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# ASSET MANAGEMENT GUIDE

PRISM ASSET MANAGER™

VERSION 8

**Prism Suite Quick Start Guide** published June, 2007

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# 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 in your enterprise. Use Asset Manager for managing license compliance, migration planning, desktop standardization, and software and hardware inventory.

With Asset Manager you can:

- Ensure that you have enough licenses without overbuying.
- 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.

## 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, and applications present on the managed computer.
- 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.
- The administrator has immediate access to this data through the Console.
- The administrator decides how to handle unresolved files, records software licenses, and reports on inventory through the Console.

# Inventory of Assets

## 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* tab. 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 **File | Channel Properties**.
2. On the Channel Properties dialog, go to the *Asset Management* tab.
3. Select **Automatically inventory licensed computers**.
4. Select the scanning frequency in the **Scheduled Inventory** section of the tab.
5. Set the **Auto Identify** options to determine how the most closely matched files on the *Unresolved Files* tab are handled.
6. 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. For computers on the network, the inventory results are returned quickly in most cases. For remote computers, which may not poll the Channel as frequently, results may not be returned as quickly.

### Inventory all of the Managed Computers on Demand

To inventory all of the managed computers in the Channel:

1. Highlight the **Managed Computers** branch on the *Managed tab* in the tree view.
2. Select **Inventory Now** from the Asset Management menu
3. On the Choose Scan Configuration dialog, select a configuration from the drop-down list.

4. 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* tab.

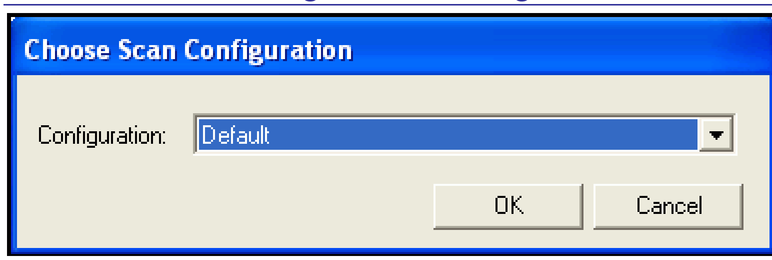
### Scan an Individual Computer or Group

To inventory an individual computer or group:

1. Go to the *Managed* tab or *Configuration Groups* tab in the tree view.
2. Right-click on the name of the computer or group in the tree view or details pane.
3. Select **Inventory now** from the pop-up 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* tab.

## Choose Scan Configuration dialog




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

This dialog opens when you right-click on a computer or group, 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, right click on a computer or group.
2. 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:

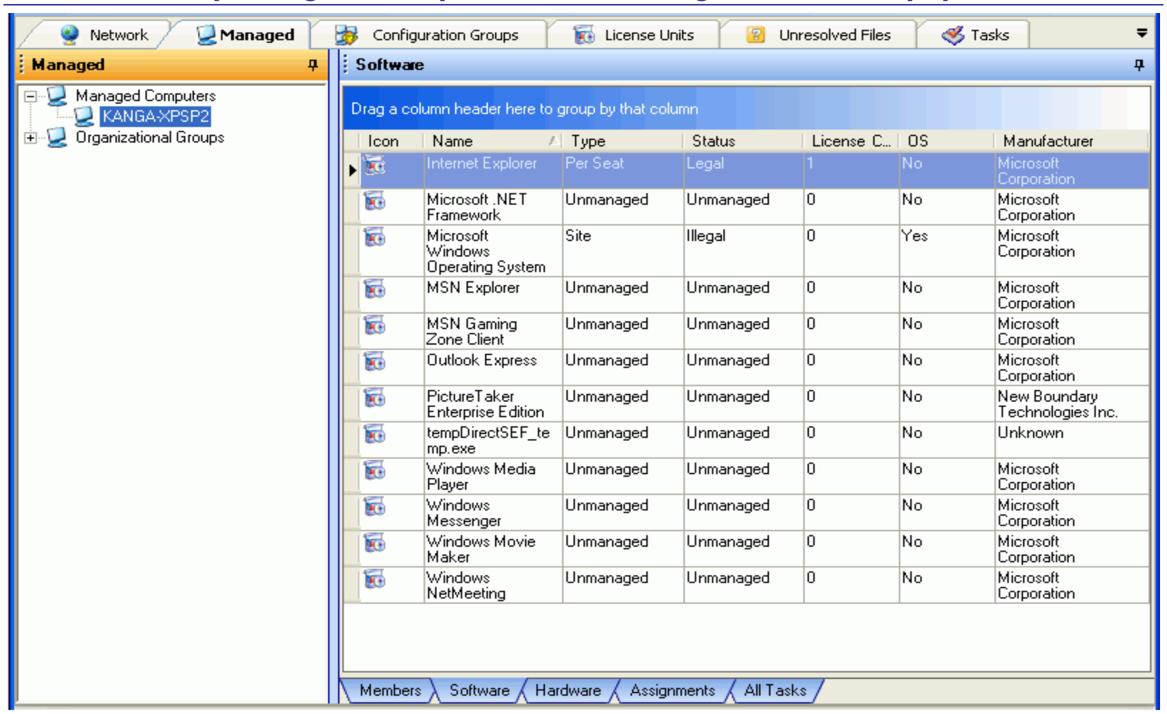
   6. Software applications and suites for that specific computer or group that match known license units are displayed in the details pane on the Managed or Configuration Groups *Software* tab.

   7. License Units are displayed in the tree view on the *License Units* tab.

   8. Files that do not match known license units are displayed through the *Unresolved Files* tab.

   9. 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* tab, 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 Application**: 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.
- **Application 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, right click on a computer or group.
2. Select **Inventory now** from the pop-up menu.
3. On the *Choose Scan Configuration* dialog box, select a configuration from the drop-down list.

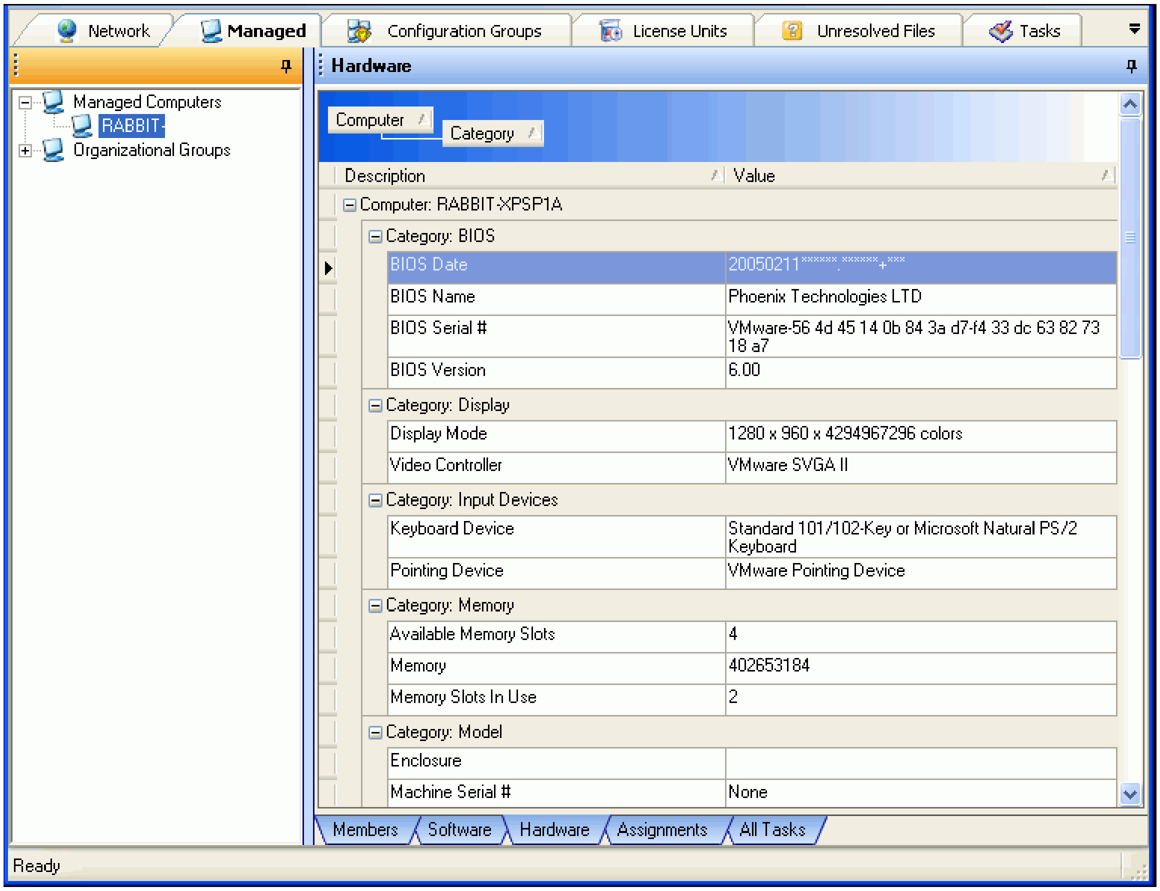
> **Note**: You can customize the hardware inventory by setting up a custom inventory configuration. See *Configuring the Inventory*.

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 the file extension, you can add any type of file to include in 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.
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:
   - 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* tab, and in the Asset Management reports.

### Schedule a Customized Scan

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

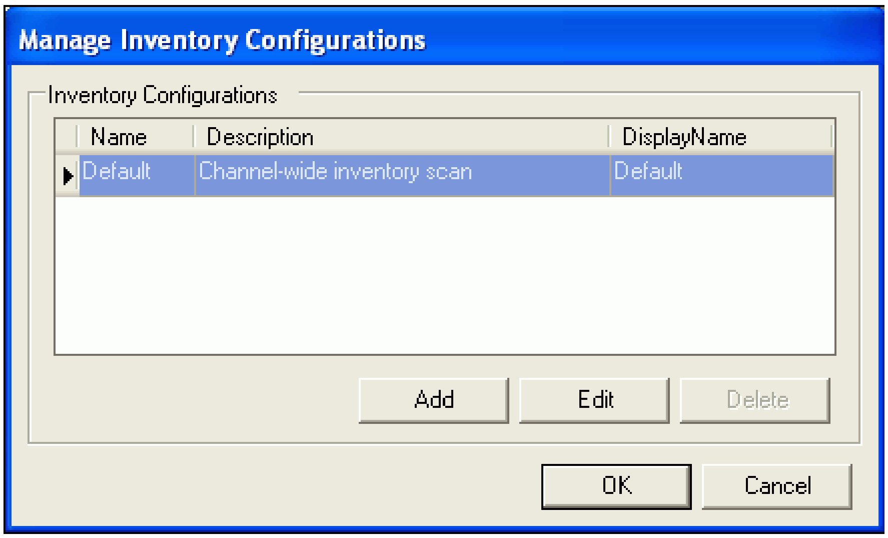
1. Select **File | Channel Properties** in the Console main window.
2. On the *Channel Properties* dialog, go to the *Asset Management* tab.
3. Select the name of your customized configuration in the Configuration field.

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

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

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

## Manage Inventory Configurations dialog



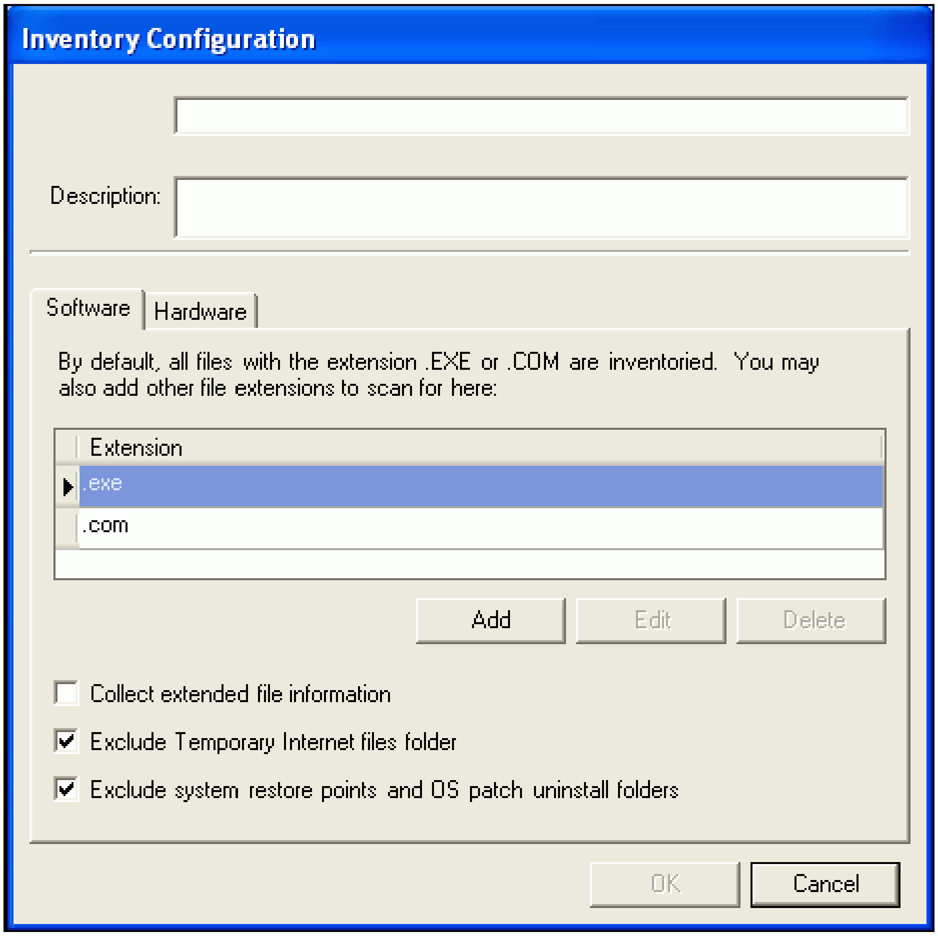

By default, Asset Manager identifies application executables and a range of hardware characteristics on managed computers during each inventory. From this dialog box, you can create a customized inventory configuration that can be used either for the schedule, Channel-wide inventory or for inventory 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



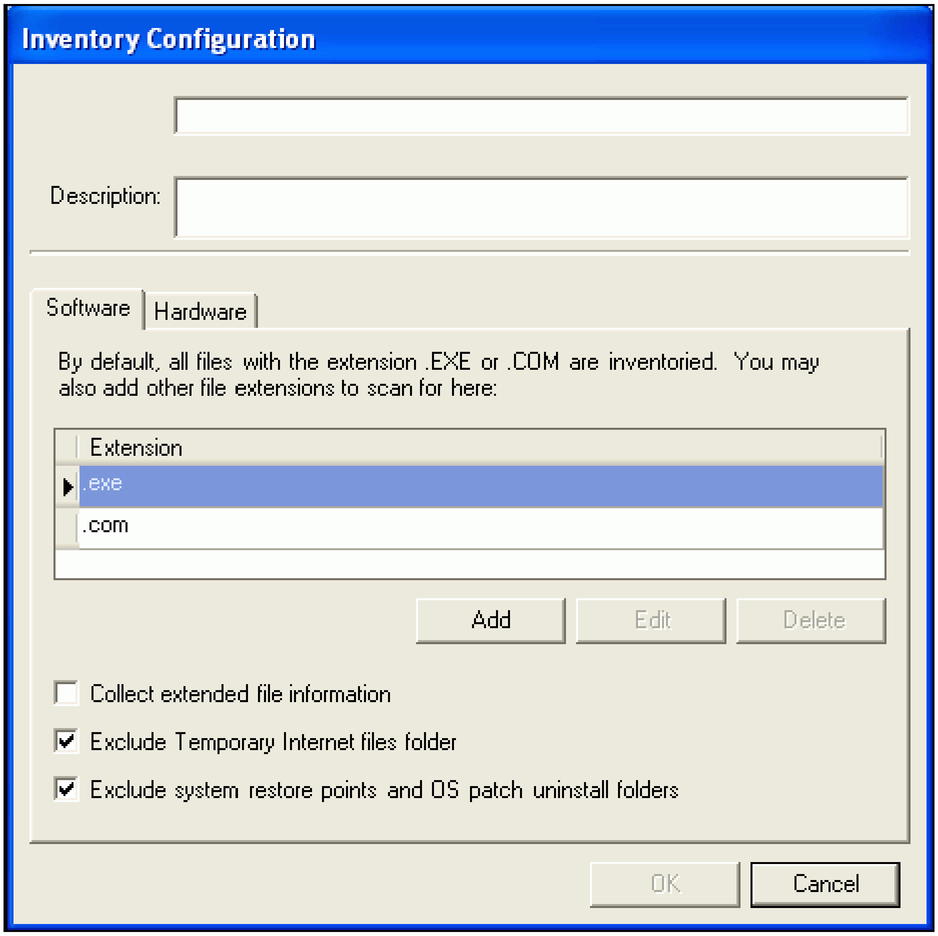

Use the Inventory Configuration dialog to specify the software and hardware characteristics identified by Asset Manager during an inventory. After setting up and naming your customized inventory configuration, you can use this configuration when inventorying computers on-demand or for the regular, scheduled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

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

### Options

- **Extension**: 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.
- **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.

- **Temporary Internet Folder**:

  ☑ **Exclude Temporary Internet files folder**: Select this option to exclude the temporary Internet directory when scanning managed computers. The inventory is completed more quickly with this option selected.

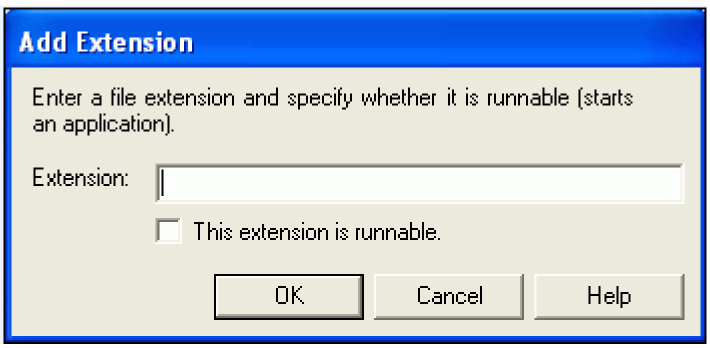
  ☐ **Exclude Temporary Internet files folder**: With this option cleared, the Temporary Internet folder is included in the scan.

- **System Restore Points and OS Patch Uninstall Files**:

  ☑ **Exclude system restore points and OS patch uninstall files**: Select this option to exclude the system restore points and uninstall files for operating system patches when scanning managed computers. The inventory is completed more quickly with this option selected.

  ☐ **Exclude system restore points and OS patch uninstall files**: With this option cleared, the system restore points and uninstall files for operating system patches are included in 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

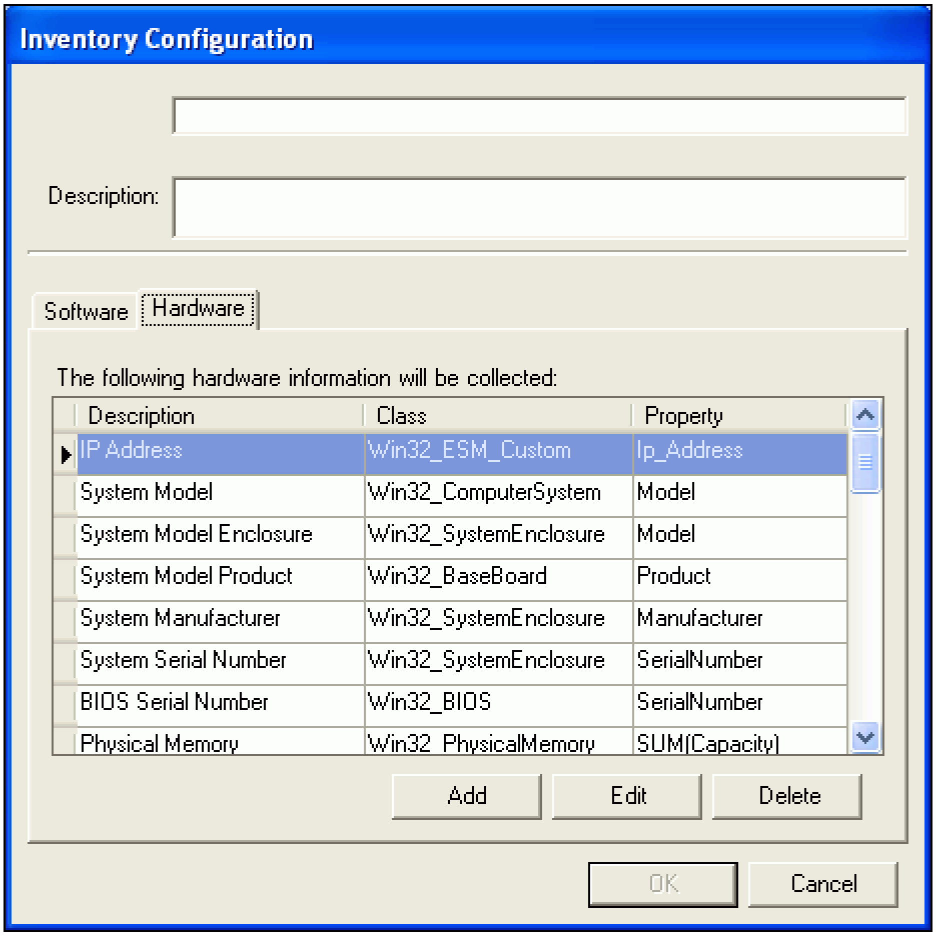
- **Extension**: Type a file extension to be included in the scan of managed computers. Asset Manager finds all files with this extension on managed computers. When the inventory is complete, these files are available through the *Unresolved Files* tab.

### Runnable

☑ **This 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* tab after the next inventory.

☐ **This extension is runnable**: With this check box cleared, files with this extension are listed on the *Unresolved Files* tab 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**: Add a new hardware configuration variable to the customized scan. New variables are added as WMI variables.
- **Edit**: Modify the highlighted variable.
- **Delete**: Remove the highlighted variable from the scan configuration.

## User-defined Fields

User-defined fields can be associated with assets, both hardware and license units. A user-defined field consists of a name and a description. Values for user-defined fields are specific to each computer or license unit. These values can be set and viewed within the console and can be viewed in reports, as described below.

All user-defined field values are strings.

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.

### 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:** To create, edit, and delete user-defined fields for computers:
    1. Select **Asset Management | User-defined Fields | Hardware** to open the User-defined Fields - Hardware dialog.
    2. This dialog may also be opened by right-clicking within the *Hardware* tab. To do this, a computer or group must first be selected.
    3. From the User-defined Fields - Hardware dialog, new fields can be added, existing fields can be deleted, and field names and descriptions can be modified.
- **Setting Values:** To set the value for an existing user-defined field for a specific computer, follow these steps:
    1. From the *Hardware* tab, select a computer for which you wish to set a user-defined field value.
    2. Scroll among the attributes and select the desired user-defined field listed under **Description**. The category for all hardware user-defined fields is "User-defined".
    3. Click under the "Value" column heading. This makes the grid cell editable.
    4. Enter the value for the field for that computer.
- **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.

### License Units

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:** 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. This dialog may also be opened by right-clicking on a license unit within the *License Units* tab.

3. From the User-defined Field - License Units dialog, new fields can be added, existing fields can be deleted, and field names and descriptions can be modified.

- **Setting Values:** To set the value for an existing user-defined field for a specific license unit, follow these steps:
  1. From the *License Units* tab (using either *Licenses* or *Members* detail tab), highlight "All License Units" or other top level group in the left pane.
  2. In the detail pane, right-click on the column headings bar and select **More Fields**.
  3. Drag & drop the desired user-defined field into the column heading bar.
  4. Select a specific license unit in the detail pane.
  5. Click under the specific user-defined field column heading for which you are setting a value. This makes the grid cell editable.
  6. Enter the value for the field for that license unit.
- **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.

## 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 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.

# 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.

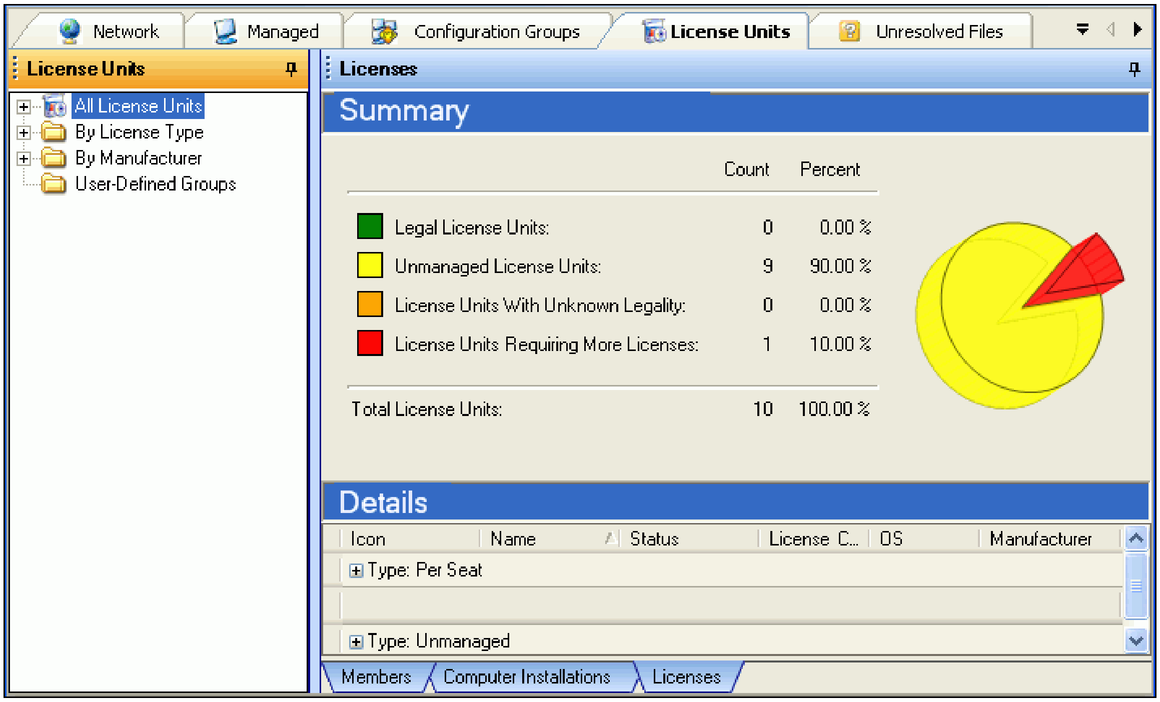
> **Note**: For Asset Manager to automatically scan all managed computers on a schedule basis and automatically match files to known license units, the automatic inventory options and the automatically identify files options must be turned on. If you prefer, you can complete the inventory on-demand and/or 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* tab. 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 concurrent, per seat, site, 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:

- **Delete License Unit**: Remove the license unit from the Channel. The files associated with this license unit are added to the *Unresolved Files* tab.

**Note**: If the Automatically Identify License Units option is turned on (see the *Channel Properties* | *Asset Management tab*, this license unit will be recreated and populated the next time a computer with this application contacts the Channel Server. To prevent it from being recreated, move the item to the **Ignore** folder on the *Unresolved Files* tab.

- **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:

- **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:

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

#### *Summary and Details*

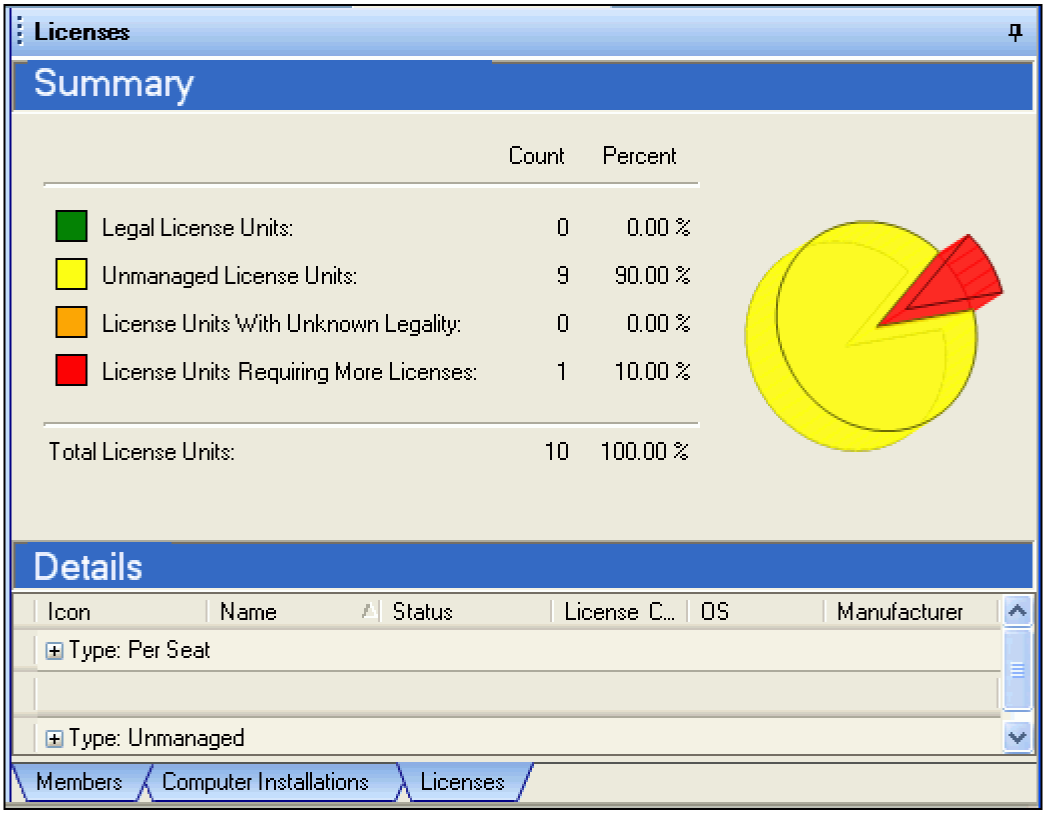
With the License Units tab open, the details pane lists all the license units that fall under the currently selected folder. This pane provides the following information for each license unit: name, license type, number of licenses, date added, who last modified the license unit, and manufacturer.

#### *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 you have selected a managed license unit or an unmanaged license unit.

**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.

- **Managed License Unit**: For managed license units, the upper part of this tab shows summary information and a pie chart to illustrate the level of compliance with software licenses for the application. 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.

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 at the top of the tab, 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.

### *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*

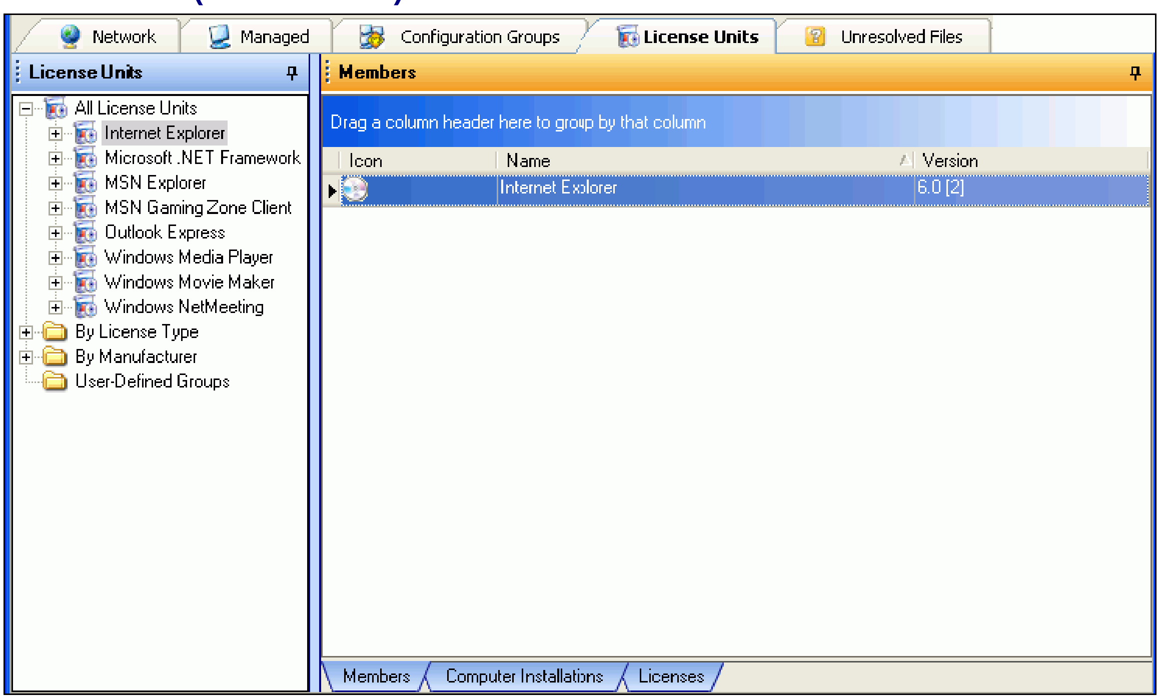
When a purchase record is no longer needed, highlight the purchase in the License Purchase History, then click the **Delete** button.

### *Select a Group*

The data displayed here reflects the status of the license units in the folder selected on the License Units tab.

- To view a status of all license units, highlight the All License Units folder in the navigation pane.
- To view the status for a specific group, highlight that group in the tree view.

## Members tab (License Units)




With the License Units tab selected in the tree view, the Members tab in the details pane lists detailed information about the applications or application suites that are members of the highlighted group.

### View a subset of the files

Highlight a group, subgroup, or individual license unit on the License Units tab to limit the list displayed on the Members tab.

### Sort or group the data

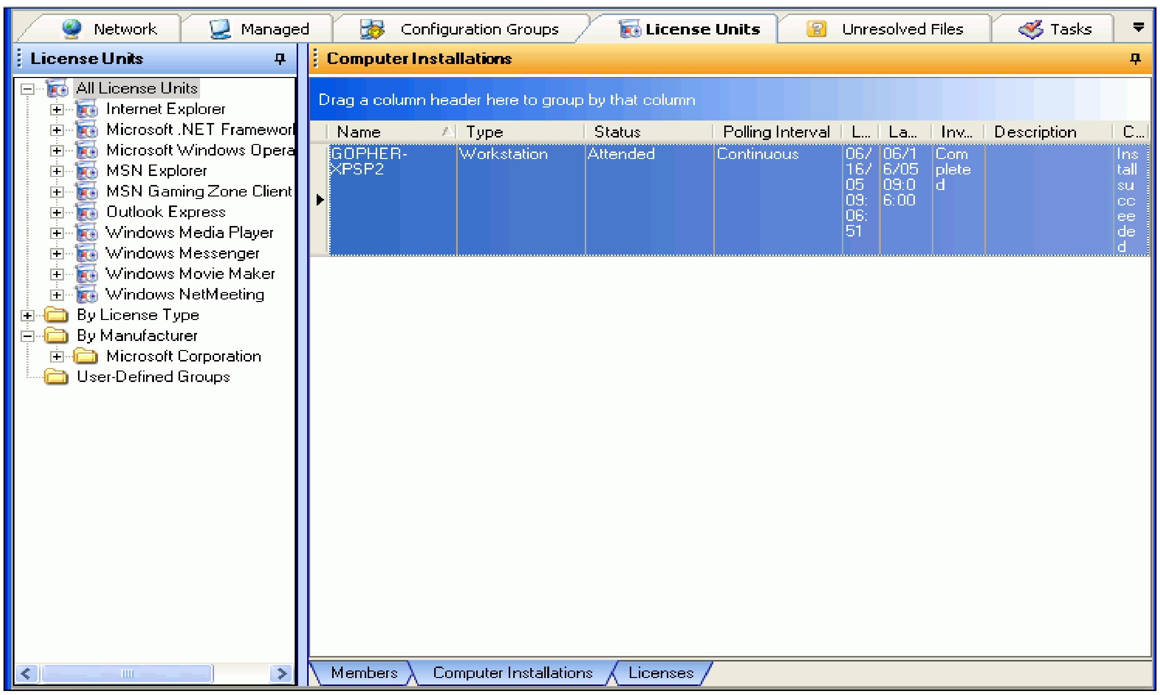
As with the other detail panes in the Console, sort or group this data by clicking a column heading or dragging a column heading into the shaded area above.

### Right-click options

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

- **Delete Application**: Remove the application from the license unit. The next time a computer with this application contacts the Channel Server, this application will be listed on the Unresolved Files tab.
- **Application Properties**: View properties for the highlighted application. See *Application Properties | General tab*.
- **Suite Properties**: View properties for the highlighted suite. See *Suite Properties | General tab*.

## 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 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 right-click on the name of a computer in this pane, these options are available:

- **Inventory Now**: Scan the highlighted computer to generate an inventory of its hardware characteristics and the applications installed on the computer.
- **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 on the Unresolved Files tab. 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 **File | Channel Properties**.
2. On the Channel Properties dialog, go to the *Asset Management* tab.
3. Turn on the options for automatically identifying files.
4. Select **Auto Identify files** from the Asset Management menu.

   The files in the Exact Match folder and/or the Close Match folder on the *Unresolved Files* tab 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 illegal computers.

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:

- Concurrent
- Per Seat
- Site

## 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:

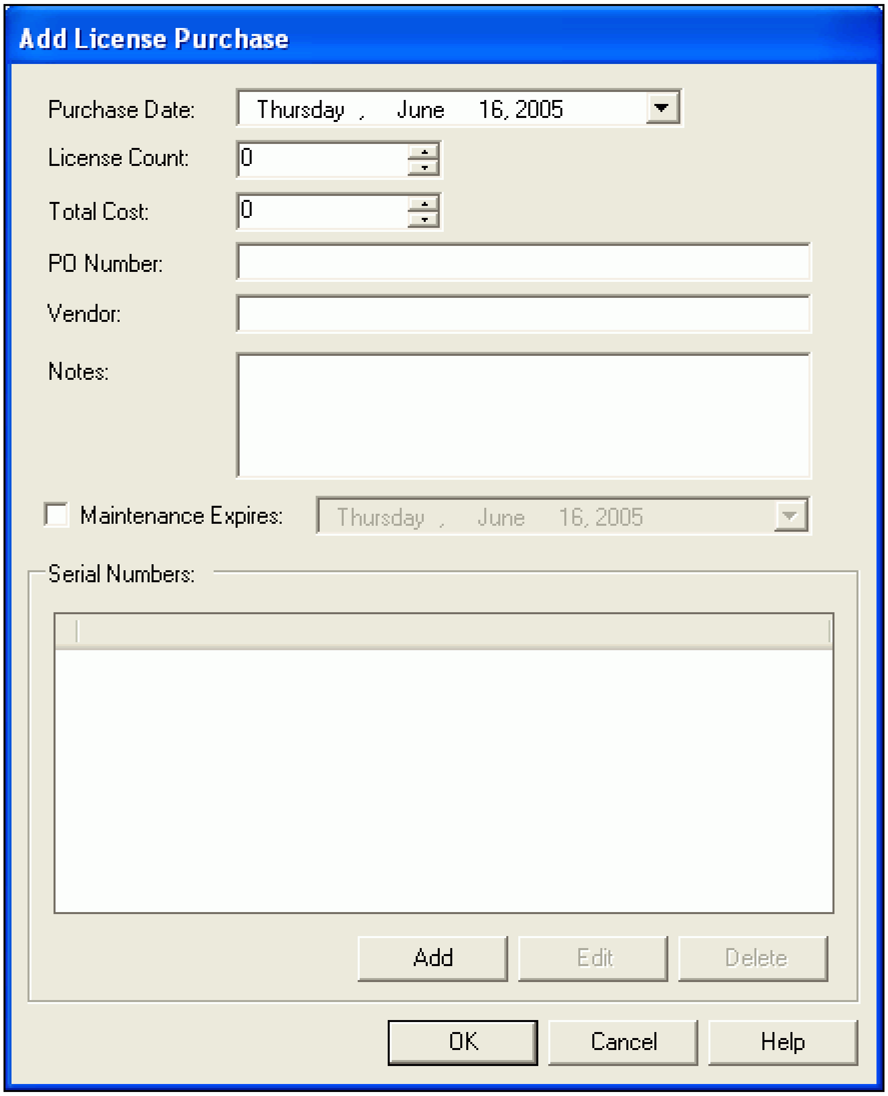
1. On the *License Units* | *Licenses* tab, click on the **Add** button.
2. Record the license purchase on the *Add License Purchase* dialog.
3. Click the **Add** button.
4. On the Add Serial Number dialog, record the serial number for the new license.
5. Click **OK** on each of the dialog boxes to save 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.

- **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.

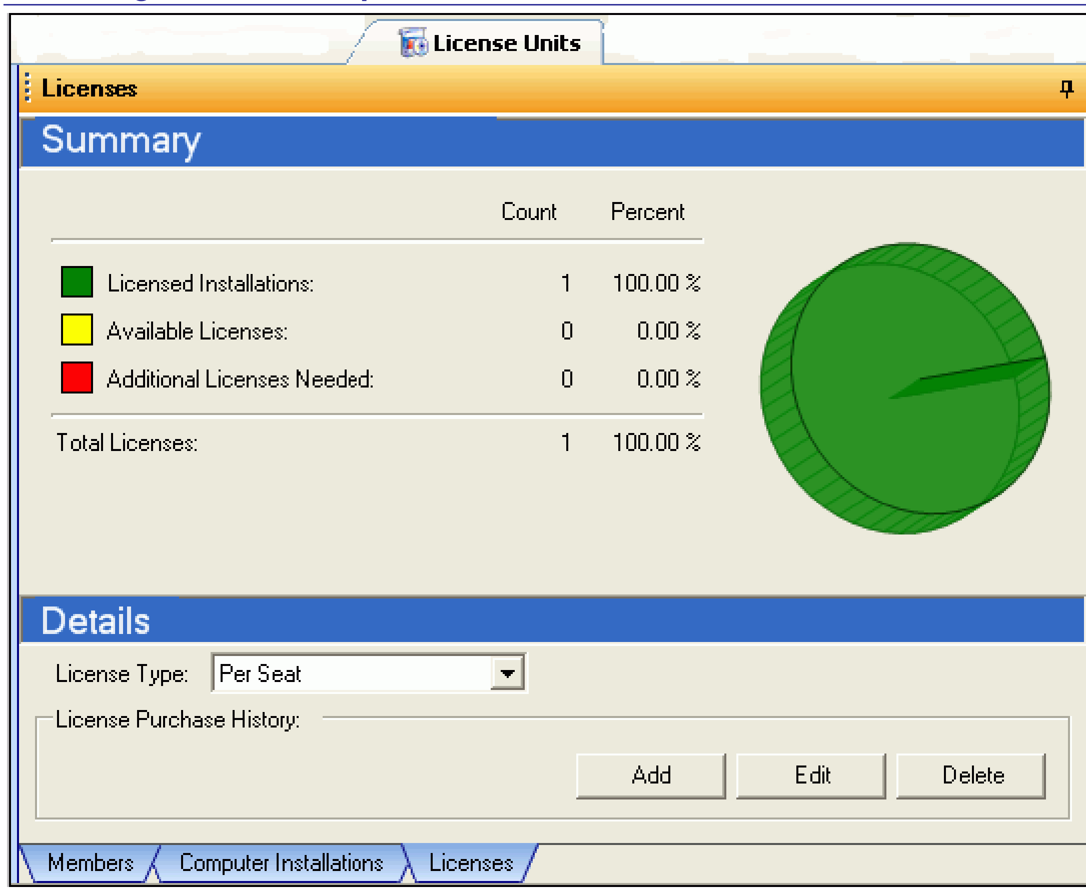
### Serial Numbers

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.

## 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 on the Unresolved Files tab. 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 on the *Unresolved Files* tab 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.

## Modifying License Units

### 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, site licenses, and concurrent 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 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.

## 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* tab.

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 on the *Unresolved Files* tab 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 on the *Unresolved Files* tab 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. On the *Unresolved Files* tab, 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.

## Removing a License Unit

If a license unit listed on the License Units tab is not needed, it can be removed. To remove 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 **Delete License Unit** from the pop-up menu.

   The files associated with the License Unit are now listed on the *Unresolved Files* tab. You can assign them to a different license unit or ignore them.

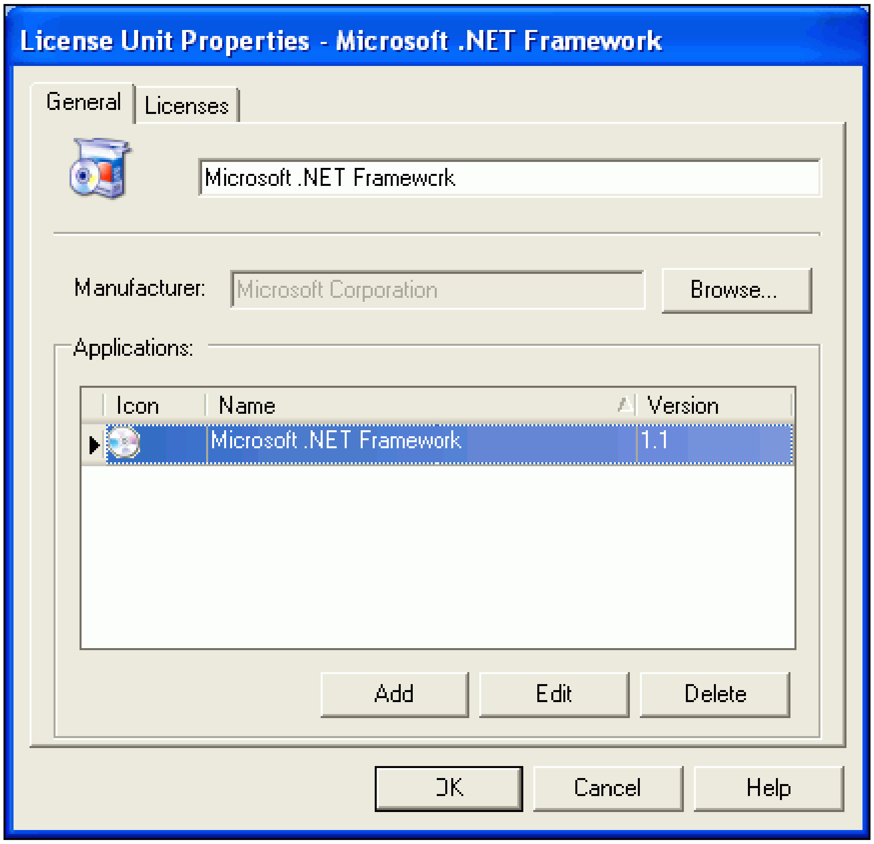
### *Exception*

A license unit that was automatically created by Asset Manager may be re-created the next time the managed computers are scanned. To prevent deleted license units from being re-created, you must turn off the **Asset Management | Auto Identify Files** option. With this option turned off, Asset Manager does not automatically create new license units.

If you manually created the license unit, it will not be automatically re-created.

## License Unit Properties

### General tab (License Unit properties)

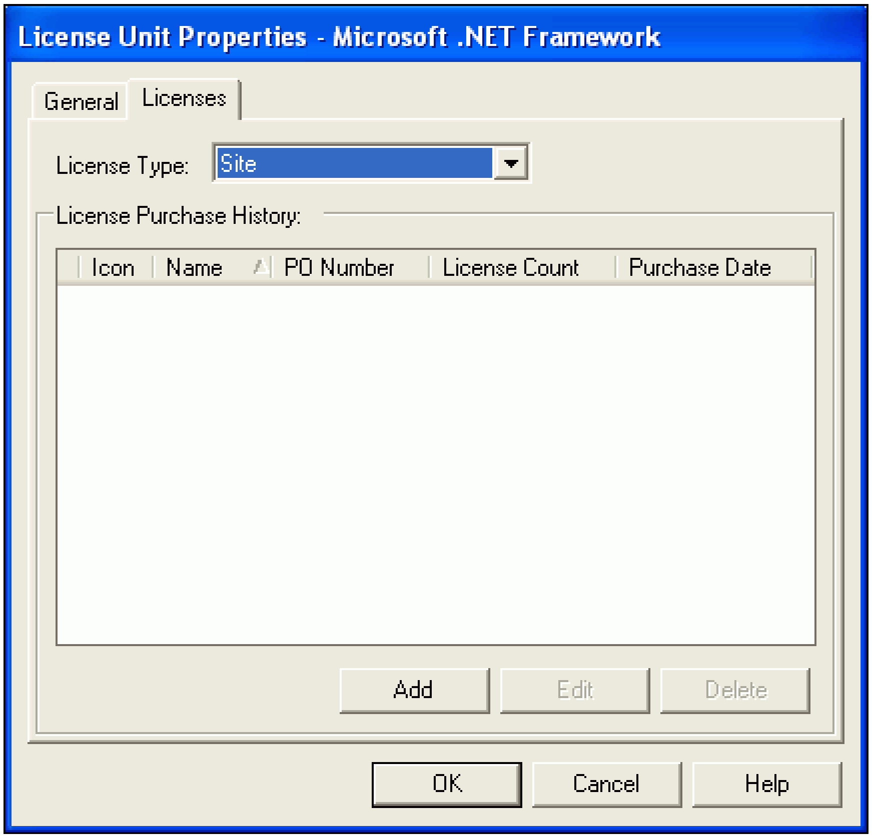



View or update information about the license unit currently selected on the *License Units* tab in the tree view. This dialog opens when you right-click on a license unit in the tree view or details pane and select **Properties** from the pop-up menu.

- **File name**: The text box at the top of the window shows the name of the executable file for the application.
- **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 on the *Unresolved Files* tab, 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, or Concurrent**: 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.

***License Purchase History***

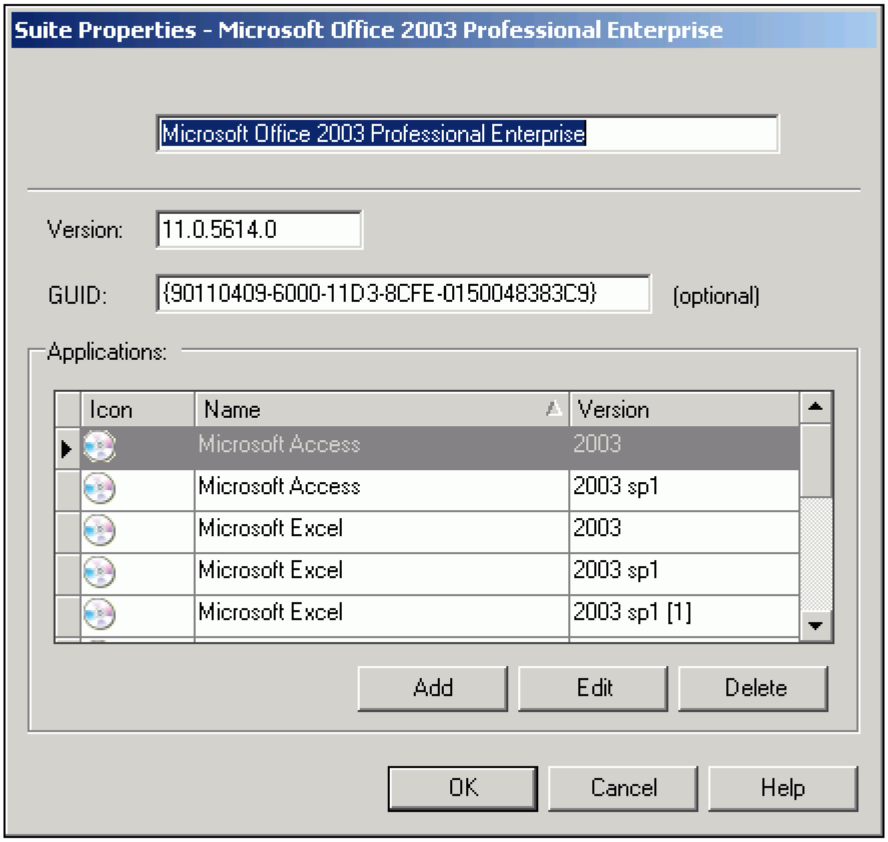
View, add, or update information about licenses purchased for this license unit. For managed licenses, Asset Manager tracks the number of licenses added and the number of managed computers where the application or suite is installed.

- **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.

- **Delete**: Remove the highlighted license record. Only the record of the license is removed. The license and the application files remain unchanged.

## File and Application Properties

### 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.

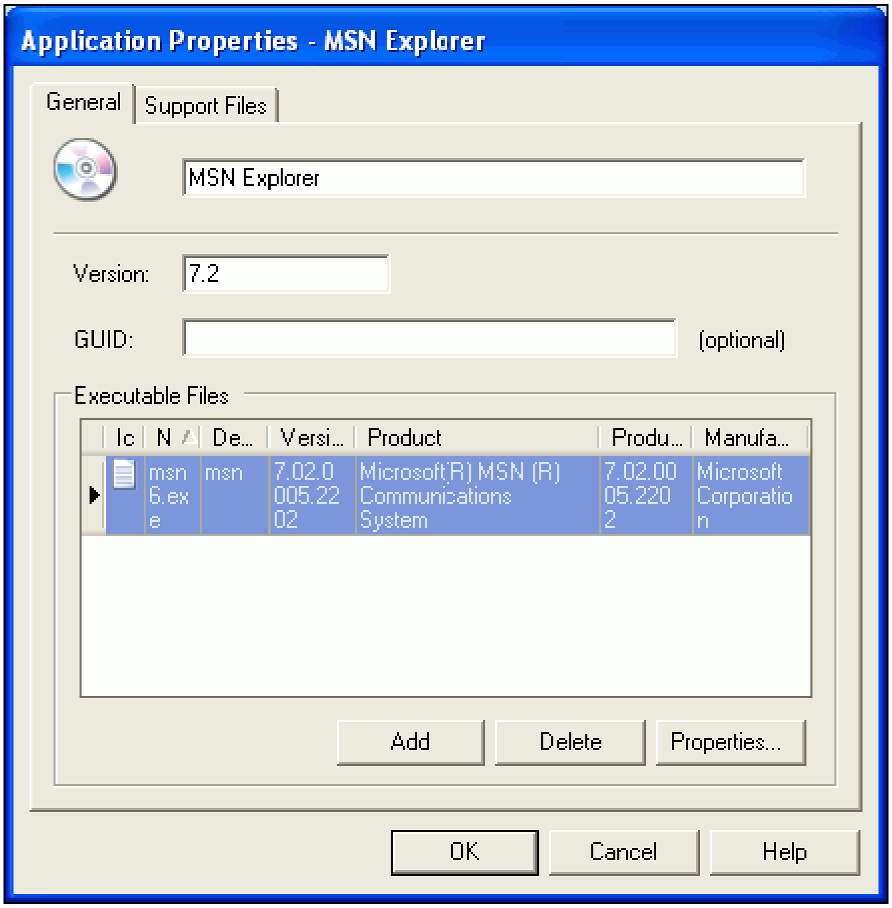
- **Suite name**: The text box at the top of the window shows the name of the suite.
- **Version**: Displays the exact version number for the suite. A license unit may include one or more versions.
- **GUID**: Enter the GUID, a unique identification string that helps distinguish one version of an application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

**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.

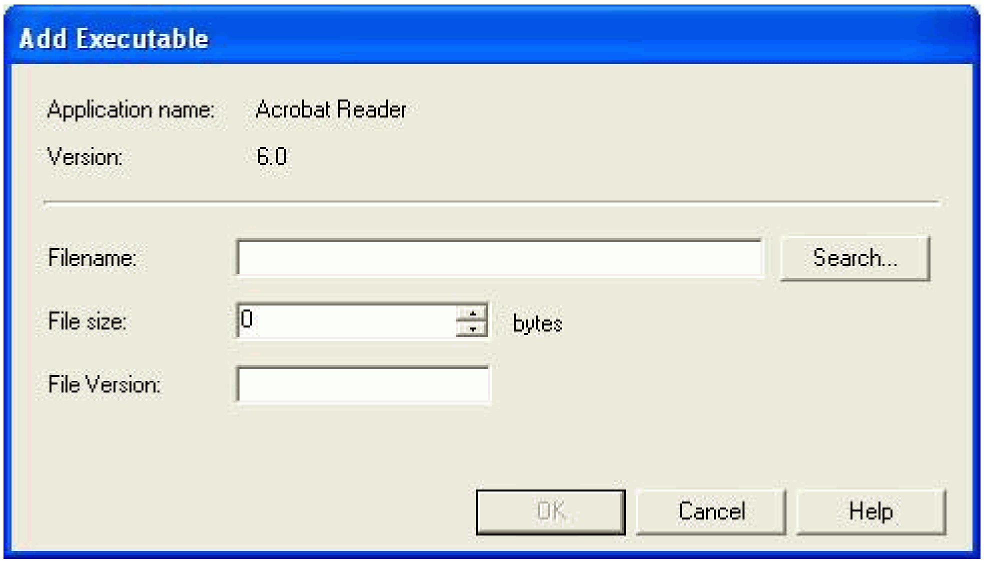
- **Application name**: The text box at the top of the window shows the name of the executable file for the application.
- **Version**: Displays the exact version number for the application. A license unit may include one or more versions.
- **GUID**: Displays the GUID, a unique identification string 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* | *Members* 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.

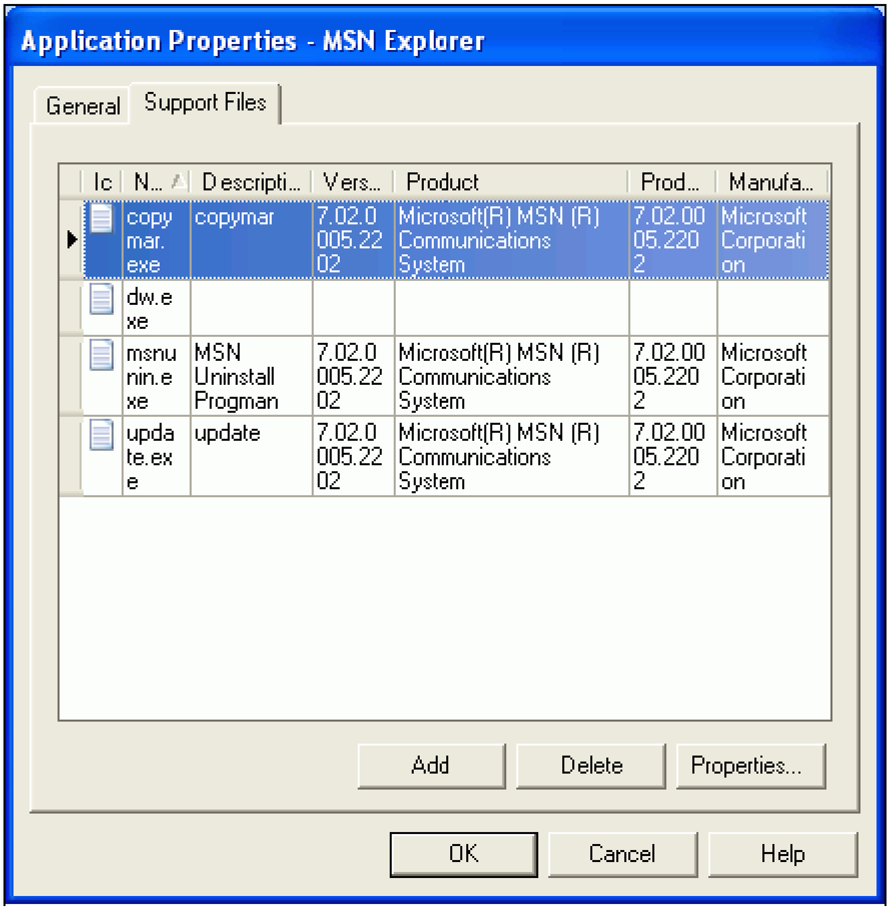
- **Application name**: The executable you add is associated with the application named here.
- **Version**: The executable you add is associated with this specific version of the application named here.

### *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.

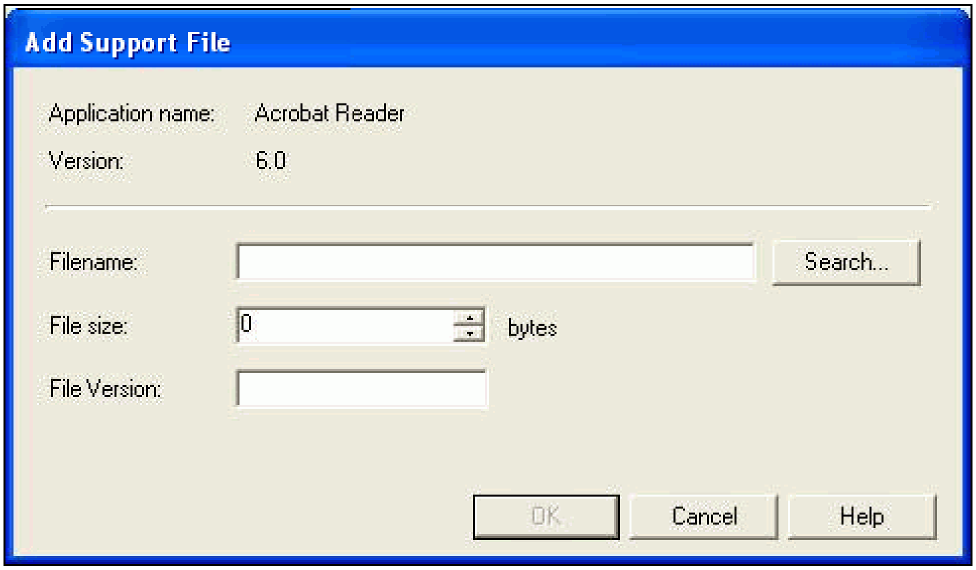
**Support Files tab (Application properties)**




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 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 Support File dialog**




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

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.

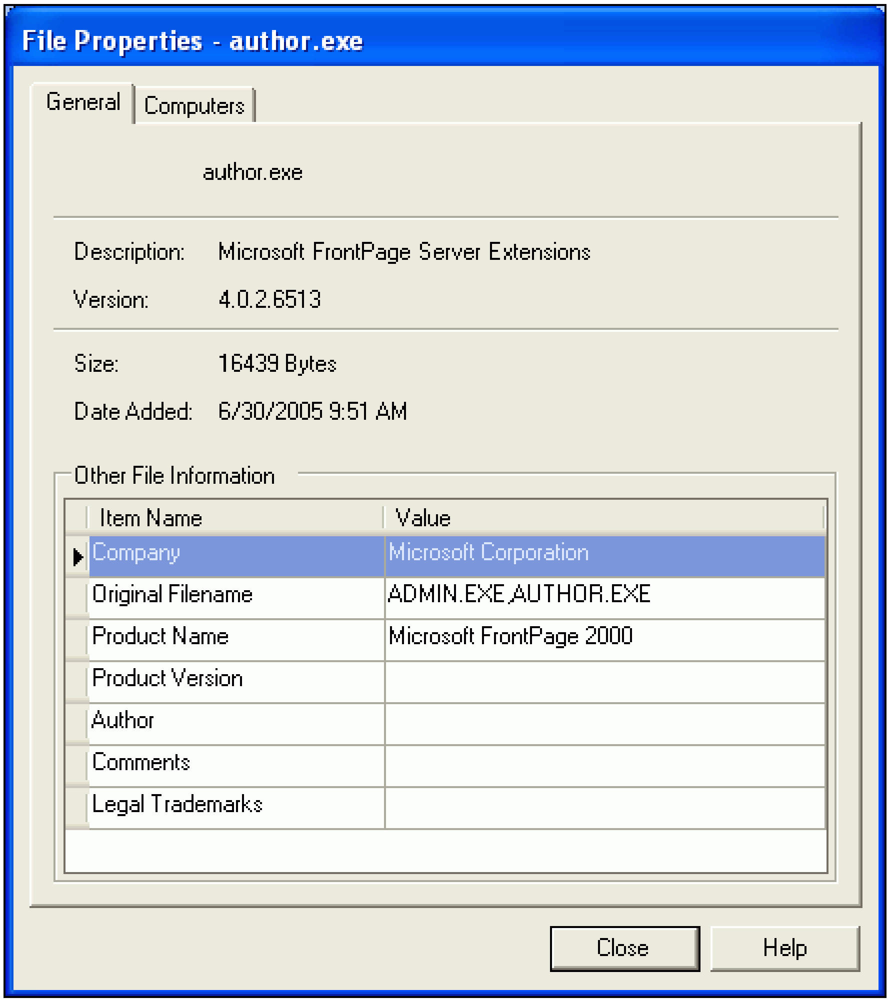
- **Application name**: The support file you add is associated with the application named here.
- **Version**: The support file you add is associated with this specific version of the application named here.

### *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 (Asset File Properties)**

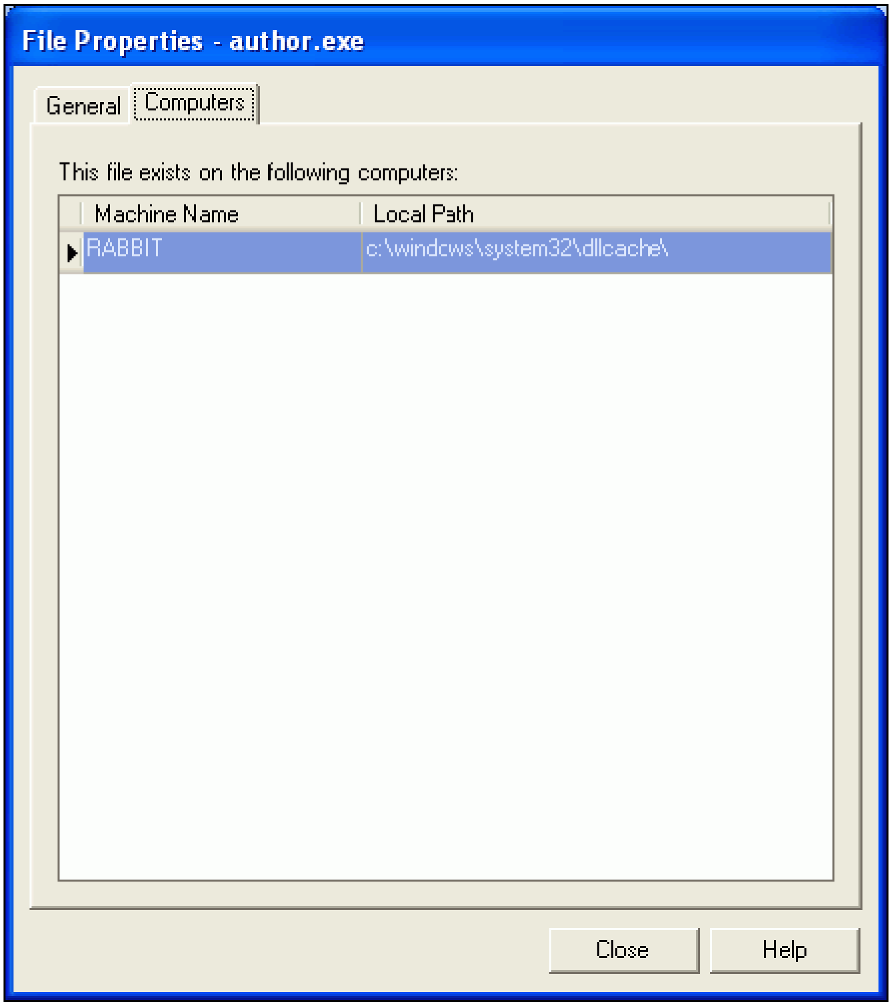



This tab lists detailed information about the file currently highlighted in the main window.

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* view, right click on a file name in the details pane, and select **Properties** from the pop-up menu.

**Computers tab (Asset 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 one 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 tab.

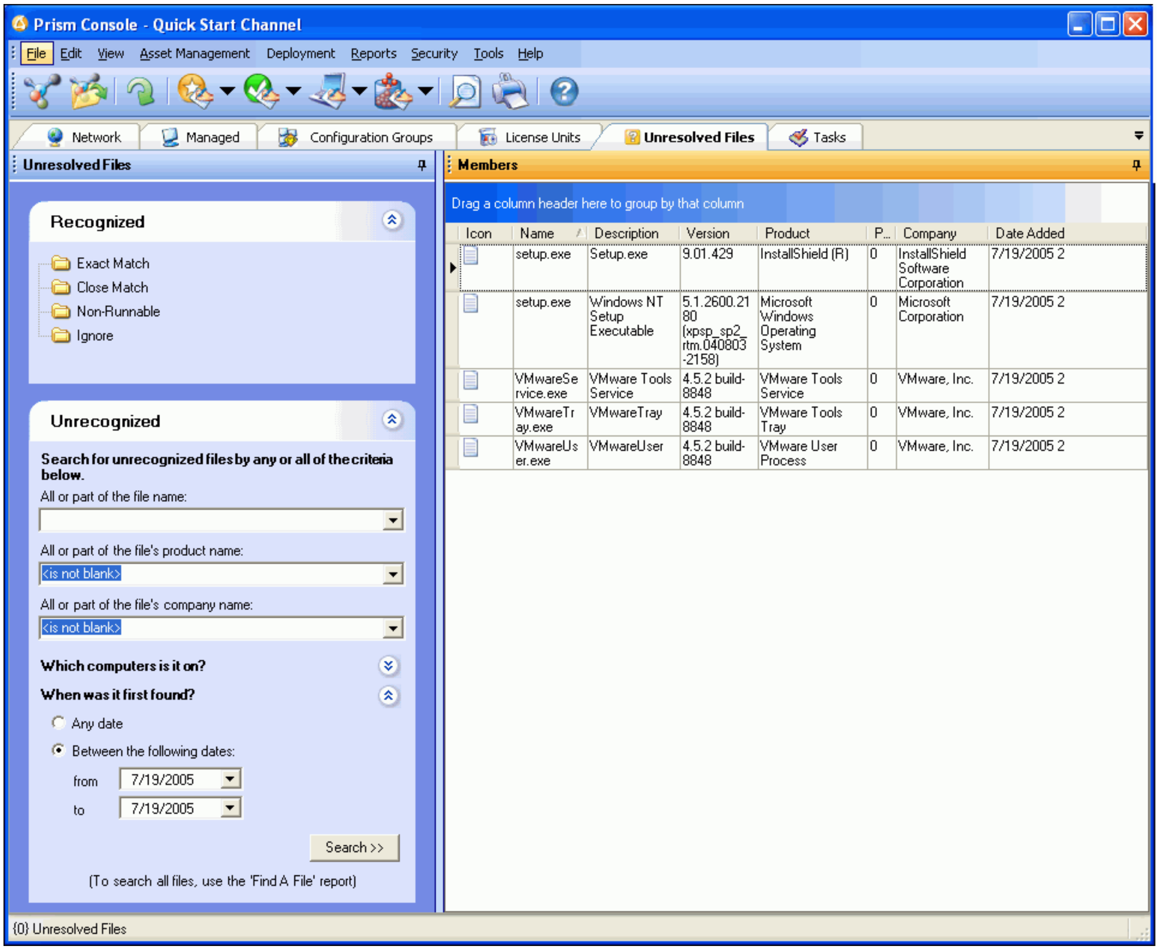
**Note**: Right-click on the file name and choose **Properties** from the pop-up menu for information that may help you identify and place this file.

### *Resolve or Ignore an Unmatched File*

To resolve or ignore an unmatched file:

1. Go to the *Unresolved Files* tab in the tree view.
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 on the Unresolved Files tab. 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 tab




The Unresolved Files tab 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 tab 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 and Close match folder are automatically assigned to license units. This feature can save time. However, if you prefer to manually identify license units:

— **Auto Identify Files option on the Asset Management menu**: Clear this option on the Asset Management menu to manually identify license units.

— **Auto Identify options on the on the Channel Properties | Asset Management tab:** Clear these options on the *Channel Properties* | *Asset Management* tab to list Exact Matches and Close Matches on the Unresolved Files tab, 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 tab 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 nonrunnable 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 tab 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*

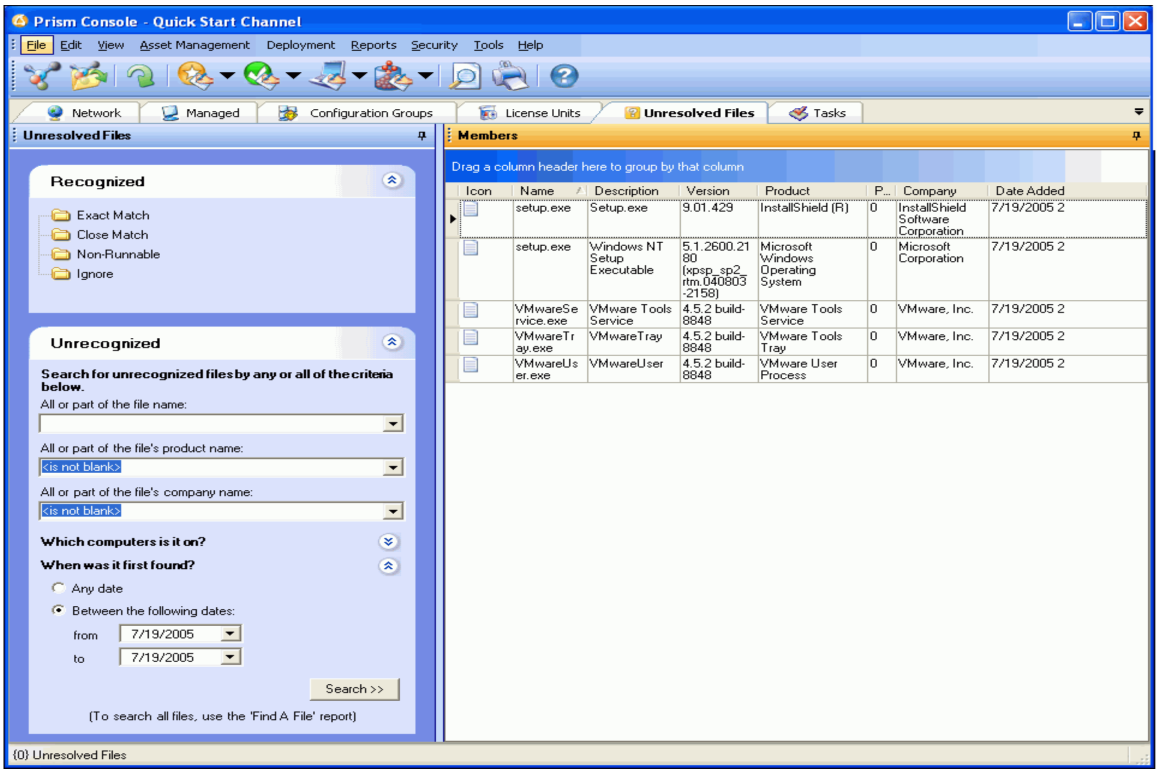
In the details pane, right-click on the name of a file to select options for resolving a file. (See *Resolving Unmatched Files*.)

## 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)



With the *Unresolved Files* tab selected in the tree view, 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 tab. 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*.

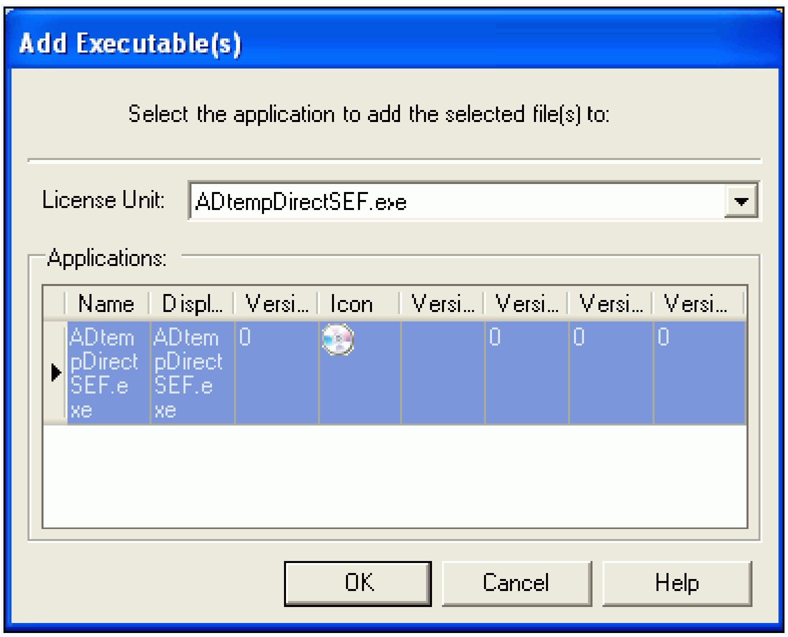
### *Sort or group the data*

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

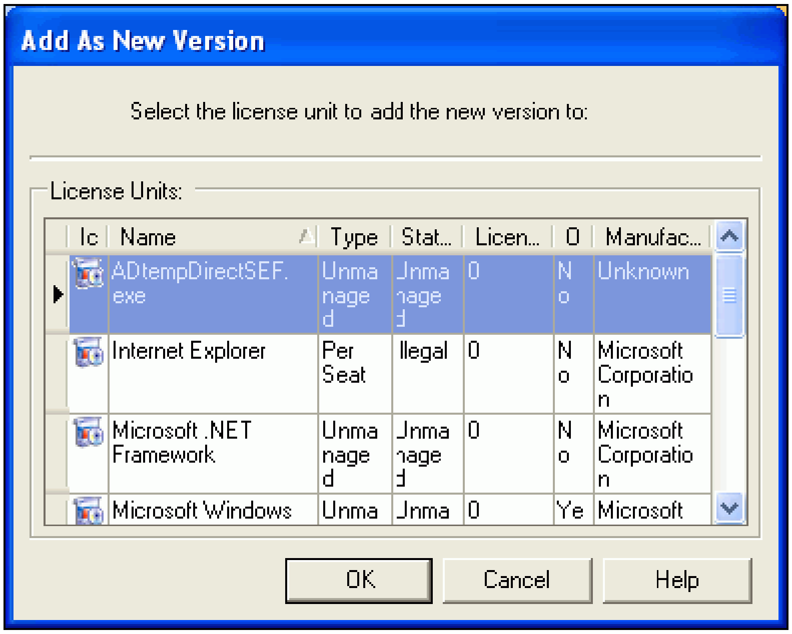



Add an alternate executable file to a license unit by completing the information on this dialog box.

This dialog box opens when you right-click on a file in the *Unresolved Files* details pane 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



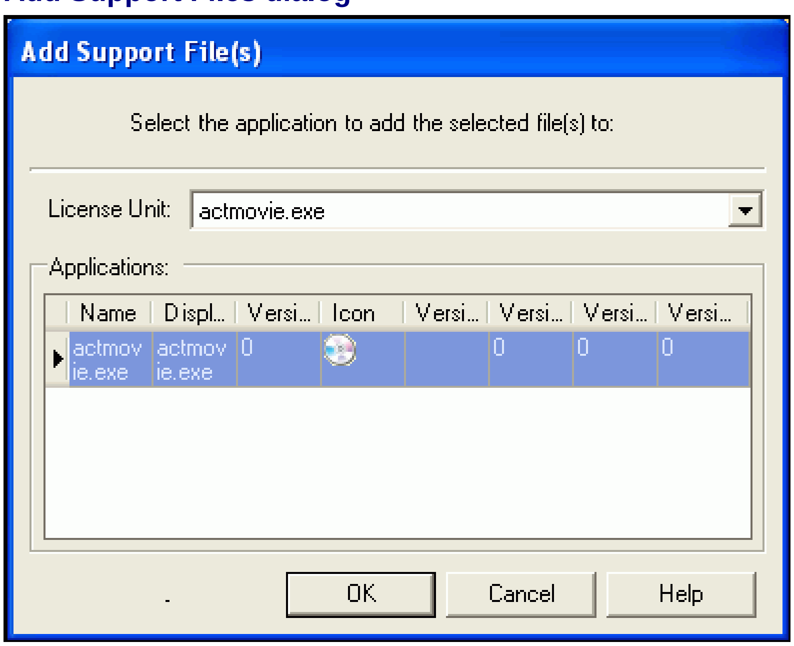

Highlight a license unit on this dialog box to add the current unresolved file as a new version to an existing license unit.

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* tab details pane.

This dialog box opens when you right-click on a file in the *Unresolved Files* tab 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 tab 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. Go to the *Unresolved Files* tab in the tree view.
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 Tab

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 on the Unresolved Files tab *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 tab when they are assigned to a license unit.

# Machine Hardware and Configuration

## 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, right click on a computer or group.
2. 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.

# Baselines 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:

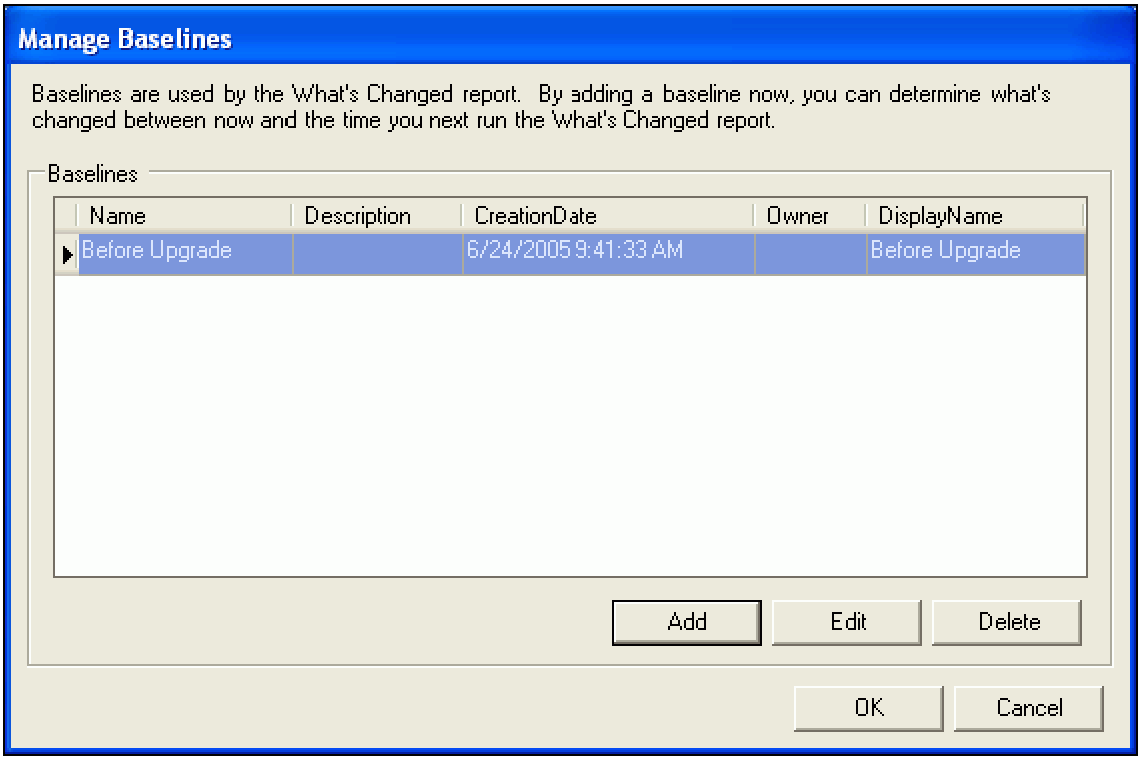
1. Select **Asset Management | Baselines**.
2. On the *Manage Baselines* dialog, click the **Add** button.
3. On the *Add Baseline* dialog, enter a name and description for the baseline data that you are capturing. Click **OK**.
4. Click **OK** on the *Manage Baselines* dialog to identify the most recent 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.

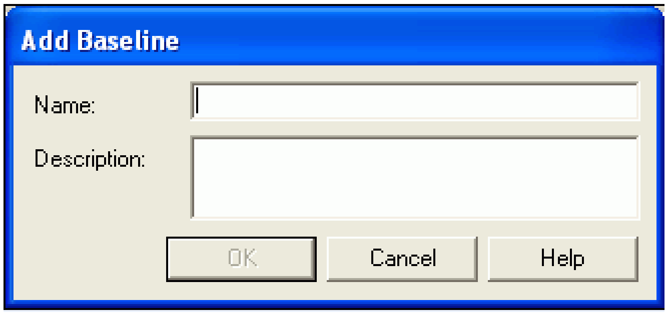
### Change the name or description for a baseline

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.

# Glossary

## Application Executable

By default, Asset Manager identifies files on managed computers that have an .EXE and .COM file extension as application executables.

## Alternate Executable

A license unit may contain multiple executable files for a single application. Alternate executable files (with an .EXE or .COM extension) are able to launch the application contained in the license unit but are not considered to be the main application executable.

Within Asset Manager, alternate executable files are identified during a scan of managed computers. They are associated with a license unit in order to keep the unrecognized file list manageable and as an alternate method for identifying the presence of an application on a managed computer.

## Concurrent license

A concurrent license is based on the number of people using the software simultaneously, rather than the number of machines where it is installed. Though it is often used for an application installed on a server and used by people on the network, it allows you to install the application on as many machines (on the same local area network) as needed. The number of users simultaneously logged onto the application must not exceed the number of concurrent licenses you own.

Concurrent licenses are controlled by the application or other metering software. Asset Manager reports only the number of licenses.

## executable file

Asset Manager automatically identifies .EXE or .COM files as application executables.

## GUID

GUIDs (Global Universal Identifiers) are unique identification strings that help distinguish one version of an application from another. The GUID string is used to determine the version of the application, and whether the application was sold separately or as part of a suite with other products. (For example, a GUID associated with Microsoft Office 2000 distinguishes it from Microsoft Word as a stand-alone application.)

The Asset Manager database includes GUID information for a wide array of commercial software applications and suites that are currently available. In most cases, Asset Manager correctly identifies the applications installed on your managed computers and accurately groups them into license units displayed through the Console.

## License Unit

A license unit is a collection of one or more suites or applications that are present on machines throughout the enterprise and are covered by a single license. Typically, the applications or suites that make up a license unit differ only by version.

The license unit may also include support files or alternate executables.

## 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.

## PSID

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

## 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.

## Suite

A suite is a collection of two or more applications that are sold as a bundle in several possible configurations (for example, Microsoft Office).

## Support File

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. They are associated with a license unit in order to keep the unrecognized file list manageable.

## WMI (Windows Management Instrumentation)

Windows Management Instrumentation (WMI) is a set of specifications from Microsoft used for accessing and sharing management information over a network.

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