you wish to import from the dropdown list. Supported file types include various types of Excel workbooks as well as text files.

- **File Name**: Enter the filename here, or use the Browse button to browse to a file of the designated type.

- **First row of import data contains column names**:

  ☑ With this option set, the first row in the file is assumed to contain the column names. Subsequent rows contain data.

  ☐ With this option cleared, there are no explicit column names. Each row is assumed to contain data, and the columns are identified sequentially starting with F1 (this being the first column), F2, F3, etc.

Press **Next** after you select the desired file to advance to the Select Key dialog.

Press **Cancel** to end the wizard without importing any data.

Spreadsheet Format

- Non-empty values that are imported will overwrite existing values in the database. For example, if a purchase order number on a license unit has a license count of 7, and you import a count of 3 for that same purchase order, the resulting value will be 3.
- Empty cells are ignored (even if the value column has been selected for import).
- Empty rows are ignored.

Select Key dialog (Import Data)

In this dialog you specify the data column in the external data source corresponding to a specific property that identifies the assets.

This dialog is part of the Importing Asset Data wizard, which opens when you select **Asset Management | Import Data**.

To specify the key column, follow these steps:

1. In the **Select Sheet** drop down, select the worksheet containing values to be imported. For text files, the dropdown will simply show the filename.

2. In the **Select Key Column** list box, select the column name containing the key for the target being imported - e.g., name. If the first row of the file contained column names, those are the values displayed in the list box. Otherwise, the columns are identified sequentially beginning with F1 as the first column.

   Note If you are using IP address as the key and are importing from a .csv file, the IP address values in the file must be enclosed in quotes ("). Alternately, an .xls or .xlsx file can be used.

3. In the **Select Field** drop down list box, select the field that corresponds to the selected column name. For Inventoried Hardware and Scanned Assets, the dropdown allows you

to select Name, IP, or MAC. For License Units and Non-scannable Assets, the only choice is Name.

4. Press **Next** to continue to the Select Values dialog. Press **Cancel** to end the wizard without importing any data.

Select Values dialog

In this dialog you specify the columns in the external data source from which you wish to import values. You can specify one or more columns to import.
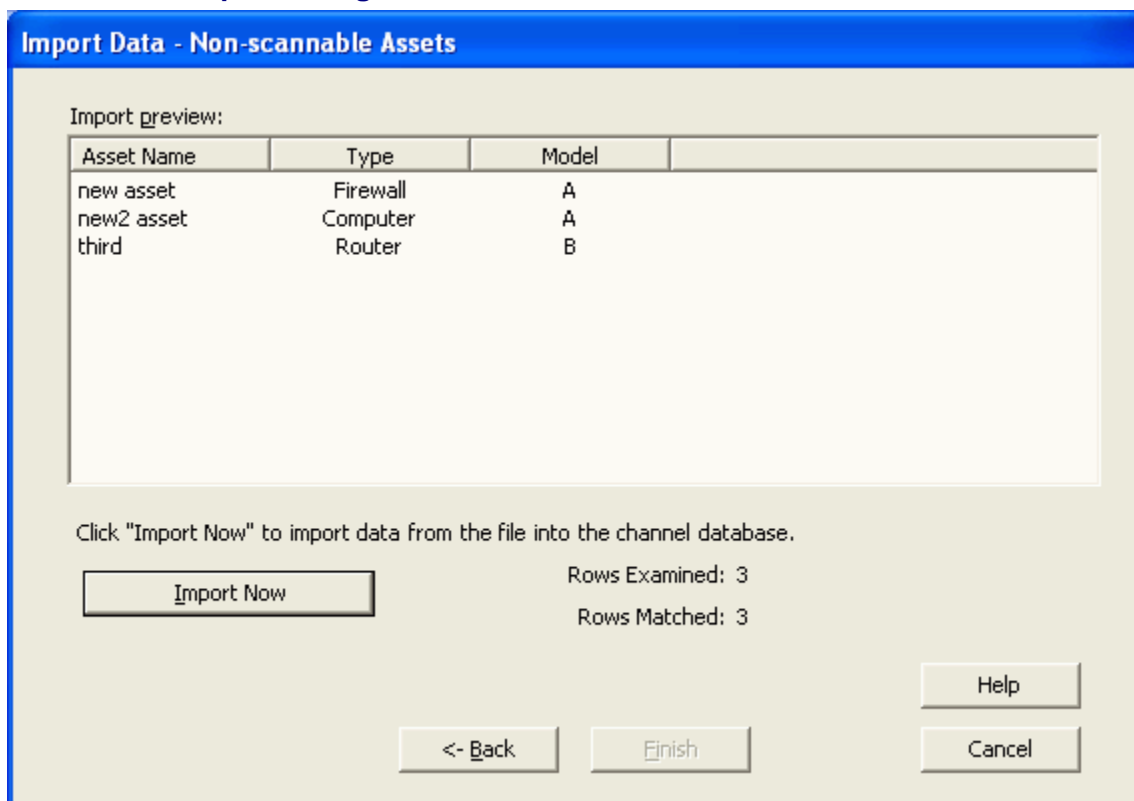
This dialog is part of the Importing Asset Data wizard, which opens when you select **Asset Management | Import Data**.

Follow these steps to specify the values to be imported:

1. In the **Import Columns** list box, select the name of a column in the external data source containing data values to be imported.

2. In the **Fields** list box, select the property corresponding to the column selected in step 1.

   - For Inventoried Hardware, the **User-defined Fields** list consists of the user-defined fields associated with hardware assets.

   - For License Units, the **License Unit Fields** list consists of the user-defined fields associated with license units and other specific properties such as Serial Number and Owner.

   - For Non-scannable Assets, the **Asset Fields** list consists of all modifiable properties (such as Purchase Date and Notes) as well as all user-defined fields associated with Assets.

- For Scanned Assets, the **Scanned Asset Fields** list consists of all modifiable properties (Asset Type, Purchase Date and Notes) as well as all user-defined fields associated with Assets.

3. Press the **Add** button to record this column-to-property mapping in the **Matched Columns** list box on the right. This list box displays all the columns whose data will be imported and the properties into which they will be imported. To remove a mapping, select it and press **Remove**.

4. Repeat steps 1-3 for additional columns you wish to import.

5. Press **Next** to advance to the Preview and Import dialog. Press **Cancel** to end the wizard without importing any data.

Preview and Import dialog

This dialog displays a preview containing a small sample of rows that would be imported. This allows you to verify the columns you have chosen prior to actually importing the values.

This dialog is part of the Importing Asset Data wizard, which opens when you select **Asset Management | Import Data**.

After verifying the results in the Import Preview area, press **Import Now** to import the values from the file. Select **Cancel** to end the wizard without making changes to your database.

Caution Pressing **Import Now** will immediately update your database; this action cannot be cancelled. Also, imported values will overwrite existing values.

Press **Finish** to close the wizard.

Importing Data for Inventoried Hardware

Values for any existing user-defined field may be imported for your inventoried hardware. Each row in the external data source contains data for a specific computer, with the first row optionally containing column names. One column must identify specific inventoried computers either by name, IP address, or MAC address. You can then specify one or more columns from which values will be imported. The import operation will extract these values for any computers that have a row in the file, and will import it directly into the database.

For example, you can import Department Name information from a spreadsheet into a "DepartmentName" user-defined field for any computers in your channel that are identified in the spreadsheet.

Procedure

Select **Asset Management | Import Data** to open the Import Data Wizard. Then:

1. In the Select Data Type dialog, select **Inventoried Hardware**. Then press **Next**.

2. In the Select File dialog, select the **file** from which you will import values. This file (.csv, .txt, .xls, etc.) contains data to be associated with your inventoried hardware. Then press **Next**.

3. In the Select Key dialog, select a **key column** in the external data source that identifies the computer, then, in the **Select Hardware Field** dropdown, select whether the computer is identified by Computer Name, IP Address, or MAC Address. For example, if your key column identifies computers by name, select Computer Name in the **Select Hardware Field** dropdown. Then press **Next**.

   > **Note** If you are using IP address as the key and are importing from a .csv file, the IP address values in the file must be enclosed in quotes ("). Alternately, an .xls or .xlsx file can be used.

4. In the Select Values dialog, select, from the **Import Columns** list, a single column you wish to import values from and then select the field it corresponds to in the **User-defined Fields** list. Then press the **Add** button. This Import/Asset Field pair appears in the **Matched Columns** list. Repeat this for each value you want to import. Then press **Next**.

5. In the Preview and Import dialog, preview the displayed subset of import results and, if desired, press **Import Now** to complete the import. The values will be imported for each asset. Press **Finish** to close the wizard.

> **Note** New computers cannot be added via the import utility. Computers for which values are being imported must already be managed in the channel and inventoried. For hardware import, rows specifying a computer that is not in the channel will be ignored.

Example

Scenario: The user wishes to import values for the "Office number" user-defined field that has been defined on computers. The data includes office numbers for 3 computers.

Spreadsheet: In this spreadsheet, the key column is the "Computer name" column. The only value column is for "Office number". There is one row per computer.

Computer name	Office number
JNTEST1	A123
PHOENIX	B456

WENDY	A123

Result after Import: After importing this spreadsheet, the hardware information for JNTEST1 indicates that its Office number is set to A123:

Hardware		
Computer ⌐		
Description	Category ▽	Value
⊟ Computer: JNTEST1		
Office number	User-defined	A123
Processor Speed	Processor	2000

Importing Data for License Units

Values for any user-defined field as well as certain other license unit properties may be imported for your license units. Each row in the external data source contains data for a specific license unit, with the first row optionally containing column names. One column must contain the name of the license unit. You can then specify one or more columns from which values will be imported. The import operation will extract these values for any license units that have a row in the file and import it directly into the database.

In addition to user-defined fields defined on license units, you can import purchase order information for those license units - for example, purchase order numbers, license counts, vendors, and serial numbers.

Data Model: License Units, Purchase Orders, and Serial Numbers

The relationships between license units, purchase orders, and serial numbers are critical to understanding license unit import:

- **License Units:** Each License Unit consists of the following attributes
  - Name
  - 0 or more user-defined fields
  - 0 or more **Purchase Orders**
- **Purchase Orders:** Purchase Orders are always associated with a License Unit. Each Purchase Order consists of the following attributes:
  - PO number (Note: PO numbers must be unique; each License Unit can have one PO whose number is blank).
  - License count
  - Purchase date
  - Vendor
  - Total cost
  - Notes
  - 0 or more **Serial Numbers**.
- **Serial Number:** Serial Numbers are always associated with a Purchase Order. Each Serial Number consists of the following attributes

- Serial number
- Owner
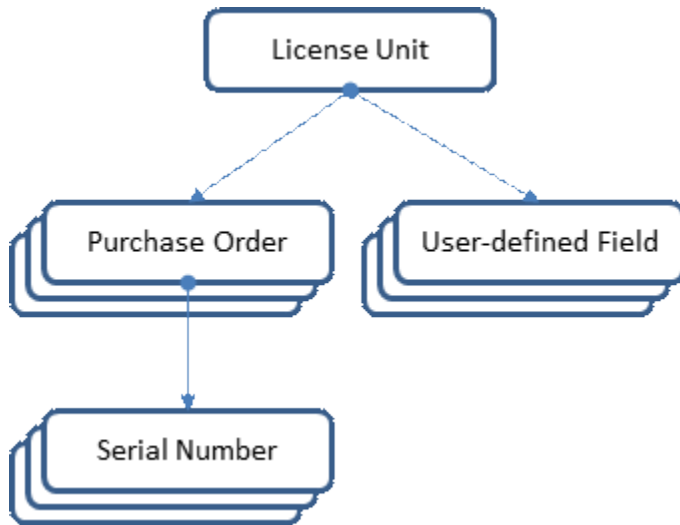
The implications of this model include:

1. License count, purchase date, vendor, cost, notes, and serial numbers are *always* associated with a purchase order number - whether you have an explicit purchase order number column or not.

    1. If you do not provide a purchase order column, any count, date, vendor, cost, notes, and serial numbers will be associated with a purchase order having a blank PO number.

    2. If you want to add 2 different license counts to a license unit, you *must* provide a purchase order column and provide 2 different purchase order numbers for that license unit. Otherwise, only the last entry (row) for that license unit will be imported.

2. For a given license unit, if a purchase order number is imported that does not already exist in the inventory, it will be added. Otherwise, the existing one will be updated.

3. If a serial number associated with a purchase order is imported that does not already exist in the inventory, it will be added. Otherwise, the existing one will be updated.

Note New license units cannot be added via the import utility. The license unit must already have been inventoried for its data to be imported. For software import, rows specifying a license unit that is not in the channel will be ignored.

Please refer to the examples below for more information.

Import Procedure

Select **Asset Management | Import Data** to open the Import Data Wizard. Then:

1. In the Select Data Type dialog, select **License Units**. Then press **Next**.

2. In the Select File dialog, select the **file** from which you will import values. This file (.csv, .txt, .xls, etc.) contains data to be associated with your license units. Then press **Next**.

3. In the Select Key dialog, select the **key column** in the external data source that contains the license unit name (Software Name). Then press **Next**.

4. In the Select Values dialog, select, from the Import Columns list, a single column you wish to import values from and then select the **License Unit Field** it corresponds to. Then press the **Add** button. Repeat this for each value you want to import. Then press **Next**.

5. In the Preview and Import dialog, preview the displayed subset of import results and, if desired, press **Import Now** to complete the import. The values will be imported for each license unit. Press **Finish** to close the wizard.

Examples

Purchase Order Import

Scenario: The user wishes to import information about 2 purchase orders for 2 different license units. The information includes license counts, costs, and vendors.

Spreadsheet: In the spreadsheet, the key column is the license unit name column, and there are 4 value columns: purchase order, count, cost, and vendor. There is a row dedicated to each purchase order number.

License unit name	Purchase order	License count	Total cost	Vendor
Cloudstar	7777	10	$100	Foo
Acme	1234	3	$1000	Foo

Result after Import: After importing this spreadsheet, the Cloudstar license unit has a purchase order number 7777 and the Acme license unit has a purchase order 1234. Both purchase orders are updated with the values from the spreadsheet. The illustration below shows the Acme license unit's purchase order 1234 with new values for License count, Total cost, and Vendor:

Serial Number Import

>**Scenario:** Multiple serial numbers can be associated with a specific purchase order. In this example, the user wishes to add 3 serial numbers to the Acme license unit's purchase order number 1234. Two of the serial numbers have an owner.

>**Spreadsheet:** In the spreadsheet, the key column is the license unit name column, and there are 3 value columns: purchase order, serial number, owner. There is a row dedicated to each of the 3 serial numbers.

License unit name	Purchase order	Serial number	Owner
Acme	1234	111	Bob
Acme	1234	222	Fritz
Acme	1234	333	

>**Result after Import:** After importing this spreadsheet, purchase order 1234 associated with the Acme license unit has 3 new serial numbers. Note that the Purchase Order's License Count, Total Cost, and Vendor values remain unchanged from the previous import.

Purchase Order with Serial Number

Scenario: Because empty cells are ignored, the previous two examples can be combined in a single import operation.

Spreadsheet: In the combined spreadsheet, the key column is the license unit name column, and there are 6 value columns. Note that there are 4 rows dedicated to the Acme license unit's purchase order number 1234, 1 for the purchase order properties and 1 for each of its serial numbers.

License unit name	Purchase order	License count	Total cost	Vendor	Serial number	Owner
Cloudstar	7777	10	$100	Foo		
Acme	1234	3	$1000	Foo		
Acme	1234				111	Bob
Acme	1234				222	Fritz
Acme	1234				333	

Result after Import: After importing this spreadsheet, the results for the Acme license unit's purchase order number 1234 will be exactly the same as in the previous example.

Note: The following two spreadsheets produce the same result. This is because license count, cost, and vendor are properties of the purchase order, and only one set of values will be retained. In the first spreadsheet below, the count, cost, and vendor are entered in one of the serial number rows; the blank cells in the next two rows are ignored. In the second spreadsheet, the last row's values for count, cost, and vendor over-write the previous two rows' values. The result is therefore a license count of 3 (not 9) and a cost of $1000 (not $3000).

License unit name	Purchase order	License count	Total cost	Vendor	Serial number	Owner
Cloudstar	7777	10	$100	Foo		
Acme	1234	3	$1000	Foo	111	Bob
Acme	1234				222	Fritz
Acme	1234				333	

License unit name	Purchase order	License count	Total cost	Vendor	Serial number	Owner
Cloudstar	7777	10	$100	Foo		
Acme	1234	3	$1000	Foo	111	Bob
Acme	1234	3	$1000	Foo	222	Fritz
Acme	1234	3	$1000	Foo	333	

Importing Non-Scannable Assets

Non-scannable assets can be directly imported into the Channel. Each row in the external data source defines a non-scannable asset to be added, with the first row optionally containing column names. One column must specify the asset's name. You can then specify one or more columns from which values will be imported. The import operation will extract these values and create one new non-scannable asset per row in the file.

Imported non-scannable asset data may include:

- Name
- Asset Type - Computer, Printer, Router, etc.
- Notes - Arbitrary notes to associate with the asset.
- Purchase Date
- Manufacturer
- Model Number
- Serial Number
- Any user-defined field defined on Assets

Procedure

Select **Asset Management | Import Data** to open the Import Data Wizard - or select **Import Data** by right-clicking on the Non-scannable Assets node. Then:

1. In the Select Data Type dialog, select **Non-scannable Assets**. Then press **Next**.

2. In the Select File dialog, select the **file** from which you will import values. This file (.csv, .txt, .xls, etc.) contains new non-scannable assets. Then press **Next**.

3. In the Select Key dialog, select the **key column** in the external data source that contains the asset's name (Asset Name). You can choose to import each row as a new asset or update assets by name. Then press **Next**.

4. In the Select Values dialog, select, from the **Import Columns** list, a single column you wish to import values from and then select the field it corresponds to in the **Asset Fields** list. Then press the **Add** button. This Import/Asset Field pair appears in the **Matched Columns** list. Repeat this for each value you want to import. Then press **Next**.

5. In the Preview and Import dialog, preview the displayed subset of import results and, if desired, press **Import Now** to complete the import. One new non-scannable asset will be created for each row in the file. Press **Finish** to close the wizard.

Note You cannot import values for existing non-scannable assets - you can only import new assets.

Example

Scenario: The user wishes to import three non-scannable assets.

Spreadsheet: In this spreadsheet, the **Select Key Column** is "Name". The 5 value columns include values for 2 built-in properties (Type and Notes) and 3 user-defined fields (Asset Tag, Owner, and Building).

Name	Type	Asset Tag	Notes	Owner	Building
Cabinet 21	Generic Asset	12335		Bob	East
Fred's boxed laptop	Computer	98765	On leave for 3 months	Fred	West
Surge suppressor	Generic Asset	55555		Bob	East

Result after Import: After importing this spreadsheet, the information for these 3 non-scannable assets would appear as shown:

Importing Data for Scanned Assets

Values for any existing user-defined field and other properties may be imported for your scanned assets - printers, computers, routers, etc.. Each row in the external data source contains data for a specific asset, with the first row optionally containing column names. One column must identify specific assets either by name, IP address, or MAC address. You can then specify one or more columns from which values will be imported. The import operation will extract these values for any assets that have a row in the file, and will import it directly into the database.

In addition to importing values for any user-defined fields that have been defined on assets, you can import into these additional scanned asset properties:

- Asset Type - Computer, Printer, Router, etc.

- Notes - Arbitrary notes to associate with the asset.

- Purchase Date

For example, you can import Department Name information from a spreadsheet into a "DepartmentName" user-defined field for any assets in your channel that are identified in the spreadsheet.

Procedure

Select **Asset Management | Import Data** to open the Import Data Wizard - or select **Import Data** by right-clicking on the Scanned Assets node. Then:

1. In the Select Data Type dialog, select **Scanned Assets**. Then press **Next**.

2. In the Select File dialog, select the **file** from which you will import values. This file (.csv, .txt, .xls, etc.) contains data to be associated with your scanned assets. Then press **Next**.

3. In the Select Key dialog, select a **key column** in the external data source that identifies the asset, then, in the **Select Scanned Asset Field** dropdown, select whether the asset is identified by Device Name, IP Address, or MAC Address. For example, if your key column identifies assets by IP address, select IP Address in the **Select Scanned Asset Field** dropdown. Then press **Next**.

   Note If you are using IP address as the key and are importing from a .csv file, the IP address values in the file must be enclosed in quotes ("). Alternately, an .xls or .xlsx file can be used.

4. In the Select Values dialog, select, from the **Import Columns** list, a single column you wish to import values from and then select the field it corresponds to in the **Scanned Asset Fields** list. This list includes all user-defined fields, plus Notes, Purchase Date, and Asset Type. Then press the **Add** button. This Import/Asset Field pair appears in the **Matched Columns** list. Repeat this for each value you want to import. Then press **Next**.

5. In the Preview and Import dialog, preview the displayed subset of import results and, if desired, press **Import Now** to complete the import. The values will be imported for each asset. Press **Finish** to close the wizard.

Note New scanned assets cannot be added via the import utility. Assets for which values are being imported must have been scanned via Network Discovery. For scanned asset import, rows specifying an asset that has not been scanned will be ignored.

Example

Scenario: The user wishes to import values for "Purchase Date" and the user-defined field "Office number" that has been defined on assets. The data includes data for 3 assets, identified by IP address.

Spreadsheet: In this spreadsheet, the **Select Key Column** is "Asset IP", hence the **Scanned Asset Field** selection is **IP Address**. The value columns are "Purchase Date" and "Office number". There is one row per asset.

Asset IP	Purchase Date	Office number
192.168.1.100	2/14/2009	A123
192.168.1.101	2/14/2009	B456
192.168.1.102	1/1/2009	A123

Result after Import: After importing this spreadsheet, the information for these 3 scanned assets would appear as shown:

Index